EndNote®

The All-In-One Solution

Search bibliographic databases on the Internet

Organize your references in a snap

Create bibliographies in one simple step

ISI RESEARCHSOFT ™

THOMSON SCIENTIFIC

EndNote®

Windows Version 5.0

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Chapter 1

Welcome to EndNote

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Introducing EndNote

Welcome to EndNote—the complete reference solution!

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

♦ EndNote is a reference database—it specializes in storing, managing, and searching for bibliographic references in your private reference library.

♦ EndNote is a bibliography maker—it builds lists of cited works automatically. Use EndNote to insert citations into word processing documents and later scan those documents for in-text citations to compile a bibliography in any format that you need.

Requirements

System Requirements: EndNote is a 32-bit application. It runs under the following operating systems:

♦ Windows 95

♦ Windows 98

♦ Windows 2000

♦ Windows ME

♦ Windows NT 4 or later for Intel processors

EndNote does not work with Windows 3.1 or OS/2.

Hardware Requirements:
♦ An IBM PC or compatible computer with a Pentium or compatible processor (or higher) and a minimum of 16 MB of RAM.

♦ A hard drive with at least 25 MB of free space.

♦ In order to use EndNote's *Connect* command, an Internet connection is required. To use the *Open Link* command to access a web site, you also need a web browser installed.

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

Compatibility

EndNote Libraries: EndNote 5 is fully compatible with all libraries from earlier versions of EndNote and EndNote Plus for DOS, Windows, and Macintosh. See "Transferring Libraries Across Platforms" on page 59 for details.

EndNote Styles: EndNote 5 can use styles created by EndNote versions 2-4; however, EndNote 5 styles cannot be used by versions prior to version 4. When opening an EndNote style prior to version 4, EndNote 5 opens it as a new untitled style which you may save with a new name. The original style remains untouched so that you may still use it with older EndNote versions.

Word Processor Compatibility: As of June, 2001, EndNote for Windows is compatible with:

♦ Microsoft Word for Windows 1.0-Word 2000

♦ WordPerfect for Windows 5.0-9.0

♦ Rich Text Format (RTF)

♦ ANSI Text

♦ HTML

See our web site at www.endnote.com for updates.

Cite While You Write and EndNote Add-ins for Microsoft Word & WordPerfect
Add-ins are available for Microsoft Word 7, 97, and 2000 and WordPerfect 7-9.0. (Cite While You Write is EndNote's only formatting method for Word 97 and 2000 documents.)

The Add-ins integrate EndNote with your word processor to give you more powerful formatting abilities than using the EndNote program alone. For example, with the Add-ins you can format, unformat, and re-format a single document—without ever exiting your word processor! The Add-ins provide easy access to your EndNote references and the EndNote formatting commands from the *Tools* menu in Word or WordPerfect.

About This Manual

This manual assumes that you know how to use Windows, your word processor, and the mouse. For help on these topics, consult your computer owner's guide or your word processor manual.

The following representations for key combinations are used:

Instruction	Explanation
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.

Customer Services

Register Your Copy of EndNote

If you haven't done so already, please mail, fax, or e-mail your registration to ISI ResearchSoft (register@endnote.com). You also have the opportunity to register during installation. Even if you purchased EndNote directly from ISI ResearchSoft, 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

Technical Support

Contact Technical Support if you encounter problems while using EndNote. Before contacting us, have a clear description of the problem and know which version you have of Windows, EndNote, and your word processor. (To find the EndNote version, start the EndNote program and choose *About EndNote* from the *Help* menu.) Also have your EndNote serial number available.

Technical support tips are also available from the EndNote web site and the EndNote-Interest e-mail forum (see page 6).

Customer Service

Contact Customer Service for non-technical questions such as registering your software, ordering new copies or upgrades of EndNote, quantity discounts, referrals to dealers, and general product, billing, or payment information.

Contact Information

Our hours are Monday–Friday, 8:00 am – 5:00 pm Pacific Time.

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Email:	pc-endnote@isiresearchsoft.com (technical support)
	info@isiresearchsoft.com (customer service)
	register@endnote.com (to register the program)
Web:	www.endnote.com
FTP:	ftp.endnote.com

International Customer & Technical Support

For customer support or technical support outside of North America, please visit our web site to locate a local distributor.

International Support: www.endnote.com/ENcontact.htm

Web and FTP Sites

The EndNote web site (www.endnote.com) contains technical support tips, utilities for data transfer, and information about the latest versions of EndNote. You can also find updated styles, filters, connection files, and other related documents at these sites. The Web site has numerous links to files posted at the FTP site, and you can also browse the anonymous FTP site directly (ftp.endnote.com).

The *EndNote-Interest* Email Forum

If you wish to join an ongoing e-mail forum of EndNote users like yourself, follow the instructions below. There are two types of subscriptions: The first delivers the endnote-interest messages individually, so that every time a user sends a message to endnote-interest, it is redirected to each member of the list. The second option, which we recommend, is to subscribe to the endnote-interest-digest—a daily compendium of endnote-interest messages.

In general, ISI ResearchSoft does not answer questions posted to endnote-interest, but lets users answer each other's questions.

To subscribe to the EndNote-Interest group, send e-mail:

To:	`majordomo@endnote.com`
Subject:	[leave empty]
Body:	`subscribe endnote-interest`

To subscribe to the EndNote-Interest-Digest:

Body:	`subscribe endnote-interest-digest`

To unsubscribe, type this as the body of the message:

Body:	`unsubscribe endnote-interest`

To change a subscription to "digest" format:
First unsubscribe from the endnote-interest list, then subscribe to endnote-interest-digest.

What's New in EndNote 5

The following features have been added since EndNote 4:

Enhanced Support for Microsoft Word 97/2000

♦ Locate and insert EndNote citations without leaving Microsoft Word. See "Basic Instructions" on page 196.

♦ Instantly format citations as they are entered. See "Instant Formatting" on page 213.

♦ Easily set a custom bibliography layout, including a bibliography title. See "Formatting the Bibliography and/or Changing Bibliography Settings" on page 214.

♦ Add custom notes to citations. See "Including Notes in the List of References" on page 201.

♦ Hot link to a URL found in a bibliography. Just click on the URL to start your browser.

♦ Share a paper, including full reference data in the Traveling Library. See "The Traveling Library" on page 225.

♦ Quickly remove field codes to submit your paper to a publisher. See "Removing Field Codes" on page 224.

Updating Styles, Filters, & Connections

♦ Automatically download the latest files from our web site.

♦ Easily access ISI's Web of Science. Once the records are in EndNote, click on a record's URL to jump back to the original Web of Science record.

Spell Checking

♦ Check highlighted text or open references. See "Starting Spell Check" on page 89.

♦ Search supplied multi-language and discipline-specific dictionaries. See "Spell Check" on page 421.

Chapter 2

Installing & Upgrading EndNote

Chapter 2   Installing & Upgrading EndNote

EndNote Installation Options

Before you proceed with the installation, read all installation options that pertain to your computer setup. This may save you considerable time later on.

1. Do you have a CD-ROM drive?

EndNote is distributed on CD-ROM. If you do not have a CD-ROM drive, contact ISI ResearchSoft to obtain a floppy disk installation set.

2. Are you upgrading EndNote?

We suggest that you back up any styles, import filters, and connection files that you don't want overwritten before running Setup (See"Upgrading from an Earlier EndNote Version" on page 13). You *do not* need to uninstall any earlier version of EndNote to upgrade it.

3. Are you installing EndNote onto a network?

Appendix B covers general information about licensing and using EndNote in a network environment.

4. Do you want to use Cite While You Write or the EndNote Add-in for Microsoft Word or WordPerfect?

These functions put EndNote commands in Word and WordPerfect's *Tools* menu. They also allow EndNote to create the bibliography and format the citations for the document that is open in Word or WordPerfect.

If Microsoft Word (versions 7, 97, or 2000) or WordPerfect (versions 7, 8, or 9) is installed on your computer, the appropriate Cite While You Write or EndNote Add-in files are installed automatically when you run the EndNote installation. These features can be used with a shared copy of Word or WordPerfect on a network.

Keep in mind that in order for Cite While You Write or the EndNote Add-in to install properly:

♦ Microsoft Word 7, 97, or 2000, or WordPerfect 7, 8, or 9 must be correctly installed on your computer *prior to* installing EndNote.

♦ For Word, the EndNote installer must be able to locate the Word Startup folder. You need to have full read and write access to Word's Startup folder in order to install EndNote commands.

Installing EndNote

To install EndNote:

1. Make sure no applications are running.

2. Insert the EndNote CD into your CD-ROM drive.

3. The EndNote Setup program will start. If you do not have Autoplay enabled, or if you are installing from floppy disks, choose *Run* from the *Start* menu, type "d:\setup" (use the drive letter appropriate to the drive containing the installation disk) and press ENTER.

4. Follow the instructions on screen to complete the installation.

   ♦ Setup gives you the choice of doing either a *Full* or *Custom Installation* (see "EndNote Installation Options" on page 11 for details). By default, EndNote is installed in the C:\Program Files\EndNote folder. You can change this folder if you wish.

   ♦ If a previous installation of EndNote is found, 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.

   ♦ Read the "Readme" file for any last minute information that may not have made it into the manual.

Custom Installation Options

Although we recommend that you use the *Full Installation* option to install EndNote, the *Custom Installation* option can be useful if you are low on disk space or if you just need to reinstall certain EndNote components.

To do a custom installation:

1. Make sure no applications are running.

2. Insert the EndNote CD into your CD-ROM drive.

3. The EndNote Setup program starts. If you do not have Autoplay enabled, or if you are installing from floppy disks, choose *Run* from the *Start* menu, type "d:\setup" (use the drive letter appropriate to the drive containing the installation disk) and press ENTER.

4. Click *Install EndNote* and follow the instructions on screen until you see the option to do either a Full Installation or Custom Installation. Choose *Custom Installation*, and click *Next.*

5. Verify that you have the correct folder specified, and click *Next* to display the screen where you select the components that you want to install.

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.

Selecting Components

There are five major categories of components that are installed with EndNote:

♦ Program

♦ Styles (formats for creating bibliographies)

♦ Filters (files for importing text files of reference data)

♦ Connection Files (to connect to online reference databases)

♦ Word Processor Add-in files (files for Cite While You Write or the EndNote Add-in)

To omit an entire category, uncheck the box next to its name. To choose subsets of the items you want to install, click the button to the right of the category, and select the specific items that you want to install (or reinstall).

Upgrading from an Earlier EndNote Version

While it is not required, we recommend that you uninstall the prior version of EndNote before installing EndNote 5. See "Uninstalling EndNote" on page 16.

By default, EndNote 5 is installed into the C:\Program Files\EndNote folder. If Setup detects an earlier copy of the EndNote program in that folder, it alerts you and gives you two options. If you continue with the installation to install EndNote 5 into your existing EndNote folder, Setup removes the older EndNote application and word processor support files. You should 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 other non-EndNote files in the EndNote folder.

- **Backup older files**: EndNote 5 provides complete, updated sets of styles, filters, and connection files. But if you want to keep any of your older modified files to use with EndNote 5, 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 5.

- **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 5. 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.

NOTE: Cite While You Write support or the EndNote Add-in is linked to only one copy of the EndNote program, and only one instance of any Add-in can be used at one time. If you install the Cite While You Write or EndNote Add-ins, they will replace older versions even if you install EndNote in a separate folder.

Checking Your Installation

To run EndNote, click the *Start* button, choose *Programs*, select *EndNote*, and then choose *EndNote Program*.

A dialog will ask you to open a reference library file. Choose *Cancel*. To check the version number of EndNote, choose *About EndNote* from the *Help* menu. Click on the splash screen to clear it.

Checking Microsoft Word Support

To see if the Cite While You Write or EndNote Add-in is correctly installed, start Word and click on Word's *Tools* menu. In Word 97 or 2000, you should see EndNote commands on an *EndNote 5* submenu. In Word 95, EndNote commands appear directly on the *Tools* menu.

Word 97 or 2000 Tools menu and EndNote 5 submenu
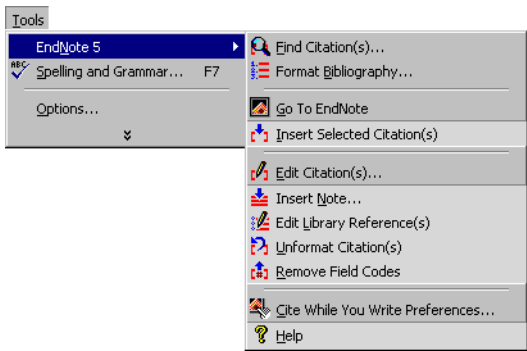
Word 95 Tools menu
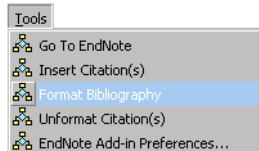
Checking WordPerfect Support

To see if the EndNote Add-in is correctly installed, start WordPerfect and click on the *Tools* menu. You should see an EndNote submenu with various EndNote commands.
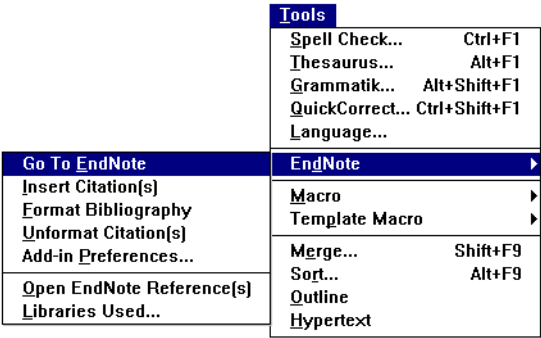
If you have trouble installing the Add-in, see "EndNote Commands Do Not Appear on Word or WordPerfect's Tools Menu" on page 448.

Automatically Updating Files

You can automatically update EndNote 5 with free enhancements, including the latest output styles, filters, and connection files.

To update your copy of EndNote:

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

Uninstalling EndNote

To uninstall EndNote:

♦ From the *Start* menu, choose *EndNote* and select *Uninstall EndNote.*

This Uninstall program removes only files, groups, and icons installed by the EndNote installer the *last* time it was run. For example, if you use the installer's "Custom Installation" option to re-install style files only, the Uninstall program removes only style files.

It will *not* delete your libraries or any new files you have created. It will *not* delete folders if they contain files you created. You will need to manually delete those files with the Windows Explorer.

Where to Go From Here

Now that EndNote is installed, you can proceed with "The EndNote Guided Tour" (Chapter 3). If you had any trouble with the installation, repeat the installation steps to verify that the program was correctly installed.

Chapter 3

The EndNote Guided Tour

Chapter 3　　The EndNote Guided Tour

Introduction to the Guided Tour

This Guided Tour introduces you to the basics of using EndNote for storing references and writing papers. The Guided Tour is not designed to show you everything about EndNote, but it does provide a quick summary of some important features.

Part I: Introduction to an EndNote Library

In this section, you learn how to start EndNote, open a reference library, set a default library, and select, open, and close a reference. These skills prepare you for the rest of the Tour.

Part II: Reference Management

This section illustrates how to enter, search for, and print references from an EndNote library. You also learn how to create and print an annotated bibliography.

Part III: Using EndNote While Writing a Paper

This section describes how to cite EndNote references while writing a paper with Microsoft Word (97 or 2000). You will learn how to insert citations and have EndNote generate a bibliography for the paper. (If you use a word processor not listed here, see Chapter 11 or Chapter 12 for instructions.)

Part IV: Searching Remote Databases

This part of the tour demonstrates how to use EndNote to search remote databases and library catalogs available online. The features requires that you have a connection to the Internet.

Are You Ready?

At this point we assume that both EndNote and your word processor are installed on your computer. If you have not installed EndNote, please follow the instructions in Chapter 2 before continuing.

The Guided Tour uses the sample paleontology files that are installed in the Examples folder in the EndNote folder. These example files include a sample EndNote reference library called Paleo.enl and a number of copies of a "Paleo" paper, one of which is appropriate for your word processor.

Part I: Introduction to an EndNote Library

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

♦   Start EndNote and open a library.

- ♦ Set a default library to open automatically.
- ♦ Select and open references in the EndNote library.
- ♦ Close references.
- ♦ Quit from the EndNote program.

NOTE: Microsoft Word and WordPerfect users can also start EndNote from within Word or WordPerfect, as you'll see in Part III of the Tour.

Start EndNote

To start the EndNote program and open the sample library:

1. From the *Start* menu, choose *Programs*, select *EndNote,* and then choose the *EndNote Program*. A dialog appears prompting you to open a reference library.

2. Make sure your current folder is the EndNote folder.

   If it is not, you will need to navigate using the "Look in:" list in this dialog to find the EndNote folder. By default, this will be on the C drive in the Program Files folder. To get there, click the "Look in:" list, choose the "C:" drive and click *Open*; select Program Files and click *Open*; and then select and open the EndNote folder.

3. Select the Examples folder and click *Open*. You should now see the file "Paleo.enl", the example EndNote library. Select Paleo.enl and click *Open*.
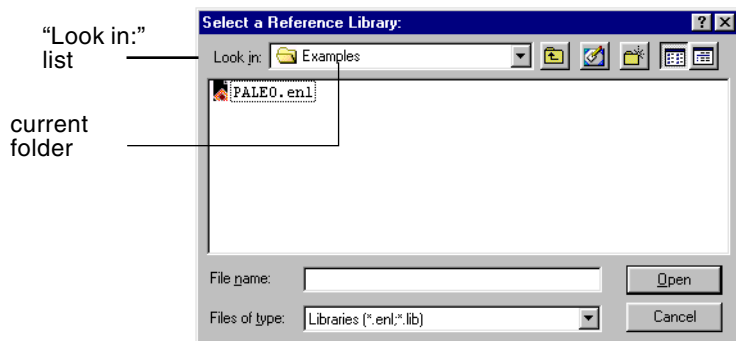
The Library Window

When you open the Paleo Library you see the **Library window** listing all of the references that the library contains:
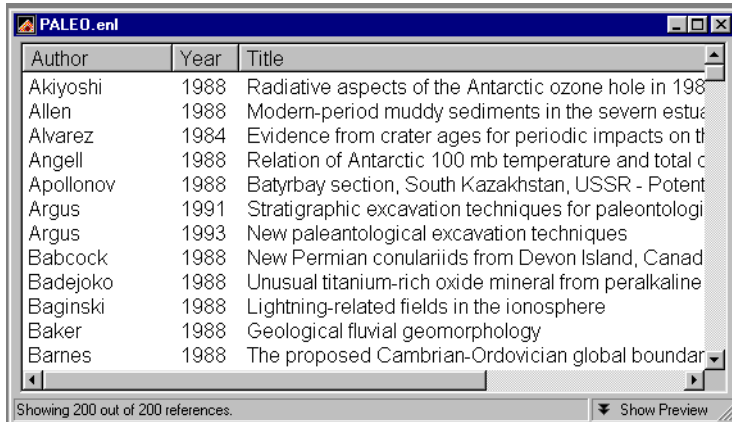
By default, the Library window displays the first author's last name, the year, and the title for each reference. The information displayed here in the Library window, as well as the font used for the display, can be changed using the EndNote Preferences. Chapter 4 provides more information about customizing the Library window.

You can browse through your reference library by using the scroll bar, the scroll arrows, or the PAGE DOWN, PAGE UP, HOME, END, and ARROW keys.

Previewing References

More detail about a reference can be seen easily by using the Preview pane in the Library window.

♦ Click the *Show Preview* button at the bottom of the Library window.

This preview pane uses the current **output style** to display the selected reference as it will be formatted for a bibliography. Only one reference is displayed in the pane at a time. If multiple references are selected, only the first one is displayed. The format of the reference in the preview pane can be changed by choosing a different output style. See Chapter 4 for more detail about customizing the Library window view.

♦ When the preview pane is showing, the button name changes to *Hide Preview*. Click *Hide Preview* to hide the preview pane.

Sorting the References

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

To change the sort order:

1. Click the Year column heading to see the references sorted in ascending order based on the year of publication.

2. Click the Year column heading again (a second time) to reverse the sort order and see the references sorted in *descending* order.

3. Now click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

Setting a Default Library

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

To set a default library:

1. From the *Edit* menu, choose *Preferences* and click *Libraries*.
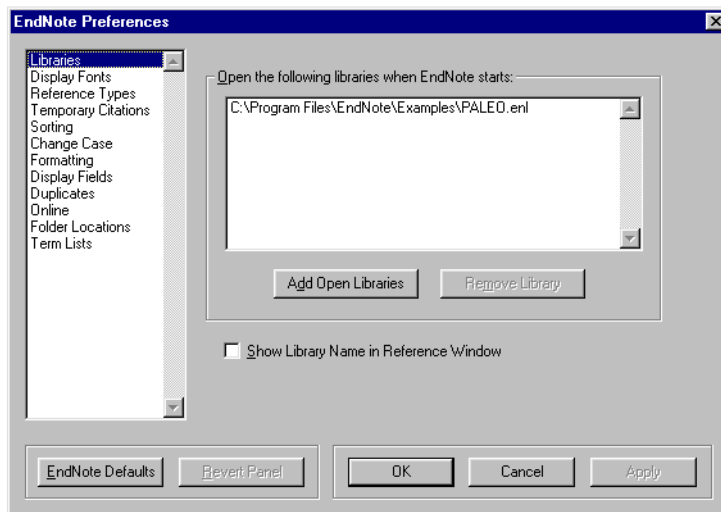
2. Click *Add Open Libraries.* You should see the Paleo Library (Paleo.enl) listed at the top of the window.

3. Click *OK* to save this change and close the Preferences dialog.

Select & 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 of the field by which the library has been sorted.

To see how this works, click *once* on any reference to select it. If you have arrow keys on your keyboard, press the UP or DOWN ARROW to select the previous or next reference. When the library is sorted by author name (as it should be now), you can also select a reference by typing the first few letters of the author's last name.

To quickly find and display a reference:

1. Select the Argus reference by typing "`arg`" without pausing between letters.
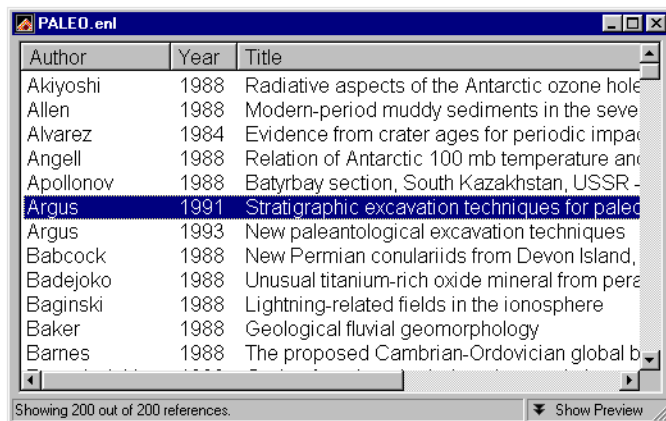
Now that the reference is selected, there are a number of things you can do with it, such as view its contents, copy, cut, delete, or edit it. For now, just open the reference to view the contents.

2. Open the selected Argus reference by pressing the ENTER key or by using the *Edit* command in the *References* menu. You can also open a reference by double-clicking it in the Library window.

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

title bar ——— [■] Argus, 1991 #11   [_][□][×] ——— close
                                                                       button

[←] [→]   Refere_nce Type: |Journal Article   [▼]|

Author	[▲]
Argus, Michele V.	
Matthews, Edward K.	
Year	
1991	
Title	
Stratigraphic excavation techniques for	
paleontologists	
Journal	
Journal of Paleontology	
Volume	
17	
Issue	[▼]
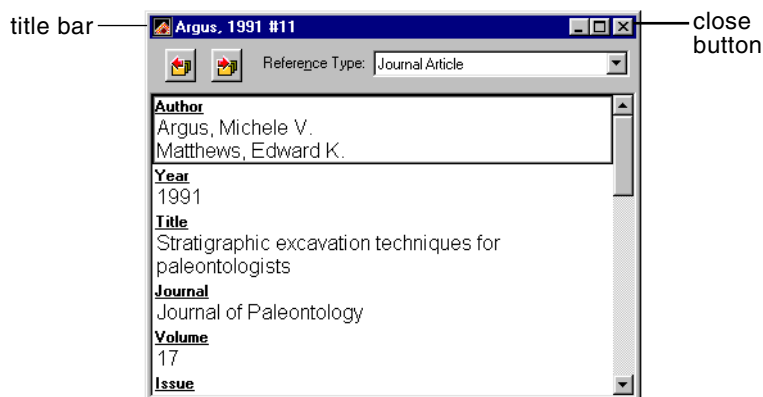
This is where you enter or edit information for a reference. The citation information is displayed at the top of the Reference window in the title bar, "Argus, 1991 #11". As you will see in Part III of the Guided Tour, this information is used by EndNote to match citations in a paper to references in 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 backwards through the fields.

The window may also be resized by clicking and dragging the lower right window corner. To reposition the window, click on the title bar and drag the window to the desired location.

Close the Reference

Close the reference by clicking the close button in the upper right corner of the Reference window. You can also choose *Close Reference* (CTRL+W) from the *File* menu. EndNote automatically saves all changes to a reference when the Reference window is closed.

This concludes Part I of the Guided Tour. If you do not plan to continue with the Guided Tour, quit from EndNote by choosing *Exit* from the *File* menu (CTRL+Q**)**. Otherwise, continue with the tour.

Related Sections

The following chapters provide more information about topics mentioned in this part of the Guided Tour:

♦   Learn how to change the display of the Library window in Chapter 4.

♦ Read "Selecting References" and "Opening References" in Chapter 5 to learn the various ways to select and open references.

♦ The Preferences panels provide numerous ways in which you can customize your version of EndNote. See Chapter 18 for more information about working with the preferences.

Part II: Reference Management

In this part of the Guided Tour you will learn how to:

♦ Enter a reference into a library.

♦ Search for a subset of references.

♦ Create and print an annotated bibliography.

For this scenario, pretend that you have just found a new book that discusses an intriguing theory about dinosaur extinction. You want to immediately enter that reference into your EndNote library and then print the reference, along with other related references, to share the information with a colleague.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo Library (Paleo.enl), as shown in Part I of the Guided Tour.

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.

♦ Import text files of references that have been downloaded from online bibliographic databases or CD-ROMs.

This example demonstrates how to type reference information into EndNote. The other methods are covered in Chapter 6: "Searching Remote Databases with EndNote" and Chapter 7: "Importing Reference Data into EndNote".

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

1. From the *References* menu, choose *New* (CTRL+N). An empty Reference window opens with the words "New Reference" displayed at the top.

Reference Type list
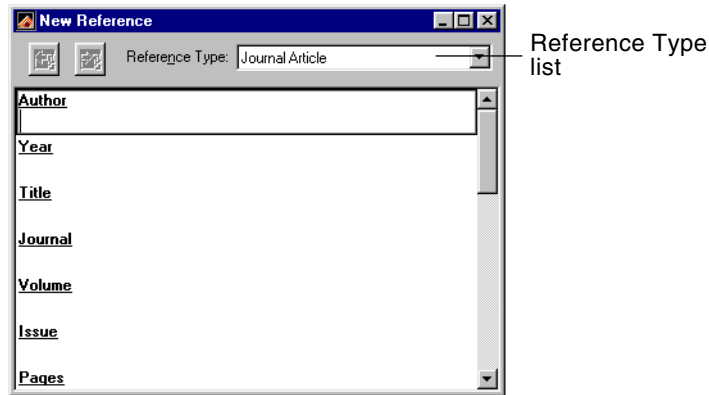
New references always appear as journal articles but can be changed to any other type of reference using the *Reference Type* list the top of the Reference window. For this example, create a Book reference.

2. Click the *Reference Type* list and choose *Book*.

Reference Type set to "Book"
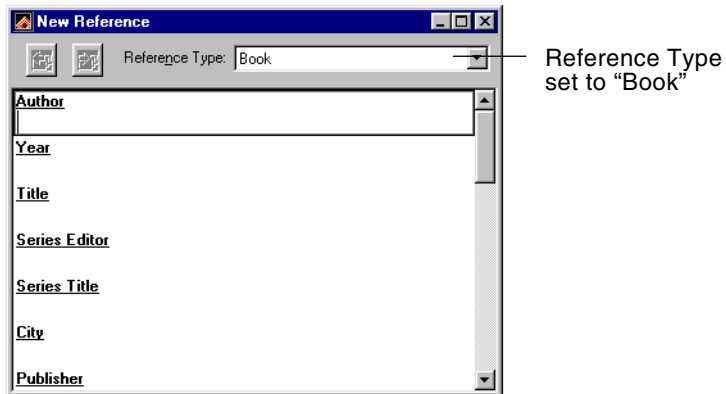
You are now ready to enter reference information beginning with the author names. Author names can be entered two ways: either "First Middle Last" such as "Carol Margaret Jacobson" or "Last, First Middle" such as "Jacobson, Carol Margaret." Individual author names *must* be entered one per line.

3. With the cursor in the Author field type:

        Jacobson, Carol

As you type, EndNote will suggest 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.
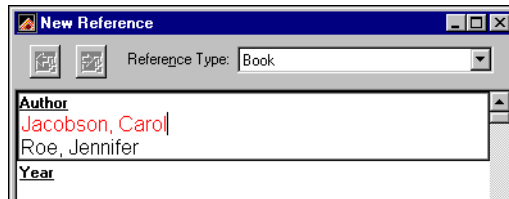
4. The name you are entering, Carol Jacobson, is a new author in this database, so keep typing until you complete the name and then press the ENTER key.

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 or save 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 Chapter 9.

5. Now enter the second author's name:

    Roe, Jennifer

This author is already in the Paleo Library, so as you start typing the last name, you'll see EndNote complete the name for you.

4. Press the TAB key to accept EndNote's suggested author name, and move to the Year field. In the Year field, type:

    1999

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, if necessary. You can also use the mouse to click in the desired field.

Title: Impacts of meteorites on Earth

City: New York

Publisher: Blackcourt Press

Number of Pages: 100

Abstract: The impact of a meteorite hitting earth millions of years ago may have led to the extinction of some marine life.

close button

This book does not have a Series Editor or a Series Title, so those fields can be left empty.
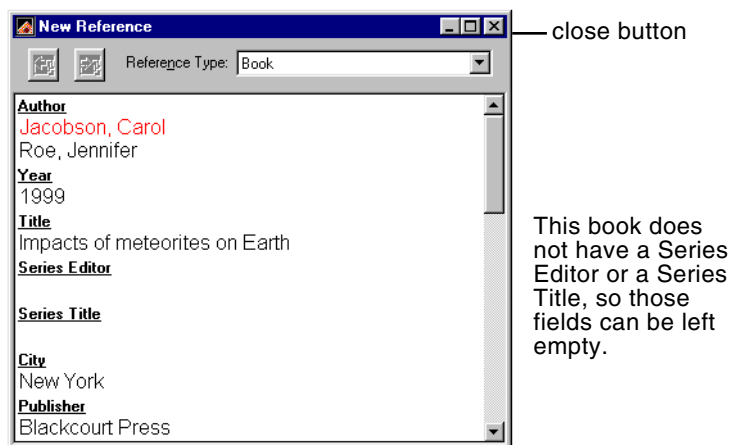
No extra punctuation (such as parentheses around the year) or text styles (such as bold or italic) are entered into the reference. EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

5.   Close the Reference window by clicking the close button, or by choosing *Close Reference* (CTRL+W) from the *File* menu.

All information is automatically saved when you close a window. Your new reference should now appear in the Library window.
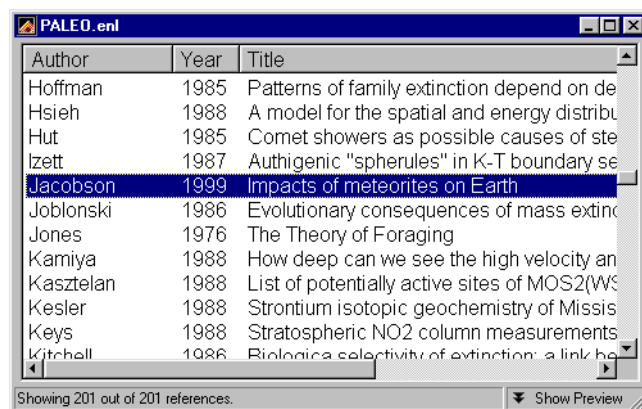
Search for a Set of References

Now that you have added the new reference, you are ready to print the references that you want to share with your colleague. Let's assume you want to generate a list of all references about extinction that were published in the 1990's.

To search for references:

1. From the *References* menu, choose *Search* (CTRL+F).

2. Type extinction as the first **search item**.
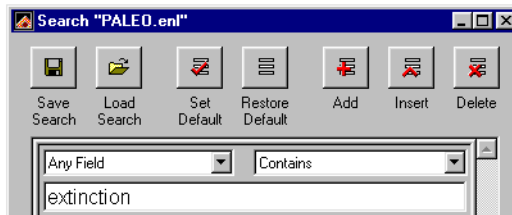
The words *Any Field* above "extinction" mean that EndNote will find references that have the word "extinction" in any field. Now set up the second search item to find references from 1990 or later.

3. From the **field list** in the second search item, choose *Year*; from the **comparison list**, choose *is greater than or equal to*; and type 1990 as the search term.

4. Notice the option between the two search items is set to "Or". Click "And" to set up the search to find all references about extinction that are also published in the 1990's. The Search window should now look like this:
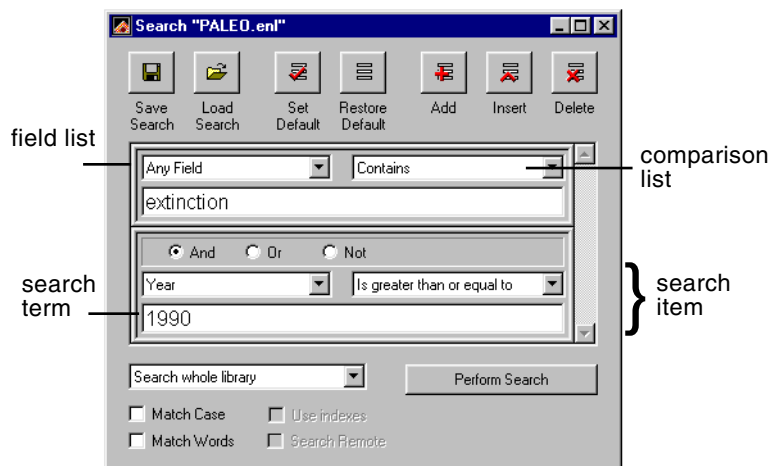
5. Click the *Perform Search* button to begin the search. In a moment, EndNote displays the search results.

```
PALEO.enl                                    _□×
Author      Year   Title
Schwartz    1990   Greenhouse hypothesis: effect on dinosaur e
Morehouse   1993   Statistical evidence for early extinction of rep
Argus       1993   New paleantological excavation techniques
Billoski    1993   Debate II
Billoski    1992   Introduction to Paleontology
Matthews    1993   A look at 'cold' as a possible cause of major
Jacobson    1999   Impacts of meteorites on Earth


◄                                                          ►
Showing 7 out of 201 references.              ▼ Show Preview
```

The status area at the bottom of the Library window should now read, "Showing 7 references out of 201."(You are still looking at the same Paleo Library as you were before, however EndNote has restricted the view to display just the results of the search.)

Now that you have located all of the desired references, you are ready to print them for your colleague.

Select a Style That Includes Abstracts

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.

We have provided a style called *Annotated* that includes the contents of the Abstract field with the formatted reference. Select this style to print the references with abstracts:

♦ From the *File* menu, choose *Output Styles*, and then select *Annotated* to print the references with abstracts.

If you don't see the *Annotated* style in the *Output Styles* menu, you can select any style and go on to the next step. Any bibliographic style can be modified to make an annotated bibliography. See Chapter 15 for more information about modifying and selecting styles.

Print the Found References

Now that you have selected a style, you are ready to print the bibliography.

To print a bibliography:

1. From the *File* menu, choose *Print*. A standard print dialog appears.

2. Click *OK* to begin printing.

You can also use the *Export* or *Copy Formatted* commands to create a word processing document with these references if you would prefer to have the bibliography on disk rather than on paper. See Chapter 13 for more information about creating independent bibliographies.

If you do not want to continue with Part III of the Guided Tour, and you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to quit the EndNote program.

Related Sections

Sections in the manual related to this portion of the tour:

◆ If you are eager to begin creating your own library, see Chapter 4.

◆ Chapter 5 provides more detail about typing references into your library.

◆ See Chapter 6 for information about connecting directly to online bibliographic databases and retrieving references into EndNote.

◆ If you will be importing references that have been downloaded from an online or CD-ROM database, you should continue with the tutorial in Chapter 7.

◆ More information about searching the EndNote library can be found in Chapter 8.

◆ Read Chapter 13 about creating reference lists directly from your EndNote library.

Part III: Using EndNote While Writing a Paper With Microsoft Word

NOTE: Continue with this part of the Tour only if you use Microsoft Word97, or 2000. If you use a different word processor, or if you have an older version of Word, turn to Chapter 11 or Chapter 12 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 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 an EndNote citation into your paper.

♦ "Format" your paper by having Cite While You Write update the in-text citations and create a bibliography.

Open the Paleo Paper in Microsoft Word

For this example, pretend you are writing a paleontology paper about dinosaurs. A copy of a sample paper, called Paleo.doc can be found in the Examples folder in your EndNote folder.

Before you begin, make sure EndNote is running and your Paleo library is open. EndNote looks for matching references in the currently open libraries. While EndNote can automatically start and open your default library when needed, opening the library first assures you that you are citing references from the appropriate library.

To open the Paleo Paper:

1. Start Word.

2. From Word's *File* menu, choose *Open*.

Most likely you are now looking at the contents of your Word folder or the "My Documents" folder.

To find EndNote's Examples folder:

3. Choose "C:" from the "Look in" list at the top of the dialog, then scroll through the list of folders and open the Program Files folder, and the EndNote folder within it. Then open the Examples folder. (These instructions assume EndNote is installed in the Program Files folder on your C drive; if you chose a different location to install EndNote, you need to navigate to that location to open the Examples folder.)

4. Select the Paleo.doc file and press ENTER.

When the Paleo document opens, it looks something like this:
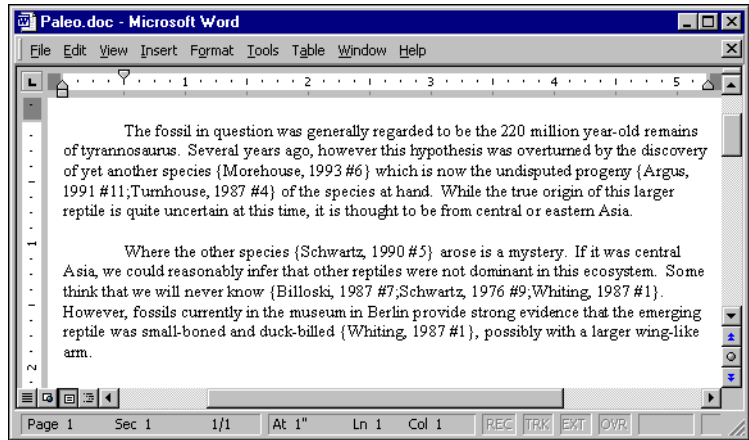
Notice that throughout the document there are sections of delimited text, such as "{Schwartz, 1990 #5}." These are EndNote's temporary citations which list the first author's last name, the year of publication, and the unique EndNote record number for each reference cited. These delimited citations are *not* intended to appear in the final copy of your paper. Rather, they serve as *temporary citations* until EndNote formats the paper and replaces them with citations in a particular style.

Cite the Gardiner Reference

Pretend you have just typed in the last sentence of the paper and now you want to cite the source of this idea. Position your cursor at the end of this sentence just before the period and type a single space to separate the citation from the text:

> ...larger wing–like arm │.

You are ready to insert a citation at this location in the paper.

You may notice EndNote's Instant Formatting feature running in the background and formatting the existing citations and creating a bibliography at the end of the paper.

For this example, you will cite the reference by Gardiner:

1.   From the *Tools* menu, select the *EndNote 5* submenu and then *Find Citation(s)*.
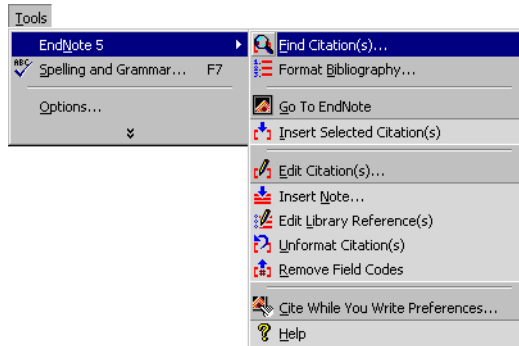
2. The Find Citations dialog appears. Type "gardiner" in the "Search for" box and click *Perform Search*.
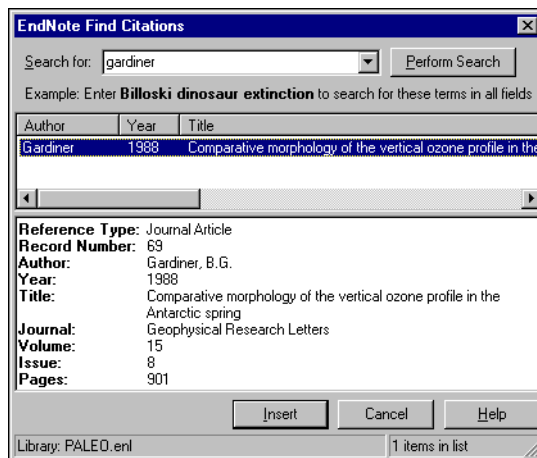
EndNote lists the matching references. In this case, a single reference matches the search.

3. Click *Insert* to insert the selected reference as a citation.

EndNote not only inserts the citation, but Instant Formatting formats it and adds it to the bibliography at the end of the paper. The Paleo document should now look like this with the new Gardiner citation added to it. The Gardiner citation is circled here for emphasis.

```
Paleo.doc - Microsoft Word
File  Edit  View  Insert  Format  Tools  Table  Window  Help
```

The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however this hypothesis was overturned by the discovery of yet another species (Morehouse and Tung 1993) which is now the undisputed progeny (Turnhouse 1987; Argus and Matthews 1991) of the species at hand. While the true origin of this larger reptile is quite uncertain at this time, it is thought to be from central or eastern Asia.

Where the other species (Schwartz and Billoski 1990) arose is a mystery. If it was central Asia, we could reasonably infer that other reptiles were not dominant in this ecosystem. Some think that we will never know (Schwartz 1976; Billoski 1987; Whiting, Billoski et al. 1987). However, fossils currently in the museum in Berlin provide strong evidence that the emerging reptile was small-boned and duck-billed (Whiting, Billoski et al. 1987), possibly with a larger wing-like arm (Gardiner 1988).

Argus, M. V. and E. K. Matthews (1991). "Stratigraphic excavation techniques for paleontologists." Journal of Paleontology 17: 119-127.
Billoski, T. V. (1987). "Triceratops extinction linked to asteroid collision." Science 79: 75-76.
Gardiner, B. G. (1988). "Comparative morphology of the vertical ozone profile in the Antarctic spring." Geophysical Research Letters 15(8): 901.
Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." Journal of Paleontology 17: 198-209.
Schwartz, M. T. (1976). "Evolving ecosystems: role in dinosaur extinction." Nature 12: 16-17.
Schwartz, M. T. and T. V. Billoski (1990). Greenhouse hypothesis: effect on dinosaur extinction. Extinction. B. T. Jones and N. V. Smith. New York, Barnes and Ellis: 175-189.
Turnhouse, M. B. (1987). "Role of 14^C dating in paleontology." Journal of Paleontology 75: 11-15.
Whiting, J. R., T. V. Billoski, et al. (1987). "Herding instincts of cretaceous duck-billed dinosaurs." Journal of Paleontology 75: 112-132.

```
Page 1    Sec 1        1/1        At 2.7"    Ln 12   Col 62    REC  TRK  EXT  OVR
```

In this example, each of the Cite While You Write citation and bibliography fields is shaded. This is set with Microsoft Word's Field Shading option, which you can turn off if you do not find it helpful. The shading is for onscreen help only, and does not print.

Now, assume that you have finished writing your paper and all of the citations have been inserted.

4.   From Word's *File* menu, choose *Save*.

Now you are ready for EndNote to generate the bibliography in a different style, perhaps to submit the paper to a different journal.

Change the 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 format again with a different bibliographic style:

1. From Word's *Tools* menu, choose *Format Bibliography*.
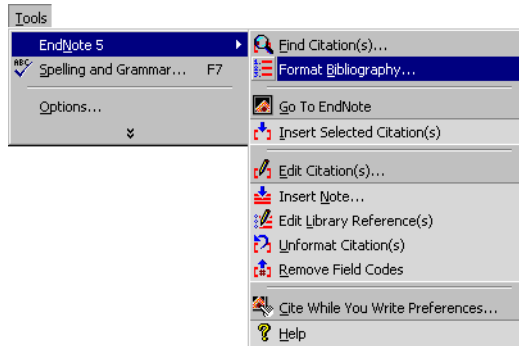
A Format Bibliography dialog appears, where you can select a bibliographic style.
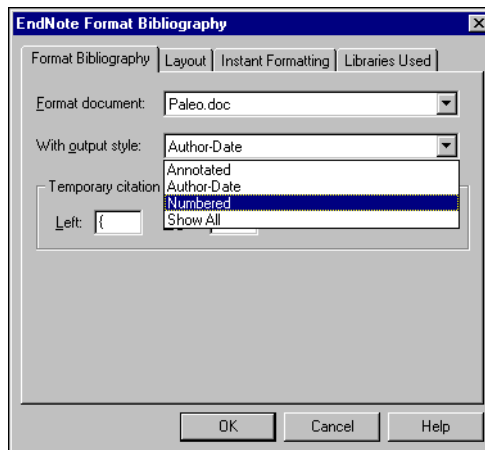
Styles contain instructions for how EndNote should format the citations and bibliography. For this example, you will use the *Numbered* style, which tells EndNote to replace in-text citations with numbers and create a numbered bibliography at the end of the paper. Some styles require the author and year in the citation. EndNote can do that, too—just select the style you want and EndNote does the rest!

2. Change the "With output style" setting to *Numbered*.

3. Click on the Layout tab, and under "Bibliography title" type "References".
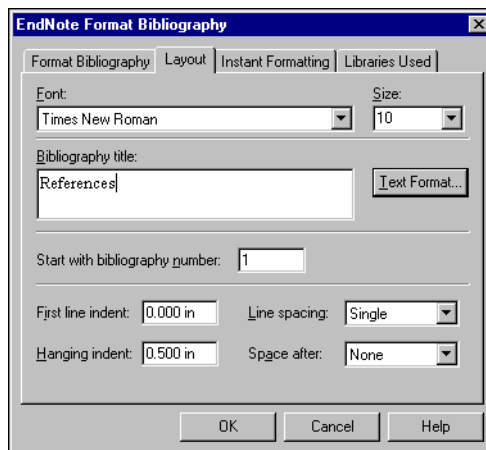
4. Click *OK* to reformat the paper.

EndNote automatically replaces the existing citations with numbered citations and regenerates the bibliography. The paper is ready to be printed and submitted!

If in the future, if you need to make changes to the paper such as adding or deleting citations or text, just make the necessary changes 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.

That completes this Guided Tour. Exit Microsoft Word by choosing *Exit* from the *File* menu.

Related Sections

The following chapters provide more information about topics mentioned in this part of the Guided Tour:

♦ More than 700 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *File* menu and select the *Style Manager*. See "Accessing Styles in Other Places" on page 306 for information on how to access other styles.

♦ This process of citing references and creating bibliographies with Cite While You Write is covered in Chapter 10.

Part IV: Searching Remote Databases

This brief tutorial guides you through the basic steps of connecting to a remote database, searching the database, and saving the references that you want to keep. More detailed information about each of the steps appears later in this chapter. In order to complete this Guided Tour, you must be at a computer with access to the Internet (either dial-up or a direct network connection).

About the Medline Practice Database

For this guided tour, we'll be connecting to a Medline Practice Database made available by Ovid Technologies, Inc.—a company that provides access to a wide variety of bibliographic databases. In this context, "Medline Practice Database" is the **remote database** we will be searching; "Ovid" is what we call the **information provider** because they provide their customers with access to the reference information.

The Medline Practice Database is a subset of the real Medline medical database, limited to records from 1993 only. Access to the full Medline database, and other online databases is available using the different connection files that are installed with EndNote (see "Selecting a Connection File" on page 94).

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 *Connect* command does). However, some setups, such as America Online, require that you establish an online connection (sign on) *before* choosing EndNote's *Connect* command.

Disconnecting: EndNote will not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using EndNote's *Connect* feature.

NOTE: America Online users must have version 3.0 or later in order to use EndNote's online features.

Step 1. Connect to a Remote Database

The first step in searching a remote database is connecting to it, so that is how we begin the guided tour.

To connect to the Medline Practice Database:

1. With EndNote running, go to the *File* menu, select the *Connect* submenu, and select *Connect*. (The *Connect* menu will eventually list the databases to which you have connected in the past. You may customize this list using the Connection Manager. See page 95.)
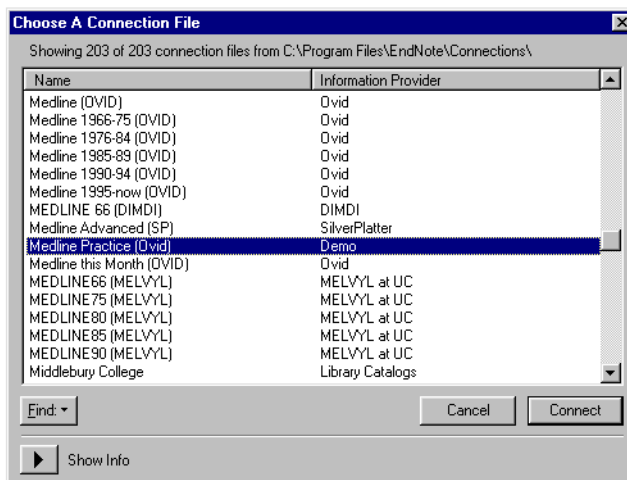
2. Select the *Medline Practice (Ovid)* connection file (start typing the file name to quickly jump to it in the list), and click *Connect*.

NOTE: This window displays all of the connection files available in your Connections folder. Use the *Find* button to quickly view various categories of databases to help you locate the one that you need.

By selecting that connection file, you have directed EndNote to connect to Ovid's Medline Practice database. If for any reason the connection *cannot* be successfully established, EndNote alerts you with an error message and closes the connection. See "Troubleshooting Connections" on page 450.

When the connection has been successfully established, EndNote opens a **Retrieved References window** for the Medline Practice Database on Ovid's server, and displays the Search window. Note that the "Search Remote" option is automatically selected. EndNote is ready to search the remote database.

Retrieved References window ———

Search window ———

"Search Remote" is automatically selected when you connect to a remote database.
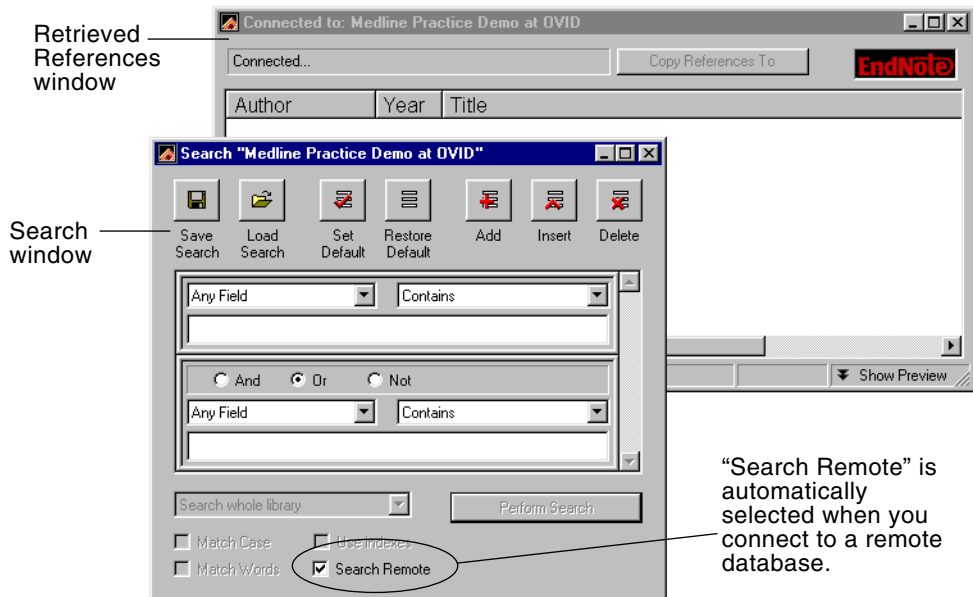
NOTE: If you have previously set a default configuration for the Search window, the search field menus will display the fields you have selected as your defaults. If one of these fields appears italicized in the menus in the Search window, that indicates it is not a valid option for the remote database.

Step 2. Search the Database

The next step is to enter the search term(s) to find the references you need. Searching a remote database is very similar to searching an EndNote library with a few exceptions. (See "Available Search Options" on page 100.)

Let's say you are interested in information about the success of corrective eye surgery, such as radial keratotomy.

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

1. Enter "radial keratotomy" into the first search item and verify that the field list in that item is set to *Any Field* (the comparison list for remote searches is always set to *Contains*).

field list — ← Any Field | Contains → — comparison list

radial keratotomy
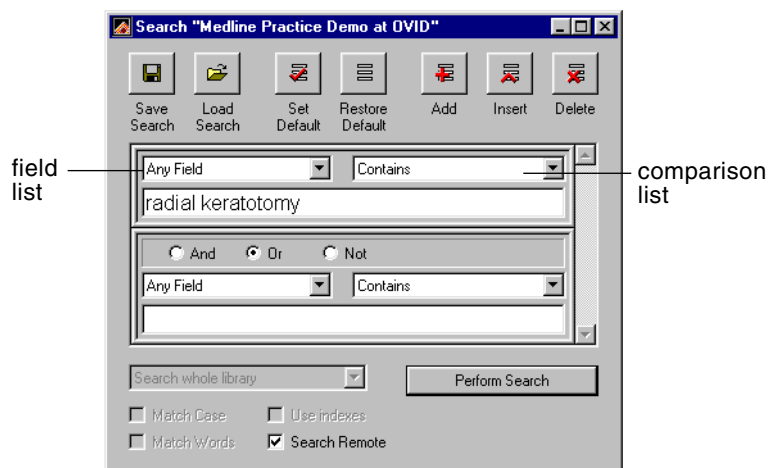
2. Click *Perform Search*.

EndNote sends the search request off to the remote database (Medline Practice Database, for this example), and the summary of the search results is displayed:
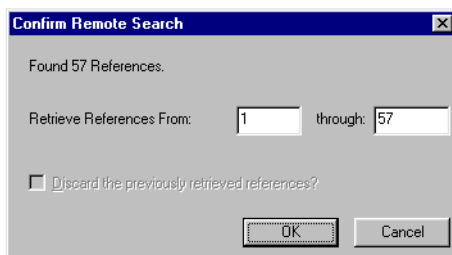
The dialog displays the number of references that were found to match your search request, and gives you the option to retrieve them. If the result set seems too big, you can always refine the search to get closer to exactly those references you want. Let's refine this search by looking for just the follow-up studies about radial keratotomy:

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

4. Click in the second search item and type "Follow-Up Studies".

5. Change the field list in that second search item to *Keywords*.

6. Change the setting between the first two search items to "And."

7.   Click *Perform Search.*

Choose the "And" option.

Choose *Keywords* from this list.
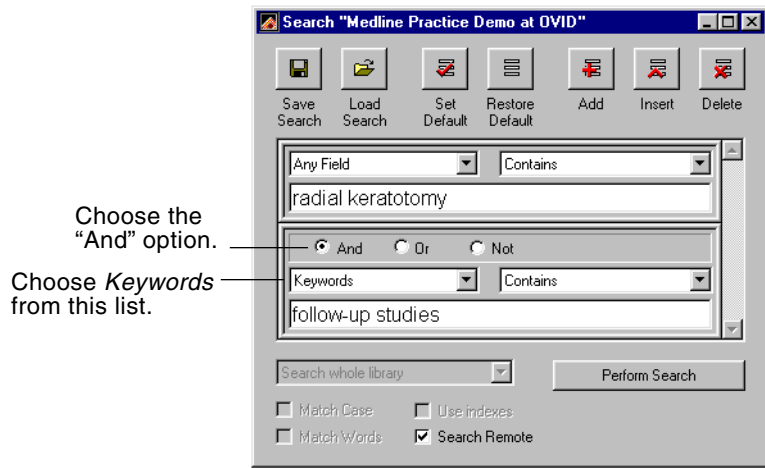
This time only 17 references were found. Let's retrieve just the first 10 references for this example:

8.   Change the number in the second box in the dialog to "10" and click *OK.*
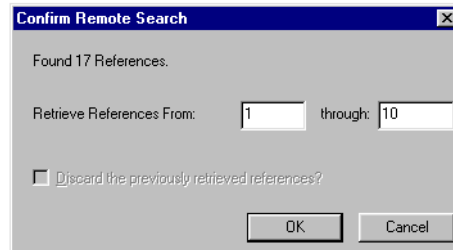
The references are downloaded and appear in the Retrieved References window for the Medline Practice Database connection.

You can halt a retrieval in progress by clicking the *Pause* button at the bottom of the Retrieved References window, or by pressing the Escape key (ESC).

Author	Year	Title
Waisberg	1993	Bilateral high hyperopia after radial keratotomy [see comm
Shapiro	1993	Radial keratotomy for intolerable myopia after penetrating
Gothard	1993	Four-incision radial keratotomy for high myopia after pene
Frangie	1993	Excimer laser keratectomy after radial keratotomy
Weinstock	1993	Excimer laser keratectomy for the correction of myopia
Ernst	1993	[Radial keratotomy. Optical and functional results after a 5-
Hahn	1993	Excimer laser photorefractive keratectomy to correct resid
Georgaras	1993	Correction of myopic anisometropia with photorefractive k
Fleming	1993	Corneal asphericity and visual function after radial keratoto
Au	1993	Radial keratotomy in an elderly patient

Showing 10 out of 10 retrieved references.

Step 3. Save the References

At this point you can peruse the retrieved references to see which ones you would like to keep. Save the references you want by transferring them into one of your own EndNote libraries.

The selected references can be copied to an open library using drag-and-drop or the *Copy* and *Paste* commands. You can also copy references directly to a library that is open, to a library that is closed, or to a new library using the *Copy References To* command, as described below.

For this example, we'll save a few of the retrieved references to the EndNote example library called "Paleo.enl."

1. Select a subset of the references displayed by holding down the CTRL key and clicking on the individual references. (SHIFT-click to select a range of references.)

2. Choose the option to *Copy # References To> Choose Library* (the number indicates the number of selected references).

Connected to: Medline Practice Demo at OVID

Done | Copy 5 References To ▾ | **EndNote**

New Library...
Choose Library...

Author	Year	Title
Waisberg	1993	Bilateral high hyperopia after radial keratotomy [see comm
Shapiro	1993	Radial keratotomy for intolerable myopia after penetrating
Gothard	1993	Four-incision radial keratotomy for high myopia after penet
Frangie	1993	Excimer laser keratectomy after radial keratotomy
Weinstock	1993	Excimer laser keratectomy for the correction of myopia
Ernst	1993	[Radial keratotomy. Optical and functional results after a 5-
Hahn	1993	Excimer laser photorefractive keratectomy to correct resid
Georgaras	1993	Correction of myopic anisometropia with photorefractive k
Fleming	1993	Corneal asphericity and visual function after radial keratoto
Au	1993	Radial keratotomy in an elderly patient

Showing 10 out of 10 retrieved references. | ▼ Show Preview

3. In the dialog that appears, open the Examples folder in the EndNote folder, choose Paleo.enl, and click *Open*. The references retrieved from Medline Practice Database are copied to the library.

That's all it takes! When you close the Retrieved References window for Medline Practice Database, EndNote alerts you that the references in the Retrieved References window will be discarded. Because you have already saved what you needed, you may click *OK* and close the window.

Where to Go From Here

This concludes the tutorial for using EndNote's *Connect* command.

♦ See Chapter 6 for details about establishing connections, searching for references, and retrieving references.

♦ Read "Selecting a Connection File" on page 94 to learn about the connection files that are available with EndNote.

♦ See "Troubleshooting Connections" on page 450 if you encountered any problems establishing a connection.

Chapter 4

Introducing the EndNote Library

Chapter 4   Introducing the EndNote Library

The EndNote Library

An EndNote **library** is a collection of references, each containing the information required to create a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references. This chapter provides an overview of the EndNote library, including instructions for opening and creating libraries, and navigating within a library.

Important Points About Libraries

Listed below are some important points about the EndNote library. Detailed information about each of these items follows.

♦ By default, the Library window displays the first author, year, and title of each reference, sorted in alphabetical order by first author. You can change the displayed fields with the *Display Fields* preference.

♦ Each library can store up to 32,000 references or grow to 32 MB—whichever comes first.

♦ There is no limit to the number of libraries you can create, assuming that you have the disk space to store them. We recommend that you keep all the references you cite in your papers in one main library.

♦ You can select default libraries to open automatically when EndNote is started.

♦ You can open more than one library at a time.

♦ Libraries created with the Macintosh versions of EndNote can be used by the Windows version of EndNote, and vice versa (see page 58 for more information on transferring libraries across platforms).

♦ The Library window can be resized and the display font can be changed to any font or size that you prefer.

♦ Each library is a separate file that can be independently moved, copied, renamed or deleted using the Windows Explorer (or by opening "My Computer").

Back Up Your Libraries

Your EndNote library becomes increasingly valuable to you as you add references to it. Consequently, it is imperative that you back up your libraries, along with any other important documents. You can use the *Save a Copy* command to save a copy of your library to a floppy disk (or elsewhere) for safe keeping. See Appendix A for more information about making backup copies of your files.

The Library Window

When you first open a library with EndNote you see a **Library window**, showing the references you have entered. Each reference is displayed on a single line showing the first author's last name, the year of publication, and as much of the title as will fit in the window.

click column headings to sort

minimize, maximize, & close buttons

Each line represents an individual reference.

scroll bar

Double-click a reference to open it.

Click and drag window corner to re-size.

Author	Year	Title
Akiyoshi	1988	Radiative aspects of the Antarctic ozone hole in 198
Allen	1988	Modern-period muddy sediments in the severn estua
Alvarez	1984	Evidence from crater ages for periodic impacts on th
Angell	1988	Relation of Antarctic 100 mb temperature and total c
Apollonov	1988	Batyrbay section, South Kazakhstan, USSR - Potent
Argus	1991	Stratigraphic excavation techniques for paleontologi
Argus	1993	New paleontological excavation techniques
Babcock	1988	New Permian conulariids from Devon Island, Canad
Badejoko	1988	Unusual titanium-rich oxide mineral from peralkaline
Baginski	1988	Lightning-related fields in the ionosphere
Baker	1988	Geological fluvial geomorphology
Barnes	1988	The proposed Cambrian-Ordovician global boundar

PALEO.enl

Showing 200 out of 200 references.　　　　　　　　　　　　☒ Show Preview

Navigating in the Library Window

There are a number of ways to browse through your references.

♦ Scroll through the list of references in the Library window by clicking in the vertical scroll bar with the mouse.

♦ The ↑ and ↓ keys move up or down from the currently selected reference, or if nothing is selected they select the last or first reference in the library, respectively.

♦ You can quickly sort the references by clicking on a column heading. For example, click *Year* to sort by year. A second click will change the order of the sort from ascending to descending.

♦ Typing a letter selects the first matching reference. The matching depends on the order in which the library is sorted. For example, if the library is sorted by the Author field, typing a letter selects the first reference in which the author's last name begins with that letter. For example, typing the letter "Z" selects the Zartman reference in our Paleo Library since Zartman is the first author's name to begin with a "Z." Type several letters and the selection jumps to the first name that begins with those typed letters. Letter matching starts over after a half-second pause.

♦ The HOME and END keys go to the first or last reference respectively; PAGE UP and PAGE DOWN move up or down a screen of references.

♦ To find specific references, choose *Search* from the *References* menu. (See Chapter 8 for more information.)

Showing a Reference Preview

Click the *Show Preview* option at the bottom of the Library window to display the preview pane. (Click the triangle next to the words "Show Preview.") Once the preview is showing, the command changes to *Hide Preview*; clicking that option hides the preview pane.
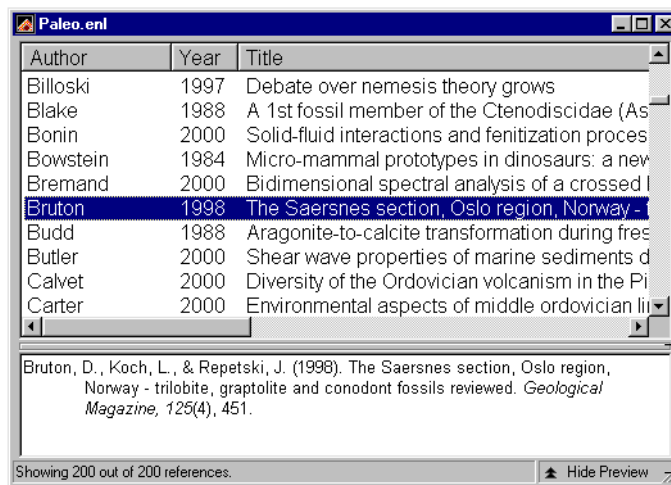
click and drag to change the height of the preview pane

click to show/hide the preview pane

The preview displays the selected reference in your current style. If multiple references are selected, it displays just the first one in the selection. The preview is not editable; to edit the reference, double-click it in the Library window.

Choosing the Current Style

Since the preview uses the current style, it's important to know how to set that style. To select your current style:

♦ From the *File* menu, choose *Output Styles* and select a style in the list. The checkmark next to a style name indicates that it is the current style.

If you do not see the style that you want in the *Output Styles* menu, don't worry. Hundreds of styles are provided with EndNote and are available via the Style Manager: Choose *Open Style Manager* from the *Output Styles* menu, and mark the style or

styles that you would like to be available in your *Output Styles* menu. You should now be able to choose the style that you need from the *Output Styles* menu. (For more information about using the Style Manager, see "The Style Manager" on page 300.)

For convenience, the styles listed in the *Output Styles* menu are also available in a styles menu in the Main toolbar. You can also add styles to the menus using the *Select Another Style* option from the style menu in the toolbar. Simply choose *Select Another Style*, select the style, and click *Choose.*

Resizing the Preview Pane

To change the height of the preview pane, click on the bar that separates the preview from the rest of the Library window, and drag up or down. (When the cursor is over this area, it changes to indicate that you are in the right place to resize the pane.)

Previewing Multiple References

The preview pane only displays a preview for one reference at a time, formatted according to the current style.

To preview multiple references:

1. Select the references in the Library window.

2. Choose *Copy Formatted* from the *Edit* menu.

3. Choose *Show Clipboard* from the *Edit* menu.

The Clipboard window displays the selected references.

Using the Preview to Display Notes or Abstracts

Some may find it useful to configure the Library window such that the main window displays bibliographic data (such as author, year, title, and journal), and the preview pane displays just notes or abstracts. That would allow you to browse through your references in the Library window without having to open individual references to see more about them. To configure the display of the Library window fields, see "Changing Display Fields" on page 52. To get the preview to display just the notes or the abstract, you will need to create a custom style to include just those fields (see page 278).

Resizing the Library Window

Like most windows in EndNote, the Library window can be resized by clicking the window border or lower right window corner and dragging to the desired size, or by clicking the

maximize or minimize buttons in the upper right corner of the Library window.

EndNote remembers the new size of the Library window as well as its location on the screen so the next time you open it, the library appears with the same dimensions and in the same location as when you last closed it. Each EndNote library can have its own unique dimensions and screen location.

Library Display Font

Choose a different font and size for the text displayed in the Library window by using EndNote's preferences. The list of references in the Library window uses the Library Display Font. The Preview uses the General Display Font. Changes made to the display fonts apply to all EndNote libraries opened on that computer.

To change the Library Display Font:

1. From the *Edit* menu, choose *Preferences*.

2. Click the *Display Fonts* option.
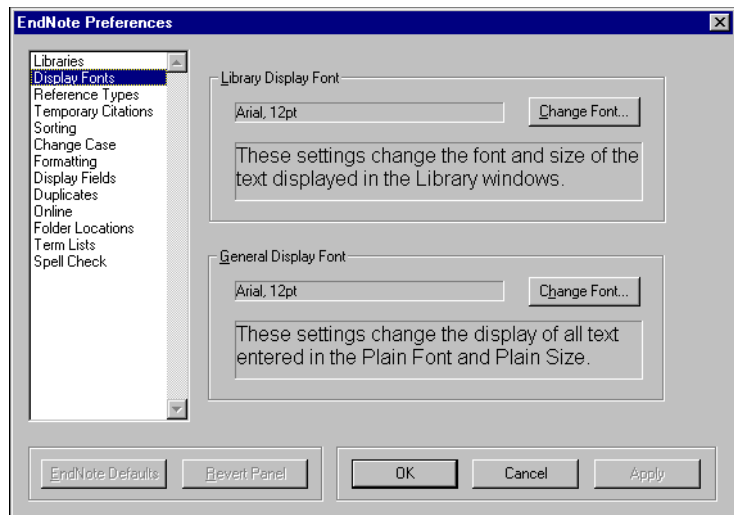
3. Click the *Change Font* button, and select a different display font and/or size from the *Font* and *Size* lists. Click *OK* to close the font selection dialog and return to the *Display Fonts* preferences panel.

4. Click *OK* to save the changes and close the Preferences dialog.

Changing the display fonts does not affect the font EndNote uses when it creates a bibliography. EndNote uses the font of your paper for the bibliography.

Changing Display Fields

EndNote defaults to showing Author, Year, and Title fields in the Library window. You may display other fields, change the order of the fields displayed, or change the names used for the column headings in the Library window.
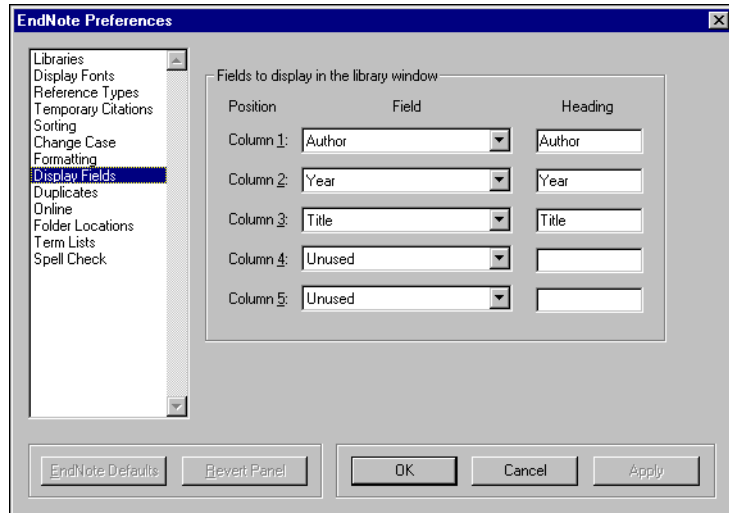
To customize the Library window display:

1. From the Library window, choose *Preferences*.

2. Click the *Display Fields* option in the list.

3. Choose the desired field from the Field list. You may select up to five fields to be displayed in the Library window. Select *Unused* instead of a field name if you want to show fewer than five fields.

4. By default, the column heading in the Library window will be the same as the Generic name of the field. If you would like to change the name for the Library window display, you may do so by entering a new name in the Heading section next to the chosen field.

5. Click *OK* to save the changes and close the Preferences dialog.

These settings apply to all libraries.

The Library Window Sort Order

The references listed in the Library window are automatically sorted by the first author's last name, the year, and the order in which they were entered (the record number). This sort order can be changed by choosing *Sort Library* from the *References* menu (see "Sorting the Library" in Chapter 8) or by clicking the column headings. When you sort a library, that sort order is retained even after you close and reopen a library.

When you sort the library, all alphabetical sorting is carried out according to the rules of your Windows system unless you specify a different language in the *Sort Library* dialog.

The library sort order is in effect only when the library is showing all of the references. EndNote displays the results of a search in the order in which they were found. Similarly, after importing references, EndNote displays the newly imported references in the order in which they were imported. This behavior greatly enhances the speed of these two functions. Choosing *Show All* from the *References* menu returns all of the references to the Library window and lists them according to the last sort order specified.

NOTE: "Sort Order: Bibliographies and Multiple Citations" on page 337 describes how to set the sort order for a bibliographic style. See "Sorting" on page 413 for information about having EndNote ignore certain words or names when sorting references.

Creating Libraries

Although you can create as many libraries as you like, we strongly recommend that you keep all of your references together in one main EndNote library. Having all of the references you need in one place avoids unnecessary complexity when you are writing papers, creating bibliographies, or moving files between computers. Instead of making different "specialty" libraries, you will find it more useful to create one library and use the Keyword and Label fields together with EndNote's *Search* and *Sort Library* commands to help you organize and categorize your references.

Creating a New Library

To create a new library:

1. From EndNote's *File* menu, choose *New*.

EndNote presents a dialog prompting you to name and save the new library:

New reference library:		? X
Save in: 🗀 EndNote	▼ 🖭 ⬜ 📑 📰 📰	

🗀 Connections
🗀 Examples
🗀 Filters
🗀 Lists
🗀 Styles

File name:	Untitled.enl	Save
Save as type:	EndNote Library (*.enl) ▼	Cancel
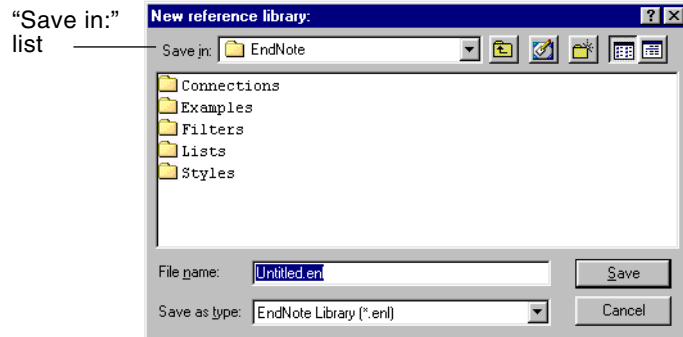
2. Enter a name for your new library. If you include an extension, use the extension ".enl" which stands for "EndNote Library". If you don't include an extension, EndNote will add ".enl" automatically.

3. Using the "Save in" list, choose the location where you would like to save the library.

4. Click *Save* and the new library appears as an empty EndNote library, showing "0 references out of 0."

My Library.enl			_ □ X
Author	Year	Title	

Showing 0 out of 0 references.   ⯆ Show Preview
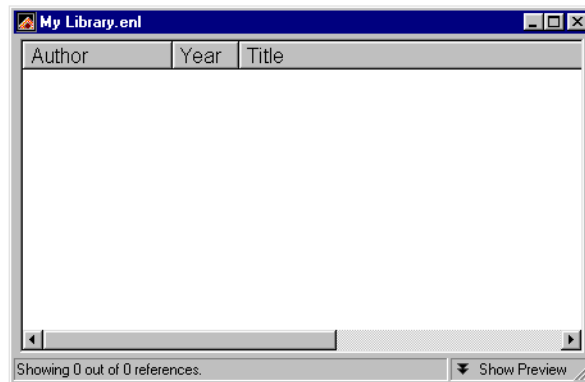
Now that you have created a new library, you can begin entering references into it. The following chapters illustrate the different ways to add references to an EndNote library:

♦ Chapter 5, "Entering and Editing References," discusses how to enter individual references manually.

♦ Chapter 6, "Searching Remote Databases with EndNote," describes how to connect directly to online databases and retrieve references from them.

♦ Chapter 7, "Importing Reference Data into EndNote," shows you how to import references that you have previously downloaded from online bibliographic databases.

If you have just created a library that will be the main library that you use, you can set it to open automatically every time you start EndNote by setting it to be your "default library" (see page 55).

Save a Copy of a Library

EndNote automatically saves changes to your library as you work with it, so there is no *Save* or *Save As* command for the library. You can, however, use the *Save a Copy* command to create an exact copy of your library.

To create a copy of your library:

1. With a library open, choose *Save a Copy* from the *File* menu.

2. Name the new library and choose where to save it.

3. Click *Save* and EndNote creates the copy of the library.

The new library does not open, it is simply saved to disk. EndNote leaves your original library open as it was before the command was chosen.

Setting a Default Library

EndNote allows you to specify the libraries that you want to open automatically when EndNote starts up. We call these the "default" libraries.

To assign or change the default library:

1. Open the library or libraries that you would like to set as your default. (You must have a library open in order to set it as your default library.)

2. From the *Edit* menu, choose *Preferences* and select *Libraries*.
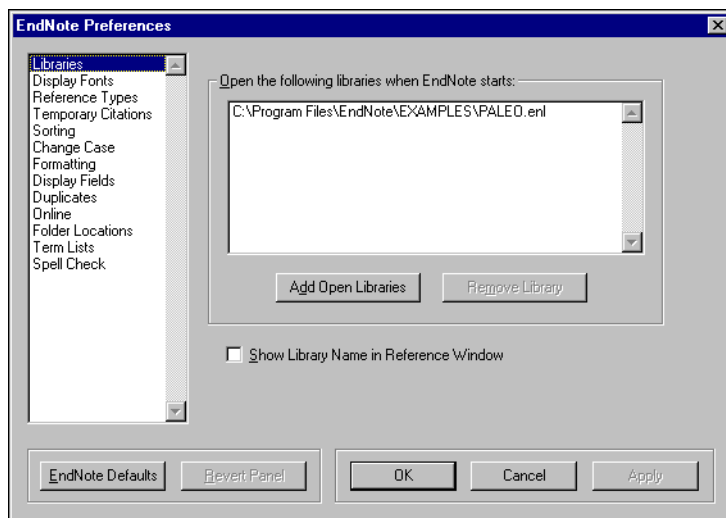
3. Click *Add Open Libraries* and all of the currently open libraries will be added to the list of default libraries that should open every time EndNote starts.

4. Click *OK* to save your changes and close the Preferences dialog.

Removing Default Libraries

To remove a library from the list of default libraries:

1. From the *Edit* menu, choose *Preferences* and select *Libraries* from the list of options.

2. Select the library that you would like to remove from the list of default libraries and click *Remove Library.*

3. Click *OK* to save your changes and close the Preferences dialog.

Creating a Library from ProCite or Reference Manager

EndNote can read ProCite database versions 4 and higher, and Reference Manager database versions 8 and higher.

To convert a ProCite or Reference Manager database to an EndNote library:

1. Start EndNote.

2. From the *File* menu, select *Open Library*.

3. Locate the database you want to convert and click *Open*.

4. (optional) Click *Customize* if you want to change the default mapping of reference types and fields.

5.   Click *Convert* to create a new EndNote library from the ProCite or Reference Manager database.

The conversion process makes a *copy* of the existing database. The original database is not altered.

Opening, Closing, & Deleting Libraries

Opening a Library

To open a library when the EndNote program is already running, choose *Open* from EndNote's *File* menu and select *Open Library*. (If you have previously opened a library, EndNote will list that library below the *Open Library* command; you may simply choose the library to open it directly and skip the dialog shown below.)

When you choose the *Open Library* command, EndNote displays a dialog similar to this:

"Look in" list ———

Select a Reference Library:	? ✕
Look in: 📁 Examples ▾ 🔁 📝 📂 ▦ ▤	
📕 PALEO.enl	

File name: [   ]   Open

Files of type: Libraries (*.enl;*.lib) ▾   Cancel
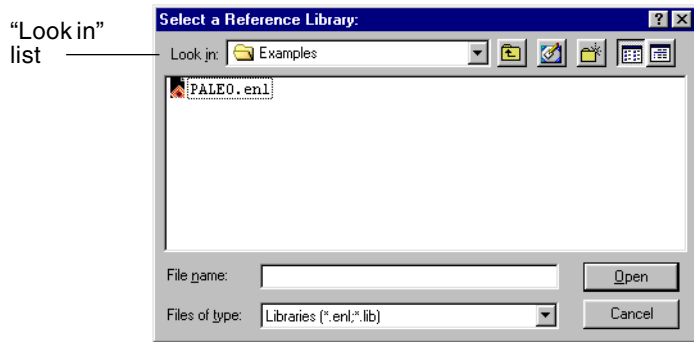
By default, this dialog displays all files with the extension "*.enl" or "*.lib". If your library name has a different extension, you should change the "Files of Type:" option to *All files (*.*)*.

If your library is listed in the dialog, select it and click *Open*. If your library is not listed there, then it is probably saved in a different place on your hard drive or floppy disk.

To locate a library:

1.   Click the "Look in" list and select the letter of the drive on which your library is stored.

2.   Select the folder that contains your library and click *Open.* (If your library is within several folders, continue to open each folder until you locate the library.)

3.   When you see your library, select it and then click *Open*.

Multiple People Opening One Library

EndNote does not perform "record locking" functions that would allow multiple users to *edit* one database at the same time. However, multiple users can *access* one EndNote database simultaneously as long as the database is restricted to *read-only* or *locked* status. This will allow the user to perform searches, copy information to their documents, and format their papers.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. One or two people should be assigned the responsibility for maintaining and updating the library; these users should be granted full access to the file. All other users should be granted read-only access.

Closing a Library

To close a library, do one of the following:

♦ Choose *Close Library* from the *File* menu.

♦ Type CTRL+W or CTRL+F4 when the Library window is active.

♦ Click the close button in the top right corner of the Library window.

♦ Type CTRL+SHIFT+W to close all open libraries.

EndNote automatically saves the information in your library when you close each reference. As a result, closing the library does not invoke the familiar "Save changes?" question. Instead, the Library window simply disappears, as all changes have already been saved.

Closing a library does not quit the EndNote program. If you want to quit from EndNote, simply choose *Exit* from the *File* menu and any open libraries are saved and closed automatically.

Deleting a Library

EndNote does not provide a function for deleting unwanted libraries. You must exit EndNote and delete the file by dragging the icon of the library to the Recycle Bin on the Windows desktop.

Recovering a Damaged Library

Occasionally computer files get damaged. If an EndNote library gets damaged, you may get an error message when trying to open it or work with the references. The best way to protect yourself from damaged files is to make regular backup copies of your important documents (see Appendix A). If you do not have

a backup copy of a damaged EndNote library, you can use the *Recover Library* command to repair the damaged file.

To repair a damaged EndNote library:

1. Close the library if it is currently open.

2. From the *File* menu, choose *Recover Library*. Read the information about the Recover Library command, and click *OK*.

3. In the dialog that appears, locate and select the library that needs to be repaired, and click *Open*.

4. EndNote creates a copy of the library with the suffix "-Saved" added to the name. For example, if you were repairing a library called "References" the original library would remain untouched and a new, repaired library called "References - Saved" would be created in the same location.

Once the new library has been saved, you should be able to open it and use it in place of the damaged library.

Differences Between Saved Libraries & the Original

The purpose of the *Recover Library* command is to recover as many references from the original library as possible. This means that it may also recover references that had previously been deleted from the library, but not yet purged from the file itself. If there are more references recovered in the saved library than existed at the time the original library was damaged, it means that EndNote was able to reconstruct references that had recently been deleted. These references must be deleted again.

Term lists are not recovered with the library. Consequently, you will need to rebuild each term list by choosing *Open List* from the terms menu, and then selecting *Update List* from that same menu to fill the term list with the terms used in your database.

Often the file size of the "saved" copy of the library will be smaller than the original. This is normal and not cause for concern.

Transferring Libraries Across Platforms

EndNote 5 can read libraries created in any version of EndNote for Windows, Macintosh, or DOS.

From Windows to Macintosh

Libraries created with EndNote for Windows can be used by EndNote for Macintosh. No conversion is necessary.

1. If you are on a network, simply copy the library from the PC to the Macintosh. Otherwise, copy the library to a DOS-formatted diskette using the Windows Explorer. Use a file transfer utility (which enables a Macintosh to read a DOS diskette) on your Macintosh to copy the library from the DOS disk to the Macintosh.

2. In the EndNote program on the Macintosh, choose *Open* from the *File* menu and select *Open Library*. As long as the library has the ".enl" extension, EndNote will display it.

3. Select the library and click *Open*.

If the library does not have the ".enl" extension as part of the file name, EndNote will not recognize it. In this case, press the SHIFT key down, then choose the *Open Library* command. When the dialog appears, release the SHIFT key. You should now be able to locate and open the library.

The procedure of holding down the SHIFT key in order to open the library, is only necessary the *first* time you open a library after transferring it from a PC. Once the library has been opened in EndNote on a Macintosh, it maintains the EndNote Macintosh icon and can be opened just like any other library created by EndNote on the Macintosh.

From Macintosh to Windows

Any library created by EndNote or EndNote on a Macintosh can be used by EndNote for Windows. No conversion is necessary, however you should change the name of the library to include the ".enl" extension (for example, Medicine.enl).

1. If you are on a network, simply copy the file from the Macintosh to the PC. Otherwise, use a file transfer utility to move the library from the Macintosh to a DOS diskette.

2. Start the EndNote program in Windows. (If you see a dialog prompting you for a reference library file, choose *Cancel*.)

3. Select *Open* from the *File* menu, and choose *Open Library*. Use the "Look in" list to navigate to the location of the library you want to open. If your library does not have the extension ".enl" or "*.lib" it will not appear in the dialog. If that is the case, select *All Files *.** from the file type list at the bottom of the dialog, and you should be able to see your library.

4. Select your library and click *Open*.

Chapter 5

Entering and Editing References

Chapter 5   Entering and Editing References

Introduction

There are various ways to add references to an EndNote library. This chapter deals specifically with typing information into EndNote and editing EndNote references.

See Chapter 6 for information about connecting to remote bibliographic databases and retrieving references directly into EndNote. Chapter 7 describes how to import references from a variety of sources using EndNote's *Import* command.

Important Points About References

Here is an overview of important aspects of EndNote references:

♦ Each EndNote reference stores the information required to cite it in a bibliography. Keywords, notes, abstracts, URLs and other information can be stored in a reference as well.

♦ Each reference added to a library is automatically assigned a unique record number that never changes for that reference in that particular library. EndNote uses these numbers to format papers. You cannot change these record numbers.

♦ You can enter about 32,000 references per library. (The actual size limit for a library is 32 MB.)

♦ Each field in a reference can grow to accommodate roughly 8 pages of text (32,000 characters), with a total limit of about 16 pages (64,000 characters) per reference.

♦ Twenty-three **reference types** are provided (such as Journal Article, Book, Book Section, Conference Proceedings, etc.). You can also create your own.

♦ The **fields** (Author, Title, Year, etc.) displayed for each reference type can be modified or deleted. New fields can also be added, up to a total of 38 fields per reference.

♦ The text of the references should remain as "plain text" unless a special font, size, or style of text is required for a specific term or character.

♦ The font used to display the text in the references can be changed using the *General Display Font* preference.

♦ References are automatically saved when they are closed; however, you may save a reference while editing the reference using the *Save* command in the *File* menu.

The Reference Window

The **Reference window** displays the contents of the reference. Each part of the reference is stored in its own field, and the type of reference is displayed below the title bar:

title bar —
Previous & Next Reference buttons —

minimize, maximize, and close buttons
Reference Type list

Title field {

scroll bar

window corner
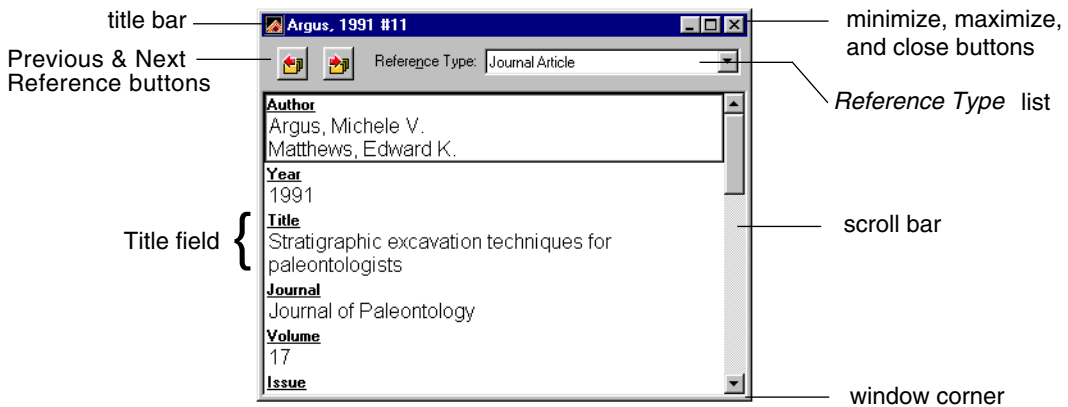
♦ The *Reference Type* list displays the type of reference that you are viewing, such as a journal article or a book.

♦ Click the *Previous Reference* or *Next Reference* buttons to close the current reference and open either the previous or next reference (based on the order the references appear in the Library window). All changes to the open reference are saved when you click these buttons.

♦ Resize the Reference window by clicking on the lower right window corner and dragging the window to the desired size. EndNote remembers the size and location of the last reference that you closed, so the next time you open a reference it will appear with the same dimensions and in the same location.

♦ Click the close button to close the reference, or type CTRL+W (or CTRL+SHIFT+W to close all references at once). All changes are saved automatically when a reference is closed.

♦ Click in the scroll bar with the mouse to scroll through the information in the Reference window.

♦ Press the TAB key to move to the next field and select its contents. SHIFT+TAB selects the previous field.

♦ The first author's last name, the year, and the EndNote record number appear at the top of the Reference window in the title bar. This is the same information that is used for the temporary citations in word processing documents.

♦ Click the maximize or minimize buttons in the top right corner to expand or minimize a Reference window. Click the restore button to restore the window to its original size.

The *Window* Menu

Any open library or reference is listed in EndNote's *Window* menu. The title of each open Reference window (that is, the author, year, and record number of a reference) appears in the *Window* menu, and it can be selected to bring that reference forward on the screen.

Previous & Next Reference Commands

When a Reference window is open, use the *Previous Reference* and *Next Reference* commands in the *References* menu to quickly browse through your references. The Reference window also includes buttons to move to the previous or next reference.
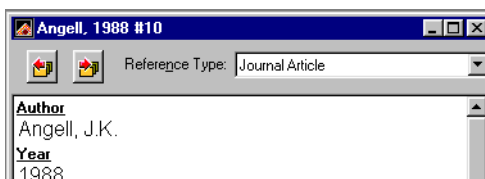
When you choose one of these commands (or click the buttons), the content of the References window changes to display the information for the previous or next reference listed in the Library window.

This command has the same effect as closing the reference that is currently displayed and opening another reference, so any changes to the currently opened reference will be saved before EndNote switches to display another reference.

Changing the General Display Font

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

The General Display Font changes the font used to display all other text that is typed into EndNote (such as in the Reference or Style windows). The General Display Font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed, exported, or copied directly from EndNote.

Changes made to the display fonts apply to all EndNote libraries opened on that computer. They do not affect the font used when you are formatting bibliographies in a word processing document. The normal font of the document is used for that. Changing the General Display Font simply changes the font that

EndNote uses for its "Plain Font" and "Plain Size" settings. Deliberate font changes that you have made in your references are not affected by the display font.

To change the General Display Font:

1. From the *Edit* menu, choose *Preferences* and click the *Display Fonts* option.
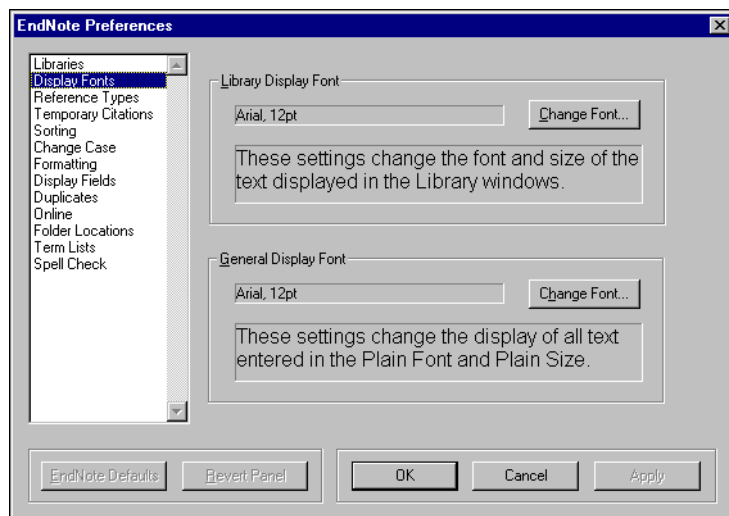
2. In the "General Display Font" section, click *Change Font*, then select a different font and/or size from the lists in the font dialog. Click *OK* to close the font dialog and see the example text displayed in the chosen font and size.

3. To see your changes in any EndNote windows that are currently open, click *Apply*. Click *OK* to save these changes and close the Preferences dialog.

Selecting References

To work with individual bibliographic entries (for example to copy, open, export or edit them), you first need to select them in the Library window. The simplest selection you can make is to click on a reference in the Library window. When you do so, that one reference is highlighted to indicate that it is selected.
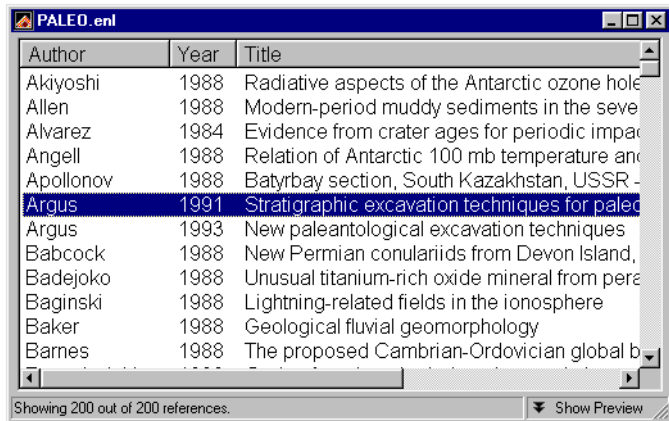
You can also select a reference by typing the first few letters the field by which the library is currently sorted. For example, if the library is sorted by the author field, type the first few letters of an author's last name to select the first reference by that author. If the library is sorted based on title, type the first few letters of the title of the reference that you want to select. (When typing the letters to match the title, articles such as "a," "an," and "the" are skipped.

To select multiple references:

♦   Hold down the CTRL key while clicking on individual references. Press the CTRL key and click on a *selected* reference to deselect that reference and retain the rest of the selection.

♦   Select a range of references by clicking on the first reference, then press the SHIFT key and click on the last reference of the range.

♦   You can also select a range of references by holding down the mouse button and dragging the mouse vertically across a range of references.

♦   Choose *Select All* from the *Edit* menu (CTRL+A) to select all of the references showing in the Library window. When all the references are selected, the *Select All* command changes to *Unselect All*.
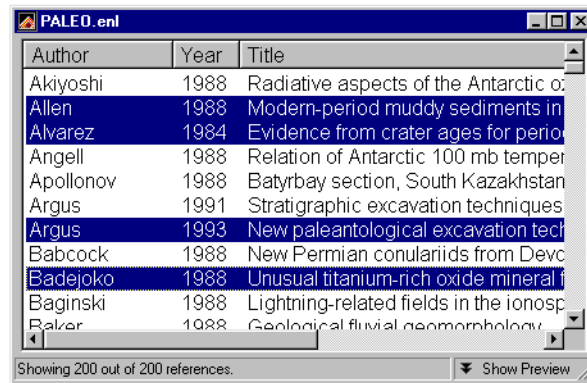
See "Showing & Hiding References" in Chapter 8 to learn how to display only the selected references, or temporarily hide the selected references from view.

Opening, Closing, Saving, & Deleting References

Opening References

Once you have the references selected, any of the following actions opens them (a maximum of 10 references at a time):

♦ Double-click the selected reference(s).

♦ Press *Enter*.

♦ Choose *Edit* (CTRL+E) from the *References* menu.
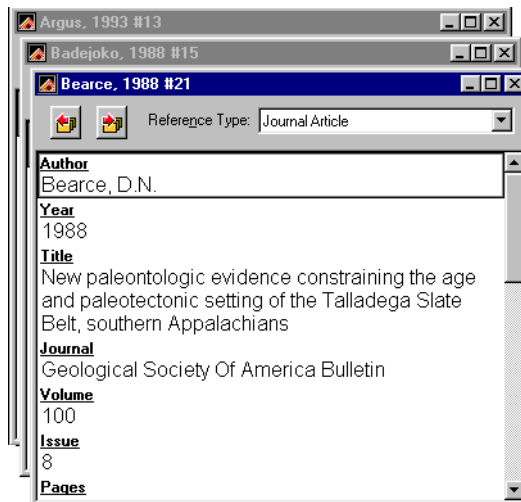
You can stop a series of selected references that are in the process of opening by pressing the Escape key (ESC).

The Reference window that opens for each of the references is where you enter and edit the reference data. Modify this text just like you would edit a word processing document: select the incorrect text and retype it, or delete and add text as necessary. Important information about entering reference data follows.

Closing References

To close a currently open reference, do any of the following:

♦ Click in the close button of the Reference window.

♦ Choose *Close Reference* (CTRL+W) from the *File* menu.

♦ Close all open references by holding down the SHIFT key while pressing CTRL+W.

♦ To close one reference and view the next or previous reference in the library, use the *Next Reference* and *Previous Reference* commands in the *References* menu (or the buttons in the Reference window). See page 65 for details.

NOTE: All data in a reference is automatically saved when you close the Reference window.

Saving References

To save a reference that you have just created, or to save any changes made to an existing reference:

♦ Close the reference(s) as described above, or

♦ Choose *Save* (CTRL+S) from the *File* menu.

If you exit from EndNote while Reference windows are open, the references are closed and saved automatically.

Reverting References

The *Revert Reference* command in the *File* menu discards all changes made to a reference since it was last opened or saved. *Revert Reference* is not available after you close the reference.

To remove the very last change made to a reference, use the *Undo* command in the *Edit* menu before closing or saving a reference.

Deleting References

Delete references from a library by selecting them in the Library window and choosing one of the following commands:

♦ *Delete* (CTRL+D) from the *References* menu,

♦ *Cut* (CTRL+X) from the *Edit* menu, or

♦ *Clear* from the *Edit* menu.

Delete and *Clear* serve the same function of removing the references from the library. *Cut* also removes the references from the library, but it stores them temporarily on the Clipboard so that you can paste them into another library. (The information on the Clipboard is replaced with whatever you *Cut* or *Copy* next.)

All three commands have you confirm that you want to remove the references from the library. You cannot undo these operations, so be sure you want to delete the selected reference(s) before dismissing EndNote's warning.

NOTE: If you delete references, you delete their record numbers in that library forever. Even if you paste these references back into the same library, they are assigned new, unique record numbers. This may cause incompatibilities with older papers that have citations that use the old record numbers. Therefore, we strongly recommend that you do *not delete references that have been used in papers* that you might want to re-format later, and keep backups of your libraries!

Creating a New Reference

Overview

To add a new reference to an open library:

1. From the *References* menu, choose *New* (CTRL+N). This opens an empty Reference window:

Reference Type list
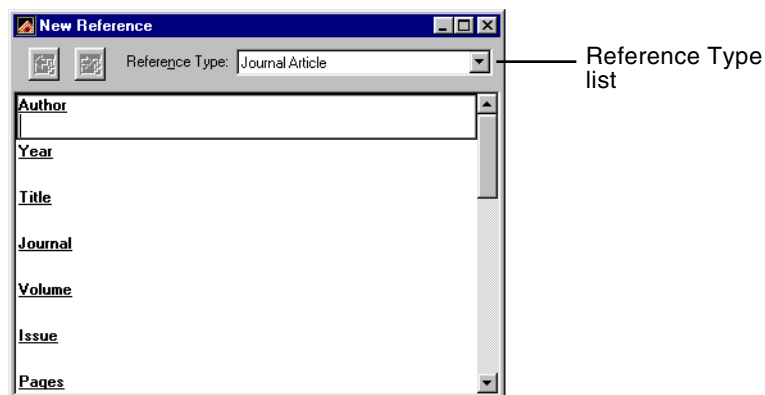
2. Choose a reference type from the *Reference Type* list at the top of the window.

3. Enter the bibliographic data into each of the fields in the reference according to the rules outlined later in this chapter.

When you are finished, close the reference to save it and add it to the library.

The rest of this chapter goes into more detail about how to enter references into EndNote.

Changing the Default Reference Type

By default, new references appear as Journal Article references. You may change this using the *Default Reference Type* option in the Preferences panel.

1. From the *Edit* menu, choose *Preferences*.
2. Click the *Reference Types* option in the list.
3. At the top of that *Reference Types* preferences panel, click the *Default Reference Type* list and choose the reference type that new references should use.

Choosing a Reference Type

When you create a new reference, that reference is assigned the default reference type. If you want to add a different type of reference, click the *Reference Type* list at the top of the Reference window, and select the reference type that you need.

Normally, you should select the reference type before entering information in the reference. However, you can change the reference type at any time, and the information you have entered is retained and transferred to the corresponding field for the new reference type.

In addition to determining how the reference is formatted in the bibliography, the reference type determines which fields appear in the Reference window. For example, a Journal Article reference would have fields for Journal, Volume, and Issue, whereas a Book would have fields for Editor and Publisher.

Customizing Fields and Reference Types
Fields can be removed, added, or renamed. You can also create entirely new reference types. See Chapter 14 for instructions on removing, adding, or modifying fields for each reference type.

Tips for Choosing the Right Reference Type

Use **Book** for books written by one or more authors, and use **Edited Book** for books edited by one or more editors (whether they are books in a series or not).

Use **Book Section** for references to parts of edited or non-edited books (a chapter, for example, or one article in a published conference proceedings).

The **Conference Proceedings** reference type is best used for unpublished proceedings. Articles that are published as part of the comprehensive conference proceedings should be entered as **Book Section** references.

Use the **Electronic Source** reference type for citing material from a Web page or ftp site. If you are citing a journal article that appears both online and in print, most style guides prefer that you use the print information and cite it as a regular journal article. Email discussions should be cited as **Personal Communications**, just like any other correspondence.

Entering References

Bibliographic information (as well as keywords, notes, and other relevant information) is entered into separate **fields** in each EndNote **reference**. By storing the pieces of bibliographic data in different fields, EndNote can later rearrange the elements to conform to various bibliographic formats (such as APA or MLA).

Special bibliographic formatting and punctuation should *not be included* when you enter reference data into EndNote. For example, you do not need to put quotes around titles, italicize journal names, or include the abbreviation "Vol." along with volume numbers. Enter only the raw data and leave the formatting to EndNote.

NOTE: There are a few exceptions to this punctuation rule, notably in the Author, Editor, and Edition fields. Read on for details.

Using Term Lists with Data Entry

EndNote uses **term lists** for the Author and Editor names, Journals, and Keywords. Term lists can also be created for other fields. These lists are updated automatically as you enter new terms into these fields. The benefit of this is that the term lists also help with data entry. If you begin to enter a name, journal or keyword that you have used before in that library, EndNote will complete the term for you to speed up data entry:
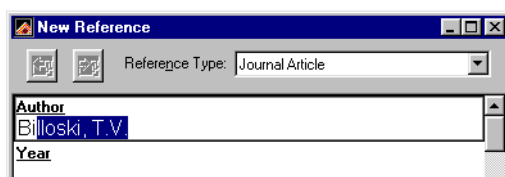
To accept a term that EndNote has suggested, simply press ENTER, TAB, or click in the next field. Terms that are new (that is, those that do not already appear in the corresponding Author, Journals, or Keyword term list) appear in red text.

A more complete discussion of EndNote's term lists is provided in Chapter 9.
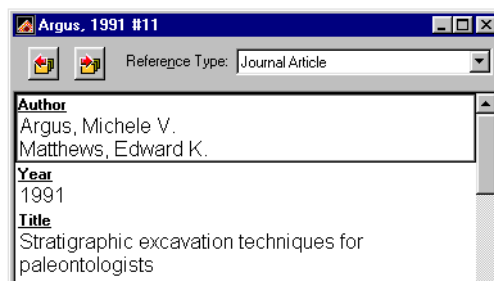
NOTE: Both the "Auto-Update" and "Auto-Complete" term list features described here may be turned off using the *Term Lists* settings in the EndNote preferences.

Author & Editor Names

The following information about Author and Editor fields applies to the following "Generic" field names: Author, Secondary Author, Tertiary Author, and Subsidiary Author.

Author and editor names must be entered *one name per line*. If an author's name is too long to fit on a single line, just let it wrap to the next line as you type it.

Author names are entered one per line.

Author names can be entered either with the last name followed by a comma and the first name, or the first name followed by the last name. Both are correct. However, note that if you have the "Suggest Terms as You Type" feature of the term lists turned on, EndNote suggests author names based on the assumption that the names are being entered with the last name first.

EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible. If you are entering initials instead of full names, be sure to type a period or a space between initials, (for example "Fisher, J.O." or "J O Fisher"), otherwise EndNote interprets the initials as a single name: "Jo."

See "Author List (Bibliography & Footnotes)" on page 331 for information about how EndNote can format author names in

bibliographies. For more information about term lists, see Chapter 9.

Using "et al." or Similar Abbreviations

Enter all author names for a particular reference. EndNote will truncate the list of authors with "et al." or "and others" as required by the bibliographic style. If you do not know all of the authors' names, then the last author should be "et al." or "and others" followed by a comma.

Anonymous Works

If a reference has no author, you should leave the Author field blank. Do not enter "Anonymous." The style that you use to format the bibliography determines how anonymous references are treated.

Note that if a work is published with "Anonymous" printed on the title page, most style guides request that "Anonymous" be entered as though it were the author name.

Corporate Authors

When entering corporate authors, put a comma after the name:

♦   U.S. Department of Agriculture,

♦   Apple Computer Inc.,

Be sure that you do not have any commas in the name because all text before the comma is interpreted as a last name.

Complex Author Names

For multiple-word last names, like Charles de Gaulle, enter the name with the last name first, such as:

♦   de Gaulle, Charles

Entering a name this way ensures that both words "de" and "Gaulle" will format as the last name.

Enter authors with titles, such as "Jr." or "III", as Last, First, Title. For example, "Alfred Smith Jr." must be entered as:

♦   Smith, Alfred, Jr.

NOTE: See the *Sorting* section of the EndNote preferences if you do not want EndNote to include prepositions (such as de, van, von, etc.) in how it alphabetizes references in a bibliography (page 413).

Year

Normally, you should enter the four numbers of the year of publication, as in `1999.` When appropriate, you may enter `in press`, or `in preparation`, or some other notation.

Titles

The following information about Title fields applies to the "Generic" fields Title, Secondary Title, Tertiary Title, and Alternate Title.

Enter titles without a period or any other punctuation at the end. Do not press the ENTER key while typing titles into EndNote; allow long titles to just wrap to the next line. Although the EndNote styles can change the capitalization of titles, it is best to capitalize the title in the same way you would like it to be capitalized in your bibliographies.

Journal Names

The Journal field is automatically set up to work with the Journals term list. This means that the Journals list will be automatically updated as you add new journal names to your references, and EndNote will use this list to facilitate data entry by suggesting journal names as you enter them into the Journal field. See Chapter 9 for more information about term lists and turning these options off.

The Journal field (in the Journal Article reference type) can be used with the Journals term list to allow for multiple formats of a journal name to be used in your bibliographies, depending on the format required (see page 185 for details). When the different forms of the journal name are entered into the Journals term list, then all it takes to change the format of your journal names in a bibliography is one change in the style used (see "Journal Names" on page 323). All of the appropriate substitutions are made when the bibliography is created.

EndNote includes predefined term lists for medical, chemistry, and humanities journals. If you would like to use these lists, you should import them into your Journals list as described in Chapter 9.

The Alternate Journal Field

The Alternate Journal field is most useful when importing or retrieving references from an online source that provides two forms of each journal name (full and abbreviated). By importing both, you can easily update the Journals term list and use the

correct form of the name without having to enter it yourself (see page 184).

If you do not import from sources that include an alternate journal name, this field is probably not necessary for you to have in your Journal Article references. You can remove it by editing the Reference Types table (see page 287).

Pages

Page ranges can be entered as complete (1442-1449) or abbreviated (1442-9) ranges. The style used to create the bibliography can change the page numbers to be either full or abbreviated page ranges, or show just the first page (see the "Page Numbers" section in Chapter 15).

Do not enter commas in the Pages field for page numbers in the thousands.

Edition

The text of the Edition field is not modified by EndNote for your bibliographies, so be sure to enter "1st," "2nd," and so on for this field if that is what you need in your bibliography.

Date

Enter dates as you would like them to appear in your references EndNote does not reformat dates.

Entering Dates for Record Keeping

You can use the Label, Notes, or any of the Custom fields to enter a date for your own record-keeping purposes (such as a record entry or modification date, or any date other than the publication dates). If you plan to sort your references by these dates, or search for a range of dates, enter the numerical version of the date instead of the name of the month because EndNote does not interpret dates and would therefore sort months alphabetically. For example, enter "95/5/21" instead of "May 21, 1995." Enter the year first, followed by the month and the day, so that the references can be sorted first by year, then month, then the day.

Short Title

Use the Short Title field to enter abbreviated versions of the regular title which should be used as part of an in-text citation or a footnote citation. This is a common request for many of the humanities styles which use a shortened form of the title in the citation to help identify which reference is being cited. For example, MLA typically lists just the author name and the specifically cited pages in the in-text citation:

(Perin 141)

But if there are multiple works by that author, MLA requires that the title, or a shortened form of it be added to the citation. If the full title of reference is fairly long, such as "Burning the Midnight Oil: Tales from Working the Night Shift," you should enter an easily recognizable form of the title that starts with the first word on which the normal title would be sorted. For example:

(Perin, *Burning* 141)

If an EndNote style is configured to use the Short Title field, and that field is empty for a particular reference, the normal Title field will be used instead.

Original Publication

Use the Original Publication field to enter any information about the original publication that you need to be included in the cited reference. For example, when citing a republished book you might want to include the original publication date, as well as any other supplementary information about the original publication (such as place published and publisher). Enter this information just as you would want it to appear in your formatted bibliography reference (including text styles and punctuation).

The only EndNote styles configured to use the original publication data are those for MLA, Chicago, Turabian, and APA. You may add the field to other style templates as well.

Reprint Edition

Use the Reprint Edition field for references that were originally published under a different title. The field should include the original title and year to indicate that this reference is a reprint of an earlier publication. Enter this information exactly as you would want it to appear in your formatted reference (including text styles and punctuation).

The only EndNote styles configured to use the original publication data are those for MLA, Chicago, Turabian, and APA. You may add the field to other style templates as well.

NOTE: This field is not intended to be used to indicate whether or not you have a reprint of the article on file. You may use one of the custom fields for that.

Reviewed Item

Use the Reviewed Item field for articles or chapters that are critical reviews of books, cinema, art, or other works. The

contents of the Reviewed Item field will vary depending on the type of review that you are citing, but typically you should enter the title of the reviewed work and the primary person responsible for it (author, artist, performer, etc.). Additional information about a production or performance may also be included. Enter the information exactly as you would want it to appear in the formatted references (including punctuation and text styles).

The only EndNote styles configured to use the original publication data are those for MLA, Chicago, Turabian, and APA. You may add the field to other style templates as well.

ISBN/ISSN

ISSN (International Standard Serial Number) and ISBN (International Standard Book Number) are codes used to identify a particular publication. An ISSN number would refer to an entire journal (such as the Journal of Virology), and an ISBN would refer to a particular book.

This field is not used by default for all reference types, but it is available in the Generic list of EndNote fields. It is most useful if you are importing reference data, or retrieving references directly from an online source. These numbers help to identify a specific publication if you needed to order it or locate it. See page 287 for information about adding fields to your reference types.

Call Number

The Call Number field is used to store library call numbers. These are the codes that help you to locate a particular publication on the shelves in your library. When available, the EndNote connection files import the call number information into this field. If you don't plan to use this feature, you may remove the field (see page 287).

Label

The Label field can be used for many purposes such as special in-text citations or reprint numbers.

Some citation styles require that citations include only part of the author's name, such as [SMIT 90]. EndNote cannot create this citation for you, but if you type "SMIT 90" into the Label field and use the Label field in your style's citation template, EndNote will insert the Label field into the citation.

If you don't need the Label field for citation purposes, it can be used as an additional field for categorizing references or storing reprint numbers. (Don't use EndNote's record numbers to number reprints because these numbers change when references

are moved to different libraries. EndNote's record numbers cannot be assigned or changed by the user.)

Keywords

Use the Keywords field to store keywords that you want to associate with the reference. You can restrict a search to just the Keywords field, so the terms you enter into this field can be used to later retrieve the references when using EndNote's *Search* command.

The Keywords term list (which maintains a list of terms used in the Keywords field) is set up to recognize semicolons (;), backslashes (\), and returns as the delimiters that separate individual keywords. If you would prefer to use other punctuation to separate your keywords, you may change these settings using the *Define Lists* command in the *Terms* menu. See Chapter 9 for details.

Notes and Abstract

The Notes and Abstract fields, like all other fields, can hold up to 32,000 characters which is equivalent to about 8 pages of single-spaced text. Use the Notes field to store personal reminders, such as the location of a quote in a book or the quote itself. Use the Abstract field for a brief description of the contents of the work.

URL (Uniform Resource Locator)

Even if you're not familiar with the acronym "URL" (Uniform Resource Locator), you probably know about the World Wide Web. The URL is simply the term for the address used to locate a specific piece of information using your web browser. The URL for the EndNote home page provides a typical example of how a URL should be entered:

`http://www.endnote.com`

When a correct URL is entered into this field, the *Open Link* command in the *References* menu can be used to launch your web browser and take you to that site. Adding any other information along with the URL will most likely keep the *Open Link* command from successfully finding the desire site.

Some online reference databases include a URL for the full text of an article online. When importing or retrieving references directly from these sources, the URLs can import directly into this field to take advantage of the *Open Link* command. You can also store a URL to related information on the web or other relevant material.

You can also use this feature to store the path to files on your hard drive (such as graphics and word processing documents). Use the *Link To* command in the *References* menu to select the file for which you would like to insert a link. This is a good trick for linking graphics or other files on your hard drive to a reference in your EndNote library. Selecting the *Open Link* command when this reference is open or selected in the library will then use the appropriate application to open the linked file.

This field is unique in how it interacts with the *Open Link* command in that the *Open Link* command automatically checks this field to find a URL or a file to launch. See "Linking References to Files & Web Sites" on page 164.

Clickable URL Links

EndNote automatically recognizes URLs if they are entered with the correct prefix (such as "http://" or "ftp://") in any field. When recognized, they become clickable web links and appear as blue and underlined text. Simply clicking on one of these links will open your web browser and go to the address given. This feature is not specific to the URL field.

Font, Size, and Style

EndNote is designed to produce bibliographies that automatically use the font and size of the text in your word processing documents. Normally, when you type text into an EndNote reference, it is entered in EndNote's Plain font, size, and style, which means that your references follow the font settings in your paper.

If any fonts, sizes, or styles other than Plain are entered into your library, they will appear in your bibliography regardless of the font of your paper. For example, you can italicize species names, add a superscripted number, or enter Greek characters such as β.

To apply font or text styles, select the text to be changed then choose the desired font, size, or style from the *Text* menu.

NOTE: If the *Text* menus are dim, it is either because you are not in an editing window (such as a Reference or Style window), or you have not selected (highlighted) any text to change.

Plain Text

The *Plain Text*, *Plain Font*, and *Plain Size* commands in the *Text* menu remove overriding fonts, text sizes, or text styles from the selected text in a reference or a Style window.

When EndNote creates a bibliography, text in Plain Font and Plain Size uses the font and size of your paper. To use these commands, first select the text you want to change, and then choose *Plain Text*, *Plain Font*, or *Plain Size* from the *Text* menu.

The default font used to display EndNote's "Plain Text" is Arial 12 point, but it can be changed using the *General Display Font* option in the *Display Fonts* section of the EndNote preferences. (Choose *Preferences* from the *Edit* menu and click the *Display Fonts* option.) The General Display Font setting changes the font in which the references are displayed but does not affect the font of a bibliography created for a word processing document.

Keyboard Commands

A full set of key commands is available so that you can enter references without using the mouse. For example, to create and enter a new reference without touching the mouse: type CTRL+N to add a new reference, type the bibliographic information using TAB or SHIFT+TAB to move forward or backward between the fields, and then press CTRL+W to save and close the reference.

Key Command	Function
CTRL+N	creates a new reference
CTRL+CLICK	to select more than one reference
SHIFT+CLICK	to select a range of references
CTRL+E	opens selected reference(s)
CTRL+W	closes the active window
CTRL+SHIFT+W	closes all windows of the same type as the active window
TAB	selects the next field
SHIFT+TAB	selects the previous field
When text is selected:	
CTRL+T	sets the text style to Plain
CTRL+L	selects the Plain font
CTRL+B	turns bold on and off
CTRL+I	turns italic on and off
CTRL+U	turns underline on and off
CTRL++ (Numeric keypad)	turns superscript on and off
CTRL+- (Numeric keypad)	turns subscript on and off

CTRL+SHIFT+= can also be used for superscript; and CTRL+= for subscript.

The ARROW keys can be used to navigate within a field.

Cut, Copy, Paste Text in the References

The *Cut*, *Copy,* and *Paste* commands in the *Edit* menu can be used to move text from one field in a reference to another field by selecting and copying or cutting the text and then pasting it in the desired location. You can also *Copy* and *Paste* text from a field in an EndNote reference to your word processor. Similarly, you can *Copy* text from a word processing document and *Paste* it into a reference. If it is important to paste the text along with the fonts and text styles, use the *Paste with Text Styles* command in the *Edit* menu. The regular *Paste* command does not include font, size, or text style information when pasting into EndNote from another program. Avoid pasting unwanted fonts and text styles into EndNote references because those fonts and text styles will carry through into future bibliographies.

Using "Drag and Drop" Within a Reference

Text may also be moved around within a reference by selecting the text and then dragging and dropping it in a new location. When text is moved this way *within* a reference, it is moved from one location to another. When it is dragged from one reference to another reference or to another program (such as your word processor), it is *copied* and therefore not removed from the reference.

To drag and drop text: First select the text of interest. Then click on the selection, and keep the mouse button pressed while you drag the text to another location. When the cursor is positioned in the right place, release the mouse button to "drop" the text there.

Copying and Pasting Complete References

In addition to copying and pasting text between fields, EndNote can *Copy* and *Paste* entire references between libraries.

To use the *Copy* and *Paste* commands:

1. Select one or more references in the Library window (hold down the CTRL key to select multiple references or the SHIFT key to select a range of references). Do not open the references.
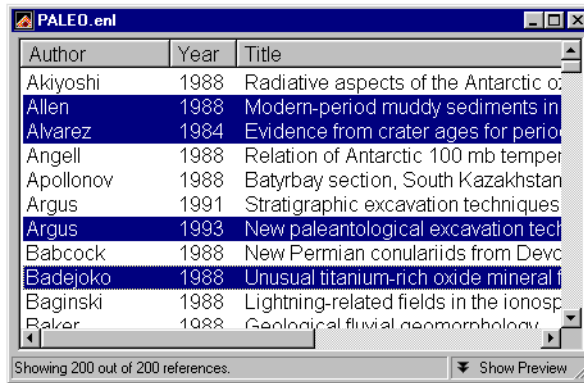
2. Choose *Copy* (CTRL+C) from the *Edit* menu and those references are copied to the Clipboard.

3. Open another EndNote library and choose *Paste* (CTRL+V) from the *Edit* menu to paste directly to the Library window. The references you copied are pasted into the library and sorted correctly with the existing references.

Copying references using drag-and-drop:

An easy way to copy references between libraries is to use the drag-and-drop functionality. Simply select the references you want to copy, click on any part of the selection, and use the mouse to drag them to another open library. Release the mouse button when the cursor is over the destination library, and all of the select references will be copied into the library.

If you need to copy all of the references in one library to another library, you can also use the *Import* command to directly import one library into the other (see Chapter 7).

NOTE: Any time you copy a reference and paste it into another library, or import a reference into another library, the reference is assigned a new record number in the destination library.

Entering Several Articles from the Same Source

Use a reference "template" to facilitate entering a series of references that have some information in common (such as various sections from one book, or a number of papers presented at the same conference). The template you create is an incomplete EndNote reference with just the common information entered into it.

To create a reference template:

1. Choose *New* from the *References* menu.

2. Enter all of the bibliographic information that the references have in common (such as the year, book title, publisher, and city for different sections from one book).

3. Close the reference when you are finished. It remains selected in the Library window.

4. Choose *Copy* (CTRL+C) from the *Edit* menu to copy it.

5. Use the *Paste* (CTRL+V) command to paste the reference several times, to create as many partially-filled references as you need. You should paste directly to the Library window—do *not* open a new reference and choose *Paste*.

6. Select all of the partially-filled references that you just created and edit them (double-click them, press ENTER, or type CTRL+E to open up to 10 selected references at one time).

Complete each of the individual references. Close and save them by pressing CTRL+W.

Entering Special Characters

EndNote references can include special characters, including characters with diacritics, and Greek, mathematical, and typographical symbols. Diacritical characters are a part of standard Windows fonts, which use the ANSI (also called Latin 1) character set. Most symbols can be entered in the Symbol font.

Entering Characters with Diacritical Marks

Characters with diacritical marks can be entered in EndNote using any of the text-entry methods supported by Windows. Each of these options is described in this section:

♦ Type the character on the keyboard (if the character is part of the language supported by the keyboard).

♦ Type the ANSI or ASCII code for the character on the numeric keypad of your keyboard while pressing the ALT key. (Tables of the ANSI and ASCII codes follow.)

♦ Copy the characters from other Windows programs, and paste them into an EndNote reference. Character Map is a small program supplied with Windows for this purpose.

NOTE: Diacritical characters can also be entered into EndNote term lists. If you frequently use certain diacritical characters, or words that include diacritical characters, you can store them in a term list and choose them from that list when entering references.

Entering Character Codes

ANSI codes are the character codes normally used by Windows programs. ASCII codes are the character codes used by DOS. The first 128 codes are identical for both ANSI and ASCII. These are the upper and lower case letters, all numbers, and the symbols available on the keyboard. The remaining 128 codes in each set are different. The Windows keyboard interface allows you to enter either ANSI or ASCII codes by typing the code on the numeric keypad while pressing the ALT key. If the number is preceded by a 0 (zero), the code is interpreted as an ANSI code. Otherwise, Windows will interpret the code as ASCII.

The following table lists characters generated by the upper 128 ANSI codes:

Code		Code		Code	
0128	_	0160	n..b. space	0192	
0129	_	0161	¡	0193	
0130	‚	0162	¢	0194	
0131	ƒ	0163	£	0195	
0132	„	0164	¤	0196	
0133	…	0165	¥	0197	
0134	†	0166	¦	0198	
0135	‡	0167	§	0199	
0136	^	0168	¨	0200	
0137	‰	0169	©	0201	
0138	Š	0170	a	0202	
0139	‹	0171	«	0203	
0140	Œ	0172	¬	0204	
0141	_	0173	-	0205	
0142	_	0174	®	0206	
0143	_	0175	¯	0207	
0144	_	0176	°	0208	
0145	'	0177	±	0209	
0146	'	0178	2	0210	
0147	"	0179	3	0211	

NOTE: If these codes don't appear as they should when you type them, check your General Display Font settings by choosing *Preferences* from the *Edit* menu and clicking the *Display Fonts* option. Some fonts cannot display these characters.

This table lists the characters generated by the upper 128 ASCII codes for U.S. keyboards. Note that some diacritical characters cannot be generated using ASCII codes:

Code		Code		Code	
128	Ç	160	á	192	
129	ü	161	í	193	
130	é	162	ó	194	
131	â	163	ú	195	
132	ä	164	ñ	196	
133	à	165	Ñ	197	
134	å	166	ª	198	
135	ç	167	º	199	
136	ê	168	¿	200	
137	ë	169		201	
138	è	170	¬	202	
139	ï	171	½	203	
140	î	172	¼	204	
141	ì	173	¡	205	
142	Ä	174	«	206	
143	Å	175	»	207	
144	É	176		208	
145	æ	177		209	
146	Æ	178		210	
147	ô	179	³	211	

Using the Character Map

The Character Map program (CHARMAP.EXE) is supplied with all versions of Windows. Both diacritical characters and symbols can be entered using the Character Map:

To use the Character Map:

1. Start the Character Map program, by choosing *Accessories* from the Windows *Start* menu, then choosing *System Tools* and *Character Map*.

2. Select the *Symbol* font, if necessary. (All other fonts will revert to the Typing Display Font when pasted in EndNote.)

3. Double-click the character(s) you need.

4. Click the *Copy* button to copy the characters to the Clipboard.

5. Return to EndNote, position the cursor in a reference, then select *Paste* from the *Edit* menu to paste the characters.
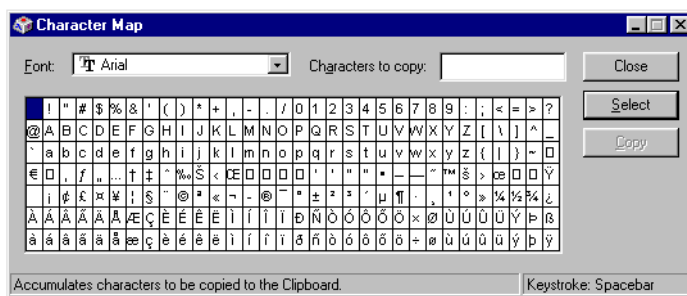
Spell Checking

To begin using EndNote's spell checker, you must have an open record in the active window. If the active window does not display an open record, the spell check command is disabled.

If text is highlighted in the active record, that selection is checked first, and then you will be prompted to check the rest of the record. If there are other open records, you will then be prompted to check those records.

EndNote's spell checker can check spelling accuracy in all fields except the Author fields (Author, Secondary Author, Tertiary Author, and Subsidiary Author).

Starting Spell Check

To start spell checking:

1. Open the record(s) you wish to check.

2. (optional) If you want to check only a portion of the text, highlight only that text.

3. From the *References* menu, select *Spell Check*.

NOTE: These are other ways to start spell checking: Right click the mouse and select Spell Check from the contextual menu, or click the Spell Check toolbar button, or press F7.

---

4. If EndNote finds a word that is not found in the selected dictionaries, it displays a Check Spelling dialog.
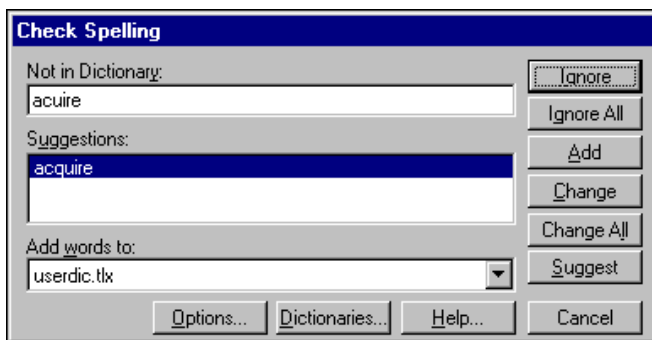
The Check Spelling dialog works just like a spell checker in a word processor. For a complete description of each button on the Check Spelling dialog, press the *Help* button.

Spell Check Options and Dictionaries

You can access Spell Check Options and Dictionaries in two ways:

♦   From the *Edit* menu, select *Preferences*. At the bottom of the left column, click on *Spell Check*. An *Options* button and a *Dictionaries* button appear.

♦   Start Spell Check. When EndNote detects a misspelled word, the Spell Check dialog appears. An *Options* button and a *Dictionaries* button are available on the dialog.

For information about the Spell Check Options and Dictionaries preferences, including a list of dictionaries supplied with EndNote, see "Spell Check" on page 421.

Chapter 6

**Searching Remote
Databases with EndNote**

Chapter 6   Searching Remote Databases with EndNote

Introduction to Searching Online Databases

Using EndNote's *Connect* and *Search* commands, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer! And to make it even easier, the results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

How Does It Work?

EndNote is able to provide access to these remote sources using an information retrieval protocol called "**Z39.50.**" Z39.50 is widely supported by libraries and information providers around the world as a convenient method to access their library catalogs and reference databases.

EndNote stores the information necessary to connect to and search these online databases in individual **connection files**. Pre-configured connection files are provided for a number of these sources. If necessary, you can also customize or configure your own connections to Z39.50-compliant databases (see Chapter 17).

NOTE: If the online database that you access is not available on a Z39.50 server, EndNote will not be able to connect directly to it. We suggest that you submit a request for Z39.50 compatibility to your librarian or the institution that provides access to the database. You can still import references downloaded from non-Z39.50 databases. See Chapter 7 for instructions.

What EndNote's Searching Offers

EndNote's search interface provides a simple way to do basic searches on EndNote libraries and remote databases. The same Search window is used for both purposes. This removes the need to learn a separate program to access the online databases or go through the extra steps of saving the references to a text file and importing them into EndNote.

This search interface is not intended to replace the advanced search options that may be available using the search interface offered by your information provider. There may be times when you want to use the information provider's search interface (for example, to take advantage of a thesaurus of search terms) and then import those references into EndNote. This is still an option using EndNote's *Import* command (see Chapter 7). But once you know the terms that you want to use in your searches, being able to retrieve the necessary references directly from EndNote is a very fast and efficient approach.

Quick Overview

The process of searching a remote database is very similar to searching an EndNote library. Here are the basic steps involved, more detailed descriptions of these steps are provided throughout this chapter. Also see page 38 (in the Guided Tour chapter) for a detailed demonstration of how to use this feature.

To retrieve references from a remote database:

1. From the *File* menu choose *Connect* and select the *Connect* command from the submenu.

2. Select the database that you would like to search, and click *Connect.*

   When the connection has been established, an empty Retrieved References window opens and EndNote's Search window appears, ready for you to enter a search.

3. Enter your search request into EndNote's Search window, and click *Perform Search.*

4. EndNote searches the database and displays the number of references that were found to match your search criteria. Click *OK* to retrieve the references.

5. Once the references appear in the Retrieved References window, you may browse through them and transfer to your EndNote library the ones that you want to keep.

Selecting a Connection File

Before a remote source may be searched, you must first connect to it by selecting the corresponding **connection file**. The connection file tells EndNote which online database you want to search, where to find it online, and what search options are available for it.

Access-Restricted Databases

EndNote comes with pre-configured connection files to free reference databases and library catalogs as well as databases that require payment and/or a password for access. Most of the databases offered by the commercial information providers (Ovid, OCLC, DIMDI, SilverPlatter, etc.) require an account and password for access. There are, however, numerous databases that are available at no cost to you, and no account is required (see "Free Databases" below).

When you attempt to connect to a restricted database, EndNote prompts you to enter your user ID and/or password. Simply enter the necessary information, and click *OK* to log on.

(Depending on the database you are accessing, the passwords and IDs may be case-sensitive.)

For certain connections, EndNote might prompt you for more information than you have to provide (for example, a Group ID or User ID along with a password). You may leave blank the items that do not pertain to you.

NOTE: To gain access to a restricted database, you will need to contact the information provider directly to set up an account. ISI ResearchSoft does not control access to any of the sources.

Free Databases

Two major databases that do **not** require passwords are the PubMed database from the National Library of Medicine, and the Library of Congress. Many of the general library catalogs are also unrestricted. Additional connections may be available at the EndNote web site (http://www.endnote.com/home/z3950.htm).

Databases Not Requiring an Account

Description	Information Provider/Category
PubMed MEDLINE and pre-MEDLINE references) from the National Library of Medicine	NLM
Most university library catalogs	Library Catalogs
Demo files provided by Ovid Technologies	Demo
Books at theLibrary of Congress	Library of Catalogs
Library catalog, Magazine, and News databases	California Digital Library (formerly MELVYL)
Colorado Alliance of Research Libraries (includes databases outside of Colorado)	CARL

Picking Your Favorite Connection Files

EndNote provides dozens of connection files for a variety of sources. To peruse the list of available connection files in EndNote's Connections folder, choose *Connection Files* from the *File* menu, and select *Open Connection Manager*.

Click column headings to sort the list.

Click to search for files.

Click to display details about the selected file.
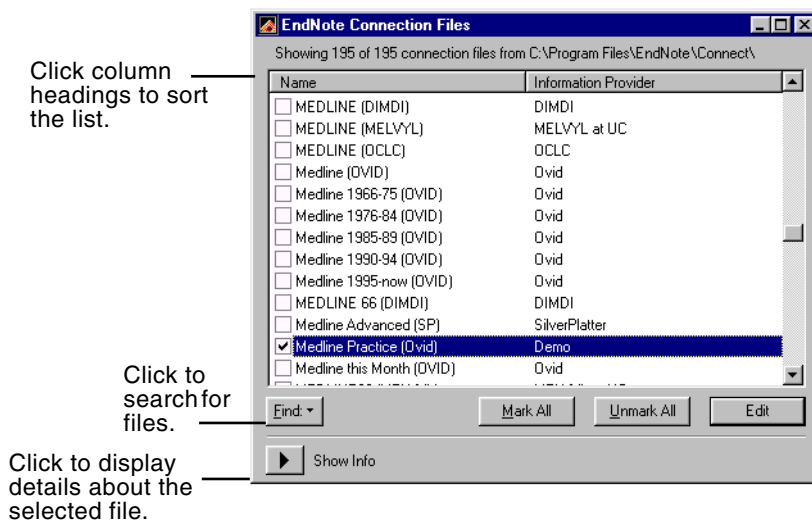
When you have found a connection file that you'll want to use in the future, click the checkbox to the left of it to mark it as a favorite. All marked files appear in a submenu of the *Connect* command, giving you easy access to those files you use most often.
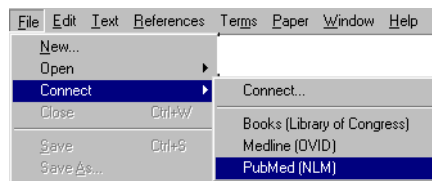
This step is not required; you can always choose the *Connect* command to pick a connection file that is not listed in the menu.

Use the following features in the Connection Manager window to locate the connection file(s) that you want to use:

♦ Click *Find* and EndNote displays the list of information providers (categories) used for all of the connection files. Choose one to restrict the list to show just that set of files. That will help you to find the one you want, or choose *Mark All* to mark the entire subset.

♦ Click the *Find* button, and choose *by Name* to search for a connection file by the name of the database.

♦ Click the column headings to sort the connection files by name or by information provider. Clicking the same column

heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

♦ If you know the name of the connection file that you want to use, you may start typing it and the first file that matches what you type will be selected.

♦ Click the *Show Info* button at the bottom of the dialog to display additional information about the selected connection file.

NOTE: For information about editing connection files or creating new ones, see Chapter 17.

What if Your Database Isn't Listed?

If a connection file hasn't been provided for the database that you want to search, contact your librarian or information provider to see if their database is available on a Z39.50 server. If it is, you should request the information required to set up a Z39.50 client for that database. See "Steps to Create a New Connection File" on page 400 for more information.

Adding Connection Files

The Connection Manager displays all of the connection files in the selected connections folder. If you have received a connection file from a colleague or librarian or downloaded one from the web, simply copy it into your Connections folder in your EndNote folder, and it will appear in the Connection Manager.

If necessary, you can designate a different Connections folder:

1. Choose *Preferences* from the *Edit* menu, and select the *Folder Locations* option.

2. In the "Connection Folder" section, click *Select Folder* and select the folder that contains the connection files that you want to use.

3. Open the folder and then click *Choose.*

4. Click *OK.*

NOTE: A resource page about Z39.50 information can be found at the EndNote web site (http://www.endnote.com/home/z3950.htm). Additional connection files and instructions are posted at that site as they become available. You can automatically download the latest connection files available from ISI ResearchSoft. See "Automatically Updating Files" on page 16.

Searching a Remote Database

The first step to searching a remote database is to connect to it. Once the connection has been made, you're able to use EndNote's Search window to search the remote database.

Establishing the Connection

If you have connected to a particular database before, or if you have selected a database as one of your "favorites" (see page 95) it will appear in the submenu of the *Connect* command. This saves you a few steps in the process of using the *Connect* command.

To connect to a remote database:

♦ Choose *Connect* from the *File* menu, and select the desired database if it is listed there. That will start the connection.

♦ If the database you want to search is not listed with the *Connect* command, choose *Connect*, select the desired database, and click *Connect* to make the connection.

Click column headings to sort the list.

Click to search for files.

Click to display details about the selected file.

Choose A Connection File

Showing 203 of 203 connection files from C:\Program Files\EndNote\Connections\

Name	Information Provider
Medline (OVID)	Ovid
Medline 1966-75 (OVID)	Ovid
Medline 1976-84 (OVID)	Ovid
Medline 1985-89 (OVID)	Ovid
Medline 1990-94 (OVID)	Ovid
Medline 1995-now (OVID)	Ovid
MEDLINE 66 (DIMDI)	DIMDI
Medline Advanced (SP)	SilverPlatter
Medline Practice (Ovid)	Demo
Medline this Month (OVID)	Ovid
MEDLINE66 (MELVYL)	MELVYL at UC
MEDLINE75 (MELVYL)	MELVYL at UC
MEDLINE80 (MELVYL)	MELVYL at UC
MEDLINE85 (MELVYL)	MELVYL at UC
MEDLINE90 (MELVYL)	MELVYL at UC
Middlebury College	Library Catalogs

Find: ▾   Cancel   Connect

▶ Show Info

(This Connection dialog is very similar to the Connection Manager described on page 95, but it does not provide the options to edit connection files or mark them as favorites.)

When a successful connection has been made, the Retrieved References window appears and the Search window is automatically opened with the "Search Remote" setting selected. You are now ready to begin searching the database.

The connection to the remote database is maintained until you close the Retrieved References window or, after a period of

inactivity, the connection automatically times out. If you are using a dial-up internet connection (with a modem), EndNote does not disconnect you after it closes a connection to a remote database.

NOTE: If you have any difficulty establishing a connection, see "Troubleshooting Connections" on page 450.

Remote Database Searching (Overview)

Searching a remote database is essentially the same as searching your own EndNote library. After establishing a connection:

1. Enter your search term(s) into EndNote's Search window.

2. Choose the appropriate search options.

3. Click *Perform Search* to send the search request to the remote database.

A few significant differences between searching a remote database and an EndNote library are described in this section. See "Searching for References" on page 140 for general information about using the Search window.

The name of the remote database being searched

Choose a search index for the remote database from these lists.

These settings are unavailable when "Search Remote" is selected.

Search "Medline Practice Demo at OVID"

Save Search | Load Search | Set Default | Restore Default | Add | Insert | Delete

Any Field — Contains
radial keratotomy

And | Or | Not
Keywords — Contains
follow-up studies

Search whole library — Perform Search

Match Case | Use indexes
Match Words | Search Remote

"Search Remote" must be checked.

The Search Remote Option

The "Search Remote" checkbox must be selected in order to submit a search to the remote database. Turn this option off to search only the references that are in the Retrieved References window, instead of searching the entire remote database.

If you change the focus of your search from a remote database to an EndNote library (by clicking on a Library window, or by closing the Retrieved References window), this "Search Remote" option is automatically dimmed because it does not apply to an EndNote library. If you then switch back to have the Retrieved References window as the focus of a search, the "Search Remote" option will be available again.

Available Search Options

Once you are connected to a remote database and the "Search Remote" option is selected, certain elements in the Search window change from the settings that are available for EndNote library searches.

♦ The search options menu at the bottom of the window is dimmed when searching a remote source. You are always set up to search the entire remote database whenever "Search Remote" is chosen.

♦ The Match Case, Match Words, Use Indexes, and Set Default options are unavailable for remote database searches.

♦ The options available in the search menus (such as *Author*, *Title*, or *Keywords*) vary with each database and they are not the same as searching the fields in an EndNote library (see "Searching EndNote Fields vs. Remote Database Indexes" on page 102).

♦ The comparison menu for each search item is always set to *Contains*.

Boolean Searches

Multiple search terms can be combined using the boolean operators And, Or, and Not. EndNote constructs a search from the top to the bottom of the search window, finding the search results of the first two items, then combining that result set with the third search item, and so on.
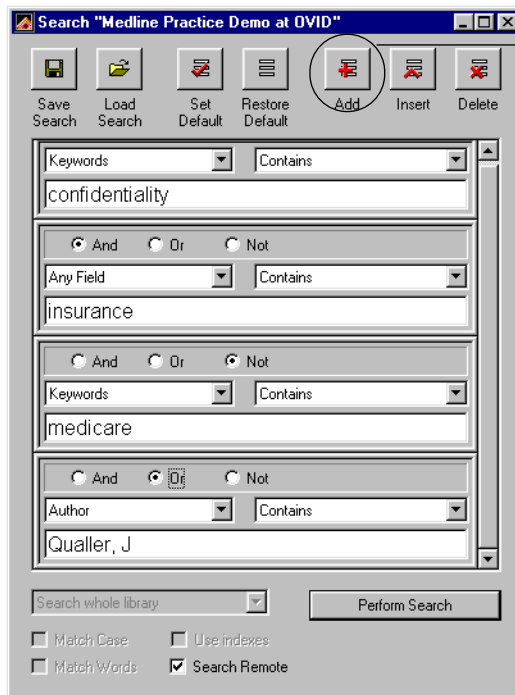
Click *Add* to append new search items to the list.

Click and drag the corner to resize the window and view more search items at one time.

For example, the search shown above could be written as:

```
(((confidentiality AND insurance) NOT medicare)
OR Qualler,J)
```

First EndNote looks for references about confidentiality and insurance, then any references about Medicare would be omitted from that set, and finally all references by "J. Qualler" would be added.

Keep in mind that "OR" broadens your search by adding together two result sets; "AND" narrows the focus of the search by looking for the intersection of references found; "NOT" also narrows the search by omitting the results for one term from the current result set. See Chapter 8 for more information about the *Search* command.

Searching EndNote Fields vs. Remote Database Indexes

When searching a remote database, you are *not* searching the specific fields in each record, but rather the available search indexes for that database. The search menus in EndNote's Search window list only available indexes for the remote database, so you won't see all of the generic EndNote field names listed as you do when searching an EndNote library.

The connection file for a particular database stores the names and settings for the search options listed in the search menus. See "Search Attributes" on page 397 if you are interested in changing the pre-configured options.

Understanding Search Results

When searching a remote database, the search menus display a list of available search *indexes* supported at the remote site. These are not *fields* in the remote database, but rather sets of search terms and synonyms designed to facilitate your searches.

It is not uncommon to search for a term in an index and notice that the exact term appears nowhere in the retrieved reference(s). For example, you might search for "heart attack" in the Title index of a medical database and find references that do not include "heart attack" in the Title field but, instead, they use the term "myocardial infarction." This apparent discrepancy can be attributed to the search index of the remote database, which has mapped the common term "heart attack" to its scientific equivalent "myocardial infarction."

It is also not uncommon for some of these databases to index personal names that appear in the titles or keywords along with the author names. For example, a search of the Library of Congress for "Charles Dickens" in the Author index displays books *about* Dickens as well as those written by him. This form of indexing is most commonly seen with library book catalogs and not with the scientific reference databases. Sometimes you can restrict the searches to books *by* that particular author by setting up a search to find (for example) "Charles Dickens" in Author, NOT "Charles Dickens" in Keywords.

These search indexes are maintained by the providers of the databases and are not controlled by EndNote.

Remote Database Search Limitations

Some of the search options have additional limitations that you wouldn't encounter when searching an EndNote library. For example, some databases prohibit searching for a year alone. The year can be specified only to limit a search (these are called "limit fields"). In such a case, a search for 1997 as the year would be denied, but searching for Smith as an author *AND* 1997 as the year (thereby limiting the results of the author search), would be allowed.

If you have set up a search that is not accepted by the remote database, an error message will describe the source of the problem as specifically as possible. (See "Troubleshooting Connections" on page 450.) Keep in mind that these restrictions are set by the information provider, not EndNote.

Documentation from the information provider may help to clarify what search options are available. Where possible, we have provided links to this information from our Z39.50 resource page (http://www.endnote.com/home/z3950.htm).

Changing the Focus of the Search

The target of the search is the remote database (represented by the Retrieved References window) or EndNote library that is active (forward-most) when the *Search* command is chosen. (If you haven't yet connected to the remote database or opened a library, you will need to do so before you can search it.) To change the focus of a search from one currently open database to another, choose the desired source from the *Window* menu or click on its window, and then choose the *Search* command (CTRL+F) from the *References* menu.

The available search options differ among the various remote databases, as well as between remote databases and EndNote libraries. When you change the target of a search, the options in the Search window change automatically. As a result, it is possible to set up a search for a particular remote database that is *not* supported when searching an EndNote library, the retrieved references, or a different remote database.

If a previously selected option in the search menus is not available for the new target, it appears italicized in the search menu to show that it is not a valid option.

When switching the focus of your search from one source to another and back again, the original search setup is retained as long as you haven't changed any settings in the Search window.

Running Multiple Searches

If references are in the process of being retrieved when you submit another search to the *same* remote database, the new search cancels the retrieval of the previous search. However, simultaneous searches of *different* remote sources do not interrupt each other's search and retrieval.

Retrieving & Saving References

After a successful search, EndNote alerts you to the number of references that were found. You have the option of retrieving all of the references or a specific range of references. (The order of the retrieved references reflects the way they were returned from the server—this is not necessarily alphabetical, chronological, or in order of relevance.)
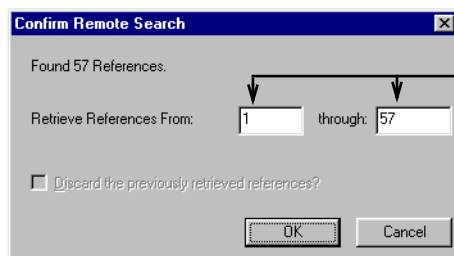
Confirm Remote Search	✕
Found 57 References.	
Retrieve References From: 1 through: 57	Change one or both of these numbers to specify the range of references to be downloaded.
☐ Discard the previously retrieved references?	
OK Cancel	

Choosing *OK* brings the Retrieved References window forward and EndNote begins to retrieve references into it.

Changing the range of references to be retrieved is useful if you want to check the results of your search before downloading the entire set of references. For example, you may want to retrieve only references 1-5, then check those references, and either continue downloading or change your search criteria. To continue downloading, submit the search again, then request only references 6 through 57. You can also use the *Pause* button at the bottom of the Retrieved References window to halt the retrieval. Click *Resume* if you want to continue.

If you discovered that you should refine your search to get better results, it's helpful to look at the keywords of the references you have downloaded and see if there are terms there to help you refine your search strategy.

If references have already been downloaded into the Retrieved References window, this dialog (shown above) gives you the option of deleting them with the "Discard the previously retrieved references?" checkbox. Choosing that option deletes all

of the references in the Retrieved References window (whether they are "showing" or not). Newly retrieved references are appended to the references already showing in the Retrieved References window.

The Retrieved References Window

References downloaded from a remote database are displayed in a temporary holding place called the Retrieved References window. When you connect to multiple remote databases, each one is represented by its own Retrieved References window.

Use the Retrieved References window to browse through the references you have found. Open the references to review their contents just as you would for a reference in an EndNote library: by double-clicking, or selecting the reference(s) and choosing *Edit* from the *References* menu, or pressing ENTER. Use the *Search*, *Sort*, and *Show/Hide Selected References* commands to help you review the search results. The preview pane can also be used to preview a formatted version of the selected references. You can even use the *Change Field* command to add a comment to the retrieved references. (See Chapter 8, "Managing References" for information about these database commands.)

Retrieved references that you want to keep should be transferred to a new or existing library as described on page 106.

Features of the Retrieved References window

♦ The window's title bar displays the name of the remote database to which you are connected.

♦ The **message area** at the top of the window shows the progress of the reference retrieval or the number of references currently displayed.

♦ The **status bar** at the bottom of the window displays messages pertaining to the status of the connection and reference retrieval.

♦ The *Pause* button lets you pause or resume the reference retrieval. Pressing the Escape (ESC) key also stops retrieval.

♦ As with a normal EndNote Library window, the center region contains the (retrieved) references.

♦ An animated logo at the top of the window indicates exchange of information with the remote database.

remote
database
name

Animated logo
indicates
exchange of
information
with a remote
database.

The
retrieved
references

Click here to
pause or
resume
downloading.

status
bar
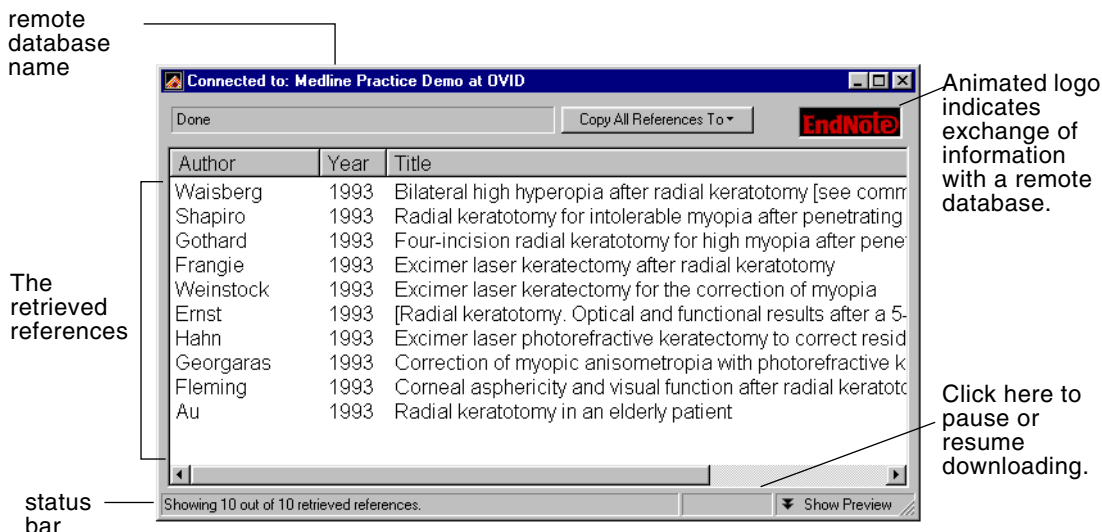
Differences Between the Retrieved References Window and a Library

Although a Retrieved References window mimics many of the features of an EndNote Library window, it is **not** a place where you permanently store references. Consequently, features such as the QuickFind index, term lists, and the ability to add references are not available when working with references in the Retrieved References window.

Retrieved references are not assigned record numbers until you save them into an EndNote library. As a result, you cannot cite references from this window in a paper—they must be saved to an EndNote library first.

Term lists are specific to individual EndNote libraries, therefore term lists (and their auto-completion and auto-update features) are not available for references in the Retrieved References window. However, when you transfer references to a library, the new terms are added to that library's term lists (as long as the auto-update preference has not been turned off).

Saving References to a Library

The Retrieved References window is a temporary holding bin for the results of a remote search. They need to be transferred to the library of your choice using any one of the following methods:

◆ If the destination library is open, you can drag-and-drop selected references from the Retrieved References window to the destination library. Select the desired references, then click on any part of the selection, keep the mouse button pressed, and drag the selection to another Library window. The selected references will be copied to that library.

◆ Select the references that you want to save, and click the *Copy References To* menu at the top of the window. Choose the option to copy them to any currently open library (names of open libraries are listed in the menu), to a new library, or to an existing library that is not already open. If no references are selected, all of the references are transferred.

◆ Selected references may be copied by choosing *Copy* from the *Edit* menu, and then pasted into another library by opening the desired library and choosing *Paste* from the *Edit* menu.

NOTE: EndNote does not check for duplicates when you use any of the methods above. If you transfer your references from the Retrieved References window to a temporary library, you can use the *Import* command to import that library into your main library and check for duplicates in the process. See Chapter 7 for details. You may also use the *Find Duplicates* command in the *References* menu.

The Connection Status Window

The Connection Status window provides detailed information about a connection and EndNote's interactions with the remote database and server. This window is useful to help you or to help EndNote Technical Support assist you in tracking down the source of a problem with a remote database.

View the connection status information by choosing *Show Connection Status* from the *Window* menu to display the Status window. When that window is open, this command changes to *Hide Connection Status*, which closes the Status window.

The Status window displays information for all of the current connections. A menu at the top of the Status window lets you view either the record data for each reference or the status messages returned from the server of the remote database.

Click to change the
view between Record
Data and Status
Messages.

The data shown here is
in MARC format. This
format is described on
page 377

```
Remote Status                                         _ □ ×
Record Data                                ▼
<<<<< Start of Record 1 Data:                             ▲
001    93174111
041    $aFrench
072    $a00007250
100 1  $aDor P
245 10 $a[Medical confidentiality and insurance (see comments)].
260 0  $bRevue Medicale de Bruxelles.   $b14(1-2):37-9, 42, 1993 Jan-Feb.
260    $aBelgium
500    $aOriginal Title:  Le secret medical et les assurances.
500    $aComments:  Comment in: Rev Med Brux 1993 Sep;14(7):224
500    $aNLM Journal Code:  slk
500    $aISSN:  0035-3639
500    $aEntry Month:  9305 Revised: 951004
567    $aJournal Article
650    $aBelgium                                           ▼
```

NOTE: The Connection Status window displays the last 32K of text
written to the log file. If you need to see more than that, you can open
the Connect.log file in a word processor after closing the Retrieved
Reference window(s).

The Log File

All messages and retrieved references for a given EndNote
session are recorded in EndNote's log file. By default, the log file
is called "Connect.log" and is saved in the same folder as the
EndNote program. An existing log file is overwritten the first
time EndNote establishes a connection after being started.

You may choose a different name and/or location for the log file
using the Online settings in the Preferences window. To do so,
choose *Preferences* from the *Edit* menu and select the *Online*
option from the list. Click *Choose* in the "Connection Log" section
to name the new log file and choose where to save it.

You may also choose not to create a log file by unchecking the
"Use Log File" option. This will slightly speed up the retrieval
process. However, without a log file you will not be able to scroll
back through the record data or status messages after you
change the *View* setting in the Connection Status window.
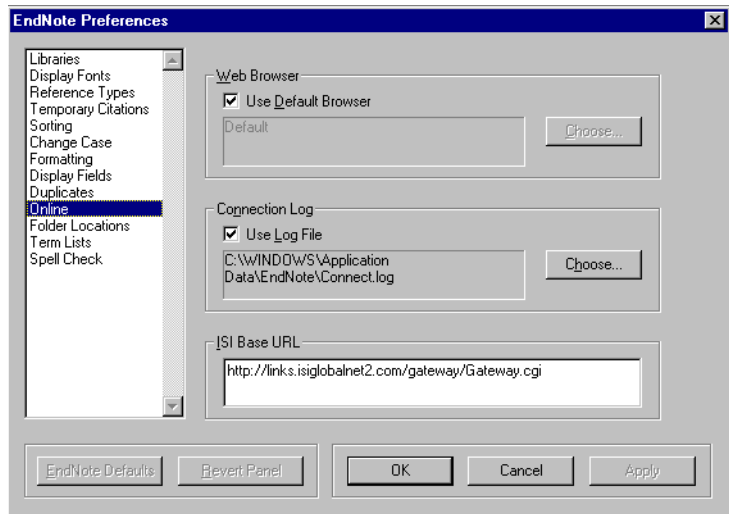
Importing a Log File

The log file is just a regular text file. It can be viewed using a word processor and even imported, if necessary, using the connection file. In this sense, you can think of the log file as a back up for the references that you have retrieved in a particular EndNote session. You can verify that EndNote retrieved the reference data correctly by browsing through the log file in your word processor and comparing the unmodified data to what came through in your EndNote references. If necessary, you can change the filter settings in your connection file and re-import the references (without re-connecting to the remote database).

To import a log file using the filter options of a connection file:

1. Open a library into which you want to import the log file.
2. Choose *Import* from the *File* menu.
3. Click *Choose File* and select "Connect.log." (Substitute the name of your log file if you have changed the default name.)
4. Choose *Use Connection File* from the *Import Options* list in the Import dialog
5. Select the desired connection file and click *Choose*.

6. Now you should be back in the Import dialog with both the file and the import option set. Click *Import*.

NOTE: The connection file and filter file for the same database are most likely configured to import very different reference formats. Normally a connection file is configured for MARC data, whereas the filters are set up for a tagged data. Because the output formats are so different, you should not use a filter file(*.enf) to import a log file from the same database—instead, choose the connection file (*.enz) as the import option.

Chapter 7

Importing Reference Data into EndNote

Chapter 7   Importing Reference Data into EndNote

Importing Reference Data into EndNote

There are many sources of bibliographic data that can be used to help you create your EndNote library. To avoid re-typing this data into EndNote, we have provided several means by which you can get references into EndNote:

♦ Import references saved or downloaded from CD-ROMs or online data services (for example, Ovid, SilverPlatter, or ISI)

♦ Import text files that conform to a particular format (such as the Tab-delimited or EndNote Import format). These files can be created by you or generated from other databases.

♦ Text files exported from other bibliographic software programs

Once you have a file in the proper format and you know which import option or filter to use, the import instructions are the same for all of these types of data. This chapter covers the basic import instructions first, and then goes into detail about how to get your data files in the right format and choose the correct import option.

NOTE: Although we try to provide many flexible ways to get data from other sources into EndNote, we do not claim that EndNote can import data from all sources. In some cases, you may have to write your own import filter (see Chapter 16), or you may need to manipulate the data in a word processor before it can be imported. If none of these tools helps you to import your data, tips on how to quickly copy and paste data into EndNote are described on page 134.

General Importing Instructions

To import a text file or an EndNote library into an EndNote library:

1. Open the library into which you want to import the references.

2. Choose *Import* from the *File* menu.

Import	☒
Import Data File: [ ] [Choose File...]	
Import Option: [EndNote Library ▼]	
Duplicates: [Import All ▼]	
Text Translation: [No Translation ▼]	
[Import] [Cancel]	
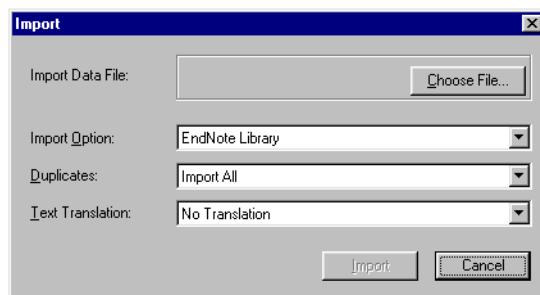
3. Click the *Choose File* button to locate and open the file you want to import. All files, except for EndNote libraries, must be plain ANSI or ASCII text files. Select the file and click *OK*.

4. Select the appropriate import option from the *Import Option* list. Import options are described on page 115.

5. Select an option from the *Duplicates* list:

    ♦ *Import All*
      Imports all references, including duplicates.

    ♦ *Discard Duplicates*
      Imports all references except duplicates.

    ♦ I*mport into Duplicates Library*
      Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

    By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. See page 417 if you would like to change the duplicates criteria.

6. Choose a Text Translation option if necessary.
    This option allows you to specify the text encoding of the file you import. Choose *No Translation* for all text files except MARC format files, which usually require *ANSEL* translation.

7. Click *Import* to import the file.

When the import is complete, only newly imported references are showing in the Library window. This is a perfect time to add a keyword to all of the imported references using the *Change Field* command (page 159), or to peruse the imported data to be sure it imported as expected. To return all of your references (including the newly imported ones) to the library display, choose *Show All* from the *References* menu.

Import Options

EndNote's import options include:

♦ **EndNote Library**
Used to import one EndNote library into another.

♦ **EndNote Import**
Used to import text files that have been downloaded from online databases or exported from EndNote using the EndNote format. See page 131 for more information.

♦ **Refer/BibIX**
Used to import text files exported from the Refer or BibIX programs. The EndNote import format is based on the Refer/BibIX format.

♦ **ProCite**
Used to import text files that have been exported from ProCite (Macintosh or Windows). You may also open ProCite files using EndNote's *Open* command. See the EndNote Help file for details.

♦ **Tab-Delimited**
Used to import text files in which the fields within a single references are separated by tabs. For details see page 127.

♦ **Reference Manager (RIS)**
Used to import text files exported from Reference Manager, Reference Update, Reference Web Poster, or any other source that uses the RIS format. Reference Manager databases can also be opened directly in EndNote using EndNote's *Open* command. See the EndNote Help file for more information.

♦ **ISI-CE**
Used to import text files downloaded from ISI's Web of Science and other ISI sources.

NOTE: References downloaded from ISI's Web of Science contain a "hot" URL. Click the URL to jump back to the online reference!

♦ **Various import filters**
EndNote includes dozens of import filters configured to

import data from a variety of online databases. Most likely, the first time you import a file, you won't see the import filter that you need in this list. Choose *Other Filters* from the *Import Options* list to find the filter that matches the source of the data you want to import. Import filters that you have recently used or chosen as your favorites will be listed in the Import Options list in the Import dialog.

The table on page page 116 provides more information about the download formats that work with these filters. See page 119 for information about how to choose the filters to appear in the *Import Option* list.

♦ **Multi-Filter (Special)**
A special option for importing files that include references from multiple sources (see "Identifiers" on page 369).

♦ **Use Connection File**
EndNote provides the option of using a connection file as an import filter. This is useful if you need to import the Connect.log file generated by using EndNote's *Connect* command to search a remote database. The Connect.log file should include all of the references from your previous session. See Chapter 6 for more information.

NOTE: The built-in import options (EndNote Library, EndNote Import, Refer/BibIX, ProCite, Reference Manager (RIS), and ISI-CE) cannot be modified, but the filters can. See Chapter 16 for information about creating and modifying import filters.

Importing References Downloaded from CD-ROMs and Online Databases

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

There are two main things you need to know in order to correctly import downloaded references into EndNote:

♦ How to download the data in the right output format.

♦ Which import filter to use to import the data into EndNote.

This section describes these two items. The table on page 126 summarizes a number of common sources of bibliographic data, the instructions for downloading tagged files, and the EndNote import option to use to import the references into EndNote.

Getting Data in the Right Format

For text to be imported with any of the EndNote filters, the data must be consistently "tagged," with each tag starting on a new line, and the file saved as ANSI or ASCII text. Here are two examples of such an output:

```
AU- CRAMER, -Z.O.
TI- AQUATIC MACROPHYTES AND LAKE ACIDIFICATION
PY- 1993
SO- ENVIRONMENTAL-POLLUTION. VOL. 5, NO. 2, PG.54-79
DE- LAKES, ACIDIFICATION, ENVIRONMENTAL EFFECTS,
    MACROPHYTES, ECOLOGY, PLANT PHYSIOLOGY


Author:   Cramer, ZO
Title:    Aquatic macrophytes and lake acidification
Year:     1993
Source:   Environmental Air Pollution. Vol. 5(2) pp.54-79
Keywords: lakes--acidification--environmental effects--
          macrophytes--ecology--plant physiology
```

NOTE: If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately. See page 349.

Choosing the Correct Import Filter

Once you have captured and saved your data file in the appropriate format, you should identify the proper EndNote filter to import the data. There are over 200 filters included with EndNote, each designed to read a specific tagged format from a specific information provider.

♦ To see a complete list of available filters, choose *Import Filters* from the *File* menu, and select *Open Filter Manager*.
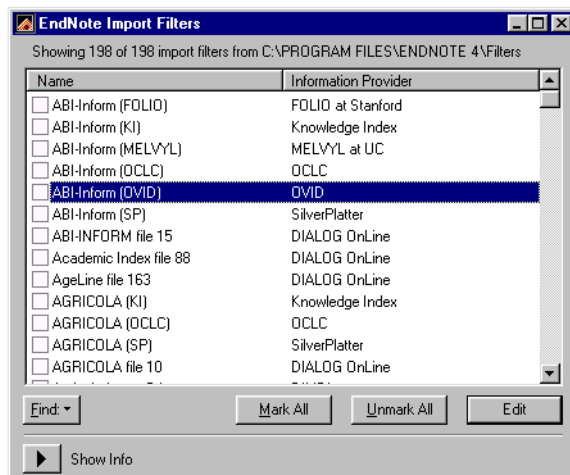
Use the *Find* button in the lower left corner of the Filter Manager window to find all filters for a particular information provider or to search for a filter by name. When you have located the filters that you want to use, mark them as your favorites by clicking the check box to the left of the filter name. You can also mark all of the filters currently showing after using the *Find* option by clicking *Mark All*. Once a filter is marked as a favorite, it will appear in the Import Options list in the import dialog.

NOTE: There are many more databases and services that provide data than there are filters included with EndNote, so in some cases you may need to write your own filter or modify one of ours. See Chapter 16 for information about creating and modifying filters. You can automatically download the latest filters available from ISI ResearchSoft. See "Automatically Updating Files" on page 16. You can also check our Web site periodically for new and updated filters (http://www.endnote.com).

Comparing a Filter to a Data File

If you are uncertain whether a filter matches a data file that you have downloaded, you can compare the format from your downloaded data file to a filter. To do so, select a filter in the Filter Manager, and click the *Edit* button. When the Filter window opens, select the *Templates* option in the list at the left of the window to display the tags recognized by that filter.
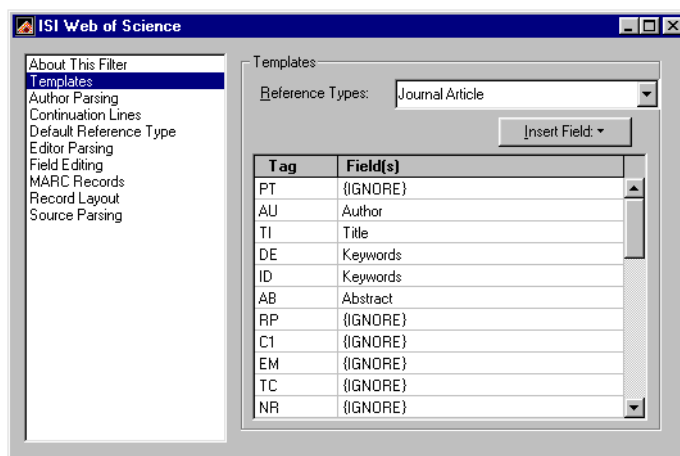
The tags and templates in the filter should match the data in the file you want to import. See Chapter 16 for information about editing filters.

Changing the Filter Folder

By default, all filters provided with EndNote are grouped in the Filter folder in the EndNote folder. These are the filters displayed when you open the Filter Manager.

If you would like the Filter Manager to access a different set of filters:

1. Choose *Preferences* from the *Edit* menu.

2. Choose *Folder Locations.*

3. In the Filter Folder section, click *Select Folder*.

4. Locate the folder that contains the filters you would like to use, double click it to open it, then click the *Select Folder* button.

5. Click *OK* to close the Preferences window and save your changes.

NOTE: When you select a filter folder, only the filters at the top level of that selected folder are listed in the Filter Manager. Filters in sub-folders (folders within the selected folder) will not appear.

Summary of Output Formats & Corresponding Import Options

A subset of the supported services are listed here with their recommend output formats. At the time this manual was printed, these were the current format options for each information provider listed in the table. If you find that these formats have changed, please check the documentation from your information provider or contact us.

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
BioMedNet's free Medline service	At the bottom of the results list, click the *Download* button. Choose *EndNote 3.1 or later* as the format, and click *Get All* or *Get Selected Refs*. The references are sent directly to EndNote and you are prompted to pick the library where you want the references to be imported.	Direct Export - the *EndNote Import* option is chosen automatically. (See page 126.)
California Digital Library Web Site **(formerly the MELVYL system)**	1. Click the *Display* button to display your references. 2. Click the *Download* button. 3. Change the "Citation Format" to "Tags Long". 4. Click *Download Now*.	Various filters for California Digital Library (Melvyl) databases are provided in EndNote's Filters folder.
California Digital Library via Telnet **(formerly the MELVYL system)**	If you are using your communication software's option to capture text, type "DISPLAY ALL TAGS LONG AB CONT" for searches on the database. If you want to have your search results sent to your e-mail address, type in the command "MAIL ALL TAGS LONG AB TO". Follow the command to mail your records with a space and the name of your e-mail address, as in: "MAIL ALL TAGS LONG AB TO KELA_K9@UCLINK.BERKELEY.EDU" Save references e-mailed to you as a "Plain Text" or "Text Only" file.	Various filters for California Digital Library (Melvyl) databases are provided in EndNote's Filters folder.
Cambridge Scientific Abstracts	From the CSA search results screen, click *Save/Print/Email*. On the" Save/Print/Email" screen, select Record: Marked or All Record Format: Complete Record Save File Format: PC Click *Save*. Your web browser asks where to save the file. If your web browser lets you save in different file formats, make sure you safe as a "Text Only" (*.txt) file.	Various filters for Cambridge Scientific Abstracts databases are provided in EndNote's Filters folder.
Carl UnCover - Reveal	Using your e-mail software, save references e-mailed to you as a "Plain Text" or "Text Only" file.	Reveal (Carl UnCover) filter

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
CAS SciFinder	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
Current Contents on Disk (CCOD) - Mac	Save references in "EndNote" format.	EndNote Import
Current Contents on Disk (CCOD) - Windows	Save references in "EndNote" format.	ProCite
Dartmouth College	Save references in "EndNote" format.	EndNote Import
DIALOG OnLine	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").	Various DIALOG OnLine filters are provided in EndNote's Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in EndNote's Filters folder.
FOLIO (at Stanford)	If you are using your communication software's option to capture text, type in "DISPLAY EXPORT ALL CONT" for searches on the database. If you want to have your search results sent to your e-mail address, type in the command "MAIL ALL EXPORT TO". Follow the command to mail your records with a space and the name of your e-mail address, as in: MAIL ALL EXPORT TO ZUNI_K9@STANFORD.EDU Save references e-mailed to you as a "Plain Text" or "Text Only" file.	Various filters for FOLIO (at Stanford) are provided in EndNote's Filters folder.
HealthGate - MEDLINE	At the "HealthGate Search Results" screen, select the desired references to download. At the bottom of the screen, choose "Download references for importing into bibliographic management software", then click on the "Retrieve Selected References" button. You will be prompted by your web browser software to save the file to your computer.	MEDLINE (HealthGate) filter

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
HOLLIS (at Harvard)	When sending references to your e-mail account, specify style "B" to get the appropriate tagged format. Save references e-mailed to you as a "Plain Text" or "Text Only" file.	HOLLIS filter
Information Express Alerting Service	Save references in "EndNote" format.	EndNote Import
INNOPAC Library System (Release 9)	Save references in "EndNote" format.	INNOPAC filter
ISI CD (Citation Indexes)	From the "File" menu, choose "Save Records". In the Save Records dialog, choose the NLM Medline format from the "Export Format" menu.	ISI Citation Indexes filter
ISI Web of Science	When viewing your marked references, click *Export* to have the references exported directly to EndNote. (See "Direct Export from Web Pages" on page 126.) You may also choose *Save to File* to save the references to a text file and import them into EndNote.	ISI-CE
Knowledge Finder	Place document in the Save file, and select the document. Choose "Export Selected Documents" from the "File" menu.	Various Knowledge Finder filters are provided in EndNote's Filters folder.
Knowledge Index	Specify "TAG" at the end of your TYPE or DISPLAY command: type "SI/LONG/1-10 TAG"	Various Knowledge Index filters are provided in EndNote's Filters folder.
KR OnDisc	Once you've obtained your search results, select *Save Documents* from the *File* menu. Select the "Tagged" format before saving your file.	MEDLINE (KR OnDisc) filter

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
Medscape	After obtaining the search results, click the *View/Export/E-Mail Selections* button. In the "Options for View/Export/E-Mail" section at the bottom of the next page, chose to "Export selected references in PC MEDLARS format" or "Export selected references in MAC MEDLARS format", as appropriate. This displays the selected references as a web page. Use your web browser (i.e. Internet Explorer or Netscape) to save the page as a "Text Only" file. (Do not save the page in HTML format).	MEDLINE (Medscape) filter
NLM - Grateful Med for Windows	Save references in the MEDLARS format.	MEDLINE (NLM) filter
NLM - Internet Grateful Med	After choosing *Download to Disk*, select "Long records" for the level of detail, and click *Prepare Download*. Choose "Tagged MEDLARS format" and click *Download Now.*	Various NLM/Grateful Med filters are provided in EndNote's Filters folder.
OCLC FirstSearch - Web	Mark the references to be saved and click the *Email* button at the bottom of the page. Choose the following options: Marked Records, Detailed Records, Send as Plain text, Line Length 1000. Enter your email address. Save references emailed to you as a Text Only file.	Various OCLC filters are provided in EndNote's Filters folder.
OhioLink	Save references in "EndNote" format.	*EndNote Import*

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
Ovid Web	Display your search results by clicking *Display* in the Search History table. Locate the Citation Manager at the bottom of the page. Use the following settings: Fields: Complete Record Citation Format: Direct Export (if available) or Reprint/Medlars Click the *Save* Action button to download your search results. NOTE: Citation formats are available only when using Ovid's Advanced Mode.	Various filters are provided for downloads from Ovid. The appropriate filter is selected automatically when using the *Direct Export* option. If you are using Ovid's multiple database searching, you must select the *Direct Export* citation format.
Ovid for Windows	Select the *Options* button from within the "Save Documents" dialog box. From the list of options, choose the Output Format, then click *OK*. On the next screen, choose *Reprint Format* as the default.	Various Ovid filters are provided in EndNote's Filters folder.
PaperChase	Choose "Put all References from a list on a Print Queue" from the *Options* menu. From the *Print Options* menu, choose the "National Library of Medicine" format.	Various PaperChase filters are provided in EndNote's Filters folder.
PubMed	Display your search results in "MEDLINE" format by choosing *MEDLINE* from the popup list between the *Display* and *Save* buttons. Click the *Save* button to save the references to a text file.	PubMed (NLM) filter
Reference Update v5.2	Select *Reference Listings* from the *Output* menu, and choose the following options: Device: ASCII File - No Printer codes (be sure to enter the path and file name for the output file.) Output Format: Medline Click *Print* to create the output file.	ISI Reference UPdate-Medline filter
RLIN's Eureka System	Save references in "EndNote" format.	EndNote Import

Output Formats & Corresponding Import Options

Information Provider	Download Instructions	Import Option
SilverPlatter (WebSPIRS)	Once you've obtained your search results, click the WebSPIRS *Save* button. Select the following "Save Records" options: - Which fields?: All fields - Include: Record number & database name -Field labels: Short labels. Click the *Save Records* button.	Various SilverPlatter filters are provided in EndNote's Filters folder.
STN	Set your communication software's options to capture text to a file. Type the command "DISPLAY ALL"	Various STN filters are provided in EndNote's Filters folder.
TRW Search Access	Save references in "EndNote" format.	EndNote Import

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 option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported. This "direct export" or "direct download" method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter. Information providers currently supporting a direct import option at their Web site include BioMedNet, Ovid Technologies, and ISI's Web of Science. See page 329 for related information.

Creating Structured Text Files that EndNote Can Import

What do you do if your data is *not* in a format that EndNote can automatically import? You can do one of several things (or even a combination these options):

♦ Rearrange the reference data using your word processor so that it is in a format that EndNote can import (as described in this section).

♦ Copy and paste each piece of data from its source into the proper fields in EndNote, as described on page 134.

♦ Enter the data manually by typing it into EndNote as described in Chapter 5.

Creating a file that EndNote can import can be a lot of work if your data is in an arbitrary or inconsistent format. If you only have a few references to import (less than 30 or 40), it might be faster and easier to re-type them or copy and paste the references than to try to put them into a format that EndNote can import.

However, if you have a very large bibliography, it might save time to first manipulate the data in a word processor as best you can, and then import the references into EndNote and clean up the references there. Even if the imported data doesn't come through perfectly, it can be rearranged with EndNote's various commands, drag-and-drop, and copy and paste.

This section describes two different formats that you can put your data into such that it can be imported into EndNote:

♦ A *tab-delimited* format (best if your data is in a database or spreadsheet that can export to a tab-delimited file)

♦ A *tagged* format (best for when your data is in a word processor document and looks like a bibliography)

Creating a Tab-Delimited Format

The *Tab-delimited* import option can import text files in which each reference is separated by a paragraph mark (¶), and the fields within a reference are separated by tabs. Most databases or spreadsheets can export a tab-delimited text file.

Preparing the Data Before Exporting

♦ **Author Names:**
Before you export the data from a database or spreadsheet into a text file, we recommend, if possible, that you separate multiple author names with a semicolon (;) or two forward slashes "//", such as: McCartney, P.//Harrison, G.// Lennon, J. If you cannot easily do this in your database, you can do it after exporting, or manually edit the data after it is imported into EndNote.

♦ **Reference Types:**
If possible, you should make sure that each of your references includes a field indicating the reference types. Use EndNote's Reference Type names so that EndNote is able to recognize the formats. If you have only one type of reference (such as Journal Articles), it is not necessary to do this—the import settings can indicate that all references should be imported as journals by default.

If you cannot label each references with the appropriate Reference Type name, you should export your data into separate files based on reference type. This makes it easy to preserve the original reference types of the references when importing the data files into EndNote.

Preparing the Data File for Import

Once the tab-delimited file(s) are generated, you must open each file in a text editor or word processor and add two lines to it. These lines tell EndNote what the default reference type is for the data, and how the data should be interpreted.

First Line: The Default Reference Type

The first line of the file must define the default reference type for the entire file. The format for the first line is an asterisk immediately followed by a valid EndNote reference type, followed by a paragraph mark (¶). For example,

*Journal Article <¶>

If you could not make separate files based on reference type, you can specify each reference type individually within one file. In this case, your first line must be the "*Generic" reference type.

Then you can set up an additional column called "Reference Type," and under it, have the actual EndNote reference type names. For example:

```
*Generic <¶>
Reference Type <tab> Author           <tab> Year <tab> Title     <tab> Secondary Title <¶>
Journal Article <tab> Jones, J// Smith, S.<tab> 1994 <tab> Easy Pie  <tab> J. of Eating     <¶>
Book Section    <tab> Woo, W. //Lee, L.  <tab> 1995 <tab> Rain Hats <tab> J. of Clothing   <¶>
Report          <tab> Carlos, C.//Luis, R. <tab> 1991 <tab> Cat Talk  <tab> J. of Animals    <¶>
```

NOTE: The "<tab>" and "<¶>" characters are used to indicate where an actual tab and paragraph mark should be entered; the literal text "<tab>" and "<¶>" should not be typed.

Second Line: EndNote Field Names

The second line of the tab-delimited file must contain the actual field names used by EndNote into which you want the data imported. The order of the fields names does not matter, as long as they correspond to the order of the data in the rows beneath them and correspond to the names of the default reference type.

For example, if your default reference type is "*Journal Article," then the field names in the second line of your file will be those of the Journal Article reference type:

```
*Journal Article<¶>
Author          <tab> Year <tab> Title     <tab> Journal        <tab> Volume <¶>
Jones, J// Shoe, S <tab> 1994 <tab> Easy Food <tab> J. of Eating   <tab> 1      <¶>
Woo, W //Lee, L    <tab> 1995 <tab> Rain Hats <tab> J. of Clothing <tab> 2      <¶>
Carlos, C//Luis, L <tab> 1991 <tab> Cat Talk  <tab> J. of Animals  <tab> 3      <¶>
```

NOTE: The field names must be separated by tabs, and a paragraph mark must follow the last field name.

Additional Considerations

♦ Only ANSI or ASCII text files can be imported. This means no fonts styles or text styles can be preserved during import.

♦ All field names and reference type names in the file must be identical to those in EndNote. See the in Chapter 14 for a listing of all of the reference types and field names. If you have custom reference types, you may check them by choosing *Preferences* from the *Edit* menu, selecting *Reference Types*, and clicking the *Modify Reference Types* button.

♦ Multiple author names should be separated by semicolons (;) or by two forward slashes (//).

- ♦ Fields cannot contain tabs or paragraph marks. Let the lines of data "wrap" to the next line.
- ♦ Leading and trailing spaces are removed during importing.
- ♦ No upper/lower case conversion is made during importing.
- ♦ A reserved field name called "Unused" may be used for data that you do not want imported into EndNote.

Errors While Importing Tab-delimited Files

When you are ready to import this file into EndNote, choose *Import* from the *File* menu, and select *Tab-Delimited* as your import option. See "General Importing Instructions" on page 114 for detailed instructions on importing.

If EndNote cannot import a record or a field within a record, it will alert you to the error. There are three basic alerts:

- ♦ Bad Default Reference Type — The default reference type that you specified in the first line of the file is not a valid EndNote reference type name.
- ♦ Bad Field Name — A field name that you entered in line 2 of the file is not a valid EndNote field name.
- ♦ Missing Reference Type Information — There is no default reference type specified for the file and there is no reference type field defined for the references.

If you get one of these error messages during the import process, open the import file in your word processor, correct the problem, save the file as a text file, and try again.

Creating a Custom "Tagged" Format

If you have a large bibliography that you would like to import into EndNote, it may be possible to use your word processor's *Find* and *Replace* commands to insert descriptive tags in front of some of the fields of data so that EndNote can accurately import the references. In addition to adding tags, you will also need to make a filter to read your tags. (See page 131 for information about using a predefined EndNote Import format if you would rather not create your own filter.)

This section outlines the basic steps for converting a bibliography into a tagged text file.

Step I. Save a Copy of Your File

- ♦ Open your bibliography in a word processor and save a copy of the file with a new name (this is your backup).

◆   Remove everything but the reference data from the file.

Step II. Add Descriptive Field Tags

Use your word processor's *Find* and *Replace* commands to search for unique delimiters between fields, and insert paragraph marks (paragraph marks) and descriptive field tags in front of specific fields. For this example, we will show a very simple case where only the start of each reference is tagged, and the filter does the rest of the work. This works well for reference lists that have clear delimiters separating the individual components of the reference (author, year, title, etc.). In some cases, you may have better results making additional replacements in the text file before importing. The more tags you add to your data, the greater degree of accuracy you can get with the import filter.

Suppose your references look like this:

```
Jones, M. C. and Harrison, G. (1990) "Planet X"
Icarus. Vol. 3 no. 4, pp. 11-23.

Billoski, T.V. (1990) "Greenhouse hypothesis"
Extinction. Vol 2 no. 1 pp. 12-18.
```

The process of converting this bibliographic format to a tagged format would be something like this:

◆   Search for 2 paragraph marks (since the references are separated by 1 blank line), and replace with two paragraph marks and a tag "XX-" followed by a space.

The result is a tagged data file that looks like this:

```
XX- Jones, M. C. and Harrison, G. (1990) "Planet
X" Icarus. Vol. 3 no. 4, pp. 11-23.

XX- Billoski, T.V. (1990) "Greenhouse
hypothesis" Extinction. Vol 2 no. 1 pp. 12-18.
```

Once you have made all the changes to tag as much of the data as necessary, save the file (be sure to save it as a plain ASCII or ANSI text file), and create an import filter to match the tags and formats of the references.

Step III: Create a Filter

Using EndNote, create a new filter to read your data file (see Chapter 16 for instructions on how to create a filter). The template of a filter for the above data file would look like this:

Tag	Field(s)
XX-	Author (Year) "Title" Journal. Vol. Volume no. Issue, pp. Pages.

Step IV: Clean Up the Data

After you set up your file with tags and create a filter to import it, you should test and refine the filter by importing into a new library. Once you filter is working as you would like it, you can use it to import the data file into your real EndNote library.

If you can't get the filter to import everything exactly as you want, you may have to do some manual editing to correct this either before or after importing the data into EndNote. You might find it useful to import into a test library, and use the *Move Field*, *Change Text*, and *Change Field* commands in EndNote's *References* menu to clean up the data. Then transfer these references to your real library (using drag and drop, copy and paste, or the *Import* command).

Creating a Tagged "EndNote Import" File

The EndNote Import format is a tagged format based on the rules of Refer/BibIX format. In this format, each field of data (i.e., Journal, Volume, or Title) is preceded by an identifying tag: a percent sign (%) followed by a single capital letter. Entire references are separated by one blank line:

```
%0 Book
%A Geoffrey Chaucer
%D 1957
%T The Works of Geoffrey Chaucer
%E F. N. Robinson
%I Houghton
%C Boston
%N 2nd

%0 Journal Article
%A Herbert H. Clark
%D 1982
%T Hearers and Speech Acts
%B Language
%V 58
%P 332-373
```

```
%0 Thesis
%A Cantucci, Elena
%T Permian strata in South-East Asia
%D 1990
%I University of California, Berkeley
%9 Dissertation
```

Author Names in the EndNote Import Format

♦ Author names use the %A tag. This tag should repeat for each author, with the names listed one per line:

```
%A Jones, Mary
%A Simon, Jeff
```

♦ Author names can appear either as:

Geoffrey Chaucer   **or**   Cohen, Sarah

♦ Either initials or full names are accepted.

Defining Reference Types

EndNote has two ways of setting the reference type for each of the imported references.

♦ One method is to specify a reference type by using %0 (zero) and the reference type name.

Using this method, you can precisely specify the reference type, and not rely on the appearance of certain tags, as described below. The default reference types are listed below. If you have created any custom reference types, then your EndNote data files should use those names instead.

%0 Generic	%0 Journal Article
%0 Book	%0 Book Section
%0 Manuscript	%0 Edited Book
%0 Magazine Article	%0 Newspaper Article
%0 Conference Proceedings	%0 Thesis
%0 Report	%0 Personal Communication
%0 Computer Program	%0 Electronic Source
%0 Audiovisual Material	%0 Film or Broadcast
%0 Artwork	%0 Map
%0 Patent	%0 Hearing
%0 Bill	%0 Statute
%0 Case	

♦ If you do not state the reference type using the %0 tag in each record, then EndNote uses the following rules to assign reference types to the imported references:

Tags Present in the Reference	Reference Imports As This Reference Type
J and **V**	Journal Article
B	Book Section
R but not **T**	Report
I without **B**, **J**, or **R**	Book
Neither **B**, **J**, **R**, nor **I**	Journal Article

EndNote Tags and Corresponding Fields

The table below shows the tags recognized in the EndNote Import format, and the corresponding EndNote field into which each tagged item is imported.

Tag	EndNote Generic Field Name
%A	Author
%B	Secondary Title (of a Book or Conference Name)
%C	Place Published
%D	Year
%E	Editor /Secondary Author
%F	Label
%I	Publisher
%J	Journal Name
%K	Keywords
%L	Call Number
%M	Accession Number
%N	Number (Issue)
%P	Pages
%S	Tertiary Title
%T	Title
%U	URL
%V	Volume
%X	Abstract
%Y	Tertiary Author / Translator
%Z	Notes

%0	Reference Type
%1	Custom 1
%2	Custom 2
%3	Custom 3
%4	Custom 4
%6	Number of Volumes
%7	Edition
%8	Date
%9	Type of Work
%?	Subsidiary Author
%@	ISBN/ISSN
%!	Short Title
%#	Custom 5
%$	Custom 6
%&	Section
%(	Original Publication
%)	Reprint Edition
%*	Reviewed Item
%+	Author Address

Copying and Pasting References from a Document into EndNote

If you have a bibliography that is too inconsistent or difficult to parse using your word processor (as suggested in "Creating a Custom "Tagged" Format" on page 129), you can use the *Copy* and *Paste* commands as an alternative method for getting your data into EndNote and still avoid a lot of re-typing. For example, let's say you have a paper with a bibliography entry such as:

```
Blocker, C. E., R. H. Plummer and Richard C.
Richardson. The Two Year College: A Social
Synthesis. 1965.
```

To transfer the references into EndNote:

1. Open the list of references in a word processor.

2. Select a reference and copy it using the *Copy* command in your word processor's *Edit* menu. (Some word processors allow you to triple-click a paragraph to select the whole thing at once. That might be a useful shortcut for quickly selecting a reference.)

3. Open your EndNote library, and choose *New* (CTRL+N) from the *References* menu to create a new reference.

4. Put the cursor in the Title field of the new reference and choose *Paste* from the *Edit* menu.

This will paste the entire reference into the Title field of the Reference window. From here, you can drag and drop (or cut and paste) the individual pieces of data into their proper fields. Be sure to remove extraneous punctuation, and make sure author names are each on a separate line. Follow the guidelines for entering references in Chapter 5. See page 410 for information about setting a default reference type for new references.

Importing References From Other Bibliographic Software Programs

If you wish to convert references from another bibliographic program into EndNote, consult the chart below for instructions.

Conversion Utilities at the EndNote FTP Site

In some cases, you may be directed to download a conversion utility or instructions from EndNote FTP server. The folders listed in the table are subfolders at the following locations. You can use a Web browser to access the FTP server using the following addresses:

```
ftp://ftp.endnote.com/pub/pc/import_utilities
```

```
ftp://ftp.endnote.com/pub/mac/import_utilities
```

You can also get to the FTP site from a link at the EndNote Technical Support page (follow the links from the home page, http://www.endnote.com). If you do not have internet access, contact EndNote technical support for assistance.

Unsupported Databases

If your program is not on the chart, see page 127 for instructions on setting up a tab-delimited file for importing into EndNote. If your database does not offer a tab-delimited export option, contact technical support for other suggestions.

Software:	Basic Conversion Instructions:
Bookends & Bookends Pro	Export from Bookends or Bookends Pro using the "ProCite" format, and import the resulting file into EndNote using the "ProCite" import option.
BibTex	User-contributed utilities and instructions for converting BibTex files are at the EndNote FTP site: ftp://ftp.endnote.com/pub/bibtex/.
Citation 6 and WordPerfect Citation	Conversion utilities available at the FTP site in the "citation" folder.
EndNote Library	Use the *EndNote Library* import option in the import dialog. Note that the records from the library being imported will be assigned new record numbers.
NoteBook II Plus & NoteBuilder	Conversion utilities are available in the "notebook" or "notebuilder" folder at the EndNote FTP site.
Papyrus 6 and 7	Conversion utilities are available in the "papyrus6" or "papyrus7" folder at the EndNote FTP site
ProCite	Simply choose *Open* from EndNote's *File* menu to convert your ProCite database into an EndNote library. See the EndNote Help file for details.

Alternatively, you can export your references from ProCite using the quote-delimited export option. For the Macintosh and DOS versions, use the default export settings. Use the *ProCite* import option to import the resulting file into EndNote. |
| Ref-11 | Conversion utilities available at the FTP site in the "ref-11" folder. |
| Reference Manager | Choose *Open* from EndNote's *File* menu, and locate and open any one of the Reference Manager database files. This will convert your Reference Manager database to an EndNote library. See the EndNote Help file for details. Alternatively, you can export the references in RIS format, and import them using EndNote's *Reference Manager (RIS)* import option. |
| Refer/BibIX | Use the *Refer/BibIX* import option to import a Refer or BibIX text file. |

Chapter 8

Managing References

Chapter 8   Managing References

Showing & Hiding References

When working with references in your EndNote library, you can view all of the references, or just a subset. Here is an example of an EndNote library showing only 10 of the 200 references in the library. Notice the words "Showing 10 references out of 200" at the bottom of the Library window.
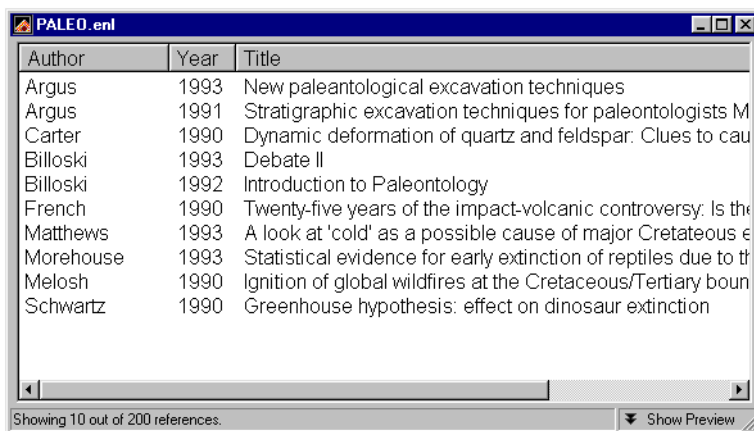
Working with Showing References

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

♦ Restrict the *Search* command to search only the showing references.

♦ Add the results of a new search to the currently showing references, as a way to combine search results.

♦ Use the *Change Text,* and *Change Field,* and *Move Field* commands to modify only the showing references.

♦ Use the term lists' *Update List* command to scan only the showing references for new terms.

♦ *Print* or *Export* just the showing references.

One way to view just a subset of references is to use the *Search* command as described later in this chapter. The *Show Selected* and *Hide Selected* commands in the *References* menu provide another convenient way for you to control which references are showing in the Library window.

Using Show Selected

Use the *Show Selected* command to restrict the references showing in the Library window to only those references that are selected.

To use the *Show Selected* command:

1. Select the references of interest (hold down the CTRL key and click the references with the mouse, or hold down the SHIFT key to select a range of references).

2. Choose *Show Selected* from the *References* menu. The references that you had selected will now be the only ones showing in the Library window.

3. After completing the work you need to do with the showing references, choose *Show All* (CTRL+H) from the *References* menu to return all of the references to the Library window.

Using Hide Selected

The *Hide Selected* command is similar to the *Show Selected* command except that it temporarily hides the selected references in the Library window from view.

To use the *Hide Selected* command:

1. Select the references that you want to temporarily hide.

2. Choose *Hide Selected* from the *References* menu.

3. After you have completed your work with the showing references, choose *Show All* (CTRL+H) from the *References* menu to return all of the references to the Library window.

Searching for References

EndNote provides a powerful and flexible *Search* command that enables you to locate specific references or groups of references. For example, you can choose a very general search, one that scans the entire library, or you can limit your searches to specific fields (such as Author or Keywords). You can also create more complex searches using a variety of operators such as *And*, *Or*, *Not*, *Greater than*, *Less than*, and others.

You can use the *Search* command to search EndNote libraries as well as remote databases that are available online. See Chapter 6 for information about remote database searches.

The Search Window

To begin a search, choose *Search* (CTRL+F) from the *References* menu. The **Search window** appears, displaying two empty **search items** (you can add more if needed).

field list —

Boolean operators —

search item {

search set list —

comparison list

click and drag the corner to resize the window
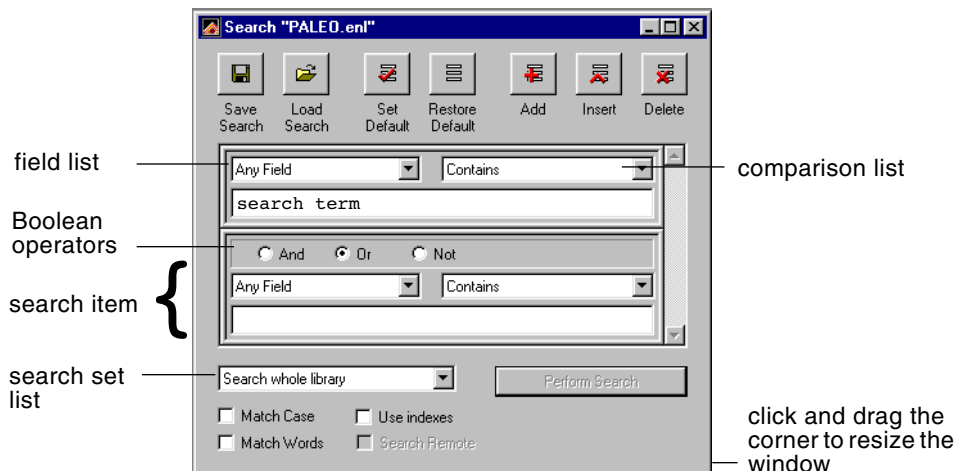
Quick Overview of the Search Window

All functions are described in more detail in the sections that follow.

Search Set List

Use the search set list to specify what set of references should be searched and how the search results should be combined with other references in the Library window. By default, EndNote searches the entire library and displays only the results of the search.

Search Item and Search Term

A search item includes the field to be searched (from the *Field* list), the comparison operator, and the text to be found (the "search term"). Use the buttons at the top of the Search window to add, insert, or delete new search items.

Field List

The field list allows you to restrict your search to a particular field such as Author, Year, or Keywords or all fields. By default, the *Field* lists are set to search *Any Field* (meaning that *all* fields will be searched). See page 146.

Comparison List

Choose an item from the comparison list to indicate how the search term should relate to the field(s) being searched. For example, EndNote can find references in which the Journal field *Contains* "science" or it can find references in which the Journal name actually *Is* "science." See page 146.

Boolean Operators

The "And," "Or," and "Not" radio buttons between the search items indicate how the search items are to be combined. By default, these operators are set to "Or." See page 148.

Search Remote

The "Search Remote" option is available when the target of the search is a Retrieved References window for a remote database. This setting lets you switch from searching the entire remote database to the subset of references in the Retrieved References window. See Chapter 6 for more information about remote searches using the *Connect* command.

Match Case

By default, EndNote ignores all capitalization when searching for text in a library. For example, a search for the text "paleontology" also finds "Paleontology."

When the "Match Case" option is checked, however, EndNote finds only those records in which the search term is capitalized exactly as you typed it in the Search window. For example, if your search term was "AIDS" and you select the "Match Case" option, EndNote ignores occurrences of the word "aids" and finds only the acronym "AIDS."

Match Words

With "Match Words" selected, EndNote finds only exact matches to the search term, rather than partial-word matches. For example, a search for the term "state," with the "Match Words" option selected, finds references with the word "state" while ignoring words like "statehood" or "understated."

Use Indexes

Selecting "Use Indexes" allows EndNote to take advantage of the built-in Author index and optional QuickFind index, resulting in faster searches. See page 153.

Set Default & Restore Default

Use the *Set Default* button to save the configuration of all of the items in the Search window except for the search terms. Click

Restore Default at any time to return the window to that configuration. See page 144.

Save Search & Load Search

If you frequently use the same search or configurations of the Search window, you can save these searches and later load them when you need them. See page 151.

Search Command Tips

Canceling Searches

Pressing ESC cancels a search in progress.

Matching Partial Words

Unless you have selected the "Match Words" or "Use Indexes" options, EndNote matches partial words when searching for text (both right- and left-truncation are enabled). Consequently, you can search for just the root of a word and find all related terms. This is a good tactic for general subject searches.

Diacritics (Accents)

Diacritical marks are used in the searches, so letters such as é, ü and î only match those letters exactly. Thus, a search for "résumé" does not find "resume." See "Entering Special Characters" on page 84 for information about entering diacritics.

Searching with Multiple Libraries Open

The *Search* command only searches one library at a time. If you have more than one library open, only the front-most library will be searched. To avoid confusion, the name of the library to be searched is displayed in the title bar of the Search window.

The Year Field

When searching in the Year field, you can enter just the last two digits of any year in the 20th century and EndNote will find all references published in that year. A search for "94" retrieves all references published in 1994, where as the same search not using indexes retrieves references from the 1940s and 1994.

Finding Empty Fields

EndNote can search for empty fields. Simply choose the desired field from the Field menu, and choose *Is* as the comparison operator, and leave the search term blank. Click *Perform Search* and EndNote finds references in which the chosen field is blank.

Cleaning Up Search Results

After executing a search, there may be a handful of references that you want to exclude from the search results. Select those

references and choose *Hide Selected* to hide them from the set of found references and display exactly the references that you want. Often this is much easier than trying to refine your search.

View the Opposite of Your Search Results

Let's say that you have searched for all of the references written by Billoski or Hall, so you are currently viewing only those references. Now, you would like to view the references *not* written by those authors. Instead of doing another search:

1. Choose *Select All* (CTRL+A) from the *Edit* menu to select all of the Hall and Billoski references.

2. Choose *Show All* (CTRL+H) from the *References* menu (notice that the original selection is maintained).

3. Choose *Hide Selected* from the *References* menu.

   You are left viewing only those references that were not previously showing in the Library window, that is, all references *not* written by Hall or Billoski.

Setting and Restoring Defaults for the Search Window

Use the *Set Default* button to save the current configuration of the Search window as your default. The default configuration will appear whenever you first open the Search window.

The layout of the window (such as the number of search items and the shape of the window) is saved, as are all of the operators, field names, and the Match Case and Match Word settings. The search terms are not saved.

Click the *Restore Default* option in the Search window to clear out all of the search terms currently entered in the Search window, and reset all of the settings back to the default configuration.

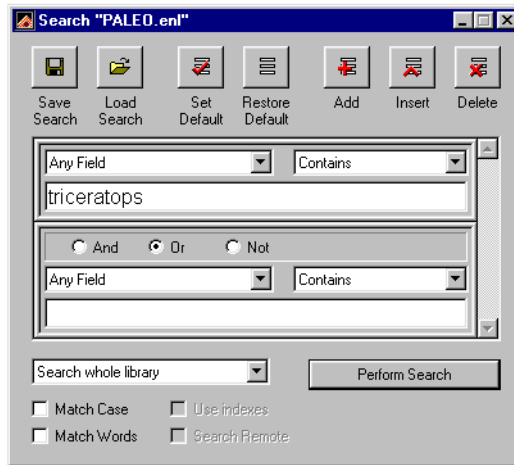# Simple Searches

To find all references that contain a particular term:

1. Choose *Search* from the *References* menu (CTRL+F).

2. Type the desired text into the first search item. This example uses the word "triceratops" as the search term.

3. Click the *Perform Search* button to begin the search.

If no references in the library match your search request, EndNote beeps and displays "No matching references were found." Otherwise, all matching references are displayed in the Library window:
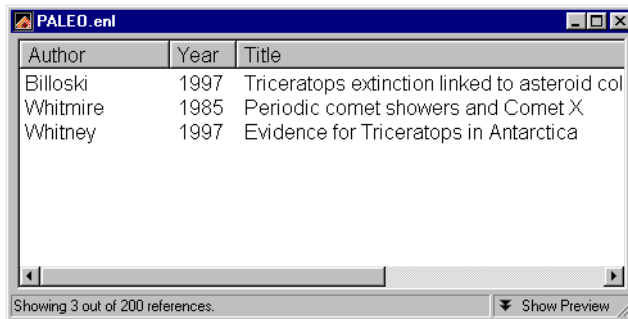
4. When you are finished working with the found references, choose *Show All* (CTRL+H) from the *References* menu to restore all references to view, or choose *Search* (CTRL+F) from the *References* menu to start another search.

NOTE: After completing a search, EndNote displays the same library that you were viewing before the search, however only the references that match your search requests are showing.

Restricting Searches to Specific Fields

By default, the *Search* command looks for a match for the search term in any of the fields in your references. This is what the phrase "In Any Field" indicates. Use the *Field* list in the Search window to narrow your search by changing *Any Field* to a specific field.

For example, to find references published in 2000, restrict the search to the Year field to avoid finding entries that include "2000" in the abstract, title, or elsewhere.

The search is restricted to the *Year* field.

NOTE: The field names in the *Field* list are EndNote's "Generic" field names. For example, *Author* represents Reporter, Editor, Artist or any other variations of the Author field used in the different reference types. See Chapter 14 for a complete list of Generic field names and their corresponding field names in each reference type.

Using Comparison Operators

Comparison Operators

The "comparison operators" are used to indicate how the search term relates to the chosen field in that search item. For example, if you have a search item that looks like this:

You will be searching for references where the Title (the search field) *contains* (the comparison operator) dinosaur (the search term). The comparison operators function as follows:

♦ **Contains:** finds all references where the search field includes the search term.

♦ **Is:** finds all references in which the entire content of the search field is exactly the same as the search term.

♦ **Is Less Than:** finds all references in which the search term is less than the contents of the search field.

♦ **Is Less Than or Equal To:** finds all references in which the search term is less than or identical to the contents of the search field.

♦ **Is Greater Than:** finds all references in which the search term is greater than the contents of the search field.

♦ **Is Greater Than or Equal To:** finds all references in which the search term is greater than or identical to the contents of the search field.

For all of the "Greater Than" and "Less Than" comparisons, the comparison is either numerical or alphabetical based on the nature of the term. When the fields have both numbers and letters, numbers are considered "less than" letters, and empty fields are ignored.

NOTE: Comparison operators other than "Contains" cannot be used when searching remote databases.

Examples of Symbols in Searches

Field	Comparison Operator	Search Term	EndNote finds:
Year	Is Greater Than	1990	all references published after 1990.
Year	Is Less Than	1990	all references published before 1990.
Year	Is Greater Than or Equal to	1995	references published during or after 1995.
Title	Is Less Than	A	all references where titles start with a number.
Author	Is Less Than or Equal to	C	all references with authors whose last names begin with A, B, C, or a number.
Author	Is Greater Than or Equal to	S	all references with authors whose last names begin with S-Z.
Title	Contains	hawaii	all references with "hawaii" in the title
Title	Is	hawaii	all references with "hawaii" as the exact title
Abstract	Is		all references with no abstract

Combining Search Items with "And," "Or," and "Not"

You can combine search items in EndNote using the Boolean operators "And," "Or," and "Not" to produce the following effects:

And finds references that match the preceding search item(s) and the following search item. "And" narrows search results.

> **Example:** A search for "triceratops" *And* "extinction" finds only those references that mention both terms.

Or finds references that match either the preceding search item(s) or following search term. "Or" broadens the search.

> **Example:** A search for "triceratops" *Or* "extinction" finds all references that include either term.
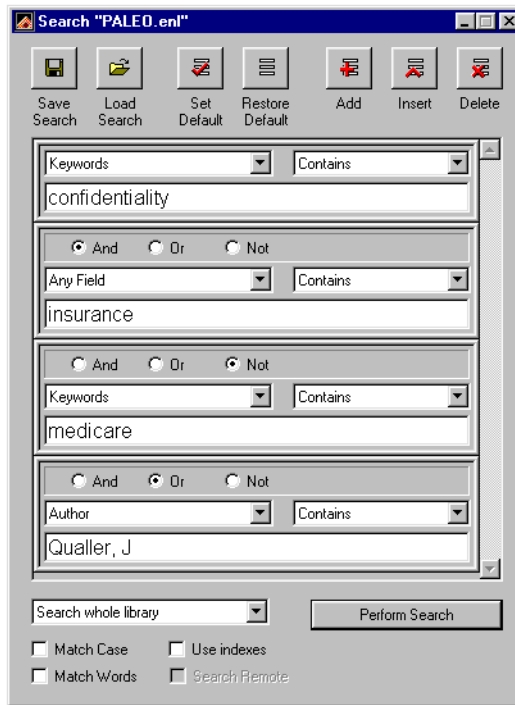
Not finds all references containing the preceding term(s) and then omits references that contain the subsequent term. "Not" narrows search results.

> **Example:** A search for "triceratops" *Not* "extinction" finds all references including "triceratops," excluding any triceratops references that mentioned extinction.

You can use the Boolean operators ("And," "Or," and "Not") in sequence with as many search items as necessary to build your search strategy.

Items in combination searches are executed from the top to the bottom of the Search window. For example, if you have entered four search items in the Search window, EndNote carries out the search by combining the results of the first two items with the third search item. Those results are combined with the fourth search item to produce the final search results. For example, the search below could be represented as:

(((confidentiality *and* insurance) *not* medicare) *or* Qualler, J)

Search "PALEO.enl"

```
Save      Load      Set       Restore   Add       Insert    Delete
Search    Search    Default   Default
```

Keywords | Contains

confidentiality

○ And   ○ Or   ○ Not

Any Field | Contains

insurance

○ And   ○ Or   ● Not

Keywords | Contains

medicare

○ And   ● Or   ○ Not

Author | Contains

Qualler, J

Search whole library | Perform Search

☐ Match Case   ☐ Use indexes
☐ Match Words   ☐ Search Remote

Adding or Deleting Search Items

You can add or delete search items using the *Add*, *Insert*, and *Delete* buttons at the top of the Search window.

Add adds a new search item to the end of the list.

**Insert** inserts a new search item immediately before the selected search item.

Delete removes the selected search item.

Move between search items by pressing the TAB key to go forward and SHIFT+TAB to go backwards. You can also click with the mouse in the desired search item to select it.

Combining Results from Separate Searches

By default, EndNote searches the entire library and then displays *only* the results of the search in the Library window. To search only a subset of references, or to combine your search results with other references, choose one of the following options from the Search Set list in the Search window.

Search Set list
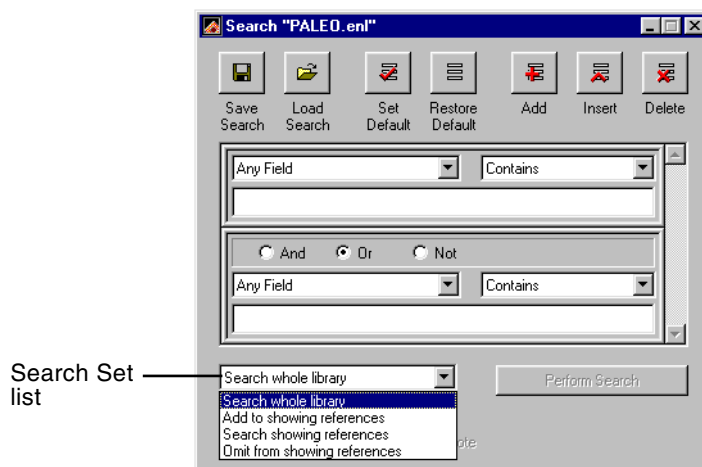
Add Search Results to Currently Showing References

Choose *Add to showing references* if you want to search the whole library and add the results of your search to a subset of showing references. For example, if you have already found a group of references written by Komar in 1998, and now you want to add, all references written by Billoski in 1997:

1. Choose *Search* (CTRL+F) from the *References* menu.

2. Enter "Billoski" in Author *And* "1997" in Year.

3. Choose *Add to showing references* from the Search Set list.

4. Click *Perform Search* and you should see the combined results of the two searches.

Search Only the "Showing" References

Select the *Search showing references* option in the Search dialog to restrict a search to only those references that are currently displayed in the Library window.

This is useful to narrow the results of a previous search, or to search a set of references that you have just imported from another library or online database.

Omit Search Results from Showing References

Choose the *Omit from showing references* option to hide the results of a search from the references that are showing in the Library window. This is a convenient way to locate all references that *do*

not include a particular term or to narrow the results of a previous search. For example, to find all references *not* about extinction:

1. With all of the references showing in the Library window, choose *Search* from the *References* menu.

2. Choose *Omit from Showing References* from the Search Set list in the Search window.

3. Type "extinction" into the first search item, leaving the *Field* list set to *Any Field*.

4. Click *Perform Search*.

EndNote displays every reference except those that contain the word "extinction."

Saving Search Strategies

The *Save* and *Load* buttons at the top of the Search window allow you to save the settings currently in the Search window and recall them for later use. All of the options in the Search window are saved, including the search terms; however, the target of the search (such as your EndNote library or a remote database) is not saved.

To save a search:

1. Configure the Search window as you would like.

2. Click the *Save* button in the Search window.

3. A dialog appears, prompting you to name the search strategy. Enter or edit the name and click *Save.* The search files are saved by default in the EndNote\Searches folder in the Windows Application Data folder. You may save them elsewhere if you prefer, but EndNote will open to this Searches folder when you choose to Load a saved search. EndNote search files use ".enq" as the file name extension.

To load a saved search:

1. With the Search window open, click the *Load* button in the top left corner of the window.

2. In the dialog that appears, select the search strategy that you would like to use, and click *Open.*

3. The contents and settings of the Search window will change to reflect those of the saved search. Click *Perform Search* to initiate the search.

Using EndNote Database Indexes

For each of your reference libraries, EndNote can maintain special "indexes" for high-speed searching. EndNote automatically maintains an Author index. In addition, you have the option of setting up a special QuickFind index for the Keywords field or for all of the fields in your library.

Searching With Indexes

Setting Up a Search to Use Indexes

Check the "Use Indexes" box in the Search window to make use of the indexes during searches of EndNote libraries. With this option selected, EndNote finds references almost instantly when searching the indexed fields, even in very large libraries.

The "Use Indexes" option in the Search window is only available if you are searching specifically in an indexed field (for example, select *Author* from a search item's *Field* menu list). The "Use Indexes" option must be checked for EndNote to use the indexes during the search.

You can combine an indexed search with other search items, but the speed applies only to the indexed item(s), meaning that the overall search is subject to the regular unindexed speed. Take advantage of the speed of the indexes by searching the indexed fields alone and by entering only one word per search item.

Differences Between Indexed and Non-Indexed Searches

Speed is not the only difference between indexed and non-indexed searches. Indexed searches differ from normal searches in that they match partial words only from the *beginning* of the word (right truncation). For example, a search for "physics" will not find "geophysics." And searching an indexed library finds only words. Punctuation and other symbols are not found.

Author Searching

If you need to search for first names or initials (without the last name), you should turn off "Use Indexes." Indexed author searches should be used when searching for the last name of the author.

Though the Library window only displays the last name of the first author for each reference, EndNote finds all authors cited in a reference whether or not they are listed first.

Sort Order of Indexed Search Results

In a simple EndNote search, without the "Use Indexes" option selected, the search results appear sorted by author and year. When you use the indexes, search results do not conform to a particular sort order. You can always use the *Sort Library* command in the *References* menu to sort your search results by any combination of fields.

NOTE: Turning the "Use Indexes" option on or off from inside the Search window does not alter or delete your indexes.
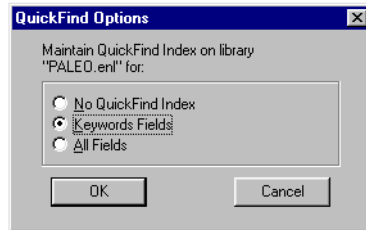
QuickFind Indexes

Important Points About QuickFind Indexes

♦ Once you create a QuickFind index, it is maintained as you add, delete, or modify the references in your library. As a result, it takes longer to save new and edited references because they need to be saved *and* indexed. Similarly, deleting records also takes more time, since it requires removing data from the index.

♦ Creating an "All fields" index for a large reference library takes considerable time, so you might want to have EndNote index your library at a time when you don't need to use your computer (for example, let it index overnight).

♦ An "All fields" index for a library with extensive abstracts and notes can double or triple the size of a library; a Keywords field index may only add 10% to the size of the file. Be sure that you have plenty of extra space on your hard disk when creating an "All fields" index.

♦ Once a library has been enlarged, it will *not* immediately shrink back to its original size if you change indexes. The size will be reduced over time as EndNote adjusts the storage of data in the file to reuse or release the unused space.

♦ We recommend that you make a back up copy of your EndNote library before creating a QuickFind index. For instructions see Appendix A.

Creating a QuickFind Index

Be sure to read "Important Points About QuickFind Indexes" before you create a QuickFind index for your library.

To create a QuickFind index, open your library and choose *QuickFind Index* from the *Edit* menu.

By default, the option for "No QuickFind index" is selected. If you select either "All fields" or "Keywords field" and click *OK*, EndNote will create the index and maintain it unless one of the other options is specified. When you change these settings, or choose the "No QuickFind Index" option, the previous index becomes inaccessible.

Finding Duplicate References

In order to help locate duplicate references, EndNote offers a *Find Duplicates* command. This command searches the references that are currently showing in the Library window to identify duplicates (based on the duplicate criteria specified in the preferences—see page 417).

To find all of the duplicate references in a library:

1. With the Library window open, choose *Show All* from the *References* menu.

2. Choose *Find Duplicates* from the *References* menu and EndNote displays all of the duplicate references in the library.

By default, references are considered duplicates if they have the same reference type (such as Journal Article or Book), and the Author, Year, and Title fields are identical. The criteria for detecting duplicates can be changed using the *Duplicates* settings in EndNote's Preferences dialog. See page 417 for details.

References which *seem* identical may not show up as duplicates if the information in the fields the EndNote checks is slightly different or if the reference types are different. When trying to

determine how references differ, it is helpful to know exactly how EndNote compares them.

Author:	Compares last name and first initials (even if the first or middle name are written in full). Capitalization is not important.
Year:	Compared exactly as entered.
Title:	Leading articles "A," "An," or "The" are ignored but punctuation is included. Capitalization is not important.
Reference Type:	Compared exactly as entered.

Deleting Duplicates

When EndNote displays the duplicates that it has found in a library, it selects all references except for the earliest entry. For example, if you have three of the same references for a journal article, all three will be displayed, but the one that was entered into your library first will not be selected. (References with the lowest record numbers are the ones that were entered first.)

With all but the original references selected, you may choose *Delete* from the *References* menu (or *Cut* from the *Edit*) menu to remove the duplicates from your library.

We strongly suggest that you check the duplicate references before deleting them. A more conservative approach to just deleting the selected duplicates would be to choose *Show Selected* from the *References* menu. That displays only the references that are candidates for deletion. You may then peruse them to verify that you would like to delete them all. Once you are comfortable that these are the references to be deleted, you may choose *Select All* from the *Edit* menu, and then *Delete* from the *References* menu.

WARNING: Before deleting duplicates, check the record numbers to be sure that you are not deleting references already cited in a paper. Use the *Display Fields* settings in EndNote's preferences to display the record numbers in the Library window (see page 417). And choose *Tile* from the *Window* menu to compare references side-by-side.

Changing Text in References

In the *References* menu there are two global editing commands: *Change Text* and *Change Field*. The *Change Text* command searches for text in your library, and either deletes that text or replaces it with other text that you specify. The *Change Field* command modifies any field in your library by either inserting text at the

beginning or end of the field, replacing the contents of the field with different text, or deleting the contents of the field.

NOTE: Be sure that you have a current backup of your library; the *Change Text* or *Change Field* operations cannot be undone with the *Undo* command.

Common Uses for *Change Text & Change Field*

Correct consistently misspelled words or names.

Use *Change Text* to search for the misspelled term and replace it with the correct spelling.

Mark the result of a search for easy retrieval.

If you have developed a complex search to locate a set of references, use the *Change Field* command to add a unique keyword to those references, so that the next time you want to retrieve that set, you can just search for the keyword.

Clean up your keywords.

You can add a keyword to a group of references using the *Change Field* command. Use *Change Text* to replace a term with a new one. If there is a keyword that you no longer want in your references, use the *Change Text* command to search for that text and replace it with nothing, thereby deleting it (you might also want to open your term list and delete it from there so that you don't use that term again).

Date or label a set of imported references.

It can be useful to add the date or source of data to a batch of newly imported references. Only the imported references are "showing" in the Library window after importing. At this point, use the *Change Field* command to add a word or phrase to any field in just those references.

Updating author's names.

There may be variations of an author's name in your data. For example, "Joe Cool", "Joe A. Cool", "J. A. Cool.", etc. Since some styles prefer whole names and others abbreviated first and middle names, it is best to update names to full names and leave the work of abbreviating to the EndNote styles.

Change Text

Use the *Change Text* command to find text in your references and replace it with other text. Changes can be restricted to a particular field in your reference, and you can also apply "Match Case" and "Match Words" restrictions.

**NOTE:** This operation cannot be undone, so be sure you have backups before making changes.

To change any text in your references:

1. Decide which references you want EndNote to scan when it looks for text to change. Make sure only those references are showing in the Library window (use *Show All*, *Hide Selected*, *Show Selected*, or *Search* commands to control which references are showing).

2. Choose *Change Text* from the *References* menu.

3. Select the field to be searched from the *In Field* list.

4. Type the text to be changed in the "Search for:" box.

5. Change the "Match Case" or "Match Words" settings if necessary (see page 142 for details).

   By default, the "Match Words" option is always selected. If you change this setting, pay close attention to whether or not the term you are changing could appear as part of another word or in a different context depending on the capitalization. **This operation cannot be undone.**

6. Type the text that should replace the original text in the "Change the text to:" box.

7. Select the "Retain Capitalization" option to maintain the same capitalization as the text being replaced.

   "Retain Capitalization" should be selected if replacing a term that might appear with different capitalizations. For example, any word may have its first letter capitalized if it is the first word in a title, but may also appear in all lowercase in other places. Do not choose "Retain Capitalization" if you are replacing an acronym with its unabbreviated version.
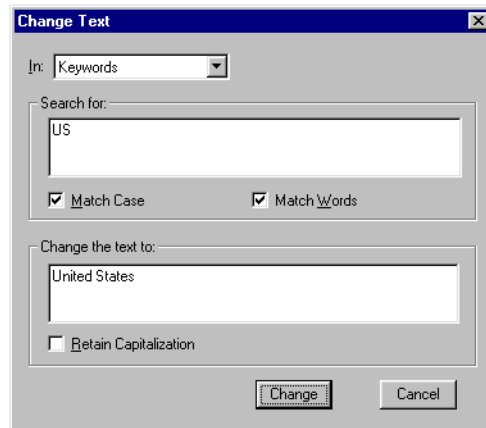
This set up changes all occurrences of "US" to "United States" in the Keywords field.

8. Click *Change* to search the showing references for the specified text and replace it with the new text. Before replacing any text, EndNote has you verify the change. The dialog EndNote presents provides information about 5 things:

♦ Which references were searched

♦ What text will be replaced

♦ Which fields were scanned for the text

♦ How many references were found to include the text in the specified field

♦ What text will replace it

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

Important Points About the *Change Text* Command

♦ The *Change Text* command applies only to the references showing in the Library window.

♦ When using *Change Text*, the new text adopts the text style of the first character of the text being replaced. For example, if you replace an italicized word, the new text will also be italicized. If only the first term that you are replacing is italicized, as in "*Thecideid* genus" then all of the replacement text will be italicized: "*Thecideid Varigata genus.*"

♦ If you need to search for text and then *delete* it, simply leave the "Change the text to" box empty.

♦ When using the *Retain Caps* option, EndNote maintains ALL CAPITAL LETTERS and "Sentence style" capitalization. It will not recognize "Headline Style." If the first letter of the text to be replaced is lowercase, the replacement text will be capitalized exactly as it was entered in the dialog.

♦ To enter a carriage return in the text box, pressCTRL+ENTER. To enter a Tab, press CTRL+TAB.

Change Field

The *Change Field* command can change the contents of a field for the references that are "showing" in the Library window.

NOTE: The *Undo* command cannot be used to undo the results of the *Change Field* command.

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 Field* from the *References* menu.

3. Choose the field that you want to modify from the *In Field* 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.

To enter a carriage return in the text box, pressCTRL+ENTER. To enter a Tab, press CTRL+TAB.

5. In the text box, type the text that should be added to the field.
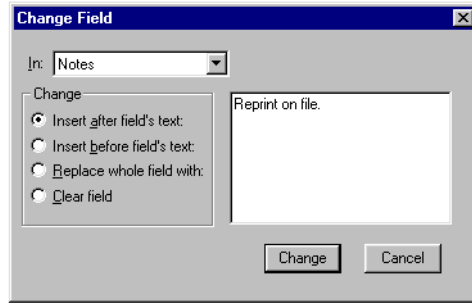
6. Click *Change*. EndNote will have you confirm the changes. The dialog EndNote presents provides information about 4 things:

♦ How many references will be changed

♦ The library in which the changes will be made

♦ The type of change that will be made

♦ The field that will be modified

7. Click *OK* to continue with the changes, or click *Cancel* to cancel this operation.

Move Field

The *Move Field* command in the *References* menu provides a way to move the entire contents of one field to another field within a reference. The command applies to all of the references that are "showing" in the Library window.

To move the contents of one field to another:

1. With a library open, choose *Move Field* from the *References* menu.

2. In the dialog that appears, use the "Move from" list to select the field you want to move the data from.

3. Use the "Move to" list to select the field where you want that data to end up.

4. Click *OK* to move the data from one field to the other within each reference that is currently showing in the Library window.

You have the option of inserting the moved text before or after the data in the destination field, or replacing the entire contents of the destination field. In the latter case, you have the additional option of whether or not to move empty fields. If you uncheck the option "Don't move empty fields," then any reference with an empty originating field deletes the contents of the

corresponding destination field (and thereby making it empty as well). If this option is turned on, the contents of the destination field will *not* be deleted if the originating field is empty.

The example below shows the *Move Field* options set up to move the contents of the Notes field into the Custom 1 field. If the Custom 1 field already has data in it, the contents of the Notes field will be added after the existing text.

NOTE: This operation cannot be undone, so be sure you have a backup copy of your library before making changes.

Sorting the Library

The *Sort Library* command provides a way to temporarily sort all references showing in the Library window for exporting, printing, copying, or just browsing.

EndNote libraries, when opened, are always initially sorted by the first author's last name, year, and record number. When you add a new reference, or modify an existing reference, EndNote automatically files it in this order. Use the *Sort Library* command to change this order.

To change the sort order:

1. From the *References* menu, Choose *Sort Library*.

2. Select one or more field names from the lists in the dialog. Enter the field names in the order you want the references sorted. (You do not have to use all five options.)

3. Click the button to the right of each field to indicate ascending or descending order.

 —— descending order

 —— ascending order

4. With the field names entered as desired, click *Sort*.

The dialog shown above is set to sort the library by author names, in alphabetical order, and then references published by the same author are sorted by year (from oldest to newest).

After the *Sort Library* command is used, EndNote's automatic filing process for new and edited references is temporarily disabled. Any new references will temporarily be added to the end of your sorted library. Choosing *Show All* (CTRL+H) from the *References* menu restores the original author/year sort order and the automatic filing of all references.

Special Cases in Sorting

Except for title fields, quotation marks, parentheses and other punctuation marks are considered during a sort. In an alphabetic sort, punctuation comes first, then numbers, then letters A-Z.

Author Names

Author names are always sorted by last name first, then first name and middle initials. If a reference has more than one author, EndNote includes the additional authors in the sort before moving on to other fields.

If your EndNote library includes author names with connectives such as de, di, van, and von, you may want to EndNote to skip

these parts of the name in order to sort the references by the principal element of the surname. See "Sorting" on page 413.

Titles

When sorting by title fields, EndNote ignores the words *A*, *An*, and *The* as well as punctuation at the start of the titles.You may enter additional words that should be ignored for sorting purposes when they appear at the beginning of a title. To do so, see "Sorting" on page 413.

Sorting Diacritical Characters

Due to speed considerations, EndNote's default author+year sort uses a special system that treats diacritics (such as ü and œ) differently from the settings in your Windows system. However, when using the *Sort Library* command or formatting a bibliography, EndNote sorts diacritical characters according to the rules of the language is selected the Sort Library dialog. Characters with diacritics are sorted differently in English, Spanish, Swedish, and other systems.

Merging Libraries

There are two ways to merge libraries: import one library into another, or copy references from one library to another.

Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library. This means that a reference that was #23 in a smaller library, could become #600 in a larger library. As a result, you cannot use the larger, merged library to format papers that have citations with the older record numbers.

NOTE: Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references.

Importing EndNote Libraries

To import one EndNote library into another use the *Import* command in the *File* menu. Choose the EndNote Library import option and be sure to pick the appropriate "Duplicates" setting (see page 114). The advantage of using the *Import* command over the other two methods mentioned here its ability to filter out duplicate references. See Chapter 7 for details.

Importing from Open Libraries

You can import references from a library that is currently open in EndNote. When EndNote imports from a currently open library, it imports only those references "showing" in the Library window. For example, if the library says, "Showing 10 out of 200 references," EndNote will only import 10 references. If the library you are importing is locked or in a "Read-Only" mode, then *all* references will be imported regardless of what is currently showing.

Using Drag & Drop

To copy specific references from one library to another, simply select them in one library (hold down the CTRL key to select non-consecutive references; use the SHIFT key to select a range), click on any part of the selection and use the mouse to drag the selection to another library. The selected references will be copied over to the library where they were "dropped."

Copying References in Libraries

You can also use the *Copy* and *Paste* commands in the *Edit* menu to transfer references. Select the references that you want to copy and choose *Copy* (CTRL+C) from the *Edit* menu. Open the library to which you want to add the references and choose *Paste* (CTRL+V).

Linking References to Files & Web Sites

With the *Link To* command in the *References* menu, you can link an EndNote reference to a file on your computer (such as a graphic, a word processing document, or a spreadsheet). The *Open Link* command can then be used to open that file at any time. *Open Link* can also be used with Web addresses (URLs).

Link a File to an EndNote Reference

To link a file to a reference in your EndNote library:

1. Select a reference in the Library window or open a reference.

2. Choose *Link To* from the *References* menu.

3. In the dialog that appears, select a file that you would like linked to the selected (or open) reference, and click *Open*.

This command simply enters the path to the chosen file into the URL field of the reference; it does not maintain any sort of dynamic link.

NOTE: The *Link To* option is only available when a single references is selected in the Library window, or when you are editing a reference.

Using the Open Link Command

Once the path to a file has been entered into the URL field, the *Open Link* command can be used to open the linked file or internet site.

To open a linked file or internet site:

1. Select or open a reference in the Library window.

2. Choose *Open Link* (CTRL+G).

The *Open Link* command opens the linked file with the appropriate program.

Note that when you type a Web address into the URL field, EndNote underlines it and changes the color of the URL to indicate that it will function as a clickable link to the web site. Simply clicking the link works just like choosing the *Open Link* command.

You must have the necessary program installed on your computer in order for EndNote to open a file created by another program. Similarly, EndNote does not include a Web browser. So, if you do not already have a browser installed, you will need to install one before using this feature to open a link to a web site. Use the *Online* settings in EndNote's preferences to select the Web browser that should open when the *Open Link* command is activated. See page 418 for details.

Using *Open Link* in Various Conditions

The *Open Link* command (CTRL+G) in the *Edit* menu can be used to open a linked file or launch a URL entered into an EndNote reference under the following conditions:

♦ When just one reference is selected in the Library window, EndNote opens the file or URL that is listed in that reference's URL field.

♦ When multiple references are selected, EndNote checks the URL field in each of the selected references (in the order listed), and opens the first link it finds.

- If you choose *Open Link* when a Reference window is open and nothing is selected, EndNote only looks for a link in the URL field.

- When a Reference window is open and text in the reference is selected, EndNote sends the selected text to your web browser and does not check the URL field for another link.

- If you need to enter multiple links into the URL field of one reference, enter them one per line. EndNote will open the first link in the field when you choose *Open Link.* If you have entered multiple URLs, you should be able to click on any one of them to activate the link.

What is a URL?

"URL" stands for "Uniform Resource Locator" and is a common term for the "address" used to identify the location of an item online. Most often, URLs refer to Web pages, such as this example of the EndNote web page:

`http://www.endnote.com`

URLs can also be used to identify the location of FTP (File Transfer Protocol) sites, telnet addresses, and even files stored on your own hard drive.

Chapter 9

Term Lists

Chapter 9   Term Lists

Introduction to Term Lists

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

Overview

To get a general sense of how the term lists work, here's a brief overview of how term lists can be built and utilized for someone with a new EndNote library. With the default term list settings in the preferences, all of the updating of terms, and auto-completion happens automatically. If you do not like this behavior, you may turn these settings off (see page 420).

Term Lists are Automatically Maintained

When you create a new EndNote library, there will be 3 empty term lists already set up and ready for you to use: Authors, Journals, and Keywords. As you enter new references into your library (whether by typing them, importing, or pasting them) EndNote updates the term lists automatically so that the Authors, Journals, and Keywords lists include all of the author names, journal names, and keywords entered into your references.

Term Lists Help With Data Entry

When you use the *New Reference* command in the *References* menu to create new references, you will notice two other features associated with the term lists. As you begin entering an author name, EndNote attempts to complete the name for you by suggesting the closest matching name in the Authors term list. If you enter a new name that is not already in your Author list, the name appears in red text to indicate that it is a new addition to the term list. When you close or save the reference, that new term is added to the list.

When you are searching for references, you can also open a term list to pick the exact term or name for which to search.

Important Points About Term Lists

The following list includes useful information about term lists. These points are covered in more detail later in the chapter.

♦ 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.

- If you enter a lot of references manually, you may find it helpful to create new term lists for things like publisher and city names. Up to 31 term lists can be created for any library.

- There is no limit to the number of terms in a term list.

- One term can be up to 253 characters long.

- Terms can be copied from one list and pasted into another.

- 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. This functionality may be turned off using EndNote's Preferences.

- Term lists can be "linked" to specific fields so that EndNote associates the correct term list with the field you are editing.

- Terms lists can be used with the "Auto-entry" feature on or off. By default, this option is turned on so that EndNote will suggest the closest matching term as you type in a reference.

- The Journals term list stores various forms of journal names that can be used when creating bibliographies. EndNote provides 3 Journals lists (Humanities, Medical, and Chemistry) that can be imported for use with your EndNote libraries.

- Libraries with term lists can be used by earlier versions of EndNote. However, term lists are only accessible when using EndNote version 2 or later.

Adding Terms to a Term List

Terms can be added to the term lists using a variety of methods described in this section. Adding terms to a term list does not change any data that you have entered in your references.

Automatic Updating of Term Lists

By default, EndNote automatically updates the term lists in a library so they stay current with the data that has been entered into the references. If you enter a term into a reference, and that term is not in the associated term list already, the term appears in red text to alert you that you have entered a new term. This can help you to maintain a controlled vocabulary for keywords and other terms; it can also be useful in catching typing mistakes.

You can turn off automatic updating of term lists if you do not want to use the term lists at all (see page 171). You can also turn

this option off and manually enter terms into your lists as described in the following sections. For example, you can manually enter all of the terms you plan to use into a term list before entering references into the library. This can be extremely helpful when you have someone else entering data for you and you want a specific vocabulary used for keywords or other terms. As references are entered into the EndNote library, the term lists can speed data entry, and if a red term appears, the person doing data entry knows that they have entered something that wasn't intended to be a valid term for that field.

Turning Off the Automatic Updating of Term Lists:

1. From the *Edit* menu, choose *Preferences.*

2. Select the *Term Lists* panel.

3. Click the check boxes for "Update lists when importing or pasting references" and "Update lists during data entry" to remove the checkmark and the feature will be turned off for all libraries edited on that computer.

Delimiters

EndNote has predefined term lists for authors, keywords, journals. When you enter multiple terms into those fields and EndNote updates the term list, it needs to know when one term ends and the next term begins. We call the punctuation that separates the terms "delimiters."

For the Author fields, author names must always be entered one name per line. Carriage returns (end of line marks) are the only valid delimiter for this field. Journals normally have just one journal name per reference in this field, so delimiters are not important here. Keywords are the most complex of the three. By default, EndNote uses carriage returns (end of line marks), semicolons, and backslashes (\) as delimiters for the Keywords field. If you would like to use other delimiters, see "Delimiters used for Separating Terms" on page 174.

Using the "New Term" Command

To manually add a term to a term list:

1. Choose *Open List* from the *Terms* menu and select the term list that you want to modify.

2. Choose *New Term* (CTRL+N) from the *Terms* menu.

3. Enter the term and click *OK* to add it to the list and dismiss the "New Term" dialog.
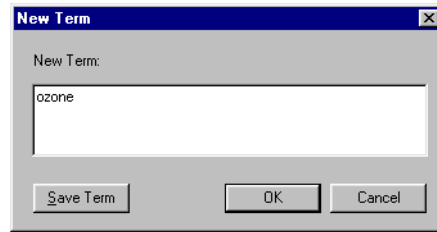
Clicking *Save Term* (CTRL+S) adds the term to the list, but keeps the window open for you to enter another term. Continue this way until you have added the last term, then click *OK* to dismiss the dialog.

If you are entering terms into the Journals term list, you will have options to enter different forms of the journal name. See page 183 for more information about using the Journal lists.

NOTE: The *Save Term* (or *Save Journal*) button is unavailable (dim) if the new term already exists in the term list.

Copying Terms Between Lists

You can copy terms from one list and paste them into another as a way to quickly transfer terms between lists. This is particularly useful because term lists are specific to an individual library.

To copy terms between lists:

1. Choose *Open List* from the *Terms* menu and select the list with terms you want to copy.

2. Select the term(s) to copy. (Hold down the CTRL key to select multiple terms; use the SHIFT key to select a range of terms.)

3. Choose *Copy* (CTRL+C) from the *Edit* menu.

4. Open another list, and choose *Paste* (CTRL+V) from the *Edit* menu.

Copying Terms From Other Sources

You can copy terms from any text, and paste them directly into a term list. If you are copying more than one term at a time, the terms must be separated by carriage returns (one term per line).

For example, to copy a word from a paper you are writing and paste that word into a term list, simply select the term in your word processor and copy it. Then switch to EndNote, open the desired term list, and choose *Paste* from the *Edit* menu. There is no need to use the *New Term* command—a new term is created automatically.

Manually Updating Term Lists

To create a term list automatically from words already in your library, use the *Update List* command from the *Terms* menu. This is useful if you have turned off the preference to automatically update your term lists, or if you have received a library from a colleague without a term list, or if you have deleted a term list and wish to recreate it.

The *Update List* command can apply to just the selected references or all references showing in the Library window. Use the *Search* command to show only those references from which you want to update the list. Or select references in the Library window and update the term list from just those references. Choose *Show All* from the *References* menu before using the *Update List* command to be sure that you are updating the list from all of the references in your library.

Important points about the *Update List* command:

♦ *Update List* does not change the terms in your references; it only adds new terms from your references into the term list.

♦ *Update List* does not add duplicate terms to a list.

♦ *Update List* removes leading and trailing spaces, but does not change punctuation.

To update a term list:

If you are updating the Journals list, see page 184.

1. Determine which references should be scanned for terms and make sure they are either "showing" or selected in the Library window.

2. Choose *Open List* from the *Terms* menu and select the term list that you would like to update.

3. Choose *Update List* (CTRL+2) from the *Terms* menu.

4. The currently linked fields are listed in the dialog as the fields from which EndNote gathers new terms. If necessary, remove a field from this list by selecting it and clicking *Remove Field*; or add a new field by selecting it from the *Add Field* list. Adding or removing field names from this list does not affect the links between fields and term lists.
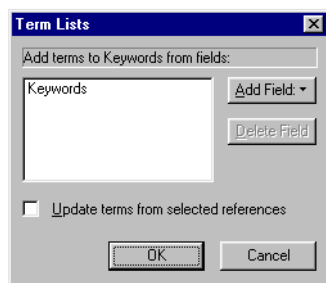
The Generic field names are used in this dialog. See the "Table of Predefined Reference Types" on page 291 to find the corresponding field names for the fields of various reference types.

5. To update a term list from only the currently selected references in your library, check the "Update Terms From Selected References" option.

6. Click *OK* to begin the updating process. When finished, EndNote displays the number of terms added to the list. Click *OK* and the process is complete.

NOTE: Typing ESC stops the update process, but all terms added up to that point are kept in the term list.

Delimiters used for Separating Terms

The text that is used to separate the terms in a particular field is determined by the "Delimiter" settings in the *Define Lists* dialog (choose *Define Lists* from the *Terms* menu).
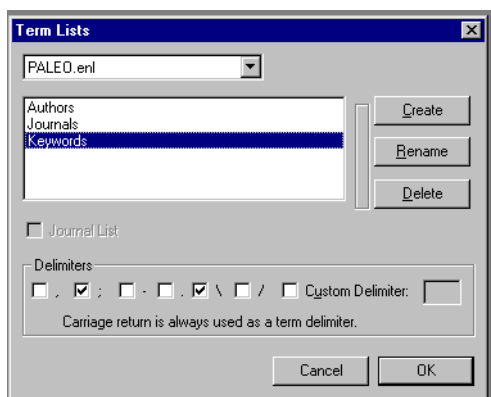
Select a term list and the delimiters used for it will be marked in the Delimiters section below.

If your keywords are separated by a slash, such as:

```
Antarctica/ozone/stratosphere
```

you should type a slash (/) as the field's term delimiter. A carriage return is always interpreted as a delimiter, so it is not necessary to enter a delimiter for the Author fields, or any other field that has terms entered one-per-line. If different delimiters are used for the same field in your references, you will need to do more than one update process, updating from the references with different delimiters separately.

Cleaning Up After Updating

After updating a term list, the newly added terms remain selected in the Term List window. Scroll through the term list to make sure that the *Update List* command had the desired results. If it did not, you can remove all of the selected terms by simply choosing *Delete Term* (CTRL+D) from the *Terms* menu.

If all of the terms are selected after the updating process, choose *Unselect All* (CTRL+A) from the *Edit* menu to unselect them.

After using the *Update List* command, you might find that due to errors or variations in spelling, you have multiple entries for the same term. Scan through the list and delete the unwanted terms.

If necessary, use the *Change Text* command to change all occurrences of a term in your library. For example, if both "geochronology" and "geo-chronology" are entered as keywords, you can delete the unwanted term "geochronology" from the term list, then click on the Library window, and choose *Change Text* (CTRL+R) from the *References* menu to change "geochronology" to "geo-chronology" throughout the library.

Importing Terms Into Term Lists

EndNote provides three lists of journal names and abbreviations; there is a list for Chemistry, Medicine (Index Medicus), and Humanities, all of which are stored in the Terms folder in the EndNote folder. If you are interested in using these 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 (see "Creating Bibliographies With Journal Abbreviations" on page 185).

If you would like to look at the lists before importing them, you may open them in your word processor—but do not edit or save them. They must remain tab-delimited text files in order for EndNote to correctly import the terms.

Terms can be imported from any text file that lists the terms one per line. If you create a list of terms in a word processing document, be sure to save the list as plain text (ANSI text) using the *Save As* command in your word processor so that you can import it.

To import a text file that contains terms:

1. Open the term list into which you want to import by choosing *Open List* from the *Terms* menu and selecting the desired list.

2. Choose *Import List* from the *Terms* menu.

3. Select the text file to be imported and click *OK.* EndNote's Medical, Chemistry, and Humanities lists are in the Terms folder in the EndNote 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.

NOTE: EndNote provides lists of journal names for the disciplines of the humanities, medicine, and chemistry. See page 183 for more information about working with the Journals list and journal abbreviations.

Using Terms Lists for Data Entry & Searching

You can use term lists to enter terms directly into a reference or into the Search window.

Inserting Terms into References

Suggesting Terms As You Type (Auto-completion)

If you are entering text into a field that is linked to a term list, EndNote finds the first matching term in the list and suggest that as the term you want to enter.
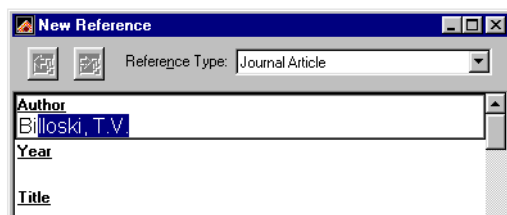
The suggested text appears highlighted after the cursor. Continue typing until EndNote suggests the correct term and then press ENTER or TAB to accept it. (ENTER will create another line in the field so that you can continue entering more author names, for example; TAB will move the cursor to the next field in the reference.)

When EndNote has suggested a term, you may also type the Up or Down arrows on your keyboard to have the suggested text change to the previous or next possible matching term in the term list.

If you enter a term that is not already in your term list, it appears in red to indicate that it is a new term. When you close or save the reference, that term is added to your term list and will no longer be displayed in red.
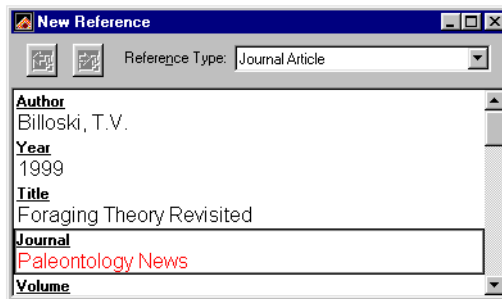
NOTE: These term list features may be turned off. To turn off the display of red text, you must turn off the preference to "Suggest Terms as You Type." See "Term Lists" on page 420.

Inserting Terms Without Using the "Suggestion" Feature

If you have turned off the option to suggest terms as you type, you can still insert terms into your references manually.

To insert a term from a Term List window:

1. Open a reference and position the insertion point where you want to add the term.

2. Press CTRL+1 to open the linked list (or choose *Open List* from the *Terms* menu and select the desired list).

3. Double-click a term to insert it directly into the reference.

Terms can also be selected by typing the first few letters of the term, by using the ARROW keys, or by clicking on the term with the mouse. Hold down the CTRL key to select multiple terms.

Press ENTER to insert the selected term or choose *Insert Term* (CTRL+J) from the *Terms* menu. (The command includes the field name, such as *Insert Term into Keywords Field*.) If multiple terms are selected and inserted, they are listed in the reference one per line in alphabetical order.

Selected terms can also be copied from the term list using the *Copy* (CTRL+C) command in the *Edit* menu, and pasted into a reference using the *Paste* (CTRL+V) command in the *Edit* menu.

NOTE: The insertion point must be in a field in a Reference window or Search window before you can insert a term.

Using Terms For Searches

To ensure that you are searching for the correct terms, you can use the term lists with EndNote's *Search* command. Terms can be entered into the Search window just as they are entered into references. For example:

1. Choose *Search* (CTRL+F) from the *References* menu, and change the first search item to search the Keywords field.

2. Choose *Open List>Keywords* from the *Terms* menu, or simply press (CTRL+1) to open the Keywords list (this key command opens the list that is linked to the field being searched).

3. Double-click a term to insert it into the Search window.

4. Click *Search* to search for your references.

Editing Terms and Term Lists

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

Modifying Terms

To edit a term in a term list:

1. From the *Terms* menu, choose *Open List* and select the list that contains the term to be modified. (Term lists can be easily opened from within the field in a reference by pressing CTRL+1.)

2. Select a term and choose *Edit Term* (CTRL+E) from the *Terms* menu. If multiple terms are selected, only the first one opens.
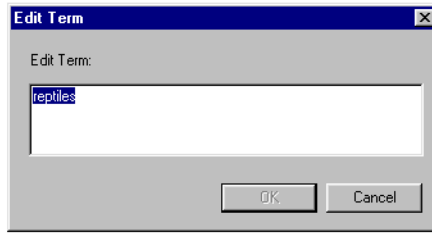
3. Change the term as necessary and click *OK* when finished. The modified term replaces the original term in the term list. (If the term already exists, the *OK* button will be dim.)

NOTE: Editing a term in a term list does not change all occurrences of that term in your library. Use the *Change Text* command to find the old term in your references and replace it with the new one.

Deleting Terms

A term can be deleted by selecting it in the list and choosing *Delete Term* (CTRL+D) from the *Terms* menu or *Clear* from the *Edit* menu. You can also use the *Cut* (CTRL+X) command in the *Edit* menu to cut terms out of the list and *Paste* them elsewhere (such as into another term list). Deleting a term from a term list does not remove it from the references in the library.

Defining Term Lists

Use the *Define Lists* command in the *Terms* menu to create, rename or delete a term list. This command is also used to specify the punctuation that separates individual terms in a reference (delimiters).

Deleting & Renaming Term Lists

Term lists can be renamed without disturbing their links to reference fields or the terms within them. Deleting or renaming term lists does not change the data entered into your references.

To delete or rename a term list:

1. Choose *Define List* from the *Terms* menu (at least one library must be open to access this command).
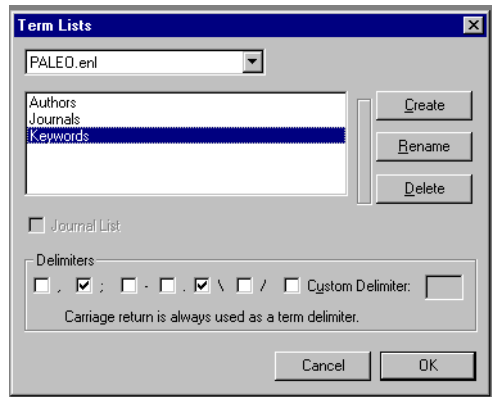
2. The menu at the top of the Define Lists dialog lets you choose from a list of open libraries. Select the library for which you would like to modify the term lists.

♦ **To Rename a Term List:** Select a term list and then click *Rename*. In the Rename List dialog, enter the new name for the list, and click OK.

♦ **To Delete a Term List:** Select a term list and then click *Delete*.

3. Click *OK* in the Term List dialog to save your changes.

Configuring Term Separators (Delimiters)

EndNote uses the delimiters in the Define Lists dialog to determine what punctuation separates the individual terms in the same field in a reference.

For example, if you import data from a source that uses semicolons (;) to separate keywords:

```
Adult, Age Factors; Astigmatism; Follow-Up
Studies; Hospitals, University; Keratotomy,
Radial; Myopia; Refraction, Ocular
```

you would want to be sure that the semicolon was selected as a separator for your Keywords term list. You would also want to be sure that the comma was not chosen because the commas in this example are used within some of the terms.

By default, EndNote uses the semicolon (;) and backslash (\), and end of line markers as separators. Words or phrases entered on different lines in a field (by pressing ENTER) are always interpreted as separate terms, but the other separators can be changed depending on your needs.

To customize the delimiters for a term list:

1. Open a library.

2. Choose *Define Lists* from the *Terms* menu.

3. Verify that your library name is selected at the top of the dialog, then click on the name of the term list that you intend to modify.

4. Click the checkbox to the left of the desired separator to choose it (or to unselect it if it is already checked).

The last checkbox provides a place to enter a custom term delimiter, if necessary.

Creating Term Lists

Predefined Term Lists

Three empty term lists are available by default with every library: Authors, Journals, and Keywords. These lists are already linked to their corresponding fields: the Authors term list is linked to the Author, Secondary, Tertiary, and Subsidiary Author fields; the Journals term list is linked to the Secondary and Alternate Title fields; and the Keywords term list is linked to the Keywords field.

Creating a New Term List

To create a new term list:

1. Choose *Define Lists* from the *Terms* menu.

2. Click *Create*, and enter the name for the new list. You cannot create a term list with the same name as an existing term list.

3. Choose the "Show 4 journal columns" option *only* if you want to create a term list for storing journal names and abbreviations. These different forms of the journal name can be used interchangeably when creating bibliographies (see "Journal Names" on page 323 for a description of this feature).

   The predefined Journals term list is already set up as a multi-column list. If you delete this list, you can create another one as described here. Do not create 4-column term lists for non-Journal fields.

4. Click *OK*.

NOTE: New term lists must be linked to fields for the "Suggest terms as you type" and automatic updating features to work. Instructions for linking term lists to fields follow.

Linking Term Lists to Fields

Terms lists are associated with fields using the *Link Lists* command in the *Terms* menu. When a term list is linked to a field, the list can be used to facilitate data entry. EndNote can also keep the term lists current by automatically adding new terms from linked fields. By linking term lists to particular fields, you can access the desired list immediately by choosing *Open List* (CTRL+1) whenever you are entering data into the linked field. Each field can be linked to only one term list. However, you can link the same term lists to different fields.

The three predefined term lists (Authors, Journals, and Keywords) are already linked to their corresponding fields. Any new term list that you create is not linked to a field until you set up the links. The links between term lists and fields are specific to each library.

To change these settings or to link a new term list to one or more fields:

1. Open a library.

2. Choose *Link Lists* from the *Terms* menu.

This first item shows the Author field linked to the Authors term list.
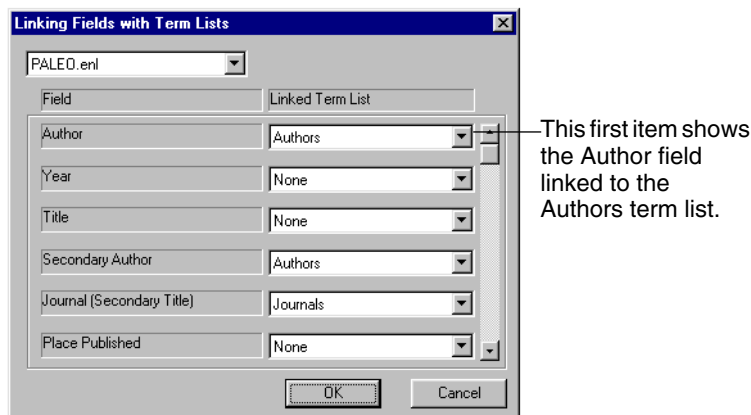
3. Choose a library from the menu at the top of the dialog.

4. The names of the available term lists appear next to the field names with which they are linked. You may change the

links here as necessary by choosing a different term list from the pop-up menus.

5. Click *OK* to save your changes and close the dialog.

These changes will not alter any data that is currently entered in either your references or your term lists. Term lists may be linked to multiple fields.

To unlink a term list from a field:

1. With the library open, choose *Link Lists* (CTRL+3) from the *Terms* menu.

2. Scroll through the list of fields to find the field that you would like to be unlinked from a list. Choose *None* from the list next to the field name.

3. Save your changes by clicking *OK*.

Exporting and Printing Term Lists

Term lists can be exported and then imported into other term lists as a way to move complete lists from one library to another (see also "Copying Terms Between Lists" on page 172). You can also open exported term lists in a word processor to print them.

To export a term list:

1. Open the term list that you want to export.

2. Choose *Export List* from the *Terms* menu.

3. Name and save the text file that will be created during the export.

4. Click OK and the terms are exported to the text file and listed alphabetically, one term per line.

This file can now be imported into another EndNote term list or opened in a word processor to be printed. Term lists cannot be printed directly from EndNote.

Working with the Journals Term List

Important Points About Entering Journal Names

You do not have to use the abbreviation sections in a Journals term list, but if you do, keep these points in mind:

♦   Enter variations of the same journal name together in one term.

♦   Enter a consistent abbreviation format in each column. For example, all Index Medicus abbreviations could be entered

under the Abbreviation 1, another format of abbreviated names in Abbreviation 2, and so on.

♦ Only the first term for each journal (the one in the Full Journal slot) is transferred when you insert a term.

♦ Use the *Journal Abbreviation* option in the styles to pick which form of the journal names should be used in the bibliography (see "Creating Bibliographies With Journal Abbreviations" on page 185).

♦ EndNote can remove periods from the abbreviations during formatting, so you do not have to duplicate your efforts entering one form of the journal abbreviation with periods, and one without. EndNote cannot add periods to an abbreviated journal name.

Updating a Journal List

In order for EndNote to accurately use the abbreviated journal names in your bibliographies, it is important to be consistent when entering different formats of a journal name. The first column should always list the full journal name, and subsequent columns should store consistent formats of abbreviated names. See page 183 for more information.

Journal lists are updated automatically unless you have turned off the preferences to update lists (see page 420). When the journal lists are updated, the entry in the main Journal field goes into the first column of the list (Full Journal) and the journal entered into the Alternate Journal field goes into the second column (Abbreviation 1). You should be consistent with how your data is entered into these fields so that the Journals term list will up updated correctly. Note that if the name entered into the Journal field exists in any of the columns of the Journals term list, it will not be added again. EndNote does its best to avoid duplicate entries in the Journals list.

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

To update a journal term list:

1. Open a library and select the references from which you would like to update the Journals term list. Alternatively, use the *Search* command to find only those references that you would like to use.

2. Choose *Open List* from the *Terms* menu and select *Journals*.

3. Choose *Update List* from the *Terms* menu.

4. Select the fields from which EndNote should extract the journal names. If importing from selected references, check the "Update from Selected References" option.
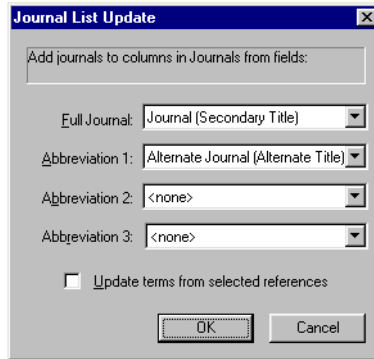
5. Click *OK*.

When the importing is complete, you will see a column of journal names listed in alphabetical order.

You can resize the term list window to view the other forms of each journal name. Click in the lower right corner of the term list window and drag the window to the desired dimensions. You should be able to view up to four columns of journal names in this list.

Creating Bibliographies With Journal Abbreviations

When you insert a journal name from the Journals term list into a reference, only the first entry for the journal name is entered. However, you can create a bibliography that uses any abbreviation in the term list by editing the style used to format the paper:

To edit a style to use journal abbreviations:

1. From the *File* menu, choose *Output Styles* and select *Open Style Manager.*

2. Select the style that you would like to edit, and click *Edit*.

3. From the list of options at the left of the Style Editor window, click *Journal Abbreviations.*

4. Select one of the available options. (See Chapter 15 for more information about these settings.)

5. Close and save the style. Now when you format a paper or look in the preview pane of the Library window, all of the journal names should be replaced with the appropriate abbreviation.

If a journal name in one of your references does not have the selected abbreviation entered in the Journals term list, the journal name appears in the bibliography exactly as it is entered in the Reference window.

Which Term List is Used for the Abbreviations?

Since it is possible (though not common) to have more than one multi-column journal list in a library, it is important to know how EndNote chooses which Journal list to use with the Journal Abbreviations feature. EndNote uses the multi-column list that is linked to the journal field used by the style. (For example, if the Alternate Journal field is specified by the style, EndNote uses the multi-column list linked to the Alternate Journal field.) If there is not a multi-column list that is linked to a journal field, EndNote uses the first multi-column list that it finds.

The predefined Journals term list that is added to every library is already set up as a multi-column list and it is linked to both the Journal and Alternate Journal fields.

NOTE: This Journal Abbreviations feature only works for Journal Article reference types. If you plan to edit your reference types, do not overwrite the Journal Article column because the Journal Article reference type is assumed to be the first reference type in the Reference Types table.

Converting Old EndNote Journals Files

If you have previously used the Journal Abbreviations feature in an earlier version of EndNote (versions 1.0-1.3.5), you can import the journal names from your old Journal Abbreviations table into the Journals term list. The information in the old table is stored in the JOURNALS.EN file and it can be directly imported into the Journals term list using the *Import List* command (see page 175).

NOTE: In this version of EndNote, you can have a different set of journal abbreviations for each library, and you may want to update each library similarly.

Chapter 10

Cite While You Write with Microsoft Word 97 or 2000

Chapter 10   Cite While You Write with Word 97 or 2000

Overview of the Cite While You Write Process

This chapter describes how to Cite While You Write (CWYW) with Microsoft Word 97 or 2000 to easily and quickly cite references and create a paper with properly formatted citations and bibliography. Cite While You Write gives you access to EndNote references and formatting commands with an *EndNote 5* submenu on Word's *Tools* menu.

You can create citations and bibliographies formatted according to any one of hundreds of styles. Instant formatting technology automatically updates your citations and bibliography as you write. A Traveling Library allows you to reformat references even when your library is not available.

Word Processor Compatibility

To Cite While You Write, you must use Microsoft Word 97 or 2000.

To format references and create a bibliography with Microsoft Word 95 or WordPerfect 7-9, please see Chapter 11 for information about the EndNote Add-in.

If you use a different word processor, or an older version of Word or WordPerfect, please see Chapter 12.

To create a stand-alone bibliography that is not based on the citations in a paper, see "Creating an Independent Bibliography" in Chapter 13.

NOTE: Cite While You Write can convert and use Word documents that previously used the EndNote Add-in.

Basic Instructions

The basic steps required to cite a reference and generate a bibliography with Microsoft Word 97/2000 are summarized below. These procedures are described in more detail later in this chapter

To Cite While You Write:

1. Open the EndNote library or libraries that contain the references you wish to cite.

2. Start Microsoft Word and open the paper you are writing.

3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.

4. From the *EndNote 5* submenu on the *Tools* menu, select *Find Citation(s)*. EndNote displays an Insert Citation dialog, which shows the previous search results.
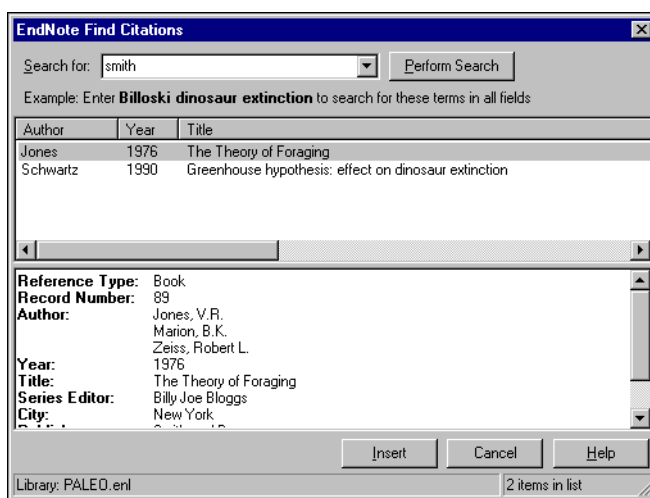
5. In the *Search for* box, enter identifying text for EndNote to locate the appropriate reference. This could be an author's last name, a year, a keyword, or any other combination of terms found in the reference.

6. Click *Perform Search* and EndNote compares the identifying text to your EndNote references and then lists the matching references:

   ◆ When a single record matches the search, EndNote inserts the citation into your paper.

   ◆ When multiple references match the search, they are listed so you can identify, highlight, and *Insert* the appropriate reference.

7. Go back to step 4 to insert the next citation, and continue citing references this way.

NOTE: When Instant Formatting is turned on, each time you insert a citation it is formatted and a bibliography is updated at the end of your document. When you are done inserting citations, your document is done! Instant Formatting is turned on by default. To find out more about this setting, see "Instant Formatting" on page 213.

---

8. If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, go to the *Tools* menu in Word and choose *Format Bibliography*.

Even when Instant Formatting applies, you may want to *Format Bibliography* in order to change the style or layout of your citations and bibliography.

A Format Bibliography dialog appears, where you can change, or simply verify, the style and layout of the bibliography.
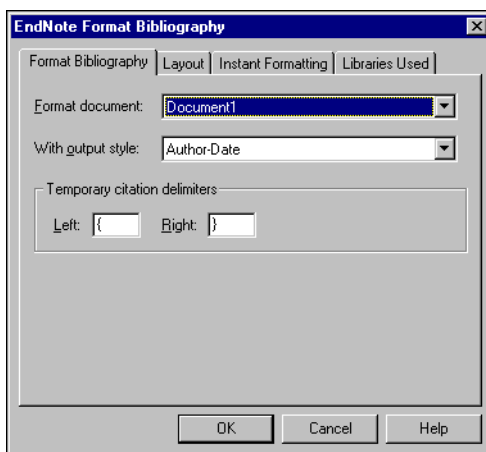
9. Click *OK*. EndNote scans your paper and, using the selected style, formats any temporary citations, reformats formatted citations, and appends a bibliography to the end of your paper.

Your paper is ready for publication!

If you need to make changes to the paper after formatting (such as adding or deleting citations), make the necessary changes, choose the *Format Bibliography* command again, and let EndNote do the rest.

Notes about Microsoft Word

Installing Cite While You Write Support in Word

EndNote's installation program installs Cite While You Write support for Microsoft Word 97 or 2000. If you install Word *after* installing EndNote, you must either reinstall EndNote or do a custom install of the word processor support. For more information, see Chapter 2, Installing & Upgrading EndNote.

EndNote commands appear on an *EndNote 5* submenu of the *Tools* menu in Word.

The Cite While You Write Commands

When Cite While You Write is installed, several EndNote commands appear on the *Tools* menu in Word. When you choose an EndNote command from the *Tools* menu, the EndNote program starts (if not already running) and a Cite While You Write menu appears in EndNote's menu bar, displaying some of the same commands as the *Tools* menu.
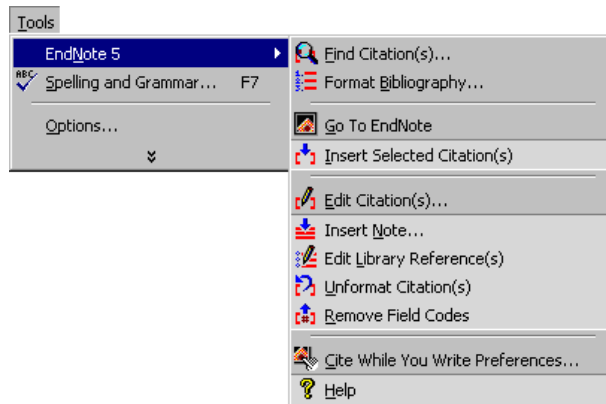
These are very brief descriptions of the Cite While You Write commands:

♦ *Find Citations* This command displays the Find Citations dialog, which allows you to search for EndNote references to select and insert as citations in your Word document. See page 196 for more information.

♦ *Format Bibliography* This command formats (or reformats) 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. See page 213 for more information.

NOTE: By default, Instant Formatting is turned on, so your citations and bibliography are automatically formatted as you work.

♦ *Go To EndNote* This command brings EndNote to the front of your screen. It launches EndNote if it is not already running.

♦ *Insert Selected Citation(s)* If one or more references are selected in your EndNote library, this command inserts them as citations at the cursor location in your Word document.

♦ *Edit Citations* This command displays the Edit Citation dialog, where you can edit existing individual or multiple citations. You can omit author and/or year from citations, or add prefix or suffix text (such as page numbers) to citations. See page 210 for more information.

♦ *Insert Note* Use the Insert Note dialog to add custom text citations to your Word document. See page page 201 for more information.

♦ *Edit Library Reference(s)* Select citations in your Word document, then choose this command to directly edit the corresponding references in EndNote.

♦ *Unformat Citation(s)* Use this command to unformat a selected citation before editing it, or to unformat the whole document. 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. See page 211 for more information.

♦ *Remove Field Codes* Use this item to save a copy of your document without formatted Cite While You Write field codes. Formatted citations and the bibliography are saved as text. This allows you to share a copy of your paper with others or submit it to a publisher. See page 224 for more information.

♦ *Cite While You Write Preferences* Use the Preferences dialog to change general Cite While You Write preferences and the EndNote keyboard shortcuts displayed on the *Tools* menu in Word. See page 426 for more information.

♦ *Help* Display help specific to inserting citations and generating bibliographies in Word.

You may prefer to execute these commands from the keyboard. Note the keyboard shortcut next to each item on the menu.

You can also use the corresponding EndNote 5 toolbar for easy access.

Field Codes

Cite While You Write places field codes around and inside your formatted citations in Word. These hidden codes allow EndNote to format, unformat, and re-format citations within Word.

For example, this formatted citation:

> (Schwartz and Billoski 1990)

appears with these field codes:

> { ADDIN EN.CITE
> <EndNote><Cite><Author>Schwartz</Author><Year>1990</Year><
> RecNum>5</RecNum><MDL><REFERENCE_TYPE>7</REFERE
> NCE_TYPE><AUTHORS><AUTHOR>Schwartz,
> M.T.</AUTHOR><AUTHOR>Billoski,
> T.V.</AUTHOR></AUTHORS><YEAR>1990</YEAR><TITLE>Gr
> eenhouse hypothesis: effect on dinosaur
> extinction</TITLE><SECONDARY_AUTHOR>B.T. Jones
> Smith,
> N.V.</SECONDARY_AUTHOR><SECONDARY_TITLE>Extinctio
> n</SECONDARY_TITLE><PLACE_PUBLISHED>New
> York</PLACE_PUBLISHED><PUBLISHER>Barnes and
> Ellis</PUBLISHER><PAGES>175-
> 189</PAGES><KEYWORDS><KEYWORD>dinosaurs</KEYWOR
> D><KEYWORD>extinction</KEYWORD></KEYWORDS></MDL
> ></Cite></EndNote>}

NOTE: We recommend that you *not* view field codes in Word. If you choose to view field codes, please don't modify them. Always keep backups of your papers!

Field codes for formatted citations include a Traveling Library of the EndNote references cited. The reference data saved with each citation includes the database name and location and all fields except Notes and Abstract. This allows you to use the document on a computer that doesn't contain a copy of your EndNote library.

Word's Cite While You Write field codes are supported only by Word 97 and Word 2000. Once you start using Cite While You Write, you must take precautions before opening those files in

other word processors or another version of Word. If a formatted document is opened and saved with an incompatible word processor, the formatted EndNote citations and bibliography lose their field codes. When this happens, EndNote cannot reformat the document.

Before you open a paper in a different word processor or give a publisher an electronic copy of your final formatted document, you should use the *Remove Field Codes* command from Word's *Tools* menu to make a copy of the paper without field codes. See "Sharing Your Word Documents" on page 223 for instructions.

Citing Sources As You Write

You can enter EndNote temporary citations into a paper at any time, but most writers prefer entering citations as they write the paper rather than waiting to insert them after the text is written.

Forms of Citations

A "citation" is the brief bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. A citation typically consists of a bibliography number or the author and year in parentheses:

```
... of the species at hand1.
```

```
... of the species at hand (Argus, 1991).
```

Citations can appear as either unformatted or formatted in your Word document.

Unformatted (Temporary) Citations

An unformatted citation is a temporary placeholder, and does not reflect final output. It may appear after you *Find Citation(s)* and *Insert*, *Insert Selected Citation(s)*, drag and drop citations from EndNote to Word, *Unformat Citation(s),* or manually enter unformatted citations. It contains information to find a unique, corresponding EndNote reference in the currently open library.

NOTE: If you have Instant Formatting turned on, you may never see an unformatted citation. Instant Formatting is turned on by default.

An unformatted citation typically consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end to identify the text:

```
{Author, Year #Record Number}.
```

For example:

```
{Alvarez, 1994 #8}
```

The unformatted citation makes it easy to identify the record cited. Even if your final goal is numeric citations, you can see meaningful information while you are working on your document.

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

Formatted Citations

The *Format Bibliography* command uses an output style to convert all unformatted citations into formatted citations, and reflects final output.

NOTE: When Instant Formatting is turned on, formatting is done as you insert citations–but you can still use *Format Bibliography* to change the style or layout of your citations and bibliography.

Formatted citations include hidden Word field codes in case you want to *Format Bibliography* again later, either after adding more citations or because you want to format in a different style.

Citations formatted in an Author-Date style might look like this:

```
(Alvarez 1994; Turnhouse 1987)
```

This is the same citation formatted in the Numbered style:

```
[1,2]
```

You can easily revert from formatted citations back to unformatted citations at any time. See "Unformatting Citations" on page 211.

Basic Instructions

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

This is the easiest way to find and insert a citation into a Word document:

1. Open the EndNote libraries that contain the references you wish to cite.

2. Open the Word document and position the cursor at the location where you would like the citation.

3. From Word's *Tools* menu, select the *EndNote 5* submenu and *Find Citation(s)* to display the EndNote Find Citations dialog.
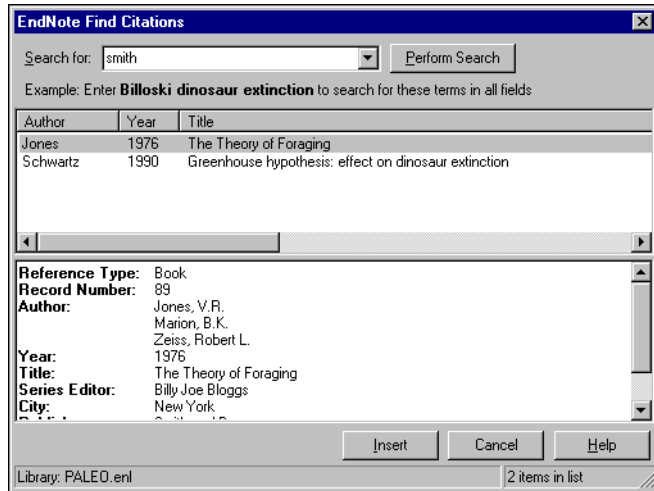
4. In the *Search for* text box, enter text to identify the reference you wish to cite. EndNote assumes an "and" between each word, and will search all fields in your records.

5. Click *Perform Search*, and EndNote compares the text to text in your EndNote references.

    ♦ If a single EndNote reference matches your text, EndNote inserts a citation for that reference.

    ♦ If several references match your text, EndNote lists the matching references for you to highlight the correct one(s) and *Insert*.

    ♦ If no references match your text, you need to modify your search text.

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

You can insert citations in an existing manuscript or as you write. Remember to *Save* your document as you work.

To format your citations and generate a bibliography, see "Generating Bibliographies" on page 213. In most cases, Instant Formatting applies as you insert citations.

Inserting Selected References

To insert references selected in EndNote:

1. Open the Word document and position the cursor at the location where you would like the citation.

2. From the *Tools* menu, select *Go to EndNote*.

3. Highlight the desired reference(s) in your EndNote library.

4. From the *Cite While You Write* menu in EndNote (or from the EndNote 5 submenu on Word's *Tools* menu), choose *Insert Selected Citation(s)*.

Using Drag and Drop or Copy and Paste

You can drag selected citations from your EndNote library and drop them into your paper at the desired location for the citation.

You can also copy citations from the EndNote Library window and paste them into the document (using the *Copy* and *Paste* commands on the *Edit* menus).

Manually Inserting Citations

You can manually type temporary citations if you prefer. See "Typing Citations into Your Paper" on page 203 to learn what types of citations EndNote recognizes.

Inserting Multiple Citations

There are several ways to insert multiple references in one in-text citation. The citations must be inserted together in one set of delimiters. When formatted, they appear as one multiple citation, sorted as your bibliographic style requires:

Unformatted: `{Hall, 1988 #77; Baker, 1988 #16}`

Formatted: `(Baker, 1988; Hall, 1988)`

EndNote can insert up to 50 citations within a single set of delimiters.

To insert multiple selected citations from the Find Citation(s) dialog:

1. From the *Tools* menu in Word, select the *EndNote 5* submenu and *Find Citation(s)*.

2. Enter a generic search term that will find the references you want, and click *Perform Search*.

3. Hold down the CTRL key while clicking on the desired references in the list (or hold down the SHIFT key to select a continuous range of references) in order to highlight the references.

4. Click *Insert*.

To insert multiple selected citations from EndNote:

1. In EndNote, hold down the CTRL key while clicking on the desired references in your library (or hold down the SHIFT key to select a continuous range of references).
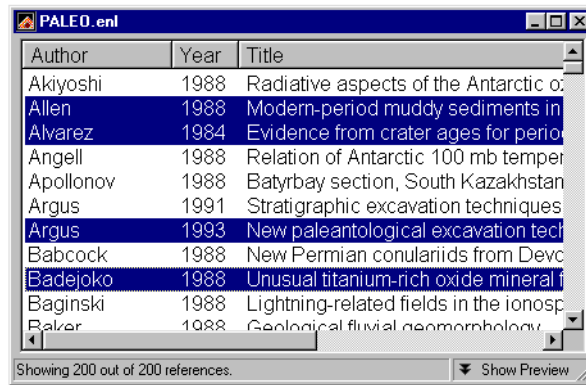
2. From EndNote's *Cite While You Write* menu or from the *EndNote 5* submenu on Word's *Tools* menu. choose *Insert Citation(s)*.

Another option is to insert citations individually, but immediately next to each other. Cite While You Write merges adjacent citations during formatting. Citations do not merge if *any* character separates them–including a space or punctuation mark.

Unformatted: `{Hall,1988 #77}{Baker, 1988 #16}`

Merged when Formatted: `(Baker, 1988; Hall, 1988)`

NOTE: If one of the citations in a multiple citation is not matched during formatting, the entire citation remains unformatted. Notes cannot be inserted as part of a multiple citation.

Inserting From Multiple Libraries

You can cite references from multiple libraries. Simply open the selected libraries before you begin inserting citations.

If possible, though, we recommend that you use a single library when writing a paper. Keeping all of your references in one library simplifies the writing process because you know exactly where to find each reference, there is little likelihood of duplicate

references, and you only need to have one library open when inserting citations.

NOTE: If you plan to insert citations from more than one library into a paper, read about the "Merge Duplicates in Bibliography" preference in the "Preferences" chapter on page 415.

Customizing Individual Citations

There may be cases where you want individual citations to differ from the standard format. You may want to remove the year or author from a citation if either was mentioned in the context of the sentence. Or, you might want to add a page reference or comment before or after the citation.

For example, assume a formatted citation looks like this:

```
Hall's discovery (Hall, 1988)
```

You can omit the author's name from the citation:

```
Hall's discovery (1988)
```

You can omit the date from the citation:

```
the 1988 discovery (Hall)
```

You can add a suffix and page number to the citation:

```
the discovery (Hall, 1988 p.4)
```

You can add a prefix to the citation:

```
the discovery (see Hall, 1988)
```

To customize a formatted citation:

1. Insert and format the citation.

2. Click on the formatted citation.

3. From Word's *Tools* menu, select the *EndNote 5* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog.
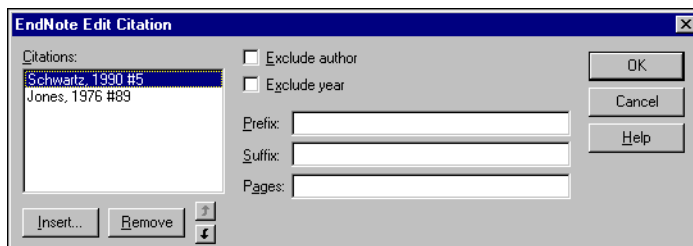
4. If the citation is part of a multiple citation, several references will be listed in the left column of the dialog. Make sure the citation you want to customize is highlighted.

5. Customize as needed:

   ♦ **Exclude Author:** Select this to omit the author name from the formatted citation.

   ♦ **Exclude Year:** Select this to omit the date from the formatted citation.

   ♦ **Prefix:** Enter text here to print immediately before the citation text (spaces are significant).

   ♦ **Suffix:** Enter text here to print immediately after the citation text (spaces are significant).

   ♦ **Pages:** Enter page numbers here to print immediately after the citation, including after suffix text.

   ♦ **Up and Down Arrows:** In a multiple citation, highlight a reference and use the arrows to change the order of display.

6. Click *OK* to implement the change(s) to the citation.

Including Notes in the List of References

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

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

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

1. Position the cursor at the location in your text where you would like the number indicating the note.

2. From the *Tools* menu, select *Insert Note* to display the EndNote Insert Note dialog.
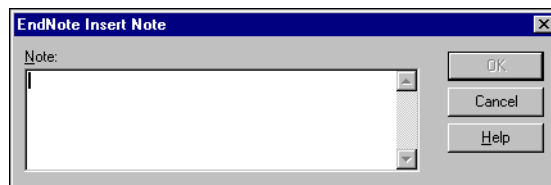
3. Type your note text into the text box. There is no limit on the amount of text you can enter.

4. Click *OK* to insert a numbered note.

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

The way that notes are displayed when unformatted can be changed in the Temporary Citations preferences (see page 411).

To manually type text as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.

2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

```
{NOTE: The authors would like to
acknowledge the support of...}
```

Restrictions on the Use of the "NOTE" Feature:

♦ This feature requires that a numbered style be used for formatting; otherwise, the note appears as text in the body of your paper.

♦ Do not use symbols in the text of the note.

♦ Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker, the prefix marker, and the multiple citation separator may be used.

♦ Notes can not be combined with regular bibliographic citations within the same set of delimiters (such as parentheses or brackets). They must be cited separately— each in its own set of delimiters.

Inserting Citations into a Formatted Paper

If you need to add one or more citations to a paper that has already been formatted, simply insert the new citations into the text (as described above) and choose *Format Bibliography* when you are ready to update the bibliography and citations.

To add a new reference to an existing citation, insert the new reference *next to* (not within) the existing citation, like this:

```
(Hockney and Ellis, 1996){Argus, 1984 #1}
```

Adjacent citations are merged during formatting, and the formatted citations are sorted according to the style:

```
(Argus, 1984; Hockney and Ellis, 1996)
```

NOTE: Do not insert a citation into the middle of a formatted citation. Insert it immediately before or after the existing citation.

Citing References in Footnotes and Endnotes

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

To cite a reference in a footnote or endnote:

1. Use the appropriate command in Word to create the footnote or endnote. (EndNote does not create the footnote or endnote in the document, but is used to insert and format citations in the note.)

2. Position the cursor in the footnote or endnote where you would like the citation(s) to appear.

3. Insert the citation as you normally would.

The EndNote style that is selected when you choose *Format Bibliography* determines how citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See Chapter 15 for more information.

If you manually enter an unformatted citation, and are citing full references in footnotes, you can include specific page numbers to be formatted like a regular EndNote field. See "Citing Specific Page Numbers in Footnotes" on page 208.

Typing Citations into Your Paper

There are many ways to insert citations in your paper, as discussed previously in this chapter. The most flexible way is to manually type temporary citations directly into your paper. Your hands never have to leave the keyboard.

The rules described in this section govern how EndNote recognizes and interprets temporary (unformatted) citations. Use these rules when typing temporary citations directly into your document.

Notes About Temporary Citations

♦ Each citation must match only one reference in the library.

♦ When Instant Formatting is turned off, a temporary citation is enclosed in citation delimiters and typically includes the first author's last name, the year of publication, and the record number for that reference: {Schwartz, 1990 #5}.

♦ Within one set of citation delimiters you can have several citations separated by semicolons:
{Schwartz, 1990 #5; Billoski, 1992 #28}.

♦ Curly braces ("{" and "}") are the default temporary citation delimiters, although they can be changed (see page 411). EndNote looks for these markers to find citations in your word processing documents.

♦ In addition to the citation delimiters, these are other possible components to a temporary citation: Author, Year, Record Number, Prefix Text, Suffix Text, and any other text found in the record.

♦ Any part of a temporary citation may be omitted, as long as enough information remains to match just one reference in the library. If you omit an author or year from a temporary citation, those components will be omitted from the formatted citation as well, unless you change the preference to do so. (See "Omitting Authors or Years from Citations" on page 206.)

Components of a Temporary Citation

The typical EndNote temporary (unformatted) citation consists of an author's last name, a year, and a record number, all enclosed in citation delimiters. However, temporary citations can take on various other formats.

Temporary citations must begin and end with the opening and closing citation delimiters, but the other components of a temporary citation can vary.

You can type any string of text found in the reference, as in:

```
{dinosaur extinction}
```

NOTE: Any text, by itself, is recognized only by Cite While You Write; the EndNote Add-in cannot use it.

Or, you can type any of these items in this order (with commas significant):

```
{Prefix\Author, Year #Record Number, Any Text,
Suffix}
```

Each component is briefly described below; more detailed information follows.

♦ **Author's Last Name:** Only the last name of one author is listed in a temporary citation. It can be any author associated with the reference, and not just the first author. Include a comma after the author's name to limit the search only to author fields:

```
{Schwartz, 1990}
```

♦ **Year:** The year should appear exactly as it does in the reference. It should always be preceded by a comma. Even if you leave out the author name, include a comma before the year:

```
{, 2001}
```

♦ **Record Number:** The record number is EndNote's unique number for a reference. It is the only part of a temporary citation that you can count on to *always* identify just one reference in your library. The record number must be preceded by a number sign:

```
{Jones, 1987 #84}
```

♦ **Any Text:** Any text that appears in the reference can be used to help EndNote locate the reference in the library. In order for this to be helpful, choose words that are unique to that reference. Enter the specific text only, or enter it as the last part of the temporary citation after a second comma:

```
{greenhouse}
```

```
{Schwartz, 1990, greenhouse}
```

NOTE: Any Text by itself can be used only with Cite While You Write. The EndNote Add-in will not be able to match the text to a record.

♦ **Prefix Text:** To add text to print before the formatted citation, type the text immediately after the opening brace and then a backslash "\" to separate prefix text from the search text:

```
{see \Jones, 1987 #84}
```

♦ **Suffix Text:** To add text to print after a formatted citation, enter a *third* comma after the search text and then type the suffix text:

```
{Smith, 1995, dinosaur, p.293}
```

NOTE: For an easy way to modify individual Cite While You Write citations once they are formatted, see "Customizing Individual Citations" on page 200.

Omitting Authors or Years from Citations

While your style may normally include the author's name and date in each in-text citation, you may want to omit the author and/or year from a particular citation. This is useful if you have mentioned the author or year in the context of the sentence and do not want to repeat the information in the citation.

To remove the author's name or date from a citation, simply leave that information out of the unformatted citation.

To omit the author's name, enter:

```
...Wyatt's recent discovery. {, 1993 #38}
```

which will format as:

```
...Wyatt's recent discovery. (1993)
```

To omit the date, enter:

```
...about his 1993 discovery. {Wyatt, #38})
```

which will format as:

```
...about his 1993 discovery. (Wyatt)
```

NOTE: *Numbered* citations do not print the author name or year in any case, so these settings would be ignored.

If you want a reference to appear in your bibliography, but not as a citation in your paper, you can exclude both the author and year, leaving only the record number. When you format your paper with a style that formats authors and years in the citations, this particular citation will not display in text, but will be included in the bibliography.

However, If you would rather have the author and year appear in the formatted citation regardless of whether or not they are in the temporary citation, choose *Preferences* from the *Edit* menu, select the *Formatting* option, and uncheck the setting to "Omit Author and/or Year from formatted citation if removed from temporary citation." With this setting turned off, you may enter just the record number "{#34}" as a temporary citation, and still

format the paper accurately with a style that requires authors and years in the in-text citations.

NOTE: For an easy way to modify individual Cite While You Write citations once they are inserted, see "Customizing Individual Citations" on page 200.

Citation Prefixes

You can type a prefix in front of any *unformatted* in-text citation, using a backslash to separate the prefix text from the reference. For example, an in-text citation such as:

```
{see also \Hall, 1988 #77}
```

formatted in the APA style would be:

```
(see also Hall, 1988)
```

When there is only one prefix in a multiple citation and it is at the beginning of the citation, it will stay there regardless of how the citations are sorted. For example, this citation:

```
{e.g. \Hall,1988 #77; Argus, 1991 #11}
```

after being formatted in the APA style will appear as:

```
(e.g. Argus, 1991; Hall, 1988)
```

If the prefix is not at the beginning of the multiple citation, or if there is more than one prefix in a multiple citation, the prefix text remains with the reference it precedes. For example, this citation:

```
{Argus, 1984 #11; especially \Hall, 1988 #77}
```

formatted in the Author-Date style will be:

```
(Argus, 1984; especially Hall, 1988)
```

Changing the Citation Prefix Marker

You can change the prefix marker from a backslash to another character by choosing *Preferences* from the *Edit* menu, selecting the *Temporary Citations* option, and changing the character in the "Citation Prefix Marker" box. Use a character that is not otherwise used in the citations. Letters, numbers, semicolons, "@" and commas cannot be prefix markers. See "Temporary Citations" on page 411 for more information.

Citation Suffixes

Additional text typed after the record number in an unformatted citation appears in the citation when it is formatted. A record number must be included to add a reference suffix. For example, this citation:

```
{Hall, 1988 #77, p. 5}
```

after being formatted in the APA style will appear as:

```
(Hall, 1988, p. 5)
```

In multiple citations, the suffix text remains with the citation that it follows, even if the citations are sorted differently during the formatting process. For example, this citation:

```
{Hall, 1988 #77 p. 5; Argus, 1991 #11}
```

formatted in the Author-Date style will be:

```
(Argus, 1991; Hall, 1988 p. 5)
```

Including Semicolons & Other Citation Delimiters in a Citation

In order to print an actual semicolon or the prefix marker (\) as part of a citation, type an accent grave (`) before the character. The accent grave tells EndNote to treat the following character as regular text, and not as a significant character for parsing the citation. For example, to create a citation that is formatted as "(see Figure 1; Jackson, 1994)" the unformatted citation must look like this: {see Figure 1`; \ Jackson, 1994 #28]. The ` character before the semicolon tells EndNote not to treat the semicolon as a separator between citations.

Citing Specific Page Numbers in Footnotes

When citing full references in footnotes, you might want to include specific page numbers. EndNote provides a way to do this where the page numbers that you type into a temporary citation can be manipulated by the EndNote style just like a field in your EndNote reference. You can add specific pages to the temporary citation, and have the EndNote style include them wherever they need to be in the formatted citation. The style can also apply special pages formatting, like deciding whether to add "p." or "pp." before the page numbers, and how to list the range of pages.

To include specific page numbers to reference in a footnote, simply enter the page number preceded by "@" at the end of the temporary citation:

```
{Smith, 1999 #24 @145-6}
```

All text that follows the @ symbol (up to the next space) is considered the "Cited Pages." You must also configure the EndNote style used to format the paper to use "Cited Pages" in the footnote template. Most EndNote styles that require a special format for citations in footnotes are already configured this way.

When EndNote formats the citation, the cited pages ("145-6" in the example above) are inserted in the correct location and formatted as appropriate for the style. See Chapter 15 for more information about EndNote's styles.

NOTE: If you enter page numbers at the end of the temporary citation without the "@" character, they will still appear in a formatted *in-text* citation, but EndNote will not be able to manipulate them by changing the page format or by moving them to a different position in the formatted citation. They will simply appear, as entered, at the end of the formatted in-text citation. This is a perfectly acceptable way to enter page numbers for in-text citations (or for footnotes formatted just like your in-text citations). See "Citation Suffixes" on page 207 to see how this works. This method will not work for citations in footnotes that are formatted as full bibliographic references or with a special footnote format. For those cases, you must use the @ symbol to identify the cited pages in the temporary citation.

Examples of Modified Citations

The following examples demonstrate how different modifications to a temporary citation affect its formatted citation in either an author/year or numbered style. In the first column is an example of a modified temporary citation before formatting, and to the right are two examples of that citation formatted in different styles.

Examples of Modified Citations

Unformatted Citation	Formatted with Author-Date	Formatted with Numbered	Comments
{Hall, #77}	(Hall)	[1]	To remove the year from the formatted citation, simply delete it from the unformatted citation.
{, 1988 #77}	(1998)	[1]	To remove the author from the formatted citation, delete just the author's name from the unformatted citation. Note that the comma remains in the temporary citation to indicate the omission of the author.
{#77}	No citation appears	[1]	This temporary citation removes the author and the year from the formatted citation. When formatted with an author-date style, the in-text citation is eliminated, but the reference still appears in the bibliography. Numbered citations appear as usual.
{Hall,1988 #77,, p.4}	(Hall 1988 p.4)	[1 p.4]	To add text after the formatted citation, add it after the third comma in the unformatted citation. With this temporary citation, the text after the third comma, including spaces and punctuation, is added to the formatted citation.

Examples of Modified Citations

Unformatted Citation	Formatted with Author-Date	Formatted with Numbered	Comments
{see /Hall, 1988 #77}	(see Hall 1988)	[see 1]	To add text before the formatted citation, type the text immediately after the opening bracket, and type a backslash "\" to separate the text from the author's name. (See "Citation Prefixes" on page 207.)
{Hall, #77, ,p.4}	(Hall, p.4)	[1, p.4]	This temporary citation eliminates the year from the formatted citation, but adds the additional text "p.4". Type additional text after the third comma.

Changing Existing Citations

You can change citations at any time. After making changes, choose *Format Bibliography* to (re)format the new or modified citations and regenerate the bibliography.

Editing Citations

Once you have inserted and formatted a citation, you should not edit it directly (although you *can* do so, if you feel you must). Direct edits are lost the next time EndNote formats the bibliography.

You can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation (as described here).

To safely edit a formatted citation:

1. Click on the citation you wish to change.

2. From Word's *Tools* menu, select the *EndNote 5* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog.
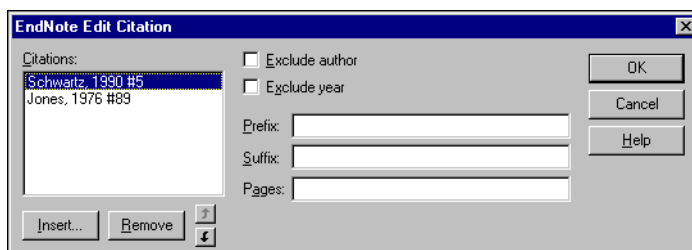
3. If the citation you want to edit is part of a multiple citation, select the appropriate citation from the list at the left of the dialog.

4. Make any of the following changes:

♦ **Exclude Author:** Select this to omit the author name from the formatted citation.

♦ **Exclude Year:** Select this to omit the date from the formatted citation.

♦ **Prefix:** Enter text here to print immediately before the citation text (spaces are significant).

♦ **Suffix:** Enter text here to print immediately after the citation text (spaces are significant).

♦ **Pages:** Enter page numbers here to print immediately after the citation, and after suffix text.

♦ **Up and Down Arrows:** In a multiple citation, highlight a reference and use the arrows to change the order of display.

5. Click *OK* to implement the change(s) to the citation.

Unformatting Citations

Unformatting reverts formatted citations to temporary citations, removes the bibliography, and turns off instant formatting.

If your citations are formatted in a numbered style, you can unformat your paper to easily identify citations as you work. You can Format Citations again later.

NOTE: Unlike formatted citations, *un*formatted citations require that you have the corresponding EndNote library open in order to format the paper again. Unformatting removes the Traveling Library.

To unformat citations:

1. Determine which citations you want to unformat:

♦ To unformat a particular citation, highlight only that citation.

♦ If the citation you want to unformat is part of a multiple citation, highlight the multiple citation. All citations within the delimiters will be unformatted.

♦ To unformat a section of the document, highlight that section.

♦ To unformat the entire document, either select nothing or highlight the entire document.

2. From Word's *Tools* menu, select the *EndNote 5* submenu and *Unformat Citation(s)*. If you are unformatted the entire document, this unformats all of the in-text citations and removes the current bibliography.

You can tell when a paper is unformatted because the citations appear in the temporary citation format (such as "{Smith, 1999 #25}").

Unformatted citations are temporary placeholders that do not reflect final output. If you want to share your document with a colleague who uses a different word processor, see "Removing Field Codes" on page 224.

NOTE: When you unformat citations, Instant Formatting is disabled. To format your paper, go to the *Tools* menu and choose *Format Bibliography*. From the Format Bibliography dialog, you can enable Instant Formatting again on the Instant Formatting tab.

Moving or Copying Citations

You can highlight any text that includes citations, then use the *Edit* menu commands to *Cut* or *Copy* and then *Paste* it elsewhere in the document. You can do this with formatted or temporary (unformatted) citations.

To move or copy only the citation itself, make sure you highlight the entire citation (including surrounding delimiters). Then *Cut* or *Copy* and *Paste* it elsewhere in the document.

Deleting Citations

To delete an unformatted citation, simply highlight the entire citation (including delimiters), and press the backspace or delete key.

While it is possible to highlight a formatted citation and simply press the delete key on your keyboard, we do not recommend you do that. If you do not completely delete the citation and all associated codes, you could corrupt your document.

To safely delete a formatted citation:

1. Highlight the citation you want to delete (or a group of citations if it is part of a multiple citation).

2. From the *Tools* menu, select *Edit Citation(s)* to display the EndNote Edit Citation dialog.

3. In the left column, select the citation you want to delete.

    ♦ If you highlighted a single citation, that is the only citation listed

    ♦ If the citation is part of a multiple citation, make sure you select the citation you want to delete.

4. Click *Remove*.

5. Click *OK*.

Generating Bibliographies

Formatting a bibliography serves two functions:

♦ It formats each in-text citation according to a bibliographic style.

♦ It adds a complete bibliography to the document (unless you override this with a setting in the output style).

The format used to print citations and references is determined by the output style selected.

Basic Instructions

When you have finished writing your paper in Word, and all of your EndNote citations have been inserted into the text, you are ready for EndNote to format the paper and generate a bibliography. This can be done in one of two ways:

♦ *Instant Formatting* actually works as you insert citations, and is enabled when you first start using Cite While You Write. EndNote uses the currently selected style to format citations and update the bibliography each time a citation is inserted. However, if you want to change the style or layout of references, you must use the *Format Bibliography* command.

♦ *Format Bibliography*, selected from the *Tools* menu, allows you to modify style and layout settings before formatting your document. This is also where you enable or disable Instant Formatting.

These are the basic formatting instructions:

1. From the *Tools* menu, choose *Format Bibliography*.

2. On the Format Bibliography tab, use the *With output style* option to select an output style to format references. It is okay to experiment with different styles because you can simply reformat again.

3. Click *OK* to format all citations and build the bibliography.

Instant Formatting

Instant Formatting works while you work. As you insert citations, EndNote uses the currently selected style to format citations and update the bibliography. By default, Instant Formatting is enabled.

However, to change the style or layout of references, or to change Instant Formatting settings, you must use the *Format Bibliography* command, which is described in the next section.

In some cases, Instant Formatting is disabled, such as when you unformat your paper.

To enable or disable Instant Formatting:

1. From the *Tools* menu, choose *Format Bibliography*.

2. Click the Instant Formatting tab.

3. Click *Enable* or *Disable* to toggle Instant Formatting.

   When enabled, you can click the *Settings* button to change these Instant Formatting controls:
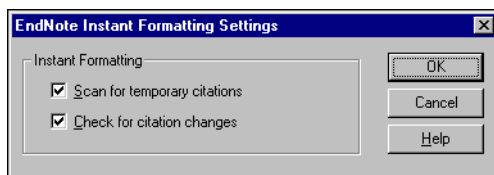
   ♦ **Scan for temporary citations** turns on scanning of temporary citations. This finds and formats all citations, including those you may have entered manually.

   ♦ **Check for citation changes** turns on background scanning that looks for citation changes.

   Click *OK* to save changes to the Instant Formatting settings.

4. Click *OK* to format all citations and build the bibliography.

NOTE: When Instant Formatting is enabled, leaving the Format Bibliography dialog--whether you click *OK* or *Cancel*--will always trigger formatting in your document.

Formatting the Bibliography and/or Changing Bibliography Settings

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

NOTE: The first time a citation is formatted, the corresponding EndNote library must be open. After that, EndNote can use the Traveling Library for reference information. See "The Traveling Library" on page 225 for more information.

To format citations and generate a bibliography:

1. From the *Tools* menu, choose *Format Bibliography*.

2. On the Format Bibliography tab, change or verify these settings:
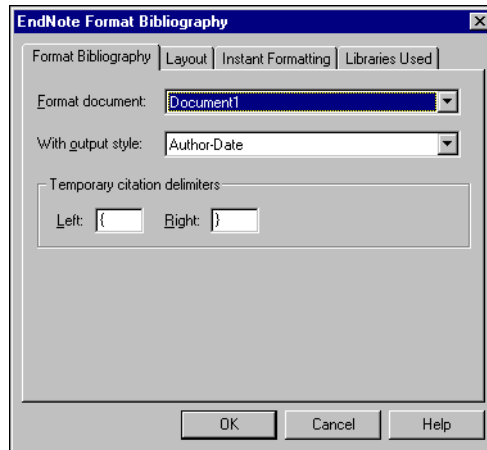
Format document: Make sure the appropriate Word document is selected from the list of open Word documents.

With output style: Select the appropriate output style to format references. You can experiment by reformatting with various output styles. To add more output styles to the list, see "Adding Styles to the Output Styles List" on page 217.

Temporary citation delimiters: These are the opening and closing delimiters for temporary citations. Make sure they are unique delimiters, and not characters you would normally use in your paper. The defaults are curly braces.

3. On the Layout tab, change or verify these settings:
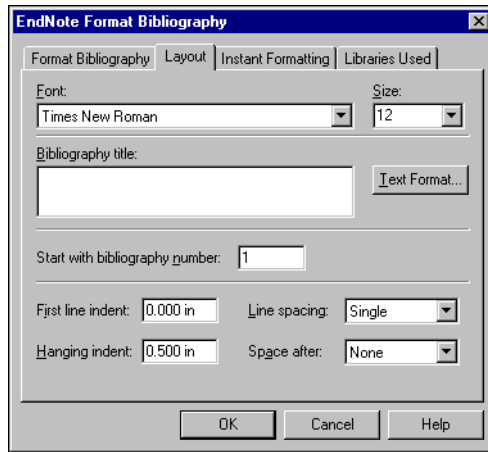
Font and Size: These are the text font and size used for the bibliography.

Bibliography title: To print a title at the top of your bibliography, type the title in this text box.

Text Format: The Text Format button displays a dialog where you can change the format of the reference list title.

Start with bibliography number: Enter a staring reference number if you want to number your bibliography.

First line indent and **Hanging indent**: Use these settings to set a paragraph indent, a hanging indent, or no indent at all. The hanging indent applies to the second and subsequent lines of a reference in the bibliography. You can type measurements as centimeters (cm), inches (in), lines (li), or points (pt).

Line spacing and **Space after**: Set the line spacing for within a reference and the space after for spacing between references.

4. On the Instant Formatting tab, you can *Enable* or *Disable* Instant Formatting. See the Instant Formatting section above for more information.

5. Click the Libraries Used tab to see which libraries are referenced in the document.

6. Click *OK* to save changes and format your citations and bibliography.

NOTE: You do not have to verify each tab every time you format. If all you want to do is change the output style, choose *Format Bibliography*, select the new output style on the Format Bibliography tab, and click *OK*.

Adding Styles to the Output Styles List

The bibliographic style selected on the *Format Bibliography* dialog determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

You can use Format Bibliography to select a different style and reformat your document at any point.

If you do not see the style that you want to use listed in the *Output Style* list:

1. In EndNote, choose *Output Styles* from the *File* menu and select *Open Style Manager*.

close button
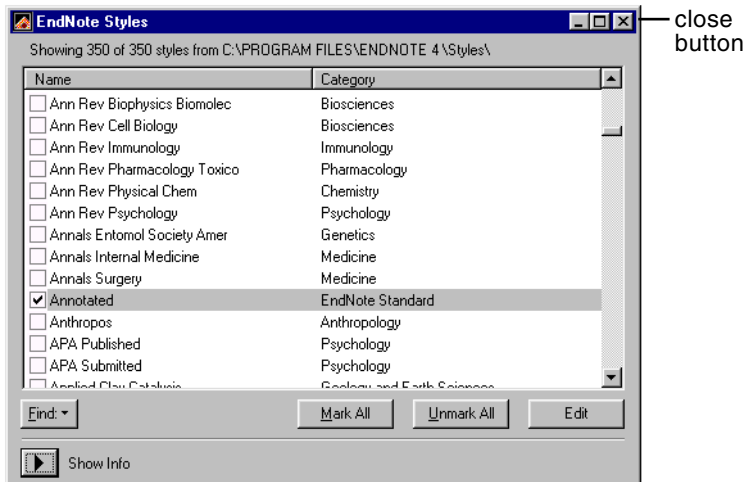
2. Find the style that you need.

♦   You can quickly select a style by typing its name, or scroll through the list to find what you need.

♦   Click on the column headings to sort the styles by either name or category. Click a second time to reverse the sort

order.Use the *Find* button in the Style Manager window to find entire categories of styles or to search for a style by a word in its name. For example, click the *Find* button and choose *Chemistry* to display all of the styles in the category "Chemistry."

3. Click the *Show Info* button at the bottom of the Style Manager window to view information about a style. (*Show Info* changes to *Hide Info* when the information panel is open.) The *Style Info* popup menu in the information panel can be changed from *Style Info* to *Style Preview* to display a preview of how the selected style formats EndNote's sample references.

4. Click in the column to the left of the style's name to choose it as one of your favorites. Or, to mark all of the styles that are displayed, perhaps a whole category, click *Mark All.*

All styles marked as "favorites" appear in the *Output Styles* menu.

Use the *Find* option to quickly locate categories of styles or individual styles.

The Show Info/Hide Info option shows or hides the information pane.

Choose to show the style preview or information.

5. Close the Style Manager by clicking the close button or choosing *Close Style Manager* from the *File* menu.

Styles marked as favorites appear in the *Output Styles* list of EndNote's *File* menu as well as the styles list in Word when you *Format Bibliography*.

All styles can be modified to meet your specifications. You can also create completely new styles if necessary. See Chapter 15 for instructions about creating and modifying styles.

Reformatting Papers

Adding New Citations to Formatted Papers

If you add more citations to your paper after the formatting process, you can update the citations and the bibliography by simply choosing the *Format Bibliography* command again.

NOTE: You do not need to unformat your citations in order to reformat them.

Reformatting with Different Styles

Similarly, if you would like to reformat your paper in a different style, go to the *Tools* menu and choose *Format Bibliography* again. Select a new style from the Format Bibliography dialog and click *OK*. Your citations and bibliography are updated for the new bibliographic style. (See "Adding Styles to the Output Styles List" on page 217 for information about expanding the list of available styles.)

Creating a Bibliography from Multiple Documents

You can use 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 book chapters.

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library.

2. *Close* all of your documents.

3. Create a *New* document

4. Designate the new document as a master document, then insert and display each of your chapters as subdocuments. (Check Word's documentation if you need step-by-step instructions.)

5. From the *Tools* menu, select *Format Bibliography*.

6. Verify the formatting options and click *OK*.

EndNote creates the bibliography, using citations from the master document and all displayed subdocuments, and places it at the end of the master document. You can move the

bibliography anywhere within the master or subdocuments, and it will remain in that location even when you reformat.

NOTE: If you choose Word's *Insert > File* command and select the "Link" option to insert a document into the text, EndNote will *not* format the linked document when you format the main document. The text from the linked document will be skipped.

Directly Editing Bibliographies

It is always best to make changes to your final bibliography by correcting the data in the EndNote library, editing the output style you are using, or adding or deleting citations from your paper. Then, after making the necessary changes, choose *Format Bibliography* and the corrections are automatically made to the bibliography.

It is not always possible for EndNote to format the bibliography exactly as needed, so you might have to manually edit the formatted bibliography. If you must do this, remember that if you reformat a paper *after* editing the bibliography, EndNote will *not* preserve your edits. When EndNote reformats a bibliography, it deletes the existing one and puts a new one in its place.

You can edit the bibliography as you would any text. The bibliography may be shaded, but you can still edit it. If you later reformat the paper, your edits will be gone.

You can add text *after* the bibliography, but make sure to put it after the end of the formatted bibliography—outside of the bibliography field.

NOTE: See the Styles chapter (Chapter 15) for instructions about editing styles. If necessary, contact technical support for assistance.

Moving Bibliographies

Cite While You Write always creates the initial bibliography at the end of the Word document that it has formatted. If you move the bibliography to a different location in the document (you can drag and drop or Cut and Paste), EndNote keeps it there even if you reformat the paper.

NOTE: When using Instant Formatting, use drag and drop to move a bibliography. If you try to use Cut and Paste, Instant Formatting will create a new bibliography at the end of the document before you have a chance to Paste.

Deleting Bibliographies

To delete a bibliography, simply select the bibliography and delete it.

Make sure you drag the cursor across the very beginning of the bibliography to select the entire bibliography field. Press the BACKSPACE or DELETE key. You can also choose *Cut* from the *Edit* menu if you want to paste the bibliography somewhere else.

Setting Cite While You Write Preferences

You can access and set Cite While You Write preferences from either EndNote or Word. The same dialog appears, and changes are saved in the same place:

♦ From Word's *Tools*, menu, select *Cite While You Write Preferences.*

♦ From EndNote's *Cite While You Write* menu (which appears only when a Word document is open), select *Preferences.*

Cite While You Write preferences include general preferences as well as the ability to assign keyboard shortcuts to menu commands. See "Cite While You Write and EndNote Add-in Preferences" on page 425 for detailed information about these preferences.

For information about other EndNote preferences that directly affect Cite While You Write, see "Temporary Citations" on page 411 and "Formatting" on page 415.

Making Changes to the EndNote Library

Once you have inserted and formatted citations in Word, changes to the corresponding EndNote library could affect reformatting.

Finding Cited References in a Library

You can quickly jump from a citation to the corresponding EndNote reference.

To find an EndNote reference:

1. Make sure both your Word document and your EndNote library are open.

2. Highlight the citation(s) in your Word document.

3. From the *Tools* menu, select *Edit Library Reference(s)*.

EndNote opens the corresponding reference for editing.

Editing a Reference in the Library

You may insert a citation in a Word document, and then later edit the corresponding reference in EndNote. Are those changes reflected in your Word document?

Your citations and bibliography will reflect the edits the next time you reformat the paper with the EndNote library open. Open your document, open your EndNote library, and choose *Format Bibliography* from the *Tools* menu in Word.

EndNote will not be able to make the update if the library is not open during formatting. Instead, it will take the original reference information from Word's field codes.

Deleting a Reference From the Library

The first time a citation is formatted, EndNote uses information from the unformatted citation to look in the open library and find the corresponding reference. If you later reformat, EndNote again looks in the library for that reference. If the reference has been deleted from the library, EndNote takes the reference information from hidden field codes in Word (the Traveling Library).

So, if you deleted a cited reference from the library, the required information is still available in the hidden field codes surrounding each *formatted* citation–even though the reference is not longer in the library.

However, an *unformatted* citation is simply a temporary placeholder. If a citation is unformatted, and you have deleted the corresponding reference from the EndNote library, EndNote will not be able to find the reference information for formatting.

If you add the reference to the library again, it will be assigned a different record number. You would need to re-insert the citation in Word.

Record Numbers

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

```
{Argus, 1991 #11}
```

The record number for a reference is also visible in the title bar of the Reference window.

Keep the following points about record numbers in mind:

- ♦ EndNote automatically assigns a record number sequentially to each reference as it is added to a library.

- ♦ If the same reference appears in two different libraries, the record numbers will most likely be different.

- ♦ Record numbers are never reused or reassigned within a library. When you delete a reference, the corresponding record number is never used again in that library.

- ♦ You cannot modify or reassign record numbers.

- ♦ We recommend that you *not* rely on EndNote's record numbers as a means of filing or numbering your office reprints, because *you have no control over this number*. Instead, enter your own unique number into the Label field, or any Custom field, and use that number for your reprints.

If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Sharing Your Word Documents

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

If you want to convert your document for use with a previous version of Word or a different word processor, you should unformat citations or remove field codes before saving in the different file format.

Of course, if you just want to print a copy of the paper for someone, you do not need to do anything to your document other than print it!

NOTE: Cite While You Write codes are directly compatible between Word 97 and Word 2000.

Submitting the Final Paper to a Publisher

Many publishers ask that you submit an electronic copy of your paper in addition to a printed copy. Because the field codes in your document may be incompatible with the publishing software, you should submit a copy of your paper without field codes, as described below.

Removing Field Codes

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

♦ Most publishers require that field codes be removed.

♦ If your colleague is using the same version of Word that you are, you can share your formatted document as is; the document includes a "Traveling Library," which includes all required information for the formatted citations and bibliography. See the next section to learn more about the Traveling Library.

♦ If your colleague is using a different word processor or an incompatible version of Word, you must remove field codes or unformat the document in order to share the document.

♦ Removing field codes means deleting Word's Cite While You Write field codes and saving the formatted citations and bibliography as text. This removes only Cite While You Write field codes, and not all other Word field codes.

♦ Because Cite While You Write cannot reformat or unformat your paper once field codes are removed, the *Remove Field Codes* command makes a *copy* of your document without codes.

NOTE: If you are working with master and subdocuments in Word, the *Remove Field Codes* command warns that it will strip codes from the original documents. You should first manually save copies of the master and subdocuments, and then remove codes from the copies.

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

1. Open your formatted Word document.

    If you are working with Master and Subdocuments, work with *copies* of your documents.

2. From the *Tools* menu in Word, select *Remove Field Codes*.

3. **Single document:** In Word's Save As dialog, type a new name for a copy of your document and click *OK*.

    Master and Subdocuments: You may be advised to first manually make a copy of the master and subdocuments. If you are already working with copies, click *OK*.

Word saves your document without embedded formatting codes, so you can submit your paper to a publisher or share with

a colleague using a different word processor (including a different version of Word).

NOTE: This copy does not contain Cite While You Write field codes, so you cannot reformat with Cite While You Write. To reformat, start with the original document, which retains field codes.

The Traveling Library

Each formatted citation in your document is saved with field codes that embed reference data in the document. The paper contains a "traveling library" of references cited.

The first time a citation is formatted, EndNote looks in the open library and finds the corresponding reference. If you later reformat, EndNote again looks for the library and that reference. However, if the library is not available or not open, EndNote will use the Traveling Library for reference information. The reference data saved with each citation includes the database name and location and all fields except Notes and Abstract.

Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same database.

NOTE: Do not unformat your document if you do not have the original references in your libraries. Unlike formatted citations, *un*formatted citations require that you have the corresponding EndNote libraries open in order to format references.

Working on Different Computers

If you are working on a single paper and moving between different computers, it is best to keep a copy of your reference library with your paper. That way you will always access the same library when inserting citations. If you separately add references to a copy of the library at home and to a different version at work, record numbers may not match up correctly and EndNote may have to rely on the Traveling Library for reference information. That isn't necessarily bad, but you want to make sure that any library edits are reflected in your Word document.

If you are inserting citations on only one machine, it is fine to move the document itself to other machines—as long as you will be accessing the document with the same version of Word.

Saving Files for Other Versions of Word and Other Word Processors

Formatted citations are Word "fields" specific to the version of Word that created them. If you open your document with a different version of Word, or use the *Save As* command to save a formatted copy of your paper in another format, you may lose the ability to format citations in that document.

If you plan to use your document with a different word processor, a different version of Microsoft Word, or on a different platform (such as DOS or Macintosh), you should either *Remove Field Codes* or *Unformat Citations* in the Word file before converting the document to the other file format.

♦ **Removing Field Codes:** When you remove field codes, you save a copy of the document and convert formatted fields to regular formatted text. The copy reflects final, formatted output, but you cannot reformat later. See "Removing Field Codes" on page 224 for more information.

♦ **Unformatting Citations:** Unformatted citations are regular text; however, they are temporary placeholders that do not reflect final output. (See "Unformatting Citations" on page 211.) You may be able to unformat citations, save to another file format, and use a different method to insert citations from these placeholders (such as the EndNote Add-in or Scan Document).

NOTE: Cite While You Write codes are directly compatible between Word 97 and Word 2000.

Chapter 11

**Citing References with
Microsoft Word 95 or
WordPerfect 7-9**

Chapter 11   Citing References with Word 95 or WordPerfect 7-9

Overview of the Citing & Formatting Processes

This chapter describes how to use the EndNote Add-in within Microsoft Word 95 or WordPerfect 7-9 to cite references and create a paper with properly formatted citations and bibliography. The Add-in gives you access to EndNote references and formatting commands directly from Word's and WordPerfect's *Tools* menus. You can create bibliographies and citations formatted according to any one of hundreds of styles.

Word Processor Compatibility

This chapter explains how to format references and create a bibliography with Microsoft Word 95 or WordPerfect 7-9.

To Cite While You Write with Microsoft Word 97 or 2000, please see Chapter 10.

If you use a different word processor, or an older version of Word or WordPerfect, please see Chapter 12.

To create a stand-alone bibliography that is not based on the citations in a paper, see "Creating an Independent Bibliography" in Chapter 13.

Basic Instructions

The basic steps required to cite a reference and generate a bibliography for Microsoft Word 95 and WordPerfect 7-9 are summarized below. These procedures are described in more detail later in this chapter.

To cite references and format a bibliography:

1. Start Microsoft Word or WordPerfect, and open the paper you are writing.
2. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.
3. Start EndNote by choosing *Go to EndNote* from Word's *Tools* menu or WordPerfect's *Tools>EndNote* menu.
4. Open your library if it is not open already, and select the reference(s) you want to cite.
5. Choose *Insert Citation(s)* from EndNote's *Add-in* menu.

EndNote inserts a temporary citation for the selected references into your paper. This temporary citation is later replaced with a formatted citation when EndNote "formats" your paper.

Continue citing references this way. When you are ready to generate the bibliography for the paper:

6. Choose *Format Bibliography* from your word processor's *Tools* menu.

In Microsoft Word:
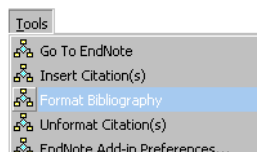
In WordPerfect:
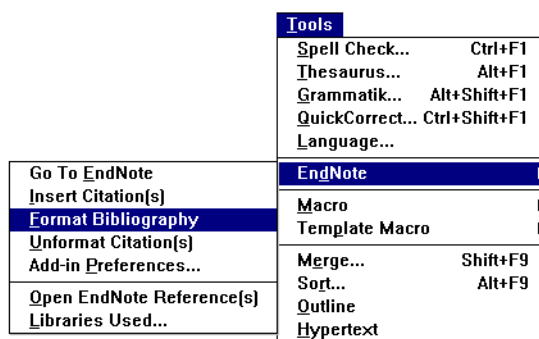
A dialog appears to confirm the formatting process. Verify that the right paper is about to be formatted and that the correct style is being used. Either may be changed, if necessary.
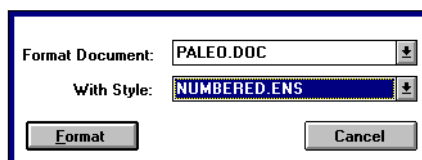
If EndNote's preference to "Confirm style and paper before formatting" is turned off, this dialog does not appear and the style selected in EndNote's *File> Output Styles* menu is used.

NOTE: The style menu in the dialog shows only the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list, click *Cancel*, switch to EndNote, and from the *File* menu choose *Output Styles>Open Style Manager*. Mark your favorite styles there, and start this step again. See "Choosing Bibliographic Styles" on page 234 for details about the Style Manager.

---

7. Click *Format*.

EndNote scans the paper for the temporary citations you inserted, replaces them with the appropriately formatted citation for the style you selected, and appends a bibliography to the end of your paper.

Now your paper is ready for publication!

If you need to make changes to the paper after formatting (such as adding or deleting citations in the text, or changing the bibliographic style), make the necessary changes, choose the *Format Bibliography* command, and let EndNote do the rest.

Introductory Information

Important Compatibility Issues

The Add-in takes advantage of technologies in your word processor which place hidden codes inside your formatted citations. These hidden codes give EndNote the ability to format, unformat, and re-format a single document from within your word processor. However, these codes are not supported by all versions of word processors.

Once you start using the EndNote Add-in to format bibliographies in Word or WordPerfect documents, you must take precautions before opening your files in other word processors or even another version of your word processor. If a *formatted* document is opened in another word processor or saved in an incompatible file format, the formatted EndNote citations and bibliography will lose their hidden codes. Once this occurs EndNote cannot reformat the document.

Always keep backups of your papers, and before you open a paper in a different word processor use the *Unformat Citation(s)* command from your word processor's *Tools* menu to unformat the paper.

If you must give a publisher an electronic copy of your final formatted document (on a diskette, for example), you should make a copy of your file and remove the hidden codes from the copy you submit. See "Converting Microsoft Word Documents" on page 249 for instructions.

If you have previously formatted papers *without* the Add-in, you might find it helpful to read "Differences Between Using Format Bibliography and Scan Paper/Format" on page 251.

Unformatted vs. Formatted Citations

A "citation" is the bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. Normally a citation consists of a bibliography number or the author and year in parentheses:

```
... of the species at hand[1].
```

```
... of the species at hand (Argus, 1991).
```

When you first copy an EndNote citation and paste it into your paper, it appears in EndNote's **temporary citation** format. This format consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end.

```
    {Author, Year #Record Number}.
```

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

The unformatted, temporary citation is just text (as opposed to being a special field or code in the paper). The *Format Bibliography* command converts these unformatted citations into formatted citations which contain hidden codes. The appearance of a formatted citation depends upon the EndNote bibliographic style selected just prior to formatting.

Unformatted Citation:

```
    {Alvarez, 1994 #8; Turnhouse, 1987 #4}
```

Formatted Citation:

Citations formatted in Author-Date style look like this:

```
    (Alvarez 1994; Turnhouse 1987)
```

Here is the same citation formatted in the Numbered style:

```
    [1,2]
```

To Unformat Citations or the Entire Paper

You can easily return a formatted citation to its original unformatted state by selecting the citation and choosing *Unformat Citation(s)* from your word processor's *Tools* menu. (If using WordPerfect, click on a citation and select *Unformat Citation(s)* from the resulting shortcut menu.) *Unformat Citation(s)* unformats only the selected citation(s). If no citation is selected, and the insertion point of your cursor is not in a

citation, the *Unformat Citation(s)* command unformats *all* of the citations in your document and deletes the bibliography.

NOTE: Although you do not need to unformat the citations in a paper before you reformat them, you *must* unformat individual citations before you edit them (see "Typing & Editing Citations in Your Paper" on page 239).

Definition of Add-in Commands

When the EndNote Add-in is installed, several EndNote commands appear in your word processor's *Tools* menu. (In WordPerfect, these commands appear on the *EndNote* sub-menu of the *Tools* menu.) When you choose an EndNote command from the *Tools* menu, the EndNote program starts (if not already running) and an *Add-in* menu appears in EndNote's menu bar, displaying some the same commands as the *Tools* menu.

♦ *Go To EndNote* This command brings EndNote to the front of your screen. It will launch the EndNote program, if it is not already running.

♦ *Insert Citation(s)* If one or more references are selected in your EndNote library, this command inserts them as a temporary citation at the location of the cursor in your word processing document.

♦ *Format Bibliography* This command formats (or reformats) 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.

♦ *Unformat Citation(s)* Use this command to unformat a citation before editing it, or to unformat the whole document before opening it in another word processor.

♦ *Add-in Preferences* See page 425 for details on the Preference settings for the Add-in.

♦ *Edit Cited References(s)* (in Word) or *Open EndNote Reference(s).* (in WordPerfect) This command automatically opens EndNote's reference windows for the currently selected citations in your paper. EndNote only opens up to 10 references at a time.

♦ *Libraries Used* Once a paper is formatted, you can use this command to find what library or libraries were used to format the paper.

Choosing Bibliographic Styles

The bibliographic style selected in the *Output Styles* submenu of the *File* menu (or the *Styles* menu in the toolbar) determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of all text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

Choose a style from the *Output Styles* submenu when you are ready to create a bibliography. You can always select a different style and reformat your document at any point.
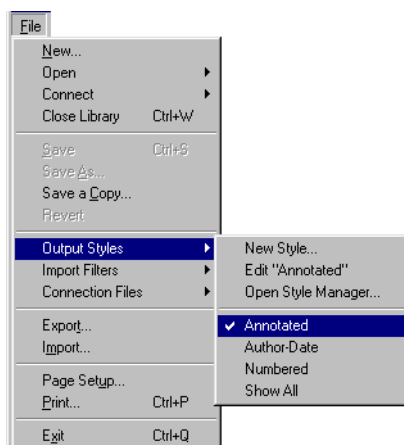
If you do not see the style that you want to use listed in the *Output Styles* submenu in the *File* menu, see "Adding Styles to the Output Styles List" on page 217.

Citing Sources As You Write

Although you can enter the EndNote temporary citations into a paper at any time, most writers find it convenient to enter the citations as they are writing the paper instead of waiting to insert them after the text is written.

Basic Instructions

To insert a temporary citation into a Word or WordPerfect document:

1. Open the document and position the cursor at the location where you would like the citation to go.

2. Select the desired reference(s) in your EndNote library.

3. Choose *Insert Citation(s)* from the *Add-in* menu in EndNote (or from your word processor's *Tools* menu).

The unformatted citations are inserted directly into your paper in the same font as the surrounding text.

Citations can also be copied from the EndNote Library window and pasted into the document (using the *Copy* and *Paste* commands in the *Edit* menus). You can also type the temporary citations if you prefer. See "Examples of Modified Citations" on page 209 to learn what types of citations EndNote recognizes.

NOTE: For shortcuts, see "Keyboard Shortcuts in Word" on page 426 or "Adding EndNote Add-in Buttons to WordPerfect's Toolbar" on page 427.

Using Drag-and-Drop

If you are using a word processor that supports drag-and-drop, you can drag selected citations from your EndNote library and drop them into your paper at the desired location for the citation. The end result is essentially the same as using the *Insert Citation(s)*. the temporary citation for the selected references will appear in your paper.

Inserting Multiple Citations

If you need multiple references in one in-text citation there are two ways to accomplish this.

To insert all of the citations together:

1. Hold down the CTRL key while clicking on the desired references in your library (or hold down the SHIFT key to select a continuous range of references).
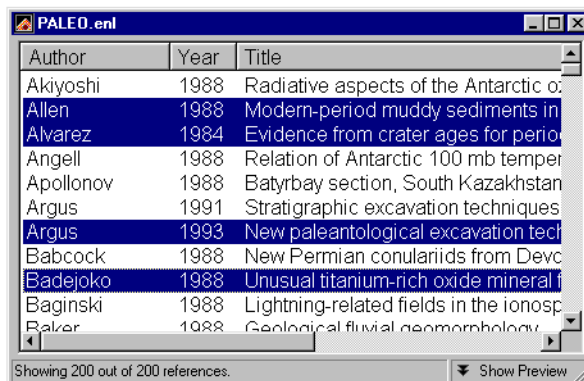
2. Choose *Insert Citation(s)* from the *Add-in* menu.

The citations are inserted together in one set of brackets. Once formatted, they appear in one multiple citation, sorted as your bibliographic style requires:

Unformatted: `{Hall, 1988 #77; Baker, 1988 #16}`

Formatted: `(Baker, 1988; Hall, 1988)`

The other option is to insert citations individually. The EndNote Add-in merges *adjacent* citations automatically during the formatting process. Citations do not merge, however, if any character, including spaces or punctuation, separates them.

Unformatted: `{Hall,1988 #77}{Baker, 1988 #16}`

Merged when Formatted: `(Baker, 1988; Hall, 1988)`

NOTE: If one of the citations in a multiple citation cannot be matched during formatting, the entire citation will remain unformatted. Notes cannot be inserted as part of a multiple citation.

Including Notes in the List of References

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

To identify text that should be included as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.

2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

`{NOTE: The authors would like to acknowledge...}`

The way that these notes are identified may be changed in the Temporary Citations preferences (see page 411). When the paper is formatted by EndNote using a numbered style, the text will be assigned a number and listed along with the references at the end of the paper.

Important Restrictions on the Use of the "NOTE" Feature

♦ This feature requires that a numbered style be used for the formatting; otherwise, the note will be left as it was entered in the body of the text.

♦ Symbols may not be used in the text of the note.

♦ Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker and the prefix marker and the multiple citation separator may be used.

♦ These types of notes can not be combined with regular temporary citations within the same set of brackets. They should be cited separately—each in its own set of brackets.

Inserting Citations into a Formatted Paper

If you need to add one or more citations to a paper that has already been formatted, there is no need to unformat it. Simply insert the new citations into the text (as described above) and choose the *Format Bibliography* command when you are ready to update the bibliography and citations.

In Microsoft Word: To add a new reference to an existing citation, insert the new reference *next to* (not within) the existing citation, like this:

```
(Hockney and Ellis, 1996){Argus, 1984 #1}
```

Adjacent citations are automatically merged when you reformat the paper. Formatted citations are sorted according to the style:

```
(Argus, 1984; Hockney and Ellis, 1996)
```

In WordPerfect: To add a new reference to an existing citation, you can either insert the citation next to the existing citation as shown above, or click on the citation to which you want to add a new reference and choose *Insert Citation(s)* from the resulting shortcut menu. In both cases, this type of insertion immediately merges the citations, leaving a single unformatted citation:

```
{Hockney and Ellis, 1996; Argus, 1984 #1}
```

Choose *Format Bibliography* to format the paper again and update the citations and bibliography.

NOTE: Do not insert a citation into the middle of a formatted citation. Insert it immediately before or after the existing citation.

Citing References in Footnotes and Endnotes

Once you have created a footnote or an endnote in your word processing document, you can cite references in the footnotes or endnotes just like you cite them in the body of the text.

To insert a citation in a footnote or endnote:

1. Create the footnote or endnote using the appropriate command in Word or WordPerfect. (EndNote does not actually create the footnote or endnote in the document, but it is used to insert and format the citations in the notes.)

2. Position the cursor in the footnote or endnote in your paper where you would like the citation(s) to appear.

3. In your EndNote library, select the reference(s) that you would like to cite.

4. Choose *Insert Citation(s)* from EndNote's *Add-in* menu or from the word processor's *Tools* menu.

The EndNote style that is selected when you choose *Format Bibliography* determines how the citations in the footnotes or endnotes will be formatted. EndNote can format these citations as brief in-text citations or like a complete references in the bibliography (shown below). It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See Chapter 15 for more information.
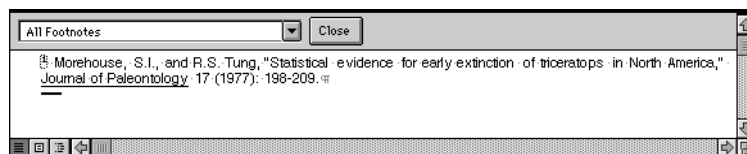
Citing Specific Page Numbers in Footnotes

Sometimes when citing full references in footnotes, you might want to include specific page numbers with the formatted reference. EndNote provides a way to do this where the page numbers that you type into a temporary citation can be manipulated by the EndNote style just like a field in your EndNote reference. This way, you can add specific pages to the temporary citation, and have the EndNote style include the wherever they need to be in the formatted citation. The style can also apply special pages formatting, like deciding whether to add "p." or "pp." before the page numbers, and how to list the range of pages.

To include specific page numbers to reference in a footnote, simply enter the page number preceded by "@" at the end of the temporary citation:

```
{Smith, 1999 #24 @145-6}
```

Everything that follows the @ symbol (up to the next space) is considered to be the "Cited Pages." The EndNote style used to format the paper must also be configured to use "Cited Pages" in the footnote template. Most EndNote styles that require a special format for citations in footnotes are configured this way.

When EndNote formats the citation, the cited pages ("145-6" in the example above) will be inserted in the correct location and formatted as appropriate to the style. See Chapter 15 for more information about EndNote's styles.

NOTE: If you enter page numbers at the end of the temporary citation without the "@" character, they will still appear in a formatted *in-text* citation, but EndNote will not be able to manipulate them by changing the page format or by moving them to a different position in the formatted citation. They will simply appear, as entered, at the end of the formatted in-text citation. This is a perfectly acceptable way to enter page numbers for in-text citations (or for footnotes formatted just like your in-text citations). See "Citation Suffixes" on page 207 to see how this works. This method will not work for citations in footnotes that are formatted as full bibliographic references or with a special footnote format. For those cases, you must use the @ symbol to identify the cited pages in the temporary citation.

Typing & Editing Citations in Your Paper

The rules described in this section govern how EndNote recognizes and interprets temporary citations. You only need to know these rules if you intend to type your own temporary citations or add or delete text from the citations.

Typing Citations into Your Paper

Manually entering citations is the same whether you are using the EndNote Add-in or Cite While You Write. See the following sections in Chapter 10, "Cite While You Write with Microsoft Word 97 or 2000."

♦ "Notes About Temporary Citations" on page 204

♦ "Components of a Temporary Citation" on page 204

♦ "Omitting Authors or Years from Citations" on page 206

♦ "Citation Prefixes" on page 207

- "Citation Suffixes" on page 207
- "Including Semicolons & Other Citation Delimiters in a Citation" on page 208
- "Examples of Modified Citations" on page 209

Deleting Citations

If after formatting a paper, you decide to delete one or more citations from the text and/or bibliography, you should delete the in-text citation from the paper, then re-format the paper by selecting the *Format Bibliography* command. EndNote automatically updates the bibliography to reflect any deletions or changes, so there is no need to manually delete references in the bibliography.

To Delete an Entire Citation

1. Using the mouse, select the in-text citation in the body of the paper.

2. Press the DELETE or BACKSPACE key if using Word, or select *Delete* from the resulting pop-up menu if using WordPerfect.

3. If necessary, choose *Format Bibliography* from the *Tools* menu to update the bibliography.

To Delete One Reference from a Multiple Citation

Suppose you want to delete just one reference from a multiple citation. For example, if you want to delete "Donnelly, et al. 1988" from this citation:

```
(Donnelly, et al. 1988; French, 1990)
```

1. Click the mouse anywhere within the citation.

2. If using Word, choose *Unformat Citation* from the *Tools* menu.If using WordPerfect, choose *Unformat Citation(s)* from the shortcut menu. Your citation should now look something like this:

```
{French, 1990 #67; Donnelly, 1988 #55}
```

3. Delete the Author, Year, and Record Number of the unwanted citation, as well as the extraneous semicolon:

```
{French, 1990 #67}
```

4. Choose *Format Bibliography* to update the citation and bibliography.

Editing Individual Citations

There may be a few cases where you want individual citations in your paper to differ from the standard format. For instance, you may want to remove the year or author from a citation, if either was mentioned in the context of the sentence, or you might want to add a page reference or comment before or after the citation.

For example, assume a formatted citation looks like this:

```
Hall's discovery (Hall, 1988)
```

You may want to change it to one of the following:

```
Hall's discovery (1988)
the 1988 discovery (Hall)
the discovery (Hall, 1988 p.4)
the discovery (see Hall, 1988)
```

Ideally these types of changes should be made to the unformatted citation *before* formatting your paper. If you have already formatted your paper, then select the citation and choose *Unformat Citation(s)* from the *Tools* menu (or from the pop-up menu if using WordPerfect). Edit the citation, then reformat the paper by choosing *Format Bibliography*.

When you edit a citation, do not to put any special Word or WordPerfect markers (such as page breaks or footnotes) within the citation delimiters.

Aside from the citation delimiters, any part of the temporary citation may be omitted, as long as enough information remains to uniquely identify the desired reference. Read on for details on how to correctly add text and modify citations so that they format properly. For a full list of examples, see "Examples of Modified Citations" on page 209.

Editing a Formatted Citation

If you absolutely must make a change to a citation in its formatted state you can do so, but this practice is highly discouraged because EndNote cannot keep track of any editing changes you make to it. In addition, it is almost always possible to make EndNote format your citations exactly to your specifications by editing the style, the EndNote reference, or the unformatted citation (see previous sections). If you must edit the citation after it is formatted, follow the instructions below.

In Word: Click in the citation. The citation may immediately become shaded (see "Microsoft Word's Field Shading" on

page 428). Even if the field is shaded, just edit the citation as if it were text. Make changes as necessary.

In WordPerfect: Click on the citation. A popup menu will appear. Choose *Edit as Normal Text* to disable the menu and allow you to edit the citation. If you click outside the citation, this will disable the *Edit as Normal Text* command, and the next time you click on the citation the pop-up menu will appear.

NOTE: If you reformat your paper after editing a citation, EndNote will present a warning that citations were changed. (See "Reformatting Papers" on page 242 for details.)

Tips for Creating Bibliographies

A quick overview of the formatting process is described here. The rest of this section documents tips for creating bibliographies using the EndNote Add-in.

Basic Instructions

When you have finished writing your paper, and all of the temporary EndNote citations have been inserted into the text, you are ready for EndNote to format the paper and generate a bibliography.

To format citations and generate a bibliography:

1. Open the paper in Microsoft Word or WordPerfect.

2. Open your library of references in EndNote.

3. Select a style from the *Output Styles* submenu of the *File* menu.

4. Choose *Format Bibliography* from EndNote's *Add-in* menu (or from your word processor's *Tools* menu).

When you choose *Format Bibliography*, EndNote prompts you to confirm the document and style to use (this is an EndNote preference you can turn off, see page 415). EndNote then generates a bibliography based on the citations in your paper and formats all of the in-text citations in the paper according to the selected style.

Reformatting Papers

Adding New Citations to Formatted Papers

If you add more citations to your paper after the formatting process, you can update the citations and the bibliography by

simply choosing the *Format Bibliography* command again. *You do not need to unformat your citations in order to reformat them.*

Reformatting with Different Styles

Similarly, if you would like to reformat your paper in a different style, just select a style from the *Output Styles* submenu in the *File* menu, and choose *Format Bibliography* again. Your citations and bibliography will be converted to the new bibliographic format. (See "Choosing Bibliographic Styles" on page 234 for more information about selecting styles.)

Formatting Master Documents

If you need to format a series of documents and put one cumulative bibliography at the end of the documents, you must first arrange the files using your word processor's Master Document and Subdocument configurations. When EndNote formats a Master Document, it also formats all of the Sub-Documents. The bibliography is appended to the end of the Master Document initially; however, you can move it to another location within the Master or Sub-Documents, and it will remain in that location even if you reformat the documents.

NOTE: If you use Microsoft Word choose Word's *Insert > File* command and choose the "Link" option to insert a document into the text, EndNote will *not* format the linked document when you format the main document. The text from the linked document will be skipped.

Editing Bibliographies

If possible, it is always best to make needed changes to your final bibliography by correcting the data in the EndNote library, editing the style you are using, or adding or deleting citations from your paper, depending on what kind of change is needed. Then after making the necessary changes, choose the *Format Bibliography* command and the corrections will be made automatically to the bibliography.

It is sometimes not possible for EndNote to format the bibliography exactly as needed, so you might have to manually edit the formatted bibliography. If you must do this, keep in mind that if you reformat a paper after editing the bibliography, EndNote will not be able to preserve your edits *and* update the bibliography. You will have to choose one or the other. When EndNote reformats a bibliography it actually deletes the existing one and puts a new one in its place. Therefore, if you need to edit your bibliography be aware of the following:

♦ If you add or delete text within the bibliography EndNote will present a warning dialog the next time you format the paper (see "Reformatting an Edited Bibliography" on page 457 for your options).

♦ If you want to add text *after* the bibliography, be sure to put it after the end of the formatted bibliography—outside of the bibliography field.

To Edit a Formatted Bibliography:

In Word: Click in the location of the bibliography where you'd like to make the change. The bibliography might become shaded, but you may still edit the bibliography as if it were text. (See "Microsoft Word's Field Shading" on page 428.)

In WordPerfect: As soon as you click on the bibliography, a popup menu appears. Choose *Edit as Normal Text* to disable the menu and allow you to edit the bibliography. If you click outside the bibliography, this disables the *Edit as Normal Text* command, and the next time you click on the bibliography the pop-up menu appears.

NOTE: See the Styles chapter (Chapter 15) for instructions about editing styles. If necessary, contact technical support for assistance.

Moving Bibliographies

The EndNote Add-in always adds the bibliography to the end of the document that it has formatted. If you move the bibliography to a different location in the document, EndNote keeps it there even if you reformat the paper.

Deleting Bibliographies

To delete just a bibliography, simply select the bibliography and delete it:

In Word: Drag the cursor across the very beginning of the bibliography. This selects the entire bibliography field. Press the BACKSPACE or DELETE key. You can also choose *Cut* from the *Edit* menu, if you want to paste the bibliography somewhere else.

In WordPerfect: Simply click on the bibliography and choose *Delete Bibliography* or *Cut* from the resulting pop-up menu. If you choose *Delete Bibliography*, then the bibliography is deleted. If you choose *Cut*, the bibliography is copied to the clipboard (so you can paste it in a different location).

NOTE: Another way to delete a bibliography is to unformat your paper. See page 248 for details.

Previewing Formatted References (or Styles)

The preview pane in the Library window displays how the currently selected reference will be formatted in the bibliography by the current style. This preview pane only shows one reference at a time.

To preview how multiple references will appear in a bibliography:

1. Select the references in the Library window.

2. Choose *Output Styles* from the *File* menu and select the style that you would like to use.

3. Choose *Copy Formatted* (CTRL+K) from the *Edit* menu.

4. Choose *Show Clipboard* from the *Edit* menu to view the references and assess the formatting results of a style.

You can leave the Clipboard open while you work to preview other styles. Text in the Clipboard is not editable, and is replaced whenever something else is copied.

Setting Margins, Spacing, and Fonts

When you choose *Format Bibliography*, the EndNote Add-in puts a bibliography at the end of your document in the same font and format as the "Normal" paragraph style in Word, or current document settings in WordPerfect. This simply means that the bibliography will have the same margins, spacing, font, and general appearance of the text in your paper.

NOTE: Microsoft Word users can create a Word paragraph style and name it "Bibliography". When formatting, EndNote will apply this style to the bibliography. See your Word manual for instructions on creating a paragraph style. This is not available in WordPerfect.

Formatting With Multiple Libraries

Although the EndNote can format papers using references from more than one library, we do not recommend that you use multiple libraries when writing a paper. Keeping all of your references together in one library simplifies the writing process because you know exactly where to find each reference, and you only need to have the one library open when formatting. Furthermore, documents written with multiple libraries cannot be formatted with the stand-alone EndNote application which can only format papers using one library.

If you are collaborating with other authors on a document, however, using multiple libraries for a paper may be a useful and necessary thing to do.

If citations have been inserted into one document from multiple libraries, all of the necessary libraries must be opened in order for the EndNote Add-in to format the paper correctly.

NOTE: Read about the "Merge Duplicates in Bibliography" preference in the "Preferences" chapter on page 415 if you plan to insert citations from more than one library into a paper.

Record Numbers

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

```
{Argus, 1991 #11}
```

The record number for a reference is also visible in the title bar of the Reference window.
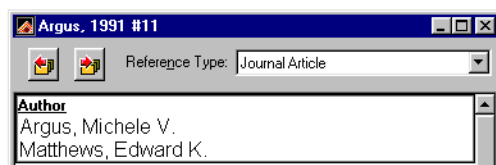
You may also see record numbers in the Library window by choosing Record Numbers as one of the display fields for the Library window. See "Display Fields" on page 417 for details.

Because these record numbers are so important, keep the following points in mind:

◆ We recommend that you do not rely on EndNote's record numbers as a means of filing or numbering your office reprints, because *you have no control over this number*, and it is subject to change under certain conditions (read on). Instead, enter your own unique number into the Label field, or any Custom field, and use that number for your reprints.

◆ EndNote automatically assigns a record number sequentially to each reference as it is added to a library.

◆ If the same reference appears in two different libraries, the record numbers will most likely be different.

◆ The record numbers are never reused or reassigned within a library. If you delete a reference, that number is never be used again in that library.

◆ You cannot modify or reassign record numbers.

Deleting References in the Library

If you delete a reference from your library after you have cited it in a paper, EndNote will not be able to find it when it tries to format that paper. If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Finding & Labeling References Used in a Paper

The Citation Matches window appears when you format a word processing document. It lists all of the citations found in a document, and displays the number of matching citations found in the currently open libraries.

The Matches window is visible in the EndNote program after the formatting is finished, or if the formatting process is canceled. (If there are problems during formatting, consult the Matches window and "Understanding Mismatched Citations" on page 459.)
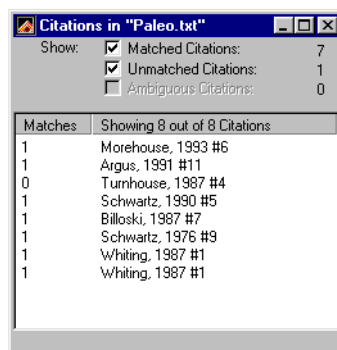
Double-click citations in the Matches window to find the matching references in your EndNote library. You can also select references in the Matches window and choose *Find Matches* from the *Paper* menu in EndNote to display the matching references in the Library window.

To locate all of the references in a library that were cited in a paper:

1. After formatting your paper, select all of the citations listed in the Matches window by choosing *Select All* from the *Edit* menu.

2. Choose *Find Matches* from the *Paper* menu.

The Library window will display the matching references.

To add a keyword to all of these references for your own filing purposes:

1. Choose *Change Text* from the *References* menu.

2. Choose *Keywords* (or any other field you would like to use from the field popup menu.

3. Enter the term or phrase you want to use to identify these references, and click *Change Text.*

Working on Different Computers

If you are working on a paper on different computers, be sure to keep a copy of your reference library on the same disk as your paper. That way, you will always access the same library when inserting citations. If you add references to a copy of the library at home and to a different version at work, the record numbers may not match, and EndNote will be unable to find references when it scans your paper.

Unformatting Your Paper

The *Unformat Citation(s)* command is normally used to unformat individual citations (see page 241), but it can also be used to return the entire document to its unformatted state. If no citations are selected in your paper, or alternatively, if the whole document is selected, *Unformat Citation(s)* unformats all of the citations in your document and deletes the bibliography.

If you plan to share your paper with someone who uses a different word processor, or another version of your word processor, you must unformat your paper, or else you will lose the hidden information in the citations which enables EndNote to reformat them.

To unformat your paper:

1. Make sure nothing is selected in the document, and that the cursor is not within a citation or the bibliography.

2. Choose *Unformat Citation(s)* from Word's *Tools* menu or from WordPerfect's *Tools>EndNote* menu.

You can tell when a paper is unformatted because all of the citations appear in the "temporary citation" format (such as "{Smith, 1999 #25}"), and there is no bibliography in the paper.

Unformatted papers can be used with any word processor, without any risk of losing the hidden codes that EndNote uses to keep track of the formatted citations. You can always open an unformatted paper in Word or WordPerfect and format it again.

Converting Microsoft Word Documents

Preparing a Paper for Formatting *Without* the Add-in

If you need to use the stand-alone EndNote program to format a paper written with the EndNote Add-in for Word, you must unformat all EndNote Add-in citations first.

1. Make sure nothing in the document is selected.

2. Choose *Unformat Citation(s)* from Word's *Tools* menu.

If just part of the paper is selected, the *Unformat Citation(s)* command unformats just that selection. If nothing or if everything is selected, it will unformat the entire document, and delete the bibliography.

Saving Word Files for Other Versions of Word

If you plan to work on a Word document using a different word processor, a different version of Microsoft Word, or a different (such as DOS or Macintosh) platforms, it is always best to *unformat* the citations in the Word file before converting the document to another file format. The unformatted citations are just regular text; however, the formatted citations are Word "fields" specific to the version of Word that created them.

♦ **From Word 6 to Word 95, 97, or 98 (Mac or Windows)**
No conversion is necessary.

♦ **From Word 98 to Word 6 (Macintosh):**
Be sure to get the latest copy of the Word 97-98 Import Converter for the Macintosh. This utility is used by Word 6 users to open documents created in Word 98. You can get this from Microsoft's Web site or the Technical Support page on the Niles Software Web site (www.niles.com). *Do not use the Save As… command to save Word 98 files as Word 6 files.*

♦ **From Word 98 (Macintosh) or Word 97 (Windows) to Word 95 or Word 6 (Windows):**
Be sure to get the latest copy of the Word97 Converter for Word 6.0/95. This utility is used by Word 6 or Word 95 users to open documents created in Word 98. You can get this from Microsoft's Web site or the Technical Support page on the EndNote web site (http://www.endnote.com). *Do not use the Save As command to save a Word document in an earlier format.*

NOTE: Do NOT use the *Save As* command to save a formatted copy of a Word 98 paper in any other format. You will lose the ability to format the EndNote citations in that document.

Giving A Publisher or Colleague a Copy of Your Final Formatted Paper

Many publishers allow you to submit an electronic copy of your paper on a diskette in addition to a printed copy. If your publisher uses a different word processor or an incompatible version of your word processor, then you must give them a copy of your paper with the hidden codes removed. EndNote will not be able to reformat or unformat your paper once the hidden codes are removed. This is why you must remove the codes *only* on a copy of your paper!

The only situation in which you would want to change formatted citations to text would be if you need to give someone a *final* copy of your *formatted* paper in electronic format (that is, on a disk or over a network). If you just want to print a copy of the paper for someone, you do not need to convert the fields to text.

If you decide to convert the formatted fields to text, you will not be able to unformat or reformat them again, so we urge you to do this only on a copy of the file. If, for some reason, you need to give someone a formatted copy and you need to continue working on the paper, give that person a copy of your paper, and keep working on the original document with the Add-in fields intact.

Microsoft Word: "Unlinking" Fields

In Word, removing the hidden codes involves "unlinking" the Add-in fields. Note that unlinking fields will unlink *all* fields in Word, including date and time stamps, cross references, table of contents, index, and other Word fields.

To change formatted citations to text:

1. **IMPORTANT:** Before you unlink field information, make a copy of your paper by choosing *Save As* from Word's *File* menu. Give the file a new name. Remember, this is the one that you will *not* be able to re-format with EndNote.

2. Select all the text in the document by choosing *Select All* from the *Edit* menu, and press CTRL+6 to run the *Unlink Fields* command.

You can add this command to a menu, using the *Customize* command from your *Tools* menu. See your Word manual for instructions.

WordPerfect: Removing Codes

To remove the hidden EndNote codes in WordPerfect, you must create a button in WordPerfect for the command "Remove Codes" as is documented in the section entitled "Adding EndNote Add-in Buttons to WordPerfect's Toolbar" on page 427. Once the button is created, click it to have EndNote save a copy of your paper without the hidden EndNote codes. *EndNote will not be able to reformat or unformat this new copy of your paper.*

Differences Between Using *Format Bibliography* and *Scan Paper/Format*

The EndNote Add-in, by definition, cannot run alone—it must run with Microsoft Word 95 or WordPerfect 7-9.

There are a few important differences between using the EndNote Add-in's *Format Bibliography* command and the *Scan Paper* and *Format* options of the EndNote program.

Formatting & Unformatting Papers

Unlike the EndNote program, the EndNote Add-in does not require that you keep an unformatted copy of your paper and a formatted copy. When you format a paper with the EndNote Add-in, your *original* paper is formatted, and it may also be reformatted or unformatted if necessary. Because you are always working on just one document, it is very important that you make a backup of your document.

Using the *Paper* Menu

The *Paper* menu in EndNote should generally not be used when using the Add-in except in one case which is explained below. Instead of using the *Scan Paper* and *Format* commands from the *Paper* menu (as you do in the EndNote program), choose *Format Bibliography* from EndNote's *Add-in* menu or your word processor's *Tools* menu. The *Format Bibliography* command combines the scanning and formatting processes into one step.

If, while formatting, EndNote encounters an ambiguous citation, it will alert you, and you may cancel formatting to correct it. At this point you can choose the *Find Matches* command from the *Paper* menu to find the ambiguous citations. See "Ambiguous Citations (Matches Greater than 1)" on page 459 for more information. See "Finding & Labeling References Used in a Paper" on page 247 for another way to use the *Find Matches* command.

Chapter 12

Citing References Without Cite While You Write or the Add-in

Chapter 12   Citing References Without CWYW or the Add-in

Formatting Citations & Bibliographies (Without Cite While You Write or the EndNote Add-in)

This chapter describes how to create formatted citations and bibliographies for your papers *without* using Cite While You Write or the EndNote Add-in.

Word Processor Compatibility

This chapter describes how to cite references and create bibliographies for the following types of documents:

♦ Microsoft Word 1-6 *(see Chapter 11 for Word 95, and Chapter 10 for Word 97 & 2000)*

♦ WordPerfect 5.0- 6.1 *(see Chapter 11 for WordPerfect 7-9)*

♦ RTF (Rich Text Format)

♦ HTML

♦ Plain Text documents

To format references and create a bibliography (Cite While You Write) with Microsoft Word 97 or 2000, please see Chapter 10.

To format references and create a bibliography with Microsoft Word95 or WordPerfect 7-9, please see Chapter 11 about the EndNote Add-in.

To create a stand-alone bibliography that is not based on the citations in a paper, see "Creating an Independent Bibliography" in Chapter 13.

For up-to-date compatibility information, contact ISI ResearchSoft.

Instructions

The basic steps required to cite references in a paper and "format" that paper using EndNote are covered here. More details about how to switch between programs and various tips for citing references are described in the sections following these basic instructions.

Citing references is a straight-forward process of copying temporary citations from EndNote and pasting them into your word processing document. While writing a paper in your word processor, you can have EndNote running in the background so that it's easy to switch between the two programs when you need to cite a source. Although you can enter the EndNote temporary citations into a paper at any time, most writers find it convenient

to enter the citations as they are writing the paper instead of waiting to insert them after the text is written.

To cite a reference in a paper:

1. Start your word processor and open the paper you are writing.

2. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.

   `...a commonly documented phenomena |.`

3. Start EndNote and open your library (if it is not already open). See "Switching Between EndNote and a Word Processor" on page 260 if you need help with this step.

4. Select the reference(s) in your EndNote library that you want to cite. Press the CTRL key while clicking on the references to select multiple references; press the SHIFT key to select a range of references.

5. Choose *Copy* (CTRL+C) from the *Edit* menu, then return to your word processor and *Paste* (CTRL+V) the temporary citation into the text of your document.

   OR

   Drag and drop the selected citations into your paper.

The pasted citation appears in EndNote's temporary format: first author's last name, year of publication, and record number, all enclosed in curly braces:

`{Morehouse, 1993 #6}`

If multiple references were selected, their citations appear together in one set of brackets in the order in which you selected them in the Library window.

`{Hall, 1988 #77; Baker, 1988 #16}`

This citation is *not* the final citation, but rather a temporary citation that will be formatted later. The number in the temporary citation is not a *bibliography number* but a unique *record number*. When you format this paper, EndNote builds a bibliography based on the temporary citations that it finds in the paper, and reformats them according to the selected style.

Continue in this manner as you write your paper. When you have finished adding citations:

6. Choose *Save* from your word processor's *File* menu.Then close your document by choosing *Close* from the *File* menu. You can leave your word processor running.

To generate the bibliography:

7. Return to EndNote. Choose *Scan Paper* from the *Paper* menu and select *Scan Paper* from the submenu. Navigate using the resulting dialog to locate and select the document you just saved, wherever you saved it. (The next time you choose *Scan Paper* you will see your recently used files listed in the submenu for easy access.)

8. Check the Matches window to be sure that EndNote was able to find matching references for all of the citations.

During the scanning process, EndNote locates temporary citations in the paper, and searches the library to find references that match each of the citations. When scanning is complete, EndNote displays the Matches window. The Matches window lists the citations found in the paper together with the number of matching references in the open libraries.

Numbers in the Matches column show how many references in your library match each citation. All citations should have only one match.
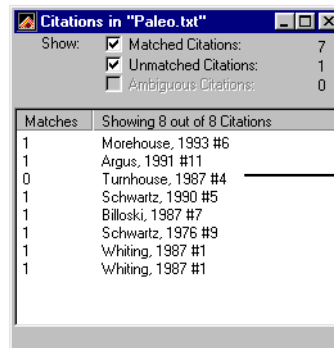
These citations were taken directly from a paper EndNote scanned.

The citations in the Matches window appear in the order they are cited in the paper. If a reference is cited more than once in a paper, it is listed more than once in this window; however the reference will appear only once in the bibliography.

Every citation listed in the Matches window should have a "1" next to it in the Matches column meaning that EndNote found exactly one reference in the library to match the citation in the paper. When all of the citations in the Matches window have a "1" next to them, then you are ready to go on to the next step of formatting a paper. If a "0" or a number greater than one appears in the Matches column, see "Correcting Mismatched Citations" on page 460.

9. Select a style from the *Output Styles* submenu of EndNote's *File* menu or from the styles menu in the toolbar.

These styles menus show only the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list choose *Output Styles>Open Style Manager* from EndNote's *File* menu. Mark your favorite styles there, and start this step again. See "Adding Styles to the Output Styles List" on page 217 for details.

10. Choose *Format* from EndNote's *Paper* menu to have EndNote create a copy of your paper complete with formatted citations and a bibliography.

11. EndNote prompts you to confirm the style that you want to use (see "Formatting" on page 415 if you would like to stop this dialog from appearing). You may also specify the starting bibliography number, if necessary (see "Specifying the Starting Number of a Bibliography" on page 266). Click *OK* after confirming that the correct style is selected.

12. You are then prompted to name and save the formatted copy of the paper.

You can change the name of the formatted document if necessary by typing a new name in the text box. You can also use the "Save in:" list at the top of the window to change the location where EndNote saves the file. By default EndNote saves the formatted file in the same location as the unformatted file.

IMPORTANT: *Never* save the formatted paper with the same name as the original unformatted document. You must have the unformatted document if you ever want to format the paper again.

While EndNote is formatting, the cursor changes to a wait cursor. When the formatting has finished, the cursor returns to an arrow and the Matches window remains open. Now that EndNote has generated a formatted copy of the paper, you can open that paper in your word processor.

13. Switch to your word processor using ALT+TAB (see page 260 if you need additional help with this step).

14. Choose *Open* from the word processor's *File* menu and select and open the formatted version of the paper. Remember that you want to open the file that has the name of the style appended to the file name.

In the formatted paper, EndNote has replaced the temporary citations with formatted citations and inserted a bibliography. The paper is ready to be printed and submitted!

Making Changes to the Paper

If you need to make changes to the paper (such as change a citation, add more text, or change the bibliographic style), you should edit the *original* unformatted document, and then format it again. EndNote will generate a new formatted copy of the paper. See "Reformatting a Paper" on page 264.

Tips on Citing Sources

Temporary vs. Formatted Citations

A "citation" is the bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. Normally a citation consists of a bibliography number or the author and year in parentheses:

```
... of the species at hand¹.
```

```
... of the species at hand (Argus, 1991).
```

When you first copy an EndNote citation and paste it into your paper, it appears in EndNote's **temporary citation** format. This format consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end.

```
{Author, Year #Record Number}
```

When EndNote formats this paper it replaces the temporary citations with **formatted citations**.

Temporary Citation: {Argus, 1991 #11}

Formatted Citation (in APA): (Argus & Matthews, 1991)

EndNote relies on the temporary citations to determine which references to include in the bibliography. During formatting, EndNote scans your word processing document for temporary citations, finds their matching references in the EndNote library, and creates a duplicate of your document complete with "formatted" in-text citations and a bibliography at the end. This new document is called your "formatted" paper.

NOTE: By default, citation delimiters are curly braces. Although it does no harm to have text other than citations within curly braces, the text used for citation delimiters can be changed. See page 463.

Switching Between EndNote and a Word Processor

With your EndNote library and word processing document both open, you can switch between the two files without closing either program.

To run both programs simultaneously in Windows.

1. Start EndNote by clicking the Windows *Start* button in the taskbar, then choose *Programs*, select *EndNote*, and pick *EndNote Program.* EndNote starts and prompts you to open your library. (To set a library to open automatically, see "Library Preferences" on page 408.)

2. You can start your word processor in a similar fashion by clicking the *Start* button, choosing *Program Files*, and selecting the option for your word processor.

3. Once you have EndNote and your word processor running, you can switch between the two programs by clicking the taskbar button for the program you wish to use.

You can also press ALT+TAB to switch between the programs. If you are running more than just EndNote and your word processor, keep the ALT key pressed, and press the TAB key repeatedly to cycle through all open programs. When you see the name of the program you want, release both keys.

Multiple References in One Citation

If you need multiple references in one in-text citation there are two ways to accomplish this. One option is to insert all of the citations together:

To insert multiple citations:

1. Hold down the CTRL key while clicking on the desired references in your library (or hold down the SHIFT key to select a continuous range of references).

```
PALEO.enl                                    _ □ ×
Author          Year    Title                         ▲
Akiyoshi        1988    Radiative aspects of the Antarctic o
Allen           1988    Modern-period muddy sediments in
Alvarez         1984    Evidence from crater ages for perio
Angell          1988    Relation of Antarctic 100 mb temper
Apollonov       1988    Batyrbay section, South Kazakhstan
Argus           1991    Stratigraphic excavation techniques
Argus           1993    New paleantological excavation tech
Babcock         1988    New Permian conulariids from Devo
Badejoko        1988    Unusual titanium-rich oxide mineral
Baginski        1988    Lightning-related fields in the ionosp
Baker           1988    Geological fluvial geomorphology    ▼
Showing 200 out of 200 references.              ▼ Show Preview
```

2. Choose *Copy* from the *Edit* menu.

3. Position the cursor in your word processing document where you want the citations to go, and choose *Paste* from the *Edit* menu.

The citations are inserted together in one set of brackets. Once formatted, they appear in one multiple citation, sorted as your bibliographic style requires:

Unformatted: `{Hall, 1988 #77; Baker, 1988 #16}`

Formatted: `(Baker, 1988; Hall, 1988)`

The other option is to add the citations to the paper individually. EndNote merges *adjacent* citations automatically during the formatting process. Citations do not merge, however, if any character, including spaces or punctuation, separates them.

Unformatted: `{Hall, 1988 #77}{Baker, 1988 #16}`

Merged when Formatted: `(Baker, 1988; Hall, 1988)`

NOTE: If one of the citations in a multiple citation cannot be matched during formatting, the entire citation will remain unformatted.

Citing References in Footnotes

Once you have created a footnote or an endnote in your word processing document, you can cite references in the footnotes or endnotes just like you cite them in the body of the text.

To cite references in footnotes:

1. In your EndNote library, select the reference(s) that you would like to cite and choose *Copy* from the *Edit* menu.

2. Create the footnote or endnote using the appropriate command in your word processor. (EndNote does not

actually create the footnote or endnote in the document, but it is used to insert and format the citations in the notes.)

3. Position the cursor in the footnote or endnote in your paper where you would like the citation(s) to appear and choose *Paste* from the *Edit* menu.

The EndNote style that is selected when you choose *Format Bibliography* determines how the citations in the footnotes or endnotes will be formatted. EndNote can format these citations as brief in-text citations or like the complete references in the bibliography (shown below). It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See Chapter 15 for more information.
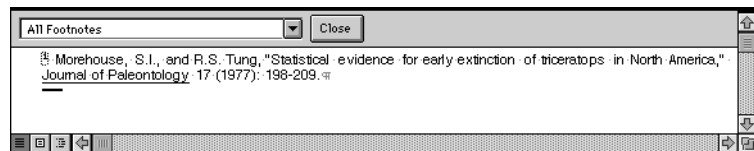
Related Sections

The following is a list of related sections in this manual that provide tips for working with the citations in your paper. Many of these sections are in Chapter 10 which describes how to Cite While You Write with Microsoft Word, or Chapter 11 which describes how to work with the EndNote Add-in for Microsoft Word and WordPerfect. These sections also apply to citing references in other word processors. Just remember to return to this chapter for the instructions about how to format and cite references.

Inserting Citations & Writing Your Papers with EndNote

♦ You may type your temporary citations by hand, as well as add text to or omit text from them, provided you follow the rules outlined under "Typing Citations into Your Paper" on page 203.

♦ "Omitting Authors or Years from Citations" on page 206 describes how to modify your temporary citations when you need to remove the author or the year from specific citations.

♦ If you commonly use curly braces in your writing, they might not be a good choice for the markers that are used to surround the EndNote temporary citations. In this case, you might want to consider using a different character for your

citation delimiters. See "Changing the Citation Delimiters" on page 463.

♦ If you might be collaborating with other EndNote users on a paper, or if your citations come from more than one library, see "Formatting With Multiple Libraries" on page 245.

♦ If you work at various places when writing your papers with EndNote, it's important to remember to keep your library and your paper together. See "Working on Different Computers" on page 248.

Formatting your Paper and Bibliography

♦ The EndNote record numbers serve an important role in matching the citations in your papers with references in your EndNote libraries. To learn more, see "Record Numbers" on page 246.

♦ If you would like to mark all of the references in your library that were used for a specific paper (for later retrieval or archiving purposes), see "Finding & Labeling References Used in a Paper" on page 247.

♦ If you run into any problems with citations in your paper not being correctly matched to references in your library (that is, citations appearing with numbers other than 1 in the Matches column of the Matches window), see "Understanding Mismatched Citations" on page 459.

Tips for Formatting Citations & Creating Bibliographies

About the Format Command

The *Format* command on the *Paper* menu is enabled only when:

♦ Your EndNote library is open,

♦ You have chosen *Scan Paper* and the Matches window is the active window,

♦ You have chosen a style from the *Styles* menu in the toolbar or the *Output Styles* submenu of the *File* menu.

Bibliographic Styles

The bibliographic style selected in the *Output Styles* submenu of the *File* menu (or the *Styles* menu in the toolbar) determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of all text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

Choose a style when you are ready to create a bibliography. You can always select a different style and reformat your unformatted (original) document at any point.

The EndNote Styles collection includes more than 300 styles, all of which can be modified to meet your specifications. You can also create completely new styles if necessary. Related sections in this manual:

♦ See "Adding Styles to the Output Styles List" on page 217 to learn more about the Styles Manager and how to get the styles you need to appear in EndNote's *Output Styles* menu.

♦ To learn about how the styles work, and how you can modify them, see Chapter 15.

♦ For help with choosing the right style for your paper, see "Previewing Formatted References (or Styles)" on page 245.

Reformatting a Paper

Since EndNote creates a *copy* of the paper during the formatting process, you can always re-format the original document, if necessary, to create a new document with the changes that you need.

Unformatted Paper   **Formatted Papers**
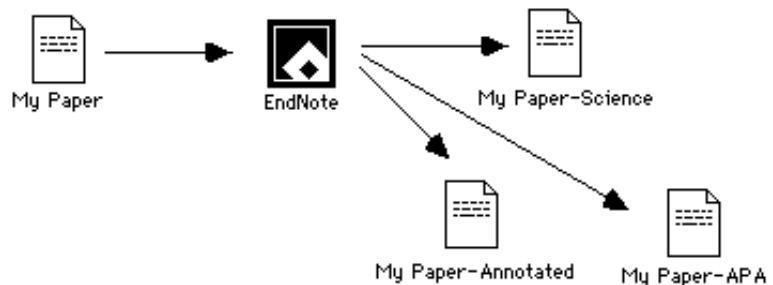
Reformatting with Different Styles

The appearance of both the in-text citations and the bibliography in the formatted paper is determined by the selected style. If you need to create a copy of your paper in a different style than what you did originally:

1. Choose a new style from the *Output Styles* submenu of the *File* menu. (See "Adding Styles to the Output Styles List" on page 217 if the style you need isn't listed in that menu.)

2. Choose *Scan Paper* from the *Paper* menu in EndNote and open the *original* unformatted copy of your paper (the one with the bracketed EndNote citations.

3.	Choose *Format* from the paper menu if the Matches window shows that all the citations in the paper are correctly matched.

4.	EndNote will prompt you to name and save the new formatted copy of the paper. Notice that the new style name is included by default as part of the new paper's name. That will help you distinguish between various copies of one paper (perhaps formatted to be submitted to different journals).

When you open the new formatted copy of your paper, you should see that your citations and bibliography use the new bibliographic format.

IMPORTANT: When you need to make changes in your paper, remember to work only with the *unformatted* copy of the paper (the one with the bracketed temporary citations), rather than the formatted copy that EndNote created.

Adding New Citations to Formatted Papers

If you have already formatted your paper, and you see that it needs to be edited by either adding or removing citations, you must return to the original, unformatted copy of the document (the one with EndNote's "temporary citations"). Open that document in your word processor. Add, modify or delete citations as necessary, and then save the paper. You may now format the paper (as described above) to create a new updated copy of it.

Creating One Bibliography From Several Papers

EndNote can format a series of separate word processing documents and put a cumulative bibliography at the end of the last one. This is useful if you are collaborating with other EndNote users and you have each written a separate part of the paper, or if you have separated a lengthy paper into different chapters. The temporary citations in each paper *must* be from the same EndNote library.

To create one bibliography from several papers:

1.	Choose *Scan Paper* from the *Paper* menu and open the first paper.

2.	The *Scan Paper* command changes to *Scan Next.* Choose *Scan Next* to open each of the subsequent papers in the correct order. Each paper's citations will be added to the list of citations in the Matches window.

3. When the last paper has been scanned, select a style from the *Styles* menu, and then choose *Format* from the *Paper* menu.

During the formatting process, EndNote makes a formatted copy of each paper and puts a cumulative bibliography at the end of the last paper. Only the last paper in the series will have a bibliography. By default, each formatted paper retains its original name with the style name incorporated into it, however you have the option to change the names.

Specifying the Starting Number of a Bibliography

When you choose *Scan Paper* and then *Format* from the *Paper* menu, EndNote prompts you to confirm the style that should be used to format the paper. It also gives you the option to change the starting number for your citations and bibliography.

If you have any reason for EndNote's numbering to being at a number other than "1" for the document that you are formatting, enter that number in this dialog. This setting is ignored if you are formatting the paper with a style that does not create numbered references in the bibliography.
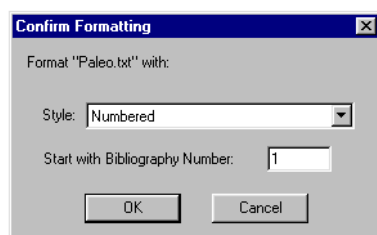
NOTE: If this dialog does not appear when you choose the *Format* command, it is probably because the preference to confirm the style has been turned off. See page 415 for more information.

Formatting HTML Documents

HTML (HyperText Markup Language) is the standard format for files posted on the World Wide Web. If you create a document in HTML format, EndNote can scan and format it just the same as any other file, except that all of the citation and reference information will be formatted using the appropriate HTML codes. See page 255 for more information about formatting papers.

Copying Formatted References

There may be times when you want to insert a fully formatted reference into the text or footnotes of your paper without having to format an entire document.

To insert a fully formatted reference:

1. Select a style from the *Styles* menu.

2. Select the reference(s) in the Library window.

3. Choose *Copy Formatted* from EndNote's *Edit* menu.

4. Switch to your word processing document, position the cursor in the text, and select *Paste* from the *Edit* menu.

If your word processor supports drag-and-drop, you may also drag the references and drop them on your paper with the CTRL key pressed. This produces the same results as using the *Copy Formatted* command.

Multiple references are sorted according to the rules of the selected style. Fonts and character styles are transferred if you are pasting into a program that interprets Rich Text Format (RTF) information on the Clipboard.

Rescanning the Paper

If there is a problem with your citation matches after choosing *Scan Paper*, leave the Matches window open and switch to your word processor to make the necessary changes. After saving your changes, close your document, switch back to EndNote and select *Rescan Paper* from the *Paper* menu.

EndNote then updates the information in the Matches window to reflect the recent changes made to the paper. If the paper was modified and saved since it was last scanned, EndNote prompts you to rescan the paper before formatting.

For more information about fixing mismatched citations, see "Understanding Mismatched Citations" on page 459.

Rechecking Citation Matches

If you add or change a reference in your library while the Matches window is open, choose *Recheck List* from the *Paper* menu to have those changes reflected in the Matches window and in the formatted paper.

For example, if you typed the citation {Geoffery, 1988} into your paper but forgot to enter the reference in the library, EndNote would list a "0" in the Matches window for the citation, because it found no matches for it. You can leave the Matches window open and then enter the Smith reference into your

library. Bring the Matches window forward and use the *Recheck List* command to recheck the library for matching references. This should change the "0" match to a "1."

For more information about troubleshooting mismatched citations, see "Understanding Mismatched Citations" on page 459.

Chapter 13

Creating an Independent Bibliography

Chapter 13   Creating an Independent Bibliography

Independent Bibliographies

There may be times when you want to create a bibliography without an associated paper. We call this an "independent bibliography" because EndNote does not generate the bibliography based on citations found in a paper—instead, the bibliography is generated independently of a paper.

Any one of the procedures described in this chapter can be used to create an independent bibliography. Each has its own advantages, so look for the option that best suits your needs:

♦ Use drag-and-drop to instantly transfer a bibliography to a word processing document

♦ Copy formatted references from a library and paste them into a word processing document

♦ Export references from a library

♦ Print references from EndNote

Styles Determine the Look of the Bibliography

The appearance of your independent bibliography depends entirely on which EndNote style is selected in the *Output Styles* submenu of the *File* menu (or the styles menu in the toolbar). The styles determine what information is included in the bibliography, how it is arranged, and what punctuation and text styles are used.

Select a style that meets your needs before exporting, printing or formatting references. If you don't see the style that you need in the *Output Styles* submenu of the *File* menu, choose *Open Style Manager* from the *Output Styles* submenu, and mark the styles that you need. Once the styles are marked as "favorites" in the Style Manager, they will show up in your styles menus. For more information, see "Adding Styles to the Output Styles List" on page 217. For information about modifying styles, see Chapter 15.

Using Drag-and-Drop to Create an Instant Bibliography

"Drag and drop" is a way of moving or copying selected text (or other items) by clicking on the text and dragging it to a new location. Simply release the mouse button when the cursor is over the destination, and the text will either be moved or copied to the new destination.

If your word processor supports drag-and-drop, you can drag a bibliography from an EndNote Library window directly into your paper.

To drag your bibliography:

1. Open your library and select the desired references.

2. Select the necessary style from the *Output Style* submenu of EndNote's *File* menu.

3. Hold down the CTRL key as you drag the references from the library and drop them directly onto a word processing document in the background.

This creates a fully formatted bibliography with the references formatted and sorted according to the selected style. The font used for the bibliography in this case is the "General Display Font." You can change this font by choosing *Preferences* from the *Edit* menu, selecting *Display Fonts*, and choosing a new font and size under the General Display Font heading. All text style information (such as bold and italic) is retained if you "drop" the bibliography into a program that recognizes RTF (Rich Text Format) text.

If your word processor does not support drag-and-drop, read about the *Copy Formatted* command below.

NOTE: Dragging with the CONTROL key pressed transfers the formatted references to the word processing document. If you do not hold down the CONTROL key, only the temporary citation is transferred. Use this later method to cite references in your paper.

Copy Formatted

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

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

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

1. Select the necessary style from the *Output Style* submenu of EndNote's *File* menu.

2. Open your EndNote library and select the desired references in the Library window.

3. Choose *Copy Formatted* (CTRL+K) from the *Edit* menu to copy the references to the Clipboard.

4. Open a document in your word processor, put the cursor where you would like the references to appear, and choose *Paste* (CTRL+V) from the word processor's *Edit* menu.

Exporting References

Exporting bibliographies from EndNote is easy and flexible. When you export from an EndNote library, EndNote creates a file of references formatted according to the chosen style.

Only Selected or Showing References Are Included

If any references in the Library window are selected, EndNote will export only those references. Conversely, if no references are selected, EndNote will export all of the references that are "showing."

♦ To export all of the references in the Library: choose *Show All* from the *References* menu, and make sure that either all of them are selected or nothing is selected.

♦ To export a subset of references, use the *Search, Hide Selected*, or *Show Selected* commands to show the subset of references you want to include. Once you have the correct subset of references showing, be sure that either they are all selected or that none of them are selected (use the *Select All* and *Unselect All* commands in the *Edit* menu)

♦ You can also export only the selected references. To select multiple references, hold down the CTRL key, SHIFT-click to select a range of references, or use the *Select All* command to select everything in the Library window. By default, when you choose the *Export* command, only the selected references will be exported.

Supported Formats

Use the *Export* command to create a free-standing bibliography in any of the following formats:

♦ **RTF (Rich Text Format)**
The RTF export is an ideal way to create a free-standing

bibliography that can be edited or printed using a word processor. This format can be opened by all popular word processors and preserves font and text style information.

♦ **Text Only**
The *Text Only* export option is suitable for draft purposes or exporting references to be imported into another database.

♦ **HTML**
Documents exported in HTML (HyperText Markup Language), provide an easy way to post reference lists on the World Wide Web.

Using the *Export* Command

To export a bibliography from EndNote:

1. Open the library from which you will export and show or select the references you want to export. See "Only Selected or Showing References Are Included" on page 273.

2. Sort the references if necessary, using the *Sort Library* command.

   References are exported in the order in which they are listed in the Library window. The sort order specified by the bibliographic style is not used. (Selected references are unselected during the sort. If you had previously selected specific references to export, use the *Show Selected* command in the *References* menu before sorting.)

3. Choose a style from the *Output Styles* submenu in EndNote's *File* menu (or the style menu in the toolbar).

4. Choose *Export* from EndNote's *File* menu.

5. Select the type of file to be exported from the "Save File as Type" list at the bottom of the dialog.

6. Enter a name for the exported file and use the "Save in:" list to specify where it should be saved. Click *Save* . (It is best to keep the assigned file extensions as part of the exported file name.)
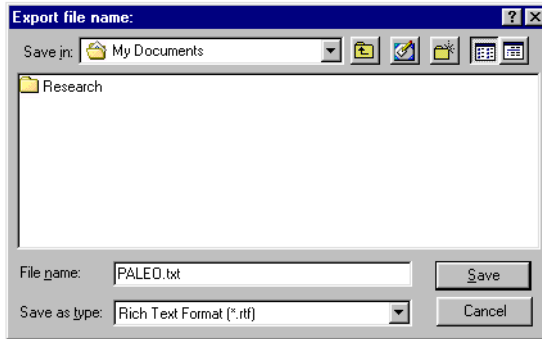
7. Open the exported file in a word processor to edit or print it. At this point, the file is just like any other text document. You can change the font, margins, line spacing, or other page layout features if necessary. (If you use the *Open* command in your word processor, make sure that the open file dialog is set to show files with the correct extension.)

   If you exported the references in HTML format, your exported reference list is ready to be posted directly to your Web site.

Printing References

Use the *Print* command (CTRL+P) in the *File* menu to print references directly from EndNote. This command is intended for use as a quick way to put your references on paper—no special page layout options are provided. Typical uses might include printing a list of references to take to the library with you, printing your notes, or generating a complete printout of the references in an EndNote library.

Important Points

In addition to the selected style, the appearance of the printed references is determined by the following items:

♦ Each printed page has 1-inch margins, left-justified text, and a header that displays the library name in the upper left corner and the page number in the upper right corner. There are no options to customize the margins, headers or footers of the print-outs. Use one of the other options for creating an independent bibliography if you need to modify these aspects of your printout.

♦ The font and size of the printed references are determined by the General Display Font, if that font is a True Type font; otherwise a font substitution will be made. Choose

Preferences from the *Edit* menu, and click the *Display Fonts* option to change the font and size if necessary. The double "T" to the left of the font name indicates a True Type font.

♦ Choose *Page Setup* from the *File* menu to specify other printing options including the paper size and page orientation. Page setup options vary depending on the printer used.

NOTE: The *Print* command is available only when the active window is a Library window.

Printing Instructions

To print directly from EndNote:

1. Make sure that all of the references you want to print are either selected or showing in the Library window.

2. Choose a style from the *Output Styles* submenu in EndNote's *File* menu (or the style menu in the toolbar).

3. Use the *Sort Library* command in the *References* menu to sort the Library if necessary.

   References are printed in the order in which they are listed in the Library window. When printing only selected references, the references are printed in the order in which they were selected. The *Sort Library* command unselects any selected references so use the *Show Selected* command if necessary before sorting to retain the subset of references you selected.

4. Choose *Print* (CTRL+P) from the *File* menu.

   In the print dialog, specify the number of copies and the range of pages to print. By default, EndNote prints only the selected references. To print all the references showing in the Library window, change the print range option to *All*.

5. Click *Print* to print the references.

Including Notes, Abstracts, & Other Information in a Reference List

Most of the styles included with EndNote produce standard bibliographies without including additional information such as notes or abstracts. Two of EndNotes standard styles are the Annotated style and the Show All style. The Annotated style includes the Abstract field after each reference, and the Show All

style lists all of the field names and the information found in those fields for each reference.

See Chapter 15 for detailed information about editing and creating styles. What follows here are two examples of common ways you might want to edit styles for your print-outs or for stand-alone bibliographies.

Creating Annotated Bibliographies

To create a bibliography that includes abstracts, you can use the Annotated style included with EndNote. The Annotated style is based on the Author-Date style, and creates an alphabetical listing of the references (by author), with the abstract appended to each reference. You can modify any other style to include the Notes or Abstract field as well.

For this example, we modify the Numbered style to include the Abstract field.

1. From the *File* menu choose *Output Styles* and select *Open Style Manager*.

2. Choose a style from the list in the Style Manager window, and click the *Edit* button. The Style window opens.

3. Choose *Layout* from the options under the *Bibliography* heading and click in the text box under the "End each reference with" heading. Text or fields inserted into this section appear at the end of each reference in the bibliography.
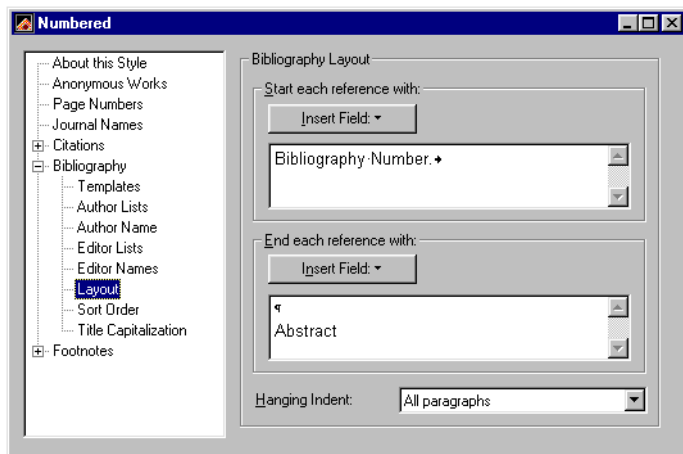
4. To insert the abstracts on a new line after each reference: choose *¶ End of Paragraph* from the *Insert Field* list, and then choose *Abstract* from the same list.

5. Choose *Save As* from the *File* menu and give the style a new name, but keep the ".ens" extension.

This annotated version of the style will appear in the *Output Styles* submenu of the *File* menu (and in the styles menu in the Main toolbar). If you format a paper, print, or export references using this style, the abstracts will be included in the bibliography.

Printing Only the Notes

To print only the notes for each reference, create a new style that includes only the Notes field.

To create a style that prints only notes:

1. From the *File* menu choose *Output Styles* and select *New Style*.

2. Click on the *Templates* panel under the *Bibliography* heading.

3. Click in the "Generic" template and choose *Notes* from the *Insert Field* menu. Press the ENTER key to add a blank line after the notes for each reference.

4. Choose *Save As* from the *File* menu. Name and save the style. You should now see this new style in the *Output Styles* submenu of the *File* menu.

4. Close the style by clicking in the close box.

Make sure you have that style selected whenever you want to print or export only the Notes from your references. This style can also be useful for previewing just the notes in the preview pane of the Library window.

Chapter 14

Customizing Reference Types

Chapter 14　　Customizing Reference Types

Introduction

What is a Reference Type?

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

In addition to an all-encompassing "Generic" reference type, EndNote has three unused reference types and 22 pre-defined reference types: Journal Article, Book, Book Section, Manuscript, Edited Book, Magazine Article, Newspaper Article, Conference Proceedings, Thesis, Report, Personal Communication, Computer Program, Electronic Source, Audiovisual Material, Film or Broadcast, Artwork, Map, Patent, Hearing, Bill, Statute, and Case.

Important Points About Reference Types

♦ You can assign a particular reference type to each reference entered into your library.

♦ The Reference Types table, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.

♦ The Reference Types table allows up to 26 different types of references, each capable of supporting up to 38 fields.

♦ Of the 26 reference types, all but the Generic type can be modified.

♦ Use the Reference Types table to add, delete, or rename fields. You can also add or remove complete reference types.

♦ The layout of the Generic reference type should be used as a guide when modifying or creating reference types. *Rows reserved for Authors should only be used for names.*

♦ Changes made to the Reference Types table are stored in the Windows system registry. They apply to all libraries opened on that computer.

♦ If you move your library to a different computer, your references will follow the layout of the Reference Types table on that computer.

♦ *Do not enter reference data into the Reference Types table.* This table is designed to store just the names of the reference fields.

Reference Types & Data Entry

The chosen reference type specifies which fields appear in the Reference window. For instance, an EndNote journal article reference includes the fields "Journal," "Volume," and "Issue," while a book reference includes fields such as "Publisher" and "City." The Reference window only displays the fields that are relevant to the chosen reference type.
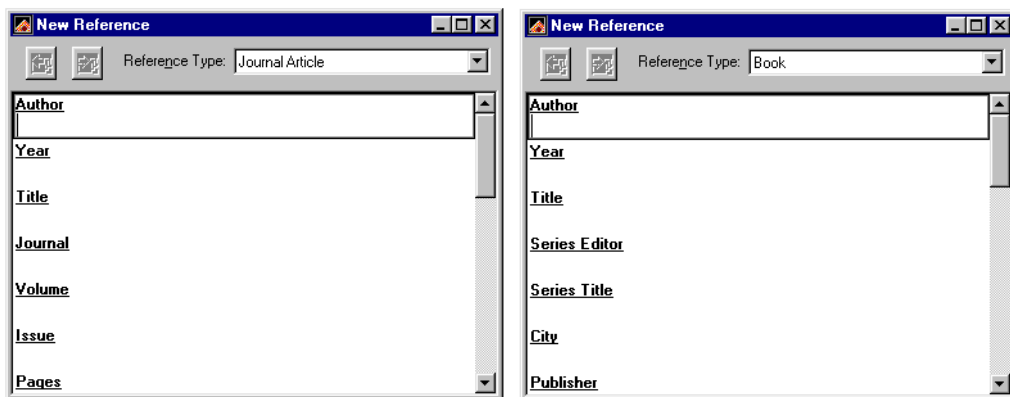
It is best to select the reference type before entering the bibliographic information in a reference. However, you can change the reference type of a reference at any time using the *Reference Type* list at the top of the Reference window.
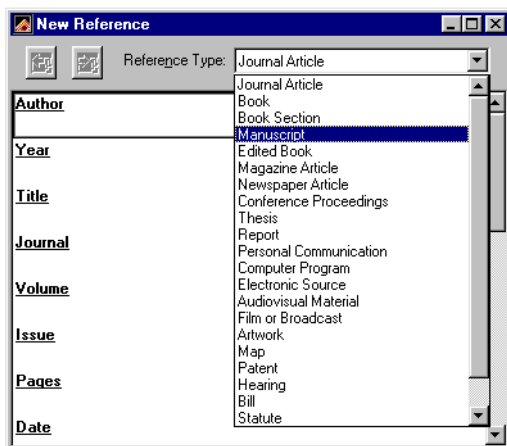
Relationship Between Reference Types and Styles, Filters, and Connections

Styles, filters, and connection files can include templates for all of the different reference types. This enables various types of references to be formatted differently in a bibliography or imported differently, as necessary.

The reference types and fields available to you when editing a style, filter, or connection file depend on how the reference types are configured in the Reference Types table. These files update automatically to reflect changes made in the Reference Types table (such as changing the name of a field).

The Reference Types Table

The Reference Types table displays all available reference types and the fields that each reference type contains. Use the Reference Types table to add, remove, or rename fields—or to add a completely new reference type.

To access the Reference Types table:

1. Choose *Preferences* from the *Edit* menu.
2. Click the *Reference Types* option in the list of preferences.
3. Click the *Modify Reference Types* button and the Reference Types table will open.

NOTE: The *Modify Reference Types* command is enabled only when all Style, Filter, Connection, and Reference windows are closed.

Edit Reference Types

Generic	Journal Article	Book	Book Section
Author	Author	Author	Author
Year	Year	Year	Year
Title	Title	Title	Title
Secondary Author		Series Editor	Editor
Secondary Title	Journal	Series Title	Book Title
Place Published		City	City
Publisher		Publisher	Publisher
Volume	Volume	Volume	Volume
Number of Volumes		Number of Volumes	Number of Volumes
Number	Issue		
Pages	Pages	Number of Pages	Pages

[OK] [Cancel]

Each column in the table represents a different type of reference. The rows correspond to the 38 possible fields that each reference type can contain.

The first column of the Reference Types table is reserved for the **Generic** reference type which lists all of the available fields. The remaining columns in the Reference Types table represent the 25 other reference types. Each cell in a column represents a field that appears in the reference. The name of the fields should correspond to their Generic field names at the start of the row.

The Generic column is the complete set of fields that can be included in any type of reference—no fields can be added to this list, nor can the names of the Generic fields be changed. As described below, the Generic reference type serves as a model for constructing all other reference types.

Navigating in the Reference Types Dialog

♦   Use the horizontal scroll bar to view additional columns of references types; use the vertical scroll bar to see the other fields available for each reference type.

♦   The UP or DOWN ARROW keys select the previous or next field, respectively, within the same reference type.

♦   The TAB key can be used to select the cell to the right of the current selection; SHIFT+TAB moves to the left.

♦   Pressing ENTER closes the dialog. Press the ESC key or click *Cancel* to exit from the Reference Types table without saving any changes.

The Generic Type

When entering references into your library, use the Generic type only for references that do not fit any of the other reference types. The more important function of the Generic reference type is to set up a guide for the other reference types to follow.

The Generic field names are used throughout the EndNote program (for example, in the Sort Library and Search dialogs) to refer to a similar category of fields that can be found in the different reference types. When you choose a Generic field name in any of these dialogs, it refers to all fields in that row of the Reference Types table. For example, if you use the *Search* command to search the Author field, EndNote searches all fields that appear in the Generic "Author" row of the Reference Types table, including fields such as "Artist," "Reporter," and "Cartographer."

As a result, when editing the Reference Types table it is important that you keep similar fields across the reference types in the same row, as defined by the Generic field names at the start of the row. Each reference type can call these fields by a different name; however, the content of the fields should be similar.

Using the Generic Type in Styles

Although the Generic reference type is rarely used for data entry, it plays an important role in formatting bibliographies. In addition to formatting Generic references, the Generic template in a style is used to format any reference types that are not specifically defined in the style. Consequently, every bibliographic style should contain a Generic template so that all references get formatted when EndNote creates a bibliography.

Special Fields

Each of the 38 different EndNote fields is capable of storing up to about eight pages of text (32,000 characters) with a total limit on any one record of 64,000 characters. Few restrictions are placed on the type of text that can be entered. However, there are a few fields that are reserved for specific functions.

Author Fields

The Author, Secondary Author, Tertiary Author, and Subsidiary Author rows in the Reference Types table are specially configured to handle author names, and should not be used for any data other than names.

When EndNote creates a bibliography, the information in these fields is formatted according to the specifications of the selected style's *Author List* and *Editor List* settings. (The *Author List* is used for the Author field; *Editor List* is used for Secondary Author, Tertiary Author, and Subsidiary Author fields.) If you put text other than personal names in any of these fields, EndNote will still try to interpret it and format it as a person's name.

The Library window displays the last name of the first author that it finds in the Author field. That name is also used in the temporary citations inserted into word processing documents.

NOTE: If you have a corporate author name in an Author field, put a comma after the name so that EndNote does not interpret it as a first and last name. For example, Acme Corporation should be entered as "Acme Corporation,".

Title Fields

The three fields that the Generic type uses for titles—Title, Secondary Title, and Tertiary Title—are usually found under different names in other reference types. For example, a section of a book which is part of a series will use all three title fields: the chapter title would belong in the main Title field, the book title corresponds to the Secondary Title field, and the series title corresponds to the Tertiary Title field.

The Generic Secondary Title and Alternate Title fields map to the Journal and Alternate Journal fields, respectively. These two fields in the Journal Article reference type are the only ones that can be used with the Journals term list to modify the journal names in formatted bibliographies (see page 183).

Pages Field

The fields in the row reserved for page numbers are the only ones that work with the *Page Numbers* option in the styles. This feature lets you specify how EndNote should format the page numbers in the bibliography (first page only or a full or abbreviated range of pages). Similarly, any field in the Pages row of the Reference Types table can take advantage of a special formatting character in the styles: the caret (^). This character allows you to pick a singular and plural form of a term to precede or follow the pages in a bibliography, for example "p. 25" and "pp. 32-45". If you enter page numbers in any other part of the reference, they cannot be used with these features.

URL Field

When a reference is selected and *Open Link* is chosen, EndNote checks the URL field for a URL. No other fields are checked. See "Linking References to Files & Web Sites" on page 164.

Customizing the Reference Types

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

Do not try to use the Reference Types table to rearrange information within your references. For example, if you delete the "Journal" field and retype "Journal" elsewhere in the column for Journal Articles, you are simply telling EndNote to close the original "Journal" field and display a new field called "Journal"

in another location—this does not move your data from the original "Journal" field to the new one. Any references that had data in the original "Journal" field will still show that information, but the field will have its "Generic" name of "Secondary Title." The new "Journal" field will remain empty.

Adding, Deleting, & Renaming Fields

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

NOTE: Be sure to read the previous section about "Special Fields" on page 285 before changing any fields.

To rename a field:

1. Choose *Preferences* from the *Edit* menu, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types table.

2. Using the horizontal scroll bar, browse the column headings to find the reference type that you want to change.

3. Within the column for that reference type, find the field name that you want to change, click on it, and type a new name for the field to replace the current name.

4. Click *OK* to return to the main Preferences window for Reference Types.

5. Click *OK* to save your changes.

Styles, filters, and connection files update automatically to use the new name.

To add a field to a reference type:

1. Choose *Preferences* from the *Edit* menu, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types table.

2. Find the column for the reference type you want to modify.

3. Look at the field names listed in the Generic column and find the one with the most similar meaning to the field that you want to add. Make sure that the corresponding cell is blank for the reference type that you are modifying. If it is not blank, then you should use another field.

4. Click in the blank cell and type the name for the new field.

5. Click *OK* to return to the main Preferences window for Reference Types.

6. Click *OK* to save your changes.

To delete a field from a reference type:

1. Choose *Preferences* from the *Edit* menu, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types table.

2. Find the column for the reference type where the field appears. Find the name of the field you want to delete and select it.

3. Press the DELETE or BACKSPACE key to clear that field name.

4. Click *OK* to return to the main Preferences window for Reference Types.

5. Click *OK* to save your changes.

The deleted field no longer appears in any references using that reference type. However, if there was any information in the deleted field, it still appears in the reference, but the field is displayed with its Generic name. For example, suppose you remove the Editor field from the Book reference type. Thereafter, when you add new book references to your library, there will be no available field for entering an editor. However, if you edit an old book reference, one in which you had entered an editor's name, the name will be displayed in the field titled Secondary Author. It is the same Editor field that was used originally, however it is now displayed with its Generic name.

Data in a field is not deleted by deleting a field from a reference type format. To remove all text from a field, use the "Clear Field" option in the *Change Field* command. You can also move data from one field to another using the *Move Field* command in the *References* menu.

Adding & Deleting Reference Types

There are three Unused columns in the Reference Types table where a new type of reference can be added. If that column is filled, you can overwrite other reference types that you don't need in order to create new reference types that you will use. For example, if your subject area never involves art, then you will probably have no use for the Artwork reference type; therefore you could replace it with another, more useful reference type.

To add a new reference type:

1. Choose *Preferences* from the *Edit* menu, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types table.

2. Scroll across to the far right of the Reference Types table and select one of the "Unused" column headings. If all of the "Unused" columns have been taken, click on the column heading for a reference type that you are willing to overwrite.

Generic	Case	Unused	Unused 2
Author			
Year	Year		
Title	Case Name		
Secondary Author			
Secondary Title	Reporter		
Place Published			
Publisher	Court		
Volume	Reporter Volume		
Number of Volumes			
Number			
Pages	First Page		

3. Type a name for that new reference type into the column heading.

4. Continue down the column for that reference type, adding new fields as necessary. (Delete or rename unwanted fields if you are overwriting another reference type.) Remember to match the meaning of the fields you add with the Generic row headings. It is often helpful to use the other reference types as guides.

5. Click *OK* after you have added all of the necessary fields, and you will return to the main Preferences window for Reference Types.

6. Click *OK* to save your changes.

You can now use this new reference type when entering references. You should also edit your styles so that they correctly reflect the type of format required for this new reference type. If you had overwritten an existing reference type, any references

that used the old reference type will change to use the new reference type.

NOTE: If you ever plan to use journal articles in your library, do not overwrite the Journal Article reference type. That first reference type column is the only one for which the Journal Abbreviation replacements can be made via the Journals Term List.

To hide an unwanted reference type:

1. Choose *Preferences* from the *Edit* menu, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types table.

2. Add a period before a reference type's name (the column heading) to have EndNote remove that option from the *Reference Type* menu in the Reference windows and elsewhere. The format, however, remains in the table if you later wish to restore it by removing the period.

   For example, if you were hiding the Map reference type, the column heading should be ".Map".

3. Click *OK* to return to the main Preferences window for Reference Types.

4. Click *OK* to save your changes.

Where Are These Changes Saved?

Your reference type settings are stored in the Windows Registry.

If you modify your reference types and later move your library to another computer, you should also modify the reference types on the other computer.

The Windows Registry also stores information about other EndNote preferences.

Table of Predefined Reference Types

The table presented on the following pages shows which fields are used in each of the different reference types and what the fields are called.

Fields with special functions are shaded. Descriptions of the unique qualities of these fields are provided on page 285.

Generic	Journal Article	Book	Book Section	Manuscript
Author	Author	Author	Author	Author
Year	Year	Year	Year	Year
Title	Title	Title	Title	Title
Secondary Author		Series Editor	Editor	
Secondary Title	Journal	Series Title	Book Title	Collection Title
Place Published		City	City	City
Publisher		Publisher	Publisher	
Volume	Volume	Volume	Volume	
Number of Volumes		Number of Volumes	Number of Volumes	
Number	Issue			Number
Pages	Pages	Number of Pages	Pages	Pages
Section				
Tertiary Author			Series Editor	
Tertiary Title			Series Title	
Edition		Edition	Edition	
Date	Date			Date
Type of Work				Type of Work
Subsidiary Author		Translator	Translator	
Short Title	Short Title	Short Title	Short Title	Short Title
Alternate Title	Alternate Journal			
ISBN/ISSN		ISBN		
Original Publication	Original Publication	Original Publication	Original Publication	
Reprint Edition	Reprint Edition	Reprint Edition	Reprint Edition	
Reviewed Item	Reviewed Item		Reviewed Item	
Custom 1				
Custom 2				
Custom 3				
Custom 4				
Custom 5				
Custom 6				
Accession Number	Accession Number	Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number	Call Number	Call Number
Label	Label	Label	Label	Label
Keywords	Keywords	Keywords	Keywords	Keywords
Abstract	Abstract	Abstract	Abstract	Abstract
Notes	Notes	Notes	Notes	Notes
URL	URL	URL	URL	URL
Author Address	Author Address	Author Address	Author Address	Author Address

Special functions of shaded fields are described on page 285.

Edited Book	Magazine Article	Newspaper Article	Conference Proceedings	Thesis
Editor	Author	Reporter	Author	Author
Year	Year	Year	Year of Conference	Year
Title	Title	Title	Title	Title
Series Editor			Editor	
Series Title	Magazine	Newspaper	Conference Name	Academic Department
City		City	Conference Location	City
Publisher			Publisher	University
Volume	Volume		Volume	
Number of Volumes			Number of Volumes	
	Issue Number			
Number of Pages	Pages	Pages	Pages	Number of Pages
		Section		
			Series Editor	
			Series Title	
Edition		Edition	Edition	
	Date	Issue Date	Date	
		Type of Article		Thesis Type
Short Title	Short Title	Short Title	Short Title	Short Title
ISBN			ISBN	
Original Publication	Original Publication	Original Publication		
Reprint Edition	Reprint Edition	Reprint Edition		
	Reviewed Item	Reviewed Item		
Accession Number	Accession Number	Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number	Call Number	Call Number
Label	Label	Label	Label	Label
Keywords	Keywords	Keywords	Keywords	Keywords
Abstract	Abstract	Abstract	Abstract	Abstract
Notes	Notes	Notes	Notes	Notes
URL	URL	URL	URL	URL
Author Address	Author Address	Author Address	Author Address	Author Address

Special functions of shaded fields are described on page 285.

Generic	Report	Personal Communication	Computer Program	Electronic Source
Author	Author	Author	Programmer	Author
Year	Year	Year	Year	Year
Title	Title	Title	Title	Title
Secondary Author		Recipient		
Secondary Title				
Place Published	City	City	City	
Publisher	Institution	Publisher	Publisher	Producer
Volume				Access Year
Number of Volumes				
Number				Access Date
Pages	Pages			
Section				
Tertiary Author				
Tertiary Title				
Edition			Version	Edition
Date	Date	Date		Last Update Date
Type of Work	Type	Type	Type	Type of Medium
Subsidiary Author				
Short Title	Short Title	Short Title	Short Title	Short Title
Alternate Title				
ISBN/ISSN	Report Number			
Original Publication				
Reprint Edition				
Reviewed Item				
Custom 1			Computer	
Custom 2				
Custom 3				
Custom 4				
Custom 5				
Custom 6				
Accession Number	Accession Number	Accession Number	Accession Number	Accession Number
Call Number	Call Number		Call Number	
Label	Label	Label	Label	Label
Keywords	Keywords	Keywords	Keywords	Keywords
Abstract	Abstract	Abstract	Abstract	Abstract
Notes	Notes	Notes	Notes	Notes
URL	URL	URL	URL	URL
Author Address	Author Address	Author Address	Author Address	Author Address

Special functions of shaded fields are described on page 285.

Audiovisual Material	Film or Broadcast	Artwork	Map	Patent
Author	**Writer**	**Artist**	**Cartographer**	**Author**
Year	Year Released	Year	Year	Year
Title	Title	Title	Title	Title
	Director			
Collection Title	Series Title			Published Source
City	City	City	City	Country
Publisher	Distributor	Publisher	Publisher	Assignee
				Volume
Extent of Work				
Number				Issue
				Pages
	Producer			
			Edition	
Date	Date Released	Date		Date
Type	Medium	Type of Work	Type	
Performers	**Performers**			
Short Title	Short Title	Short Title	Short Title	Short Title
	ISBN			Number
	Original Publication			
	Reprint Edition			
	Reviewed Item			
			Scale	
Accession Number	Accession Number	Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number	Call Number	Call Number
Label	Label	Label	Label	Label
Keywords	Keywords	Keywords	Keywords	Keywords
Abstract	Abstract	Abstract	Abstract	Abstract
Notes	Notes	Notes	Notes	Notes
URL	**URL**	**URL**	**URL**	**URL**
Author Address	Author Address	Author Address	Author Address	Author Address

Special functions of shaded fields are described on page 285.

Generic	Hearing	Bill	Statute	Case
Author				
Year	Year	Year	Year	Year
Title	Title	Title	Name of Act	Case Name
Secondary Author				
Secondary Title	Committee	Code	Code	Reporter
Place Published	City			
Publisher	Publisher			Court
Volume		Code Volume	Code Number	Reporter Volume
Number of Volumes	Number of Volumes			
Number	Document Number	Bill Number	Public Law Number	
Pages	**Pages**	**Code Pages**	**Pages**	**First Page**
Section		Code Section	Sections	
Tertiary Author				
Tertiary Title	Legislative Body	Legislative Body		
Edition	Session	Session	Session	
Date	Date	Date	Date Enacted	Date Decided
Type of Work				
Subsidiary Author		**Sponsor**		**Counsel**
Short Title	Short Title	Short Title	Short Title	Abbreviated Case Name
Alternate Title				
ISBN/ISSN				
Original Publication	History	History	History	History
Reprint Edition				
Reviewed Item				
Custom 1				
Custom 2				
Custom 3				
Custom 4				
Custom 5				
Custom 6				
Accession Number	Accession Number	Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number	Call Number	Call Number
Label	Label	Label	Label	Label
Keywords	Keywords	Keywords	Keywords	Keywords
Abstract	Abstract	Abstract	Abstract	Abstract
Notes	Notes	Notes	Notes	Notes
URL	**URL**	**URL**	**URL**	**URL**
Author Address				

Special functions of shaded fields are described on page 285.

Chapter 15

Bibliographic Styles

Chapter 15   Bibliographic Styles

Introduction

What is an Output Style?

The term **output style** (or just "style") is used to describe a particular method of documenting your work. Each style is designed as a complete solution for formatting in-text citations, footnote citations, and bibliographies for all types of references.

You can think of styles as templates that show EndNote how to arrange the information in each of your EndNote references for citations and bibliographies. For example, this reference:
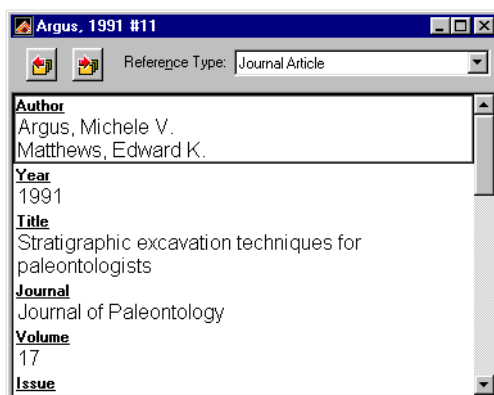
could be formatted in the Chicago style like this:

```
Argus, Michele V., and Edward K. Matthews. 1991.
Stratigraphic excavation techniques for paleontologists.
Journal of Paleontology 17:119-127.
```

Or it could be formatted in the Nature style like this:

```
1.   Argus, M. V. & Matthews, E. K. Stratigraphic excava-
     tion techniques for paleontologists. Journal of Pa-
     leontology 17, 119-127 (1991).
```

The Output Styles Menu

The style selected in the *Output Styles* submenu of the *File* menu (or the style menu in the Main toolbar) determines how references are formatted for the preview in the Library window as well as for the *Format Bibliography*, *Format*, *Print*, *Export*, and *Copy Formatted* commands.

By default, EndNote's four standard bibliographic styles are installed in your *Output Styles* menu:

♦ **Annotated:** generates an Author-Date style bibliography with abstracts.

- ♦ **Author-Date:** generates bibliography alphabetized by author name, and in-text citations with Author and Year.

- ♦ **Numbered:** generates a numbered bibliography with corresponding numbered in-text citations.

- ♦ **Show All:** generates a list of the references as entered, including all fields and the names of the fields.

Mark individual styles as your favorites in the Style Manager to have them appear in the *Output Styles* menu, the style menu in the Main toolbar, and the confirm formatting dialog.

The Style Manager

EndNote includes more than 400 individual bibliographic styles. Each one of these styles is stored as an individual file in the Styles folder in your EndNote folder.

The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal *Nature*, and the Chicago style is named after the *Chicago Manual of Style*. Styles in the Export category, such as "RIS" are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases.

To see if your journal's style is included in EndNote, peruse the list of styles in the Style Manager or consult the EndNote Help file. If your style is not available, any style can be modified to suit your needs and you can create new styles.

To see the available styles in EndNote's Styles folder, choose *Output Styles* from the *File* menu, and select *Open Style Manager*.

Shows the location of the selected Styles folder.

Click column headings to sort the list.

Click to search for files.

Click to display details about the selected file.

EndNote Styles

Showing 350 of 350 styles from C:\PROGRAM FILES\ENDNOTE 4\Styles\

Name	Category
Ann Rev Biophysics Biomolec	Biosciences
Ann Rev Cell Biology	Biosciences
Ann Rev Immunology	Immunology
Ann Rev Pharmacology Toxico	Pharmacology
Ann Rev Physical Chem	Chemistry
Ann Rev Psychology	Psychology
Annals Entomol Society Amer	Genetics
Annals Internal Medicine	Medicine
Annals Surgery	Medicine
✔ Annotated	EndNote Standard
Anthropos	Anthropology
APA Published	Psychology
APA Submitted	Psychology
Applied Clay Catalysis	Geology and Earth Science

Find: ▾   Mark All   Unmark All   Edit

▶ Show Info

The Style Manager lists the names of all of the styles available in the Styles folder and gives you the options to edit them or select them as "favorites" for quick access from the style menu in the Main toolbar, the *Output Styles* menu in the *File* menu, or the confirm formatting dialog.

Marking Your Favorite Styles

When you have found a style that you will want to use in the future, click the checkbox to the left of it to mark it as a favorite. All styles that are marked as favorites appear in the *Output Styles* submenu of the *File* menu, and the styles menu of the Main toolbar. This gives you easy access to the styles you use most often.

Use the *Mark All* button as a quick way to select a whole category of styles. For example, click the *Find* button and choose a category from the available list. EndNote displays only the styles in that category. Click *Mark All* to mark all of them as favorites and they will appear in your *Output Styles* menu. Choose *Show All* from the *Edit* menu to bring all of the styles back into view. The *Unmark All* button may be used to unmark all of the connection files that are showing in the list.

Navigating in the Style Manager

Use the following features to locate the output style that you want to use:

♦ If you know the name of the style that you want to use, you may start typing it and the first file that matches what you type will be selected.

♦ Click the *Find* button and choose category (such as Medicine or Humanities) to find only the bibliographic styles for a specific discipline.

♦ Click the *Find* button, and choose *by Name* to search for the file by the name of the style. You can enter a partial name or the full name. EndNote will display all matching results.

♦ Click the *Find* button and choose *All Styles* to return all of the styles to the displayed list.

♦ Click the column headings to sort the styles by name or by category. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

♦ Click the *Show Info* button at the bottom of the dialog to display additional information about the selected styles (such as modification and creation dates, and any comments

or limitations). You also have the option of displaying a preview of the style in the "Show Info" panel.

Previewing Styles & Showing Information

Click *Show Info* in the Style Manager to display the information panel. (After choosing *Show Info* the button changes to *Hide Info*, which will close the panel.) This panel is used to display more detail about the selected style.

♦ **Style Information:** When the drop-down list is set to *Style Info*, details about the style are displayed in the Information panel. These include the creation and modification dates, category, which style guide the style is based on, and any limitations or comments about using the style.

♦ **Style Preview:** Click *Style Info* to change it to *Style Preview.* In the preview section, EndNote shows how a journal, book, and book section would be formatted with the selected style.
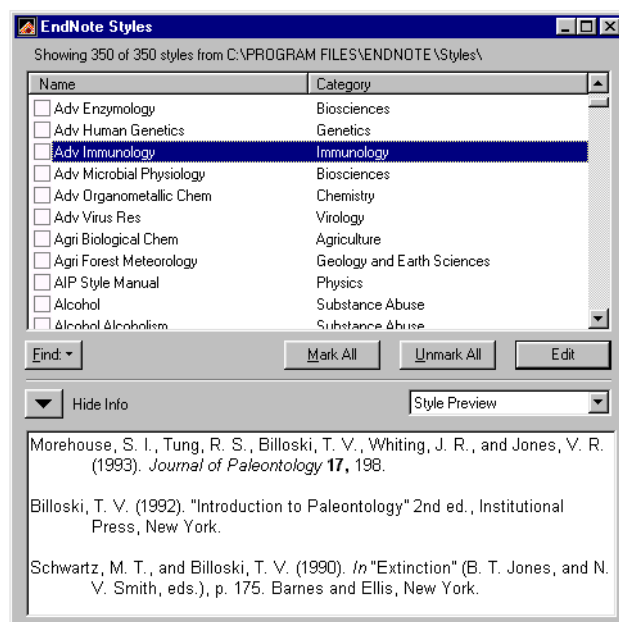
Previewing Styles Using Your Own References

EndNote uses built-in examples for the previews in the Style Manager window. If you want to preview a style using your own references:

1. In the Style Manager, mark the style as a favorite by clicking in the checkbox next to its name. This adds the style to the *Output Styles* menu.

2. From the *File* menu, choose *Output Styles,* and select the style to preview.

3. Open a library, and click the *Show Preview* button at the bottom of the Library window.

4. Select any reference in your library to have it displayed in the Library window's preview panel.

The preview pane displays only one reference at a time. If you would like to preview a group of references, use the *Copy Formatted* command and the Clipboard:

1. Select a style in the *Output Styles* submenu of the *File* menu.

2. Select one or more references in your library and choose *Copy Formatted* (CTRL+K) from the *Edit* menu.

3. Choose *Show Clipboard* from the *Edit* menu to see the formatted references as they would appear in a bibliography.

Copying Styles

Because each style is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Windows desktop.

To copy a style to a floppy disk, select the style on your hard drive and drag it onto a diskette.We recommend that you use this method to make backup copies of your styles after you modify them (see Appendix A).

To make a copy of a style from within EndNote:

1. From the *File* menu, choose *Output Styles* and select *Open Style Manager*.

2. Select the style you want to copy and click *Edit.*

3. Without making any changes to the file, choose *Save As* from the *File* menu.

4. Give this copy of the file a new name, and save it in your Styles folder if you would like access to it from within EndNote. If you save the style outside of the Styles folder (such as on a floppy disk to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

The new style will remain open. The original style will be left untouched.

Saving Styles

To save a new style that you have just created, or to save changes to a style you have just modified, choose *Save* from the *File* menu.

Alternatively, choose *Save As* from the *File* menu when you want to save a modified style with a new name.

If you close a Style window before saving a style, EndNote prompts you to save or discard the changes you have made, or choose *Cancel* to return to the style. If you quit from EndNote while a Style window is open, the same dialog appears.

EndNote automatically saves new styles to your designated style folder. (The Style Manager within EndNote only provides access to the styles that are in the designated styles folder). Your Styles folder, by default, is the folder called "Styles" in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 420.

NOTE: EndNote styles use the file name extension of ".ens" (for End̲N̲ote St̲yle), as in "Nature.ens."

Deleting Styles

To delete a style from within EndNote:

1. From the *File* menu, choose *Output Styles* and select *Open Style Manager*.

2. Select the style to be deleted.

3. Choose *Clear* from the *Edit* menu, or right-click on the style and choose *Delete* from the shortcut menu.

You can also delete an unwanted style by switching back to the Windows desktop, and opening the Styles folder in the EndNote folder. Then select the file to delete and choose *Delete* from the *File* menu, or drag the file to the Recycle Bin

Renaming Styles

Rename styles using the *Save As* command in EndNote's *File* menu. This allows you to make a copy of any style that you want to modify, so you can keep several variations of the same style. You can also rename styles by switching to the Windows desktop, clicking on the file name, and typing a new name.

Reverting Changes to a Style

If at any time you need to revert your changes back to the last saved copy of the style, choose *Revert Style* from the *File* menu.

Closing a Style

To close a Style window, click the close button in the upper right corner of the window, or choose *Close Style* from the *File* menu.

If you have not saved your changes to the style, EndNote prompts you and gives you the option to save or discard any changes that you have made.

What Should I Do if My Style Is Not Included?

EndNote supplies approximately 400 journal styles for your convenience; however, because there are thousands of journals published, the style you need may not be included. This should not be a problem though because you can design a style of your own or modify any of EndNote's preconfigured styles.

If a style that you need is not included with EndNote, we recommend that you modify a style that is similar to what you need.

To find and modify a similar style:

1. From the *File* menu, choose *Output Styles* and select *Open Style Manager.*

2. In the Style Manager, click the *Show Info* button, and change the setting in the information panel from *Style Info* to *Style Preview*. The preview of the selected style should now be displayed.

3. Scroll through the list of available styles to see if you can find one that is similar to what you need.

4. Once you have found a similar style, select it, and click the *Edit* button. The Style window opens.

5. Choose *Save As* from the *File* menu, give this copy of the style a new name that corresponds to the name of the journal you want to use it for, and click *Save*. This will also keep the original style unchanged, in the event that you need to use it later.

6. The new Style window remains open for you to edit it as you need. For more details about editing parts of a style, read "Basic Components of a Style" and "Modifying Style Templates" starting on page 306.

Once the new copy of the style has been saved, it will be added to your style menus.

NOTE: You can automatically download the latest output styles available from ISI ResearchSoft. See "Automatically Updating Files" on page 16. Visit the EndNote web site (www.endnote.com) and FTP site (ftp.endnote.com) for more information about available styles.

Accessing Styles in Other Places

The *Styles Manager* displays only those styles in the chosen styles folder. Only styles from one folder can be displayed in the *Styles* menu at any given time; styles in subfolders within the selected folder are ignored.

By default, the Styles Manager displays the styles that are in the "Styles" folder in the EndNote folder. You may copy files into this folder to have them displayed in the Style Manager, or you may change this to use a different folder, if necessary. To do so, choose *Preferences* from the *Edit* menu, select the *Folder Locations* panel, and click the *Select Folder* button in the Styles section of that panel. See "Folder Locations" on page 420 for details.

Basic Components of a Style

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

♦ To create a new style: From the *File* menu, choose *Output Styles* and select *New Style*. If you are interested in creating a new style, also read "Creating a New Style" on page 343.

♦ To edit a style: From the *File* menu, choose *Output Styles* and select *Open Style Manager.* Select the file to edit and click *Edit.* The most recently used style can also be easily opened by selecting *Output Styles* from the *File* menu, and choosing *Edit <style>.*

The Style Window

After choosing the option to edit an existing style or create a new one, EndNote opens the Style window.
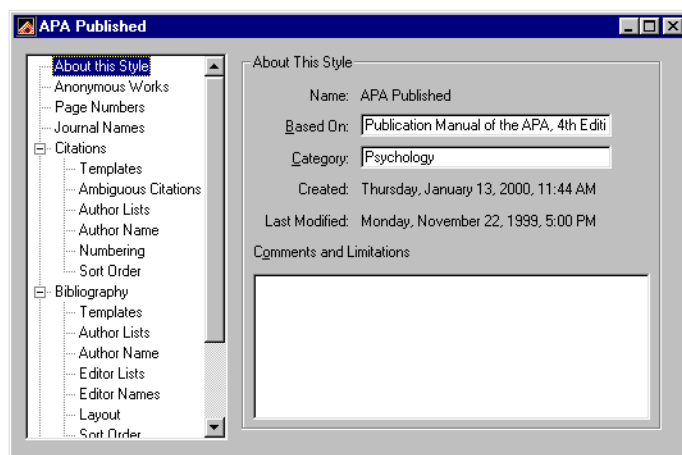
All of the different options for editing a style are listed on the left side of the Style window. The first four items (*About This Style, Anonymous Works, Page Numbers*, and *Journal Names*) apply to citations, bibliographies, and citations in footnotes. The rest of the options in the Style window are grouped under one of three headings:

Citations: Panels listed under the *Citations* heading apply only to citations in the body of the text.

Bibliographies: The items listed under the *Bibliography* heading apply to the bibliography that EndNote creates when you format a paper. These settings are also used with the *Export, Print, Copy formatted*, and *Preview* options.

Footnotes: The items under the Footnote heading apply to temporary citations that have been inserted into the footnotes or endnotes in a word processing document. (You must first create the footnotes in your word processor, and then insert EndNote citations into them.)

Click on the plus next to one of the headings to expand or collapse the view to show or hide the related options. Click on an item under the headings to view the associated panel. You may switch between panels as needed while editing the file. No changes are saved in any of the panels, however, until you choose *Save* or *Save As* from the *File* menu.

Style Templates

The *Citation*, *Bibliography*, and *Footnote* sections of the style all have a *Template* panel and other options for fine tuning the style.

The *Templates* panels are the major component of the styles. They include the field names and punctuation organized in the way EndNote should format the references for that particular style. The templates look like citations or bibliography entries, except that field names are used in place of the actual data. During the formatting process, EndNote replaces the field names with the corresponding information from the references.

Details about working with the style templates are covered on page 308.

Other Style Options

Under each heading in the Style window (*Citations*, *Bibliography*, and *Footnotes*) there are a series of options for how to fine-tune the formatted references in citations, bibliographies, or footnotes. Many of these options repeated for the three sections

(such as the settings that determine how author names are treated), because each of these three areas of the document might require a slightly different format.

These options are described starting on page 321.

Modifying Style Templates

If you are creating a bibliography that requires a style not included with EndNote, then you can modify a style to suit your needs. (See "What Should I Do if My Style Is Not Included?" on page 305.) Editing a style requires a general understanding of how styles work and the components of a style. Read "Basic Components of a Style" on page 306 to become familiar with the terms used in this section.

Citation Template

Click on *Templates* under the *Citation* heading to view the Citation panel. This template tells EndNote how to format the in-text citations in the body of your paper. For example, the Numbered style uses a bracketed bibliography number for the in-text citation. (The bibliography number corresponds to a numbered reference in a bibliography.) An author-year type of style would probably display something such as "(Author, Year)" in the citation template.

You may change the template by deleting unwanted field names or punctuation, retyping the punctuation you want, and inserting new fields using the *Insert Field* button. More information about editing templates is provided later in this section.
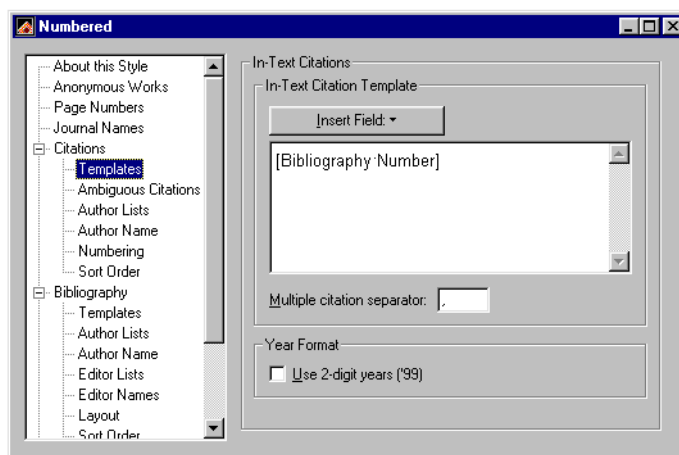
Multiple Citation Separators

Use the "Multiple Citation Separators" section of this dialog to specify the punctuation to separate multiple citations in your papers. A multiple citation is an in-text citation that includes more than one reference within a single set of delimiters, such as: (Argus, 1993; Billoski, 1993; Hall, 1988). That example uses a semicolon and a space as the separator between citations.

This separator can be changed by typing other text in "Multiple citation separator" box. Remember to include a space in the separator section when necessary.

Year Format

If you would like EndNote to use 2-digit years (such as '99) in the in-text citations, check the "Use 2-digit years" option. Years from all centuries will be abbreviated to display just the last two digits. This applies only to the years in the in-text citations.

Bibliography & Footnote Templates

Click *Templates* under the *Bibliography* or *Footnotes* heading to see the templates for how those references are formatted.
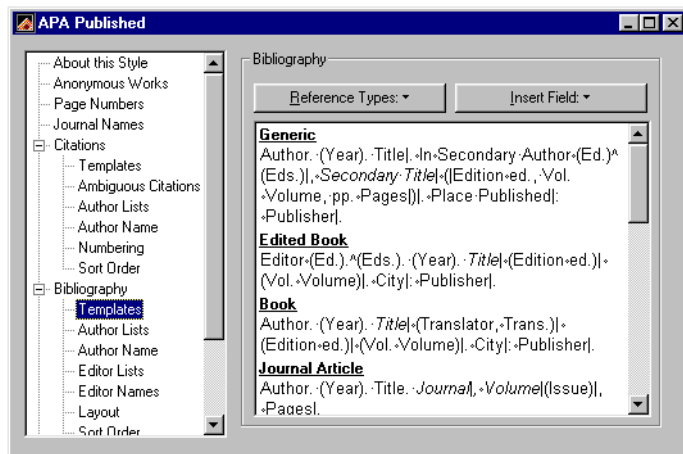
For footnote and bibliography templates, each has a "Generic" template, and other reference-type-specific templates to format the various reference types in a bibliography.

The following examples show how journal articles, books, and book sections, respectively, would be formatted with the Numbered style. Notice that each reference type is formatted differently, which is why different templates are required:

1. Emiliani, C., *Competitive evolution*. Journal of Theoretical Biology, 1982. **97**: p. 13-33.

2. Jones, V.R., *The Theory of Foraging*, B.J. Bloggs, Editor. 1976, Smith and Barnes: New York.

3. Whitney, J.R., T.V. Billoski, and V.R. Jones, *Evidence for Triceratops in Antarctica, in New Directions* in *Paleontology*, T.V. Billoski, Editor. 1987, Academic Press: New York. p.24-27.

Generic Template

The Generic template is used to format references that use the Generic reference type or do not have their own template in the style. For example, if a Book template had not been included in the style, book references would be formatted using the Generic template.

Other Reference Type Templates

The rest of the templates in the style tell EndNote how to format specific reference types, such as journals, books, and book sections.

Footnote Template Options

Styles have varying requirements for how citations in footnotes should be formatted. The options at the top of the Footnote *Templates* panel allow for the different conditions.
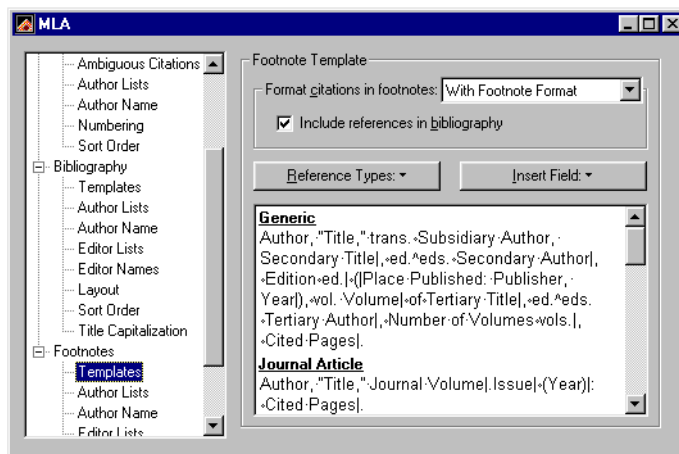
For some styles, citations in footnotes are formatted just like in-text citations (in the body of the paper). In that case, there is no need to create a special template for footnotes, simply choose the *Same As In-text* option from the Footnote Format options.

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

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

Changing the Punctuation in a Formatted Reference

Punctuation that appears in your formatted references can be changed by editing the style you are using. When you edit a style, you can delete unwanted punctuation, replace it with other punctuation, or add additional punctuation where necessary.

For example, if the Numbered style creates a perfect bibliography for your document *except* that it puts a comma after the authors' names where you need a period, you can edit the Numbered style to make this change.

To edit the Numbered style:

1. Choose the Numbered style in the *Output Styles* menu.
2. Choose *Edit Numbered* from the *Output Styles* menu to open the Numbered Style window.
3. Click the *Templates* option under the *Bibliography* heading.
4. For each reference type (such as Generic, Journal Article, and Book), delete the comma that follows the field name "Author" and type a period.

The style's bibliographic templates should now look like the example below. Notice the punctuation after the Author field in each template has been changed to a period.
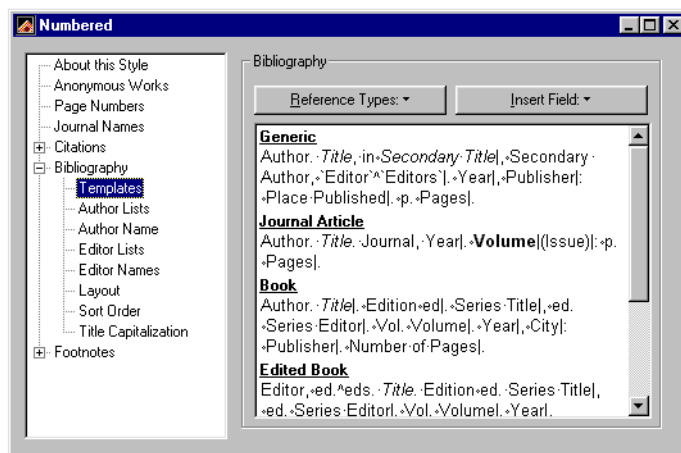
5. Choose *Save As* from the *File* menu. In the dialog that appears, enter a new name for this modified Numbered style and click *Save*.

    Or, if you prefer to just update the original Numbered style, choose *Save* instead of *Save As.*

Now you can use the new style to create a formatted bibliography that puts a period between the author names and the titles.

For information about making punctuation or spaces appear only under certain circumstances see "Special Formatting Characters" on page 317. That section also explains the use of the non-breaking spaces (·), vertical bars (|), accent grave (`), and the carets (^) that you see in the style templates.

NOTE: If you save a new style into a folder other than the current styles folder, it will not be available in the Style Manager. You should save new styles to your Styles folder, or see "Accessing Styles in Other Places" on page 306 if necessary.

Adding & Removing Fields in a Formatted Reference

The field names (such as Author, Year, and Title) that you see when editing a style template, indicate what information is included in your formatted reference. If you want to include a field, such as notes, along with your references, you should add the Notes field to the style that you use. Similarly, to exclude unwanted information that is appearing in a bibliography, you must delete the field name that contains that information from the style's bibliography template.

The examples below show two common scenarios in which fields are added to or removed from the formatted bibliography. Whenever you change the fields in a style template be sure to check the surrounding punctuation to make sure that it is still accurate.

Adding a Field to a Style Template

To insert a new field into a style template:

1. From the *File* menu, choose *Output Styles* and select *Open Style Manager*.

2. Select the style that you want to edit, and click *Edit.*

3. Click on the *Templates* option under the *Bibliography* heading, and position the cursor at the location in the template where you want to add a field.

4. Click the *Insert Field* button and choose the field to be added.

5. After the field is inserted, add any punctuation or spacing that is necessary to correctly incorporate the new field into the style.

NOTE: As a short-cut, you can use the options in the *Layout* panel to add text or punctuation before or after *every* reference in a bibliography. See "Adding Text Before Each Reference" on page 334 and "Adding Text After Each Reference" on page 335.

Deleting a Field from a Style Template

If EndNote includes information in your bibliography that you do not want to be there, you can edit the style and delete the unwanted field's name and any associated punctuation.

For example, if a style includes the issue number in your journal references, and you don't want the issue to appear:

1. Select the style in the Style Manager and click the *Edit* button.

2. Click on the *Templates* option under the *Bibliography* heading.

3. Select the text to be deleted (which includes ".Issue|" in this example), and press the DELETE or BACKSPACE key.

Along with the Issue field, also remove the period that precedes it and the vertical bar, a special formatting character, that follows

the Issue field. (See "Special Formatting Characters" on page 317 for more information about the vertical bar.)

Adding New Reference Types

When a style does not include a template for a specific reference type, such as Report, EndNote uses the style's Generic template to format that reference type. Although there are times when the Generic format suffices, often it is not sufficient because the other reference types need to be formatted differently. Therefore, you should make specific templates for the different reference types that you will be including in your bibliographies.

To add a new reference type template to a style:

1. From the *File* menu, choose *Open Style Manager* and select the style that you want to modify.

2. With the style selected, click the *Edit* button.

3. In the Style window, click the *Templates* panel under the *Bibliography* heading.

4. Choose the name of the desired reference type from the *Reference Types* drop down list. (Reference Types that have already been defined appear in the list with checkmarks next to their name.)
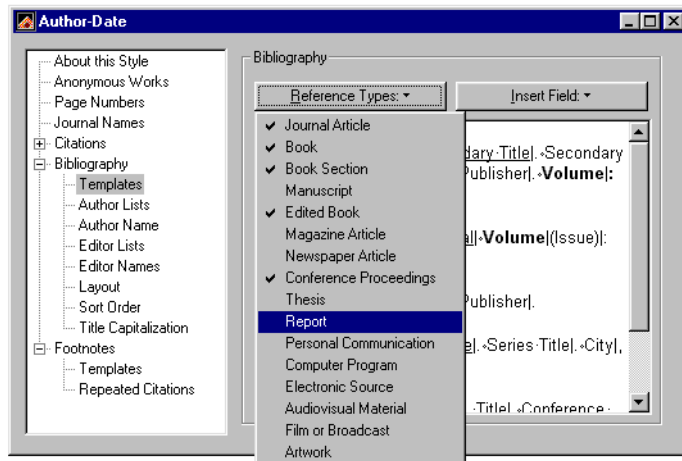
A new template for that reference type is added at the bottom of the Style window (scroll down to the bottom of the Style window if you don't see it).

Defining the Format for the New Reference Type Template

Defining the format for a new template is a process of inserting the necessary fields and punctuation in the correct order. For this

example, we want a report to look like this (Author, Title, Report Number, Year, Institution, and City):

```
Trift, M, Aspects of the tethyan rifting, 88-101.
1998, Institute for Tethyan Rifting: Austin, TX.
```

So we can insert the fields and type the punctuation to create the template for the Report reference type. Use the *Insert Field* button at the top of the Numbered Style window to insert the fields in the correct order. After inserting a field name, type the desired punctuation and spacing that should follow it. Apply text styles, such as italics for the Title, by selecting the text to change and using the *Style* commands in the *Text* menu.

The final template for the Report reference type looks like this:

Report
Author, *Title*. Report Number. Year, Institution: City.

Fonts and Text Styles

By default, text entered into a Style window appears in EndNote's *Plain Font*, *Plain Size,* and *Plain Style* settings, which allow the bibliography that EndNote creates to adopt the font settings in your paper. For example, if you type your paper in 10 point Courier font, EndNote uses that font for the paper's bibliography.

EndNote's *Text* menu commands let you apply any font, size, or text style to your Style templates.(Note that only the standard Windows fonts are available in EndNote's *Text* menu.)

All text attributes entered into a style template carry over into the bibliography that EndNote creates. You can use this feature, for example, to italicize titles or make the volume numbers bold. Any font or text style changes entered in an EndNote Reference window carry through the bibliography as well. For example, any italicized terms in your references will still appear italicized in your bibliography, regardless of the text attributes that the EndNote bibliographic style applies.

Rules for Working with Style Templates

There are four basic rules of *dependence* that govern how text, spaces, and field names influence each other when they are used in a style template. If necessary, these rules can be circumvented in specific situations using the special formatting characters described in the next section of this chapter.

Rule #1: Basic dependence

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

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

```
Volume (Issue)
```

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

Rule #2: The preceding field takes precedence over the following field.

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

In this example,

```
Volume:Issue
```

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

---

NOTE: This example shows a case where the rules of dependence might not do what you want. For example, you might want to have the colon only show when there is an issue. This can be done using the special formatting characters described in the next section.

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

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

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

```
Author.·Title
```

the title will *not* be preceded by a space in the final formatted reference because the space, just like the period, is dependent on

the Author field. However, if the style includes two spaces between the Author and the Title:

```
Author.··Title
```

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

Independent spaces can be forced to be dependent on an adjacent field using the special formatting characters discussed later.

Rule #4: Independent text always appears in the bibliography.

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

```
Edition ed.
```

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

NOTE: The non-breaking space can be used in place of a regular space to link independent text to a field. See "Link Adjacent Text (Using the Non-breaking Space)" below.

EndNote Cleans Up

Too confused about all these rules? Well, even if you don't get everything quite right according to the rules, EndNote will do its best to clean up the formatted reference. Obvious problems (such as a leftover parenthesis or a comma followed by a period) will be fixed automatically.

Special Formatting Characters

EndNote has special formatting characters that add flexibility and precision to the grouping of punctuation and fields in the style templates.

Link Adjacent Text (Using the Non-breaking Space)

If you type `Edition ed.` into a style template and use an ordinary space to separate the field name "Edition" from the abbreviation "ed.", then "ed." will appear regardless of whether or not the reference has an edition (see Rule #4).

To avoid this problem, make "ed." *dependent* on the Edition field by linking "ed." to the Edition field with a non-breaking space. Think of a non-breaking space as bibliographic formatting glue. It joins two or more items together so they act as a single unit. Thus, any text or punctuation "glued" to a field will drop out of the bibliography if that field is empty.

You can insert a non-breaking space from the *Insert Field* list in the *Templates* panels. You can also enter it by typing CTRL+ALT+SPACE.

It appears on the screen as a grey diamond. Look at the example below to understand the correct locations for a non-breaking space.

Journal Article
Author. Title. Journal Volume|: ⋄Pages|, ⋄Year|.

The non-breaking space is converted to a normal space in the formatting process. Common uses of the non-breaking space include:

```
p^pp•Pages

Edition•ed.

vol•Volume

Editor•Ed.^Eds.
```

The non-breaking space is also used in conjunction with the vertical bar (see next section) to change the dependency of a punctuation mark from one field to another.

```
Volume|:•Issue|.
```

In this case, the colon (:) is linked to the Issue field with a non-breaking space, so it does not print in the bibliography if the Issue field is empty.

Forced Separation—Using the Vertical Bar

If you do not want text or punctuation to be dependent on the preceding or following field, use the vertical bar character (|), to force a separation of the text from a field. The vertical bar can be found on the same key as the backslash (\). It can also be inserted from the *Insert Field* list in the *Templates* panels.

Think of a vertical bar as *breaking* dependence, or forcing separation between two dependent items. (The vertical bar works in exactly the opposite way as the non-breaking space.)

For example, the Journal Article templates in some styles require a period between the volume and issue. A template for such a style might look like this:

Journal Article
Author. "Title." <u>Journal</u> Volume.Issue (Year): Pages.

However, when this style formats a journal article that does not include an issue number, the bibliography entry will be incorrect, as in the following example:

```
Clark, H. and Carlson, T. "Hearers and Speech
Acts." Language 58.(1982): 332–373.
```

Notice that the period used to separate the volume from the issue appears here in the absence of an issue because it is dependent upon the Volume (Rule #2). And the space separating the volume and the year is lost because that space is dependent upon the Issue field (Rule #3).

EndNote has a way of avoiding these problems. The vertical bar character (|) can be used to break the automatic grouping of spaces and punctuation with adjacent fields.

If you insert the vertical bar before the period in our example, the period's dependency switches from the Volume field to the Issue field. Add another vertical bar before the space that follows the Issue field, and the space will no longer be dependent on the Issue field. Use the vertical bar character in conjunction with the non-breaking space. With these changes the style looks like this:

Journal Article
Author. "Title." <u>Journal</u> Volume|·Issue| (Year)|·Pages|.

And the formatted reference without an issue is correct:

```
Clark, H. and Carlson, T. "Hearers and Speech
Acts." Language 58 (1982): 332–373.
```

Other common examples for using the vertical bar include:

```
Publisher|:·City
```
```
Pages|.   (to make the final period independent)
```

Field Names in Bibliographies

Sometimes you may need to use text in a template that is also an EndNote field name for that reference type. For example, you may want to use the word "Editor" after the editor's name:

```
Jones, V.R., B.K. Marion, and R.L. Zeiss, The
Theory of Foraging, in A History of Foraging
Behavior, B.J. Bloggs, Editor. 1976, Smith and
Barnes: New York.
```

Normally, EndNote interprets the word "Editor" as a field name when it appears in a book's style template. This is even true of field names that appear as part of a word, such as "Editors" or "Issued." Field names need not be capitalized to be recognized.

To force EndNote to interpret a word as just text and not as a field name in a template, put an accent grave character before and after the word: `` `Editor` ``. The accent grave is found in the upper left corner of most keyboards on the same key as the tilde (~). Remember to also use the non-breaking space to link the text, `` `Editor` ``, to the Editor field.

Book Section
Author, *Title*. in Book Title|, Editor, `Editor`|.
Year, Publisher|: City|, p. Pages.

Singular/Plural Term Separator (Caret ^)

You can specify both singular and plural forms of labels for editors or pages in a formatted reference by using a caret (^) to separate the terms. For example, some styles put "Ed." after a single editor and "Eds." follows several editors' names. Or, similarly, "p." might precede a single page, while "pp." precedes multiple pages. This feature can be applied to any field that corresponds to the Generic field for Author, Secondary Author, Tertiary Author, Pages, and Cited Pages.

In the style template, enter both the singular and plural forms of the label separated by a caret (insert it from the *Insert Field* list or type SHIFT+6). Any text before the caret, back to but not including the preceding space, is used for the singular form; text after the caret, up to the next space, is used for the plural form. These terms must also be linked to the relevant field using a non-

breaking space. For example, a style template might look like
this:

Edited Book
Editor, ed.|eds. *Title* . Number of Volumes·vols
|.·Vol.·Volume|.· *Series Title* |.·City|:·Publisher|,·Year|.

Or like this:

Journal Article
Author. "Title." <u>Journal</u> Volume|.·Issue| (Year)|:p.|pp.·Pages|.

Additional Style Formatting Options

The templates determine the general layout of the formatted
references and citations. The remainder of the panels in the Style
window can be used to fine-tune certain aspects of a style.

Anonymous Works

Anonymous works are defined by EndNote as references where
the Author field is blank (not "Anonymous"). The settings in the
Anonymous Works panel apply to all sections of a style (*Citations*,
Bibliography, and *Footnotes*).
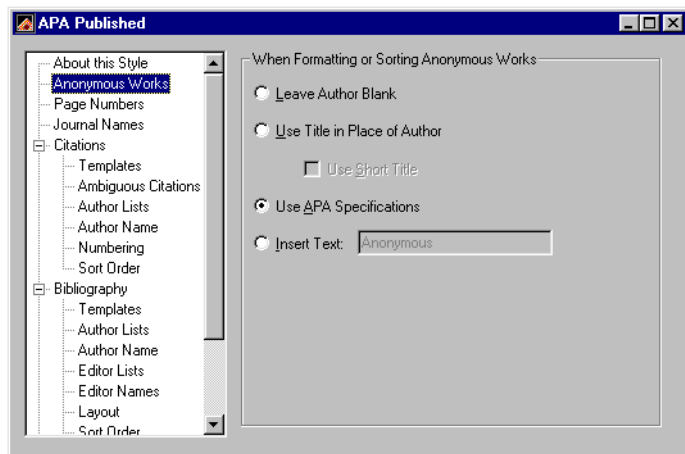
♦ **Leave Author Blank**: The author section of the formatted
reference is left empty. If the references are to be sorted by
author names, the anonymous works would be sorted at the
top of the list because they have no author.

♦ **Use Title in Place of Author**: Where the author would have
appeared, the title is used instead. If the references are sorted

by author, the anonymous references will be sorted as though the title were the author. If you would prefer that EndNote use the contents of the "Short Title" field in place of the full title (where available), click the "Use Short Title" checkbox. If EndNote encounters a reference that does not have anything entered into the Short Title field, it uses the contents of the regular Title field instead.

♦ **Use APA Specifications**: The American Psychological Association format (used by many journals) requires a special variation of the "Use Title in Place of Author" option.

♦ **Insert Text**: The text that you enter here appears in the author's place in the formatted reference, and it is used for sorting purposes if the references are to be sorted by author names. Commonly this text would be something like the word "Anonymous" or "Anon."

Page Numbers

The *Page Numbers* panel allows you to specify how the page numbers should be formatted for your references:

♦ **Don't change page numbers**
The contents of the Pages field are used directly in the formatted reference. No changes are made.

♦ **Show only first page**
Only the first characters in the Pages field up to, but not including, the first dash or comma are included in the bibliography. **Example**: "123-125" in the Pages field becomes "123" in the formatted reference.

♦ **Abbreviate last page**
Any digits of the last page number that are the same as the first page number are eliminated. **Example**: "123-125"in the Pages field becomes "123-5" in the formatted reference.

♦ **Abbreviate last page, keeping two digits**
Any digits of the last page number that are the same as the first page number are eliminated, down to a minimum of two digits. **Example**: "123-125"in the Pages field becomes "123-25" in the formatted reference.

♦ **Show range of pages**
Leading digits are added to the last page number, if necessary, so the full page range is used. **Example**: "123-5" in the Pages field becomes "123-125"in the formatted reference.

♦ **Show only first page for Journals and full range for others**
Journal articles are formatted differently from other types of references.

NOTE: The section "Special Formatting Characters" on page 317 describes how to instruct EndNote to add text such as "p." vs. "pp.", or "page" vs. "pages" to the formatted references using the caret (^).

Journal Names

Different journals have different standards for abbreviating journal names. For example, some styles may require "Proceedings of the National Academy of Science" to be abbreviated as "Proc. Nat. Acad. Sci.," "P.N.A.S." or "PNAS." EndNote's Journals term list provides a way for you store up to four variations of journal names (the full name and three forms of abbreviations) to be used in your bibliographies.

The Journals term list that is created for every library is automatically linked to the Journal and Alternate Journal fields, and therefore it is ready to be used with the Journal Names options. You simply ned to be sure that the necessary information is in the Journals term list, and that your style is set up to use the correct form of the journal name.

If your Journals term lists includes the name of the journal as it is entered in your EndNote references, and the form of the journal name that you would like to appear in your bibliographies, you may simply set your preference in a style to have EndNote substitute a form of the name in the Journals term list for what was entered into your references.

EndNote provides a journal abbreviation lists for each of three different disciplines (medicine, chemistry, and humanities). If you are interested in using one of these lists, you may import it into your Journals term list (see page 175) and set up a bibliographic style to use one of the abbreviations for the formatted bibliography. If EndNote does not provide a journal term list that applies to your area of research, you may also enter the journal abbreviations yourself. See "Working with the Journals Term List" on page 183.

To modify a style to use the abbreviations in a Journals term list:

1. From the *File* menu, select *Output Styles* and choose *Open Style Manager*.

2. Select the style that you would like to modify and click *Edit*.

3. Select the *Journal Names* panel from the list at the left of the Style window to see the available options:

♦ **Full Journal Name**
When creating a bibliography, EndNote replaces the Journal name in the reference with the form of that name in the first column of the Journals term list. This first column is normally used for full names.

♦ **Abbreviation 1**
Abbreviation 2
Abbreviation 3
In the bibliography, the journal name for each reference is replaced with the form of that name in the second, third, or fourth column of the Journals term list, respectively.

♦ **Don't Replace**
In the bibliography, EndNote uses the journal name exactly as it appears in the reference in the EndNote library. No changes are made.

♦ **Abbreviate in Journal Articles Only**
The substitutions made with the Journal Names option can apply to all Secondary Title fields, or to the Secondary Title field for only the Journal Article reference type. If you uncheck this option to apply this feature to all reference types, EndNote also abbreviates fields such as Conference Name, and the names of magazines and newspapers.

♦ **Remove Periods**
Choose this option to have EndNote eliminate the periods from all journal names in the bibliography that it is creating, regardless of the abbreviation being used. This option does not require that the journal names be in the Journals term list. For example, if the journal names are entered into your references using periods, and you do not have a Journals term list that includes the names without periods, you can still just check this option and the periods will be stripped out of the journal names when EndNote formats a bibliography.

If a journal name is not found in the specified column of the Journals term list, the style uses the journal name as it appears in the Reference window. No replacement is made for that journal.

If nothing is entered in the Journals term list or if there is no special Journals term list, the *Journal Names* option always

defaults to *Don't Replace*, and EndNote uses the journal name exactly as it appears in the original reference.

NOTE: None of these changes actually takes place in the EndNote library. These options only determine what information goes into the bibliography that is generated using the *Copy Formatted*, *Print*, *Export*, *Format*, and *Format Bibliography* commands.

Ambiguous Citations

With in-text citations like (Smith, 1995) or (Smith 246-9), references can have identical in-text citations if they are by the same author or the authors have the same last name. This leads to ambiguity in the citations that would make it impossible for the reader of your paper to know which reference to Smith you are referring. EndNote provides various ways to avoid this sort of ambiguity in your citations.

Any combination of the following options may be used. Click in the checkbox next to all options that apply. Note that these settings assume the author is used in the in-text citation. They are not relevant for styles that use bibliography numbers for the in-text citations as it is not possible to have ambiguous citations when they are uniquely numbered.
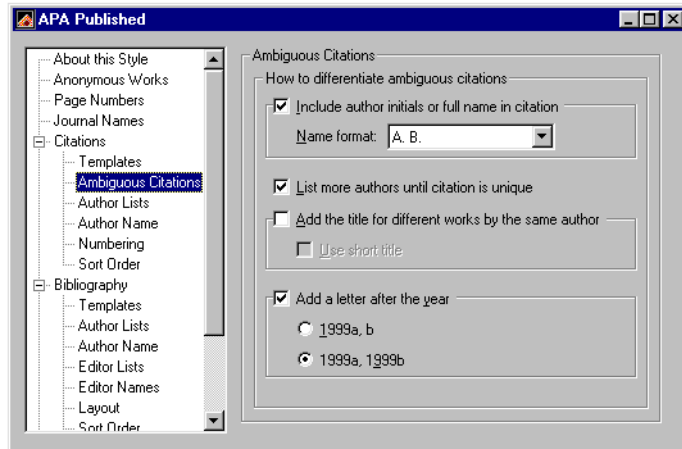
♦ **Include author initials in citation**
Check this option to have EndNote include initials with the author names to distinguish between citations by different authors that happen to have the same surname. Choose how the initials should appear from the *Initials* option in the section. For example, the MLA style uses just author names

page numbers in the citations. Initials are added to clarify which Smith wrote the cited reference:

```
(S. Smith 241-5)   and   (L. Smith 12-20)
```

♦ **List more authors until citation is unique**
Some styles request that only a fixed number of authors are listed in the in-text citation, and then "et al." or "and others" is inserted to indicate when the author list was abbreviated. Choose this option if you would like for EndNote to list additional authors to make the citation unique. For example, if the in-text citations were set to list on 3 authors, and you have two references in which the first three authors are the same, EndNote would a fourth author to the citations, and continue in that manner until the list of authors was different between the two citations.

♦ **Add the title for different works by the same author(s)**
If you have two works by the same author, it won't help you to add initials or list more authors to differentiate the two. In this case, some styles request that the title of the reference (or a shortened form of the title, be added to the in-text citation. If you choose this option and check the "Use Short Title" option, EndNote includes the contents of the Short Title field when available. Otherwise, it uses the full title. The format of the title is taken directly from the bibliography. Example in MLA style which normally includes only the author and page number in a citation:

```
(Smith, History of Our Times 35)
```

```
(Smith, Looking Forward 77)
```

♦ **Add a letter after the year**
For citations in an (Author, Year) format, EndNote can add a letter to the year to make citations from the same author published in the same year distinguishable from each other. The letter appended to the year will appear in both the in-text citations and references in the bibliography.

```
(Smith 1995a)
(Smith 1995b)
```

Numbering Citations

The settings in the citation *Numbering* panel apply only when "Bibliography Number" is used in the citation template (see page 308). This creates uniquely numbered citations in the text of the paper; the numbers correspond to entries in the bibliography. For papers formatted with a numbered style, these options are relevant to multiple citations grouped within one set of citation delimiters. When unformatted, a multiple citation looks like this:

```
{Keys, 1998 #93; Jen, 1996 #88; Yagi, 1998 #199}
```

♦ **Use number ranges for consecutive citations**
When this option is checked, consecutive bibliography numbers appearing in a multiple citation are joined by a single dash, for example:

…as shown by the Berkeley studies conducted in 1987^{3-6} and $1989^{1,7}$.

♦ **Grouped References**
The "Grouped Reference" option allows you to cite with one number any references that always appear together in the paper as multiple citations. The citations are not given their own numbers, but rather one number is used both in the text and the bibliography to identify the whole group of citations. With this setting, you also have the option to specify how the grouped references in the bibliography should be separated. This option shows a semicolon and a space as a separator:

1. McCormick, MP, Geophysical Research Letters (1999) **15,** 907; Pemberton, SG, Jones, B, Journal of Paleontology (1999) **62,** 495; Postma, G, Sedimentary Geology (1999) **58,** 47.
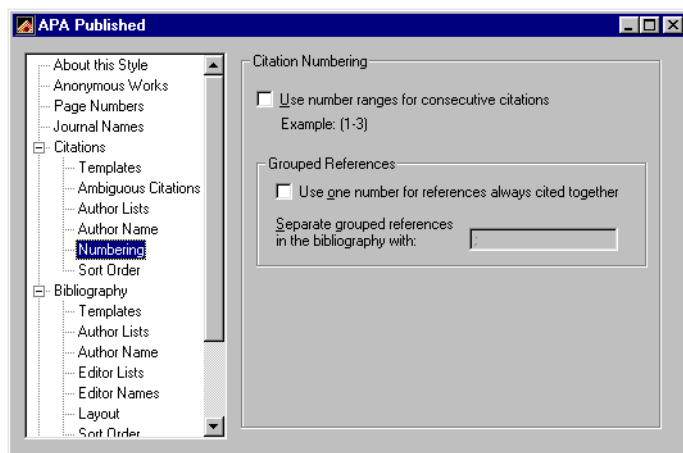
Citation Author Lists

If the style you are using lists the author names in the Citation template of the Style window, you can use the *Author List* options (as well as the *Author Names* panel) to control how the authors appear in your in-text citations. If your citations do not include the author names, ignore the *Author List* panel.

Separators Between Author Names

In the "Separators" box, enter any punctuation and spaces that separate the individual author names in a citation. In references with multiple authors, it is standard to separate the names with a comma and a space. Use the "Separator between authors" box to enter a comma and a space, or any other required punctuation. In the "Separator before last author" box, enter the separator that appears before the *last* author in a reference. Sometimes this is something other than a comma and a space, such as ", and " or an ampersand (&) followed by a space.

Normally only the first row in the Separators box is used (with the range of authors set at "1 to 100") so that the separators in that row apply to all of the authors cited in a reference. However, there are styles in which two authors are listed as "Smith and Jones" (without a comma), and more than two are listed as "Smith, Jones, and Johnson" (with a comma before the word "and"). In this case, make " and " the "Separator before last author" when there are only two authors; and enter ", and " when there are 3 or more authors (as shown in the example below).
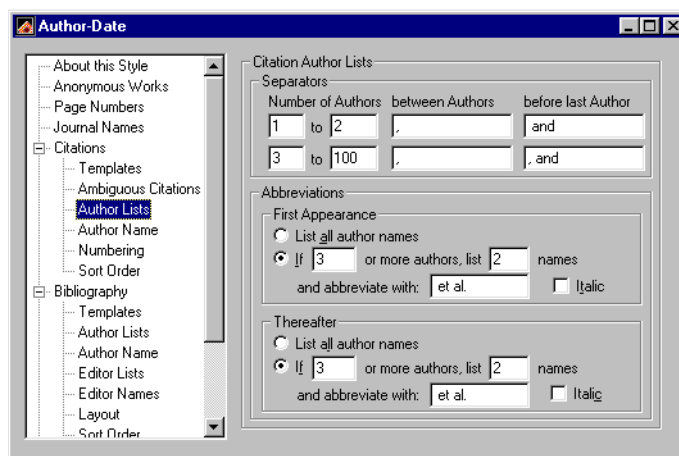
NOTE: Include spaces after commas as well as before and after the word "and". The spaces are not visible in this dialog.

Abbreviating Author Names (et al.)

Some journals require that you abbreviate the list of authors, using "et al." or an equivalent, after a certain number of authors. The "Abbreviation" section of the Author List panel allows you

to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, and what the abbreviation should be.

♦ **List all author names**
Choose this option if you do not want to abbreviate the author lists.

♦ **If ___ or more authors, list ___ names…**
Select this option and fill in the blanks with the appropriate numbers if you would like the list of authors abbreviated.

The example shown above abbreviates author lists of three or more names to show only the first author followed by ", et al." You can italicize the abbreviation by selecting the "Italics" checkbox in the dialog.

First Appearance vs. Thereafter

In some bibliographic styles, if a reference is cited more than once in your paper the first appearance of it in an in-text citation is formatted differently from subsequent citations. For example, the first citation might list all authors, while subsequent citations list only the first author followed by "et al."

Use the "First Appearance" author list settings to specify the way the authors appear the first time the reference is cited. Use the "Thereafter" options to format authors in all other appearances of the citation.

Citation Author Names

Name Format

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

♦ **First Author/Other Authors:** Using the list for "First Author" and "Other Authors", you can have the first author appear differently from the other authors in a reference. From these lists, choose the example that shows the name in the order that you would like it to be in the citation. If the in-text citations use only the last name, this setting is not important.

♦ **Capitalization:** Specify how you would like the author names to appear.
  - As Is   (as entered in the reference)
  - Normal   (first letter of each name is capitalized)
  - ALL UPPERCASE
  - SMALL CAPS.

♦ **Initials:** Choose from the available options in the list to specify how the initials should look in the citations. Choose *Last Only* if you only need the last name of the authors to appear in the citations.

"Use initials only for primary authors with the same name"
This options allows for initials to be used only when there are primary authors with the same last name included in the bibliography. Regardless of whether or not the resulting citations are ambiguous (that is, they could be from different years), EndNote will add the initials to those citations to clarify that they are from different authors who happen to have the same surname.

Consecutive Citations by the Same Author

If a multiple citation includes works by the same author, some styles request that you not repeat the author name. Check the setting to "Show author name only once" and EndNote will omit the author name from the citation after it first appears. In order for this setting to be used, the citations must all be grouped together in a multiple citation, and the citations by the same author must appear one right after the other.

For example, a reference such as this:

```
(Smith, 1993; Smith, 1999; Wyatt, 2000)
```

would be changed to look like this:

```
(Smith, 1993, 1999; Wyatt, 2000)
```

You have the additional option in this case to choose the separator to use between these citations. Notice in the example above, the style normally uses a semicolon to separate multiple citations. But when there are a series of citations by the same author, the author name are dropped and the years are separated by commas. In this case, a comma and a space should be entered as the punctuation with which to separate the consecutive citations by the same author.

If you have entered citations with suffixes and you would like those citations excluded from this formatting, check "Don't change citations with suffixes." For example, if two references by the same author included page numbers:

```
(Smith, 1993 p 24; Smith, 1999 p 5; Wyatt, 2000)
```

some styles request that you do leave the author name in the second citation for clarity.
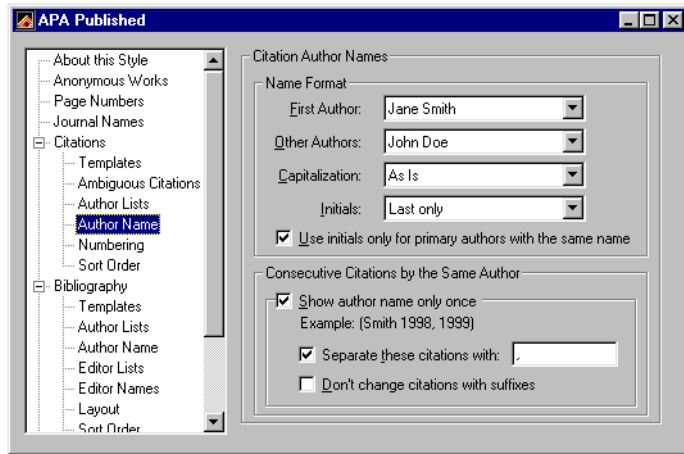
Author List (Bibliography & Footnotes)

The *Author List* panels under the *Bibliography* and *Footnotes* headings let you specify exactly how the authors are to appear in the formatted bibliographic references or in your footnotes. You can format author names different in the footnotes and bibliography so be sure that you have check the *Author List* settings under both the *Bibliography* and the *Footnotes* headings to adjust all settings as necessary. The settings in these panels apply to all reference types formatted with the current style.

These panels are identical to those provided for the *Author List* panel under the *Citations* heading, except that there is no option for "First Appearance" and "Thereafter". See "Citation Author Lists" on page 327 for details about the settings in these panels.

Author Names (Bibliography & Footnotes)

Name Format

There is an *Author Names* panel for bibliographies and footnotes, as well as for citations. Some styles request that author names are formatted differently in all three cases. Be sure that you choose the *Author Names* panel from under the appropriate heading. The author names format for citations is described on page 329. This section describes the options that are available for both the footnote and bibliography *Author Names* panel.

These settings are for choosing how author names should look—for example, whether the first or last name should come first, whether there should be a comma after the last name, and how the names should be capitalized.

♦ **First Author/Other Authors:** Using the list for "First Author" and "Other Authors", you can have the first author appear differently from the other authors in a reference. From these lists, choose the example that shows the name in the order that you want in the reference.

♦ **Capitalization:** Specify how author names should appear.
  - As Is   (as entered in the reference)
  - Normal   (first letter of each name is capitalized)
  - ALL UPPERCASE
  - SMALL CAPS.

♦ **Initials:** Choose from the available options in the list to specify how the initials should appear in the formatted references. Click the "Initials" list to choose how the authors' first and middle names should be formatted. If you have not entered the full first names and you choose the *Full Names* option, EndNote uses the names as you have entered them into the reference. Choose *Last Only* to show just the last name, with no first or middle initials.

NOTE: Initials entered into an EndNote reference must be separated by a period or a space (such as M.J. Stein or M J Stein). Two letters together (such as MJ Stein) will *not* be interpreted as two initials, but instead as a two-letter first name.
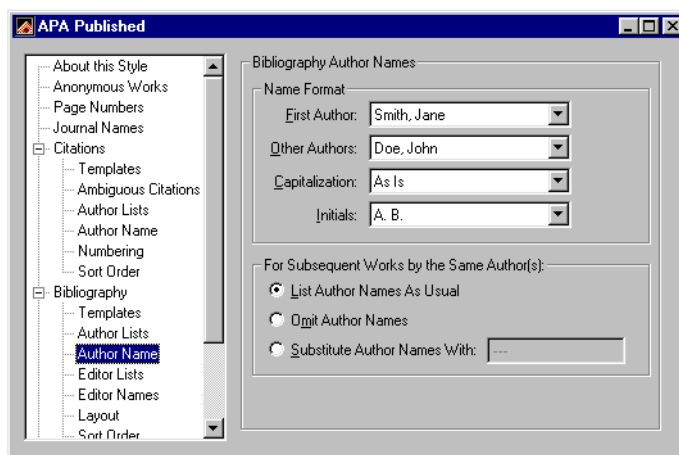
For Subsequent Works by the Same Author

When listing multiple works by the same author or authors, some styles request that the author names are omitted from all but the first reference. This can help the readability of a bibliography that is sorted by author name because you can

more easily scan the left margin of the bibliography to identify the names of the authors. The options you have for listing works by the same author include:

♦ **List Author Names As Usual:** All authors are listed according to the settings in the *Author List* panel.

♦ **Omit Author Names:** When references by the same author (or set of authors) are listed in succession, the author names are omitted from all references except the first by that author (or group of authors).

♦ **Substitute Author Names With:** Enter text here that should be used in place of the author names. Often this is a series of dashes. For example:

```
Billoski, T. V. (1992). Introduction to Paleontology. New
    York, Institutional Press.

--- (1993). "Debate II." Science 77: 5-6.

--- (1997). "Debate over nemesis theory grows." Science
    77: 5-6.
```

Editor List & Editor Names

To specify how the editors' names are to be formatted, select *Editor List* or *Editor Names* from under the *Bibliography* or *Footnote* heading. In those panels you will find some of the same settings that have been described for formatting author names.

The *Editor List* settings apply to the generic Secondary Author, Tertiary Author, and Subsidiary Author fields. These fields includes "Editor" in the Book Section and Conference Proceedings reference types, and "Series Editor" in the Book and Edited Book reference types.

The instructions for the Editor List panel are identical to those described for the *Author List* panel (see page 331). Similarly, the Name Format options in the *Editor Names* panel are the same as those for *Author Names* described on page 331.

"Editors" Are Considered Primary Authors for Edited Book Reference Types

The *Author List* and *Author Names* settings apply to the primary author field of each reference type. Therefore, *Author List* and *Author Names* apply to the editor's name in an Edited Book. And the *Editor List* and *Editor Names* settings apply to the Series Editor's name in an Edited Book reference type.

Bibliography Layout

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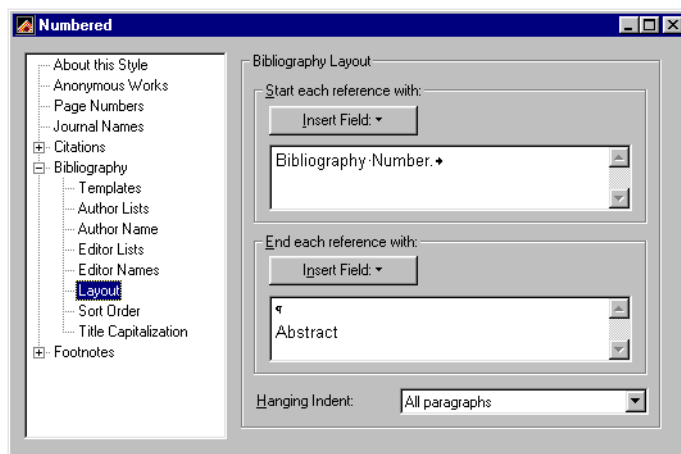
Adding Text Before Each Reference

In the "Start each reference with:" section, you can specify what information, if any, should appear before each reference in your bibliography. (For information on how to add a prefix before a *citation*, see "Citation Prefix Marker" on page 412.)

A common reference prefix is the bibliography number, which is used by all numbered styles to number the references in a bibliography.

To add a bibliography number before each reference:

1. Open the Style Manager by choosing *Output Styles* from the *File* menu and selecting *Open Style Manager*.

2. Select the style that you would like to edit, and click *Edit.*

3. After the Style window opens, choose *Layout* from under the *Bibliography* heading.

4. Click in the text box below the "Start each reference with" section, and select *Bibliography Number* from the *Insert Field* list.

5. Type the necessary punctuation after the bibliography number (such as a period and a space) or insert a tab from the *Insert Field* list.

With a style configured in this way, EndNote creates a bibliography with numbered references, such as:

```
1. Argus, M.V. "New paleontological excavation
   techniques" Nature 19, 234–237 (1993).
```

NOTE: To create a hanging indent, where the second and subsequent lines of a reference are indented, see page 336.

Other Reference Prefix Fields

Other commonly used reference prefixes appear in the *Insert Field* list.

Some bibliographic styles use a *Label* in the citation and the bibliography to refer to each entry with a short mnemonic code, often the author's name and the last two digits of the year. When you enter references into your library, you can type the mnemonic code directly into the Label field. When EndNote builds a bibliography, it can put that code before each reference.

Choosing *Citation* as a reference prefix allows you to label the references in the bibliography with the in-text citation.

Reference Type will insert the reference type (such as Journal Article or Book) before each reference.

Record Number will insert the record number before each reference. The record number is the number that EndNote assigns to each reference in the library, and it is also used in the in-text citations. Add *Record Number* as a reference prefix in any style in order to print all the references in your library with their unique EndNote record numbers.

Adding Text After Each Reference

Use the "End each reference with" section of the *Layout* panel specify what information, if any, should follow each reference in your bibliography. (For information on how to add text after an in-text citation in your document, see "Citation Suffixes" on page 207.)

This command can be used to add the content of the Label, Keywords, Abstract, or Notes field, or the Record Number. Any other text or punctuation can also be entered as a reference suffix and it will appear at the end of each reference in the formatted bibliography. Two common uses for the *Reference Suffix* command are shown below.

Example: Adding Notes to the Bibliography

If you have notes that you want to print together with your references, you should add the Notes field as a reference suffix in the style that you are using to print or format the references.

1. Open the Style Manager by choosing *Output Styles* from the *File* menu and selecting *Open Style Manager*.

2. Select the style that you would like to edit, and click *Edit.*

3. After the Style window opens, choose *Layout* from under the *Bibliography* heading.

4. Click in the text box below the "End each reference with" section, and select *Notes* from the *Insert Field* list. This will append the Notes field to every reference in the bibliography when you format a paper with the style.

If you want the notes to begin on a new line after the reference, insert a paragraph mark from the *Insert Field* list before "Notes." If you want the notes to be indented, like the start of a new paragraph, insert a Tab before the word "Notes."

Adding or Removing Blank Lines Between References

Another common use for the *Layout* options is to add a blank line between references. To do this, edit the style as described above, and insert a paragraph mark (using the *Insert Field* list) into the "End each reference with" section.

To tighten up the bibliography and get rid of the blank line after each reference, edit the style, click on the *Layout* panel, and select and delete the paragraph mark (¶) to get rid of the blank line.

Hanging Indents

Many numbered bibliographic styles require a hanging indent, as shown in the following reference:

```
1. Postma, G., Nemec, W. & Kleinspehn, K.L.
   Sedimentary Geology 58, 47 (1988).
```

```
2. Nyamweru, C. Journal of African Earth Sciences
   And The Middle East 8, 40-42 (1988).
```

EndNote provides a few hanging indent options. Normally, each reference is one paragraph, so some of these options wouldn't apply. But if you have a reference that includes more than one paragraph, EndNote gives you options for which paragraph within a reference the hanging indents should apply. Examples of multi-paragraph references include annotated bibliographies where the abstracts follow each reference, or a style such as those

common in anthropology journals where the authors are on a line of their own

Hanging indent options include: *None*, *All Paragraphs*, *First Paragraph Only*, *Second Paragraph Only*, and *All Paragraphs but the First.* The following is an example of when you would use *Second Paragraph Only*. The style requires that authors begin on the left margin, and then the year (and the rest of the reference) starts on a new line and is indented. The style applies a hanging indent to the second paragraph only, and inserts a tab before and after the year. In the word processing document, the spacing for the hanging indent should be aligned with the second tab stop.

```
Curtis, S.A., and N.F. Ness
   2000   Remanent magnetism at Mars. Geophysical
          Research Letters 15(8):737.
```

The spacing used for tabs and indents is determined by the ruler settings in your word processor.

NOTE: If you are creating a numbered bibliography, as shown in the previous example, insert a tab after the bibliography number to have the references line up correctly.

Tabs

Tabs may be inserted from the *Insert Field* menu. A tab entered into a style will appear as a tab in the formatted bibliography. The tab appears as an arrow on the screen. The width of the tab as it appears in the bibliography is determined by the tab settings in your word processor.

Tabs are often entered after the bibliography number as part of the *Layout* settings. This helps to align the start of each reference after the number, which is especially important if the bibliography entries use a hanging indent.

Sort Order: Bibliographies and Multiple Citations

Each style has instructions for sorting references in the bibliography, and how to sort formatted multiple citations in the text of your paper. Select *Sort Order* from under either the *Citations* or *Bibliographies* headings.

Multiple Citation Sort

The *Sort* panel under the *Citation* heading allows you to set the order that the style uses to sort multiple in-text citations. For example, an unformatted multiple citation looks like this:

```
{Lee, 1990 #5; Jacob, 1994 #22; Zoler, 1983 #19}
```

Formatted with the Author-Date style, the citations are sorted chronologically and the formatted citation looks like this:

```
(Zoler 1983; Lee 1990; Jacob 1994)
```

Options for sorting multiple citations include:

- ♦ **Same as Bibliography**
  Sorts multiple citations in the same order as the Bibliography Sort Order (see page 338).
- ♦ **Author + Title**
  Sorts multiple citations first by authors and then by title.
- ♦ **Author + Year + Title**
  Sorts multiple citations first by authors, then by year, and then by title.
- ♦ **Year + Author**
  Sorts multiple citations chronologically. Then citations from the same year are sorted based on author names.
- ♦ **Don't Sort**
  Multiple citations remain in the same order as they appear in the unformatted temporary citations.
- ♦ **Other**
  A custom sort order is applied to multiple citations. See "Custom Sorting" on page 339.

Bibliography Sort Order

The "Bibliography Sort Order" section determines how the bibliography should be sorted. Common options are listed, and you may also configure a custom sort order.
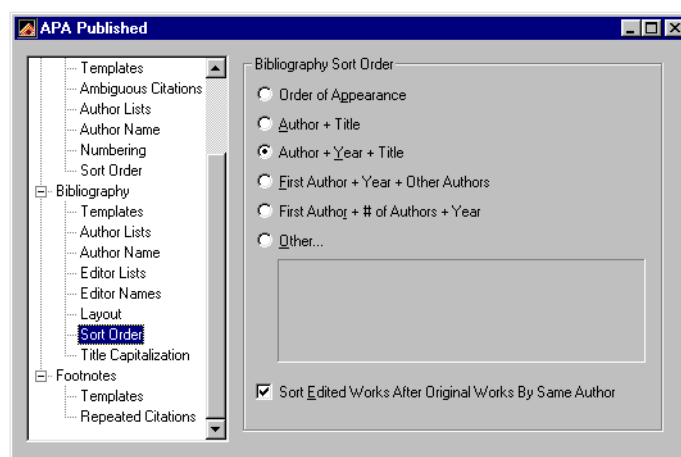
♦ **Order of Appearance**
References are listed in the order in which they are cited in the paper.

♦ **Author + Title**
References are sorted by the Author field. References with identical authors are sorted by title.

♦ **Author + Year + Title**
References are sorted by the Author field, then references with identical authors are sorted by year. References with identical authors and years are then sorted by title.

♦ **First Author + Year + Other Authors**
References are sorted by just the first author, then references with identical primary authors are sorted by year. References with identical primary authors and years are then sorted based on the other authors in the reference.

♦ **First Author + # of Authors + Year**
References are sorted by just the first author, then by the number of authors in the reference. For references with the same primary author and the same number of authors, they are then sorted chronologically based on the Year field.

♦ **Other**
A custom sort order is applied to the references in the bibliography. See "Custom Sorting" below.

♦ **Sort Edited Works After Original Works By Same Author:**
Some styles request that if the same person is the author for a book and the editor for an edited book, the original works by that author are sorted first, and then the edited works follow. This is an exception to the sorting rules that can be applied to the other sort options provided.

NOTE: When sorting by Author field, EndNote sorts based on all information in the Author field, including all author names (not just the first author) and initials. To see about omitting parts of author names or the initial words of a title when sorting, read "Sorting" on page 413.

Custom Sorting

To sort references or multiple citations differently from the options in the "Citation Sort Order" or "Bibliography Sort Order" sections, select the option for *Other* and choose from the lists any combination of up to five fields in ascending or descending order.

This window is identical to the one that appears when you choose *Sort Library* from the *References* menu. You do not need to use all five options. The button at the right of each box controls the direction of the sort, either ascending or descending order. Clicking these boxes toggles the sort order between ascending and descending order.

Once you have set up your sorting strategy, click *OK* to return to the main Sort Order panel for the style. The *Other* button will now display your custom sorting instructions.

Title Capitalization

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

Options for title capitalization include:

♦ **Leave Titles As Entered:**
No changes are made.

♦ **Headline Style Capitalization:**
The first letter of every significant word is capitalized. Articles and prepositions are not capitalized.

♦ **Sentence Style Capitalization:**
Only the first letter of every title is capitalized.

NOTE: See "Change Case" on page 415 to enter words or acronyms that should not be adjusted when EndNote changes the capitalization of titles.

Repeated Citations (in Footnotes)

Most of the complex formatting in the footnotes is relevant only to styles in the humanities. There is a wide variety of formats required for citing references in the footnotes of a paper. These options are provide in the *Repeated Citations* panel under the *Footnote* heading.
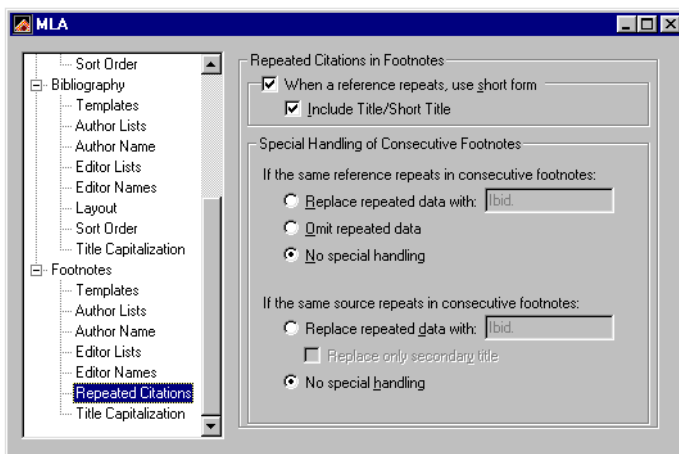
When a reference repeats, use short form

One common setting for citing references in footnotes is to list a shortened form of a reference after the first time it is cited in a footnote. So, for example, the first time the reference is cited, the full references appears (as specified in the *Templates* panel). The second time that reference appears in a footnote, only a shortened form of it (the Author name, and cited pages if there are any) are listed. Check the option to "Include Title/Short Title" if you would like both the author and the title to appear in the shortened form of the footnote references. The contents of the Short Title field will be used, if available; otherwise, the regular title will be added to the citation. The format of the title (such as italic, underlined, or in quotations) is determined by the format of the title in the footnote *Templates* panel.

Here is an example of the first occurrence of a citation in a footnote, a consecutive citation to the same reference, and a third instance of that source being cited, but the volume and cited pages are different:

```
1 George Harding, California Wildlife, 2 vols.
(New York: Nature Press, 1989), 1: 207.
```

[This is the first, and therefore complete, reference to the work].

```
2 Ibid.
```

[With no intervening reference, a second reference to the same volume and page of Harding's work requires only Ibid.]

```
3 Ibid., Vol. 2, p.51.
```

[Here another volume and page number of the reference are used.]

Special Handling of Consecutive Footnotes

Some styles take the shortening of references in footnotes even farther when the repeated references appear in consecutive footnotes (or in the same footnote). EndNote provides additional options for the special handling of these cases:

♦ **If the same reference repeats in consecutive footnotes:** When the same reference repeats in consecutive footnotes, you have the option of replacing the repeated data with text of your choice. This is normally "Ibid" (or a variation of the term). The next option allows you to simply omit the repeated data, and replace it with nothing. Or you may apply no special handling and when references repeat in consecutive footnotes they will be handled just like other repeated references in footnotes.

♦ **If the same source repeats in consecutive footnotes:** This setting does not apply to the identical *reference* that repeats in consecutive footnotes, but rather if any of the source data repeats in two consecutive footnotes. For example, if two different references happen to be from the same journal, these settings would apply to the journal name, volume, and issue (or whatever portion of that source information is identical). You may choose "No special handling" for these cases, so that these references are not abbreviated. Or you may choose to replace the repeated data with "Ibid" (or the text of your choice). If you choose this option, you may limit the replacement to only the Secondary Title field (this includes the journal, magazine, or newspaper name, or the title of a book for a book section).

NOTE: We realize that many of these detailed settings for the style can be confusing. We have done our best to configure the styles for you so that you will not need to edit them and work through these details on your own. However, if you find that you need to modify these parts of your styles, please consult your style guide for more detailed descriptions and examples of handling repeated citations in footnotes.

Creating a New Style

It is often easier to modify an existing bibliographic style that closely resembles a style that you need than it is to create a new style from scratch. (See "Modifying Style Templates" on page 308.) If you do wish to create a new style, this section gives you a general overview of the process.

Creating a bibliographic style involves building templates for the in-text citations and the bibliographic references to mimic how you want them to appear in your paper. Then adjust the various options to be sure that authors, titles, pages, and other fields are being formatted according to your requirements. The following example guides you through the creation of a fictitious author-date type of style.

Example: Creating an Author Date Style

Part I: Creating the Templates

A new style need only contain a Citation template and a Generic Bibliography template for it to produce citations and bibliographies for any paper. The Citation template applies to all in-text citations, and the Generic bibliography template applies to all reference types that do not have templates of their own in the style. The Generic template should be considered a default template, and you should add additional templates for the standard reference types which you use. If you define a specific template for any reference types, they are formatted according to that template, and not the Generic format.

1. To create a bibliographic style, select *New* from the *Styles* menu, and a new Untitled Style window appears.

2. Click the *Templates* panel under the *Citations* heading to specify the format of the in-text citations.

Our style uses the author name and the year in the citation. They are surrounded by parentheses and separated by a comma.

3. With the cursor in the Citation Template, type an open parenthesis, click the *Insert Field* button and choose *Author* from the list of available fields, type a comma, choose *Year* from the *Insert Field* button and then type the closing parenthesis.
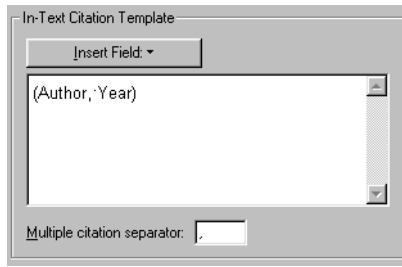
Next, define the Generic format which serves as the default template for reference types that don't have their own template. We know that books should be formatted like this, so we can set up the Generic template to accommodate that format:

```
Jones, VR, BK Marion, et al. (1976). The Theory
of Foraging. New York, Smith and Barnes.
```

4. Click the *Templates* option under the *Bibliography* heading, then click in the "Generic" section of that *Templates* panel.

5. Choose *Author* from the *Insert Field* list to add the Author field to the style template. (You can also type "Author" but it is safer to select the field name from the list.)Type a period and a space. And continue inserting fields and punctuation until you have created a template that mimic the format of the reference:

```
Author. (Year). Title. City, Publisher.
```

6. In this style, the title must be italicized, so double-click the word Title to select it, then from the *Text* menu, choose *Style* and *Italic*.

7. Save the new style by choosing *Save* from the *File* menu. In the dialog that appears, type "Practice Style" as the name of this style and click *Save.* This will save the style and add it as an option in the *Output Styles* submenu of the *File* menu.

Test the Style

Open your library and choose *Show Preview* from the bottom of the Library window. Select different references in your library to see how they format. You will probably see that the books look good, but journal articles don't display enough information. You will need to return to the style and create a template to format journal articles. To do so:

Create a New Template for Journals

In the *Templates* panel under the *Bibliography* heading, choose *Journal Article* from the *Reference Type* list. This will create a new

section for a Journal Article template. Insert the fields and punctuation to create a template as shown below:

`Author (Year). "Title." Journal ` **`Volume:`** ` Pages.`

Once again, save the style by choosing *Save* from the *File* menu. Return to the Library window, and check the preview to see how journal article references are formatted.

Finishing the Style

Continue testing how other reference types format, and include additional reference type templates as necessary. See "Modifying Style Templates" on page 308 for specifics about creating and modifying style templates.

Look at how the author names are formatted, and change the necessary settings. You should also take a close look at pages, title capitalization, the sort order of the references, and various other options provided in the Style window. These are described in the "Additional Style Formatting Options" section starting on page 321.

Chapter 16

Filters

Chapter 16   Filters

Introduction to Filters

The *Import* command in EndNote's *File* menu provides a way to import text files of reference data into EndNote libraries. EndNote has a number of built in import options as well as a large collection of configurable import "filters." Filters are designed to import references downloaded from specific online or CD-ROM bibliographic databases.

This chapter describes how to edit and create these import filters. The process of importing references using the *Import* command is described in Chapter 7.

NOTE: You can automatically download the latest filters available from ISI ResearchSoft. See "Automatically Updating Files" on page 16.

What is a Filter?

The import **filters** provide a wide range of import options. A filter is selected during the import process to show EndNote exactly how to interpret the information in your **data file** (the records downloaded or saved from an online or CD-ROM database). A filter does this by mapping the information in each downloaded reference to the corresponding fields in EndNote.

Because each database offered by the various information providers has its own way to organize reference data, there needs to be a different filter for each database. Each filter provided with EndNote has been configured to import data files from a specific database offered by a single information provider. You can easily modify any of the supplied filters or create a new filter to import from other databases.

A Comment About Difficult Data Files

Although EndNote's filters are very powerful and flexible import tools, there are still some data files that can not be conquered. Whereas some databases provide very clean tagged data, others are almost impossible to discern. Lack of consistency in the source data and the omission of reference type tags often make it difficult for a person to understand the information; the task of creating a perfect filter to handle these files is futile. When fine tuning our filters, we have done our best to always capture the necessary data—even if that means dropping it all into the Notes field. If you find filters that can be further improved, please let us know. It may also help to contact your information provider to let them know that the inconsistencies in the data entry for the database are keeping you from most efficiently making use of it.

The Filter Manager

EndNote provides dozens of import filters for a variety of sources. To peruse the list of available filters in EndNote's Filters folder, choose *Import Filters* from the *File* menu, and select *Open Filter Manager.*

Shows the location of the selected Filters folder.

Click column headings to sort the list.

Name	Information Provider
ABI-Inform (FOLIO)	FOLIO at Stanford
ABI-Inform (KI)	Knowledge Index
ABI-Inform (MELVYL)	MELVYL at UC
ABI-Inform (OCLC)	OCLC
ABI-Inform (OVID)	OVID
ABI-Inform (SP)	SilverPlatter
ABI-INFORM file 15	DIALOG OnLine
Academic Index file 88	DIALOG OnLine
AgeLine file 163	DIALOG OnLine
AGRICOLA (KI)	Knowledge Index
AGRICOLA (OCLC)	OCLC
AGRICOLA (SP)	SilverPlatter
AGRICOLA file 10	DIALOG OnLine

EndNote Import Filters

Showing 198 of 198 import filters from C:\PROGRAM FILES\ENDNOTE 4\Filters

Find: Mark All   Unmark All   Edit

Click to search for files.

Click to display details about the selected file.

▶ Show Info

The **Filter Manager** lists the names of all of the import filters available in the Filters folder and gives you the option to edit them or select them as "favorites" for quick access when you use the *Import* command.

Use these features to locate the import filter you want to use:

♦ If you know the name of the filter that you want to use, you may start typing it and the first file that matches what you type will be selected.

♦ Click the *Find* button and choose an information provider's name (such as Ovid or SilverPlatter) to find only the import filters for a specific information provider.

♦ Click the *Find* button, and choose *by Name* to search for the file by the name of the database from which you are downloading references (such as Medline). You can enter a partial name or the full name. EndNote will display all matching results.

♦ Click the *Find* button and choose *All Filters* to return all of the import filters to the displayed list.

♦ Click the column headings to sort the import filters by name or by information provider. Clicking the same column heading a second time will change the sort order from

ascending to descending. Click again to set it back to ascending order.

♦ Click the *Show Info* button at the bottom of the dialog to display additional information about the selected filter.

Marking Your Favorite Import Filters

When you have found a filter that you will want to use in the future, click the checkbox to the left of it to mark it as a favorite. All filters that are marked as favorites appear in the *Import Options* list in the Import dialog. You can get to the Import dialog by choosing *Import* from the *File* menu. This gives you easy access to those files you use most often.

To mark all of the filters for a specific information provider, click *Find* and, from that list, choose the name of the information provider. Now, with just that subset of filters listed in the Filter Manager window, click *Mark All*. The *Unmark All* button may be used to unmark all of the filters that are showing in the list.

Editing Import Filters

If you would like to modify a filter, select it in the list and click *Edit*. The remainder of this chapter goes into detail about how to work with the filters. Read the section that applies to the aspects of the filter that you would like to modify.

Copying Filters

There are two ways to copy filters. Since each filter is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Windows Explorer.

To make a copy of a filter from within EndNote:

1. From the *File* menu choose *Import Filters* and select *Open Filter Manager*.

2. Select the filter you want to copy and click *Edit.*

3. Without making any changes to the file, choose *Save As* from the *File* menu.

4. Give this copy of the file a new name, and save it in your Filters folder if you would like access to it from within EndNote. If you save the filter outside of the Filter folder (such as on a floppy disk to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

After clicking *Save* to save the new copy of the file, the new filter remains open. The original filter will be left untouched.

Saving Filters

To save a new or modified filters, choose *Save* from the *File* menu. Or, to save changes to a filter that you have just opened or modified while leaving the original filter unchanged, choose *Save As* from the *File* menu (see "Copying Filters" on page 351).

When saving a new filter, or saving a filter under a different name, EndNote automatically saves the filter to your designated filter folder. (The Filter Manager within EndNote only provides access to the filters that are in the designated filter folder). Your Filter folder by default is the folder called Filters in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 420.

NOTE: EndNote filters use the file name extension of ".enf" (for <u>End</u><u>N</u>ote <u>F</u>ilter), as in "Medline.enf.

Deleting Filters

To delete a filter from within EndNote:

1. From the *File* menu, choose *Open Filter Manager*.

2. Select the style to be deleted.

3. Choose *Clear* from the *Edit* menu, or right-click on the filter and choose *Delete* from the shortcut menu.

You can also delete an unwanted filter by switching back to the Windows desktop, and opening the Filter folder in the EndNote folder. Then select the file to delete and choose *Delete* from the *File* menu or drag the file to the Recycle Bin

The Basic Components of a Filter

The basic components of an import filter are described in this section. This information is useful if you want to customize or create a filter.

♦ To create a new import filter: From the *File* menu, choose *Import Filters* and select *New Filter*. If you are interested in creating a new filter, also read "Creating a New Filter" on page 382.

♦ To edit a filter: From the *File* menu, choose *Import Filters* and select *Open Filter Manager.* Select the file to edit and click *Edit.* The most recently used filter can also be easily edited by selecting *Import Filters* from the *File* menu, and choosing *Edit <filter>.*

The Filter Editor window

After choosing the option to edit an existing filter or create a new one, EndNote opens the Filter window.
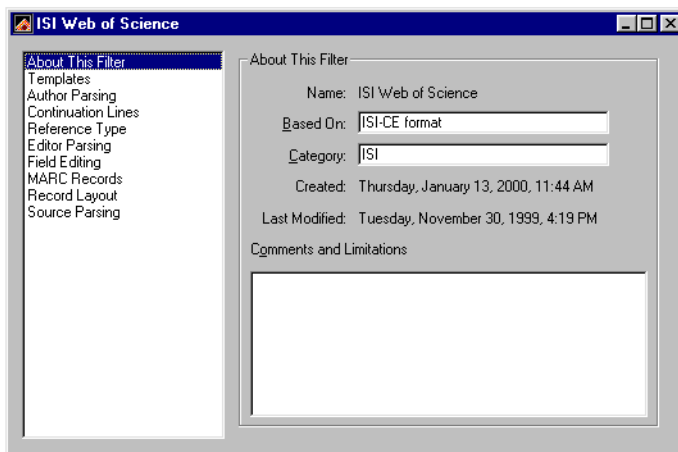
All of the different options for editing a filter are listed on the left side of the Filter window. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you choose *Save* or *Save As* from the *File* menu.

If at any time you need to revert your changes back to the last saved copy of the filter, choose *Revert Filter* from the *File* menu.

To close a Filter window, click the close button in the upper right corner of the window, or choose *Close Filter* from the *File* menu. If you have not saved your changes to the filter, EndNote prompts you and give you the option to save or discard any changes that you have made.

"About this Filter" Panel

The Filter window opens to display the *About this Filter* panel (see the picture in the preceding section). This panel contains descriptive information about the file. None of the information used in this panel has any impact on establishing the connection.

Name: Displays the name of the file as it appears in the Filters folder in the EndNote folder. The file name extension (.enf) is not displayed. The name of the file cannot be changed here; you would need to close this window and switch back to the Windows desktop to rename the file.

Based On: Enter any information about what documentation was used to create the file. Commonly the server documentation

is available on the web, so you could enter a URL here as well to make it easy to later retrieve that information.

Category: The category is typically the information provider (such as Ovid or SilverPlatter), but you may enter anything that will help you categorize and organize your filters. The category information is also listed in the Filter Manager window in the column next to the name of the file. In that window, you may sort filters by category and also search for them by category.

Created: The date the file was installed or created.

Last Modified: The date the file was last modified.

Comments and Limitations: Enter any helpful information such as how to download the references in the format that works with this filter.

All of the information in this panel is visible in the Filter Manager if you click the *Show Info* option at the bottom of the Filter Manager window. This is helpful because you do not need to edit a filter to view the comments or other descriptive information. You may simply scroll through the available filters in the Filter Manager window and view the information there.

Templates

The most important part of the filter is the *Templates* section. The templates define how the various lines of tagged data in your data file should be imported and filtered into the different EndNote fields (such as Author, Year, and Title). Different sets of templates are required for the different reference types that may be in your data file. All of the details about filter templates are covered in "Working with Filter Templates" on page 355.

Options

The rest of the options in the Filter window involve refining the data that is imported using the filter templates. For example, these options include instructions for how EndNote should interpret author names and initials, change the capitalization of fields, or even omit certain characters or terms that you don't want to be imported. Each of the various options is explained in its own section. See "The Filter Options" on page 362.

Working with Filter Templates

The *Templates* panel consists of individual Reference Type templates which correspond to the way the reference data is presented in the data file.
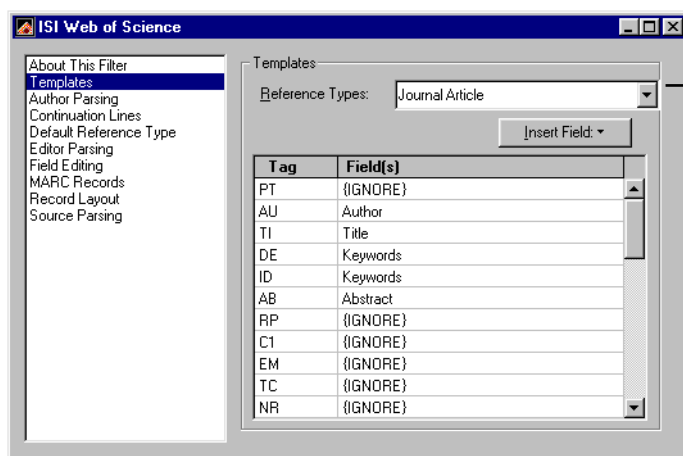
Click here to change the view to a different reference type template.

This example shows a template for Journal Articles.

Navigating in the Templates Panel

The *Templates* panel is divided into a Tag column and a Field(s) column. The tag and its corresponding field(s) are two separate cells in a row. If a cell is active, an outline appears around the cell.

To move from one cell to the next, simply press the TAB key or click the mouse in the desired cell. To move back to the previous cell, hold down the SHIFT key while pressing the TAB key.

To change the width of the Tag column in the Filter window, position the cursor over the vertical line dividing the Tag and Field(s) columns. The cursor changes to indicate that you are in the correct place. Click and drag to the right or left to resize the column widths.

Click the Reference Type list to change the view to a different reference type (such as from Journal Article to Book).

Templates for Different Reference Types

The *Templates* panel includes templates for all of the various reference types (Journal Article, Book, etc.).

♦ Click the Reference Type list to change the view to a different reference type (such as from Journal Article to Book).

The only reference types templates that need to be filled in are the ones that correspond to the reference types in your data file. For example, if the database from which you are downloading contains only journal articles, you would only need to fill in the templates for the Journal Article section in that particular filter.

Within each reference type template there is a list of tags and their corresponding EndNote field names. These templates should exactly match the way the information is organized in the data file. Any text or punctuation that you see that is not part of a field name (such as "vol." before the Volume) is included to make the template exactly match the data file.

Adding & Deleting Rows in the Filter Template

When adding and deleting rows, the order of the tags does not have to match the order of the tags in the data file. There is one case in which the order of the tags is important: if you are entering multiple variations of one tagged line, you should enter the repeated lines for that tag in order from the most complex to the simplest. This is because EndNote looks for matches starting from the top of the window working down the list of tags. It stops at the first template that matches the tagged data.
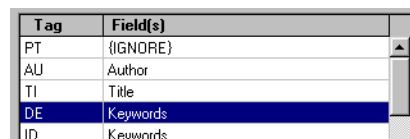
♦ To start a new row immediately below the active row, position the cursor in the Field(s) cell, and press ENTER.

♦ To start a new row immediately above the active row, position the cursor in the Tag cell, and press ENTER.

Cutting, Copying & Pasting Rows

You may use the *Cut, Copy,* and *Paste* commands to move or duplicate a cell or a row of cells. To do so:

1. Select a row by dragging the mouse across both columns. (Dragging the mouse vertically across more than one row selects a range of rows.)

Tag	Field(s)
PT	{IGNORE}
AU	Author
TI	Title
DE	Keywords
ID	Keywords

2. To duplicate the selected row(s) elsewhere in a filter, choose *Copy*(CTRL+C) from the *Edit* menu. If you want to delete the selected row and move it to another location, choose *Cut* (CTRL+X).

3. Click where you would like the cut or copied row to appear, and choose *Paste*(CTRL+V) from the *Edit* menu. The pasted row will be inserted above the row where the cursor is. If the

cursor is in the Field(s) column, the pasted row will be inserted below. (Pasting when an entire row is selected will replace the row.)

Copying & Pasting Between Reference Type Templates

By choosing *Select All* (Ctrl+A) from the *Edit* menu, you can select all the rows in a given Reference Type template. This is useful for copying an entire template to a new reference type or filter. After copying the entire set of templates for a reference type, you may choose a different reference type from the Reference Type list at the top of the window, click in the Tag cell for the new reference type, and choose *Paste.*

When you copy information from one reference type (such as Journal Article), and paste the rows into another reference type (such as Newspaper), the field names automatically change to reflect the names used by the new reference type. If there is not a corresponding field name in the new reference type, the original field name in the template is replaced with {IGNORE}, indicating that the data for that tag will be ignored.

Literal Text vs. EndNote Fields

When you look at a filter, you will notice that some of the templates contain information other than EndNote field names. For EndNote to identify which data should go into a particular EndNote field, you must include punctuation and any literal text or spaces that appear in your data file. Punctuation and literal text act as delimiters allowing EndNote to parse the data into multiple EndNote fields. None of these "delimiters" actually gets imported into an EndNote library, they merely serve as guides for EndNote to correctly import the data.

Here is an example of a data file's source line (SO:) where, in addition to punctuation, there is literal text such as "v", "n" and "p" preceding the data:

```
SO:   Youth Theatre Journal. v6 n4 p3-6
```

The "v", "n" and "p" are considered literal text because they are not EndNote field names; they represent the literal text from the data file that precedes the data that you want to import. In this particular source line, there are four different pieces of information: the journal name, volume, issue, and pages. To help EndNote determine when one field ends and the next one begins, you must insert the literal text, punctuation, and spaces found in the data file next to the appropriate field name. As a result, the above SO: tag line should be represented in a filter like this:

```
SO: │Journal. vVolume nIssue pPages
```

In some databases, you may find lines of data that include a word that is also an EndNote field name. The following source line contains the word "pages" before the page numbers:

```
SO:    Town-planning-review. vol. 62, no. 4,
       pages 461–469.
```

If entered into the filter, EndNote would normally interpret the word "pages" as a field name. (This is true whether you type it in the filter or insert it using the *Insert Field* menu.) To force EndNote to read a field's name as literal text, surround the name with accent grave characters, as in `pages`. The accent grave character is found in the upper left corner, under the tilde (~) key of the keyboard. To match the SO: line shown above, the source line in the filter should appear as:

```
SO: │Journal. vol. Volume, no. Issue, `pages` Pages.
```

The {IGNORE} Field

There may be pieces of information in a line of data that you do *not* want imported into your EndNote library. To force EndNote to ignore pieces of information, use the *Insert Field* menu to insert "{IGNORE}" in the appropriate place. For example, suppose you want EndNote to ignore bracketed text that sometimes follows the title of an article:

```
TI:    Research funds are dwindling. [letter]
```

You should add a new TI tag and template to your filter (above the existing "TI: Title" line) that looks like this:

```
TI: │Title. [{IGNORE}]
```

The Source Line

The source line is typically the most complex line of data in a record because it contains all of the information about the source of publication. For a journal article, the source line may contain the journal name, the volume number, the issue number, page numbers, and the year of publication. For a book, the source line may contain the publisher, the city, and the number of pages.

The source line in your filter must match exactly the source line in the data file in order for EndNote to distinguish one piece of information from another. You will often find more than one variation of a source line for a given reference type in a single

data file, in which case you will need to create a separate source line for each variant, starting with the most complex source. The three source lines displayed below come from a single database:

```
SO: Semin-Oncol. 76(3):465-71 1998

SO: Semin-Oncol. 127:5-24 1999

SO: Eur-J-Cancer. 118/6 (654-657) 1998
```

In the first SO: tag line, parentheses enclose the issue number "(3)". In the second SO: tag line, there is no issue, so a colon separates the volume number and the page numbers "127:5-24". In the third SO: tag line, a slash separates the volume number and the issue number "118/6", and parentheses enclose the page numbers "(654-657)".

Each variant in the data file's source lines must be defined in your filter. Since EndNote tries to match the source line in the data file with the first defined source line in your filter, you should place the most detailed source line first, followed by progressively less detailed source lines.

The filter for the above source lines should look like this:
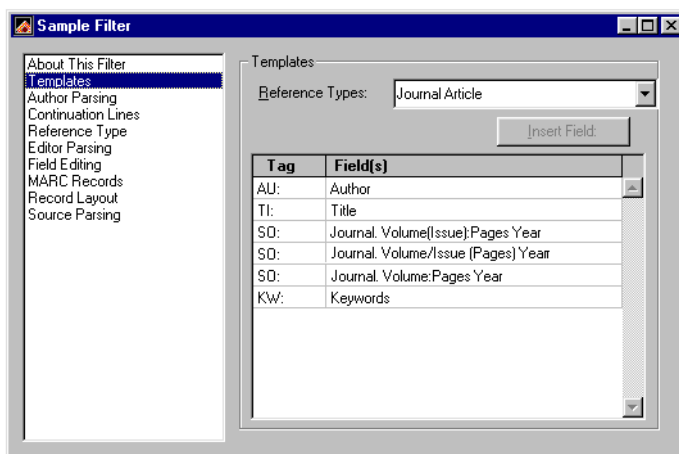
NOTE: If the filter fails to match a variation of the source line for a journal article, it is possible to have EndNote interpret the data on its own. See "Source Parsing" on page 375.

The Reference Type Tag

A reference type tag identifies the kind of work or publication being referenced in a particular record in your data file. In the

Filter window, a reference type tag is only defined by the characteristic of having literal text, and no fields, entered into the field column. This literal text is not imported into EndNote, but it is used only to identify a record's reference type.

Although a reference type tag can be any tag at all, two common reference type tags are "DT" and "PT" (which stand for Document Type and Publication Type).

```
                      JN- Am J Occup Ther; 47 (11) p998-1008|
                      CP- UNITED STATES|
                      PY- Nov 1993|
                      SN- 0272-9490|
                      JC- 3O4|
                      CN- MCJ-009105|
                      LA- ENGLISH|
Reference Type ——  ( DT- Analytic; Serial|
Tag                   JA- 9404|
                      SF- INDEX MEDICUS|
```

To ensure that EndNote imports the data into the correct reference type, you must type the Reference Type tag in the Tag column, and the reference type name (or other identifying text) exactly as it appears in the data file in the Field(s) column. (The matching is case-sensitive.) The Reference Type tag can be placed anywhere in the appropriate Reference Type template.

When EndNote imports a record, it first scans the data file, looking for a reference type tag in your filter. Then it looks for a match in the record it's importing. The first reference type tag match encountered determines which of the Reference Type templates EndNote will use to parse the record. This match also determines which reference type EndNote assigns the record in the EndNote library.

When entering the Reference Type tag in your filter, the text you enter in the Field cell must be interpreted by EndNote as literal text. A problem can arise when you have text that contains an EndNote field name. For example, the following Reference Type tag contains the field name "Journal":

```
DT- │Journal Article                                    │
```

Because the field name "Journal" appears in the template, EndNote will not interpret this DT- tag line as the Reference Type tag. Instead, the filter would import the word "Journal" (from the data file's DT: line) into the Journal field.

To force EndNote to interpret the word Journal (or any other field name) as literal text, put an accent grave character at the start and end of the word. (The accent grave character is found in the upper left corner of the keyboard, under the tilde (~) key.) The above Reference Type tag should appear in a filter as:

```
DT- `Journal` Article
```

If the database you use does not specify a Reference Type tag, all reference types in your data file will import as the default reference type (see page 368).

Fields with Special Characteristics

Certain EndNote fields contain special restrictions on what sort of data can be imported. These settings cannot be modified and apply to all import filters.

Author Fields
The words "And Others" get converted to "et al" and the word "and" is omitted. Years as well as parenthetical or bracketed text are removed by default. See also "Author Parsing" on page 363.

Year
Only 4-digit numbers (1### or 200#) are imported.

Title
The following punctuation is removed from the end of a title: Period, comma, semicolon, colon, forward slash, back slash, opening parenthesis, dash, and caret.

Pages
A "P" or "p" before the number is automatically removed.

Volume
A "V" or "v" before the number is automatically removed, as is a number that appears to be a year.

Issue
A "N", "No" or "No." before the number is automatically removed (this is not case sensitive).

When Punctuation Repeats Within a Field

A special formatting character called a "vertical bar" (|) can be placed in a filter to indicate a repeating separator within a field. For example, you may have a data file where a period followed by a space separates a journal name from the volume. However, in some cases, this separator is part of the journal name itself, with the result that a period and a space cannot be reliably used to distinguish a journal name from the volume. For example:

```
SO:   Science. 10 (3): p. 80-90
```

The above source line would be defined in a filter as:

```
SO:  Journal. Volume (Issue): p. Pages
```

Another source line in the same data file might look like this:

```
SO:   Proc. Nat. Acad. Sci. 13 (2): p. 34-45
```

The problem arises in the second source line where the separator between the journal and volume (period and a space) is found repeatedly within the journal. The SO: line in the filter instructs EndNote to import the data up to the period and space into the Journal field. Consequently, EndNote would parse "`Proc.`" as the journal name, and everything after the period up to the open parenthesis as the volume, so the volume would be "`Nat. Acad. Sci. 13`".

There is a way to indicate a repeating separator within a field in the filter. If you place a vertical bar (|) before the separator, this instructs EndNote to read up to the last occurrence of this separator. In the example above, if we place a vertical bar before the repeating Journal field separator (period and space), the SO: line in the filter would look like this:

```
SO:  Journal|. Volume (Issue): p. Pages
```

This SO: line in the filter instructs EndNote to import all the data with the period followed by a space separator as a journal. Here, EndNote would import "Proc. Nat. Acad. Sci." as the Journal, and "13" as the Volume.

The Filter Options

The remainder of the options listed in the Filter window below *Templates* provide the tools for fine tuning your filter. These options include, among other things, how author names should be interpreted, how text is indented in your data file, and which characters should be omitted when you import records into an EndNote library.

EndNote's "Smart" Settings

When possible, EndNote provides a "Smart" option for your choices in configuring the filters. Wherever you choose a "Smart" option, it means that EndNote will do it's best to interpret the data. If you don't know exactly how the reference is

configured in the data file, or if there is a lot of variability among the format of the references, then the Smart options are probably going to be the most reliable settings. In cases where the "Smart" option doesn't work for your data file, you may try the other options provided for that particular setting.

Author Parsing

Use the *Author Parsing* panel to specify how author names are arranged in your data file. These settings apply only to authors in EndNote's main (Generic) Author field. The *Editor Parsing* panel applies to editors, translators, and other authors that are in EndNote's Generic Secondary Author, Tertiary Author, and Subsidiary Author fields.
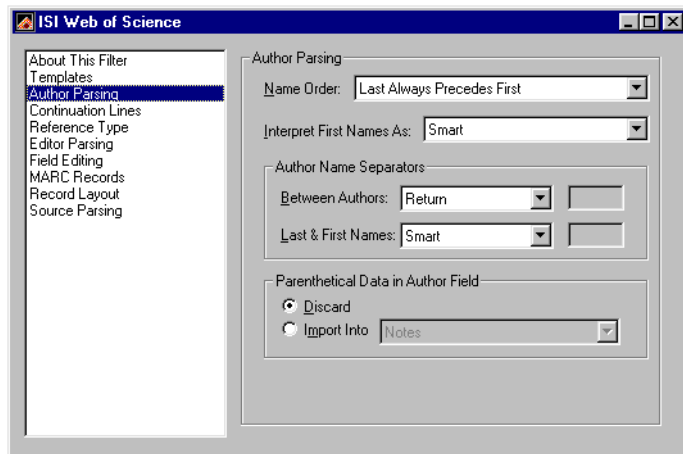
Name Order

Use the "Name Order" settings to specify the order in which first and last names are arranged in the data file. Examples appropriate to each setting are shown below:

Last Always Precedes First

```
AU: Smith, J.; Caton, K.; Jordan, L.
```

First Always Precedes Last

```
AU: J. Smith, K. Caton, L. Jordan
```

Name Order is Inconsistent

```
AU: Smith, J., K. Caton, L. Jordan
```

Interpreting First Names

The "Interpret First Names as" option allows you to specify exactly how EndNote should interpret the part of the author name that it has identified as the first name or initials.

The default is set to *Smart*, which uses the following rule: If there are three or fewer contiguous uppercase letters, these letters are imported as initials. Otherwise, the letters are imported as a whole name. For example, if the author's name appears in the data file as:

```
AU:   Childs, Jackie D
```

Smart parsing will interpret "Jackie" as the first name, and "D" as the middle initial. This author name would import as:

Author
Childs, Jackie D.

If the author's name appears in the data file as

```
AU:   von Braun, ED
```

Smart parsing will interpret ED as initials; thus the author name would import into EndNote as:

Author
von Braun, E. D.

EndNote would only import ED as a first name "Ed" if you selected the *Whole Names* option.

The *Whole Names* and *Initials Only* options should only be used in special cases. The *Whole Names* option should be used in the case where the authors in your data file are all uppercase, and full names are used. This option prevents EndNote from converting names consisting of two or three uppercase letters, as in "SUE" or "AL" to initials. For example, if the author's name appears in the data file as:

```
AU:   TOBIES, SUE
```

the *Whole Names* option would correctly import the author's first name as "Sue." By contrast, EndNote's *Smart Parsing* would interpret the whole name SUE as three initials, as "S.U.E." Likewise, if you select *Initials Only*, EndNote imports all first names as initials only. You would only choose this latter option if the all the first names in your data file are initials.

Author Name Separators

The Author Name Separators tell EndNote how to extract the individual authors from a line containing several authors.

Between Authors

The "Between Authors" option refers to the punctuation that is used to separate individual author names. It is extremely important that this setting is correct so that the author names import correctly into EndNote. Author names in an EndNote references are listed one name per line.

The default for the *Between Authors* option is set to *Smart*. With this option selected, EndNote looks for a common separator, either a semicolon (;), a carat (^) or a vertical bar (|), and use this delimiter to identify where one name ends and the next name begins.

In this example, multiple authors are separated by a semicolon:

```
AU:   Buning ME; Hanzlik JR
```

EndNote's *Smart* parsing recognizes the semicolon separating the two author names and correctly imports them into an EndNote library as:

Author
Buning, M. E.
Hanzlik, J. R.

Therefore, in this example, you do not need to change the setting. However, if your data file has a delimiter other than a semicolon (;), a caret (^), or a vertical bar (|) separating multiple authors, you must select another option from the adjacent list. To type any punctuation such as a dash or a slash, choose *Other* and type the character there. A space and a return (where the authors are listed one per line) can be selected directly from the list.

If you choose *Import As Is* from the list, EndNote will not try to separate the names that follow the author tag. Everything that follows that tag in the data file will be imported exactly as it appears in the file.

Last & First Names Separator

Once EndNote knows how to identify an individual author name in a list of authors, it looks at that name and tried to determine what the first name is and what the last name is. The Last & First Names separator is used to do this, along with the Name Order settings (page 363).

The default *Last & First Names* setting is *Smart*. With this option selected, EndNote attempts to interpret an author's name based on the following separators: a space, a comma, or a period. In your data file, if the separator used between the last name and the first name is something other than a space, a comma, or a period, you can select a separator from the adjacent list.

Parenthetical Data in Author Field

It is not uncommon for information providers to include additional information about the authors (such as date of birth or institutional affiliation).

```
AU: Takahashi, J (1944-); Izumi, R (1969-)
```

When this information is mixed in with the list of authors on the tagged author line, EndNote provides two options for what to do with it.

♦ **Discard:** All parenthetical information is discarded during the import.

♦ **Import Into:** All parenthetical data mixed in with the author names is imported into the field that you choose. We suggest that you import it into the Notes field, Author Address, or another custom field that is appropriate.

NOTE: It is not appropriate for EndNote to import that data into the Author field because it would produce an incorrectly formatted bibliography to have the parenthetical data included with the author names.

Continuation Lines

In general, EndNote ignores lines of text which do not begin with a tag *unless* the lines of text are continuations of a previous tagged item. We call these continuation lines. Here is an abstract from a data file illustrating the concept of continuation lines (all but the first are considered continuation lines):

```
AB- A single-subject research design that used
    multiple baselines across behaviors compared
    traditional adaptations to computers.
```

Because EndNote only imports tagged lines and continuation lines, it can avoid importing extraneous text that might interrupt a reference, such as your logging on or logging off text. Examples of extraneous lines are:

```
-->>Press any Key to continue
```

```
<Record 5 of 42>
```
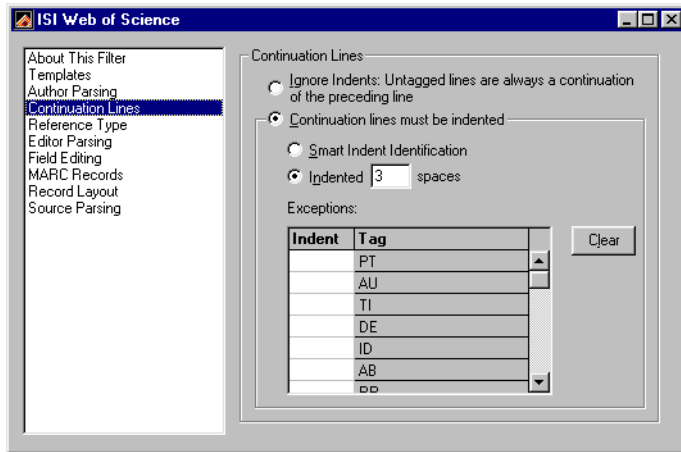
EndNote provides two general options for dealing with continuation lines:

Ignore Indents: Untagged lines are always a continuation of the preceding line

With this option set, every line of text in the data file will import according to the tags that are defined in the *Templates* panel. Do not choose this option is there is any text in your data file that is not tagged. If you use this option and do not want to import certain tagged lines, you must use the "{IGNORE}" option (see page 358).

Continuation lines must be indented

This option allows you to specify the exact number of spaces on the left margin for the continuation lines.

The following example is an abstract where the first line of data is indented four spaces from the left margin, and the continuation lines are properly indented four spaces. EndNote's default *Smart Indent Identification* would import this abstract correctly. (Spaces are shown as periods for clarity.)

```
AB-.Two experiments compared the performance of 23 12 yr
....old dyslexics with that of 8 age-matched controls on a
....battery of tests of motor balance. A dual-task paradigm
....was used: Ss performed each test as a.single task and as
....a task concurrent with a secondary task. In all single-
....task conditions there was no difference between groups.
```

However, you may find data files where the continuation lines are not aligned with the first line of data. In the following example, the continuation lines are indented two spaces from the left margin, whereas the first line is indented four spaces:

```
AB-.Beyond the inevitability of countertransference feelings
..is the question of countertransference enactments. From a
..two-person, participant-observer or observing-participant
..perspective,enactments are inevitable. The analyst becomes
..influenced by the patient (and influences the patient as
..well) and enmeshed in the patient's internalized
..interpersonal configurations.
```

For EndNote to treat the subsequent lines as continuation lines in the preceding example, the filter must specify the exact number of spaces indented on the left margin. In the example just given, you would enter "2" in the "Indent _ spaces" option.

If most of the lines in a data file import a fixed number of spaces (like two spaces in the example above), but one tagged field is indented differently (perhaps keywords are indented four spaces), you can enter exceptions in the table provided. Simply enter the number of spaces in the left column next to the tag. You only need to enter a number for the tagged field with the inconsistent import. All other lines that are left blank will use the general indent setting.

NOTE: For a quick and reliable way to count how many spaces are inserted on the left margin, turn on the setting in your word processor to display formatting characters.

Reference Type

Default Reference Type

The default reference type tells EndNote which reference type to use if it cannot identify the reference type of a record. For example, suppose that in one filter, you specify Journal Article as your default reference type, and create a template for it. If you import a data file containing conference proceedings records for which you have not defined a Reference Type template, any conference proceedings records will import as Journal Articles. Also, if the database that you use does not specify a Reference Type tag, all reference types in your data file will import as your default reference type. (See page 359 for information about

defining the reference types tag in a template.)

NOTE: The default reference type is always indicated with an asterisk (*) in the *Reference Types* list of the *Templates* panel.

Identifiers

Some information providers, such as Ovid Technologies, Inc., provide a button on their web site to allow EndNote users to send search results right from the web page to the EndNote library. In this case, there is no need for you to go through the extra steps of saving the information from the web site to a text file, and then using EndNote's *Import* command to pick a filter and import the text file. All of that happens behind the scenes.

These identifiers are also used to import data files that contain references from multiple databases. EndNote can import multi-source files like that as long as each record in the data file has a vendor and a database tag at the start of the reference. The identifiers must also be entered into the appropriate filters in the Filters folder. When you are ready to import a file that has data from multiple sources in it, be sure to choose the *Multi-Filter* import option in the Import dialog.

The way that EndNote is able to know which filter to use is by these Identifier tags entered into the filter. Both identifiers must be used. The first identifier should be the tag that includes the name of the information provider. For this example it is "VN." The exact text that follows that tag for each record should be entered into the corresponding box in the Identifiers section. The next tag is used to identify the database, such as Medline or BIOSIS. Enter the tag used for the database name, and then enter the database name exactly as it appears in each reference.
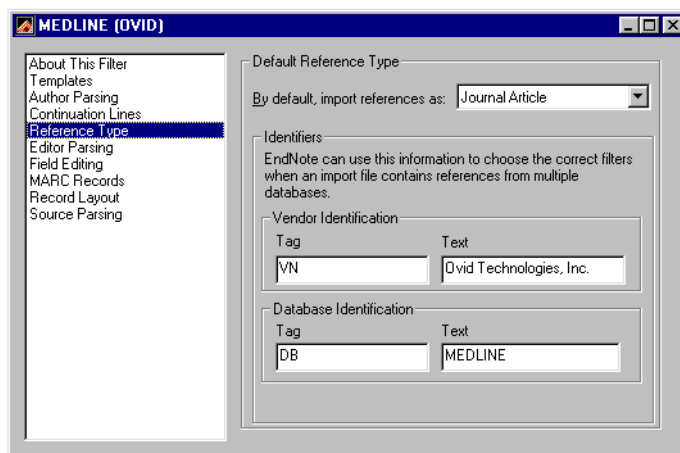
EndNote would know to use the filter shown above if the data file that it was trying to import contained those two tags and lines of text:

```
<1>
VN      Ovid Technologies, Inc.
DB      MEDLINE
AU      Jacobson, R; Campbell, S.
PY      1999
etc.
```

Field Editing — Converting Text from Uppercase to Lowercase

If the text in your data file appears entirely in uppercase letters, EndNote can convert the text to either *Sentence*, *Headline* or *Lowercase* format, depending on which option you specify in the *Field Editing* panel.

To control the lowercasing of a field, select the appropriate field from the "Field Editing for:" list at the top of the window. The EndNote fields are listed here by their Generic names. (For a list of reference type fields and their corresponding Generic field names, see "Table of Predefined Reference Types" on page 291.) Then pick a capitalization option from the "Change UPPERCASE text to:" list .

For example, a title that appears in a data file as "COMPOST AS A HUMAN NUTRIENT AND HORMONE CARRIER" would import in *Headline* capitalization as:

```
Compost as a Human Nutrient and Hormone Carrier
```

or in *Sentence* capitalization as:

```
Compost as a human nutrient and hormone carrier
```

To keep a field's text entirely in uppercase characters, choose the *Do NOT Lowercase* option.

You can apply lowercasing on any field as long as *all* the text in the field is uppercase. If any of the text in the field is in mixed case, EndNote will import it in mixed case.

The Author, Editor, and Translator fields are treated differently from all other EndNote fields. Upon importing author fields into an EndNote library, these fields are automatically converted from uppercase to headline. Due to the special characteristics of these particular fields, the option to change the case is not available in the *Field Editing* panel.
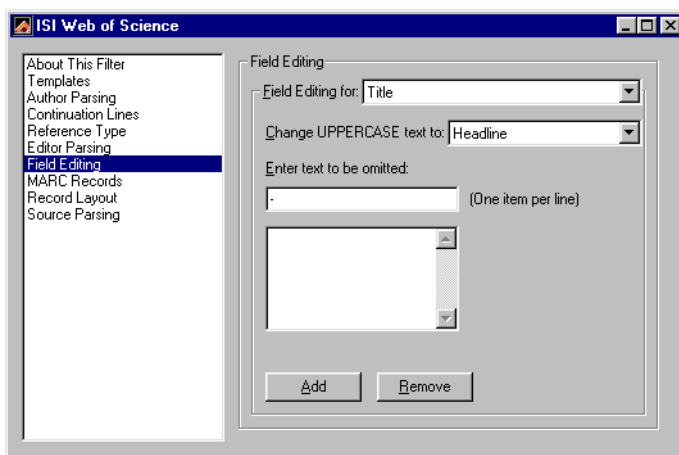
Omitting Unwanted Characters

Some lines of data have superfluous characters, such as an asterisk (*) or a dash (-), that you may not want to import. For example, in the following lines of data there are dashes in the journal name, and there is an asterisk before each keyword:

```
SO-   American-journal-of-preventive-medicine;
      12(9)

DE-   *COMPUTER SYSTEMS DESIGN; *DISPLAY
      DEVICES; *INTERFACES
```

To prevent unwanted characters from being imported into your EndNote library, use the *Field Editing* panel to specify the characters that you want to omit:

1. From the "Field Editing for:" list , select the EndNote field that contains unwanted characters. You will find that the EndNote fields are listed by their Generic names. For a list of reference type fields and their corresponding Generic field names, see "Table of Predefined Reference Types" on page 291.

2. Type the unwanted text in the "Enter text to be omitted (one item per line)" box, and then click *Add* to add it to the omission list.

When you prevent characters from being imported into an EndNote field, you are omitting the characters from the corresponding Generic field, so the omission applies to every reference type field that corresponds to the particular Generic field. For example, the Secondary Title field corresponds to both the Journal field in a Journal Article reference type and the Series Title in a Book reference type. Therefore, if you omit a dash (-) from the journal name, any dashes found in a Series Title for a Book reference type will also be omitted.

Each item that you want to omit should be entered on a separate line. For example, let's say that you wanted to omit both underscores (_) and forward slashes (/) from your records' keywords. First add the underscore, and then add the forward slash. Entering both items on the same line would cause EndNote to omit only instances of "_/", while all other instances of underscores and forward slashes would end up in your keywords. You can omit up to 254 characters per EndNote field.

To remove an item from the list, simply select the item and click *Remove*. You may select more than one item by holding down the SHIFT or CTRL key while clicking on multiple items.

NOTE: The more items added to the list, the longer it takes EndNote to import records into EndNote. To avoid slowing down the importing process, you may want to start by importing the data into an EndNote library without specifying any omissions. Then use the *Change Text* command in EndNote to delete the unwanted words and other text.

Record Layout

Use the options in the *Record Layout* panel to modify how EndNote interprets the end of a reference in a data file.
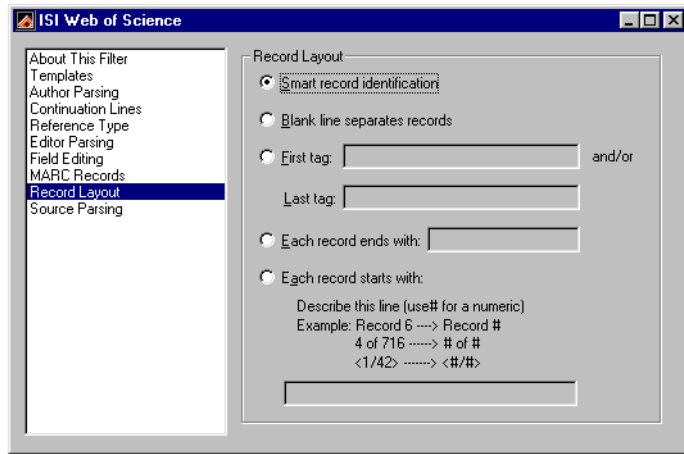
Smart Record Identification

Smart Record Identification, EndNote's default setting for Record Termination, creates a new record in EndNote each time a tag in the data file repeats out of sequence *and is preceded by a blank or extraneous line*. EndNote will not create a new record if the same tag appears in succession, provided that they are not separated by a blank line.

For example, some databases list authors one per tagged line, with the AU tag appearing two or more times in succession, as in the following example:

```
AU- D'Orazio, MG
AU- Tamura, TS
```

When EndNote sees consecutive tags, it does not start a new reference unless it finds the same tag preceded by a blank or extraneous line.

More Specific Record Layout Options

A more precise way of identifying a new record is to specify in your filter exactly how the records are terminated in your data file. The remaining options in the Record Layout panel allow you to do this.

To determine how records are terminated, open your data file in either a word processor or text editor. Check for the pattern consistently separating one record from another. Once you have determined the correct record termination, click the appropriate button under in the *Record Layout* panel to select the best option

for your data file. You may choose only one option as a record terminator.

Blank line separates records

Choose this option if the only blank lines in a data file are the ones in between references.

Using "First Tag" and "Last Tag" Options

This option lets you specify a first tag that starts the record and/ or a final tag that ends each record. Only one tag is required.

♦ Before choosing this option as your record terminator, verify that the first or last tag is consistently present in each record. This option will function correctly only if the chosen tag appears in every record.

♦ You do not need to enter both a first and last tag; either tag will suffice to distinguish one record from the next.

♦ Enter the tag exactly as it appears in the data file, including the delimiter (colon, dash, etc.) that follows the tag. EndNote treats these delimiters as part of their respective tags.

♦ You do not need to include these tags in the templates of your filter, unless you wish to import the associated data.

Each record ends with:

Choose this option if your references consistently end with a specific set of unique characters. Note that whatever you enter into this option needs to be unique enough that it doesn't appear elsewhere in your references. One common set of characters that is used to terminate each record is "||".

Each record starts with:

Choose this option if your references consistently start with text that is not a tag. For example, it is common for some information providers to begin each reference with a counter such as:

`<1>`

or

`Record 1 of 53`

In these cases, enter the text exactly as it appears in the data file, but substitute a number sign (#) for the actual number. For the examples above, you would enter "<#>" and "Record # of #".

Example

The following example illustrates a data file that contains neither a blank line, nor text terminating each record. However, there is a consistent first tag, "ND:" starting each record. So for this

example you would want to specify "ND:" as the record termination by clicking the "First Tag" button, and type "ND:" in the box.


```
First Tag ──── ( ND:43052953|
              BASE:BA83|
              AU:HILDEN O^PAHTAMAA T|
              TI:DEVELOPMENT OF THE RAZORBILL POPULATION OF THE QUARK
              IN 1957-1990|
              SO:ORNIS FENNICA^69 (1). 1992. 34-38.^1992|
              LA:English|
              SH:CHORDATE TAXONOMY-AVES^BEHAVIOR BIOLOGY-ANIMAL
              BEHAVIOR^ECOLOGY-ANIMAL^
              01:1.00/000002 DIMDI: -BIOSIS PREV AB /COPYRIGHT BIOSIS|
First Tag ──── ( ND:93110787|
              BASE:BA83|
              AU:NAKAZAWA Y^FURUSAWA M^HOHNO H^SHIDA T|
              TI:MANUFACTURE AND PROTEOLYTIC PROPERTIES OF YOGURT FROM
                  MILK CONCENTRATED BY ULTRAFILTRATION|
              SO:LEBENSMITTEL-WISSENSCHAFT & TECHNOLOGIE^24 (6). 1991.
                  491-494.^1991|
              LA:English|
```

Source Parsing

The **source line** reference to the line in the data file that represents the source information for the journal (typically journal, volume, issue, pages, and sometimes the year). It is most often the most complex and inconsistent line of data in your data file—and it is also the most important. As a result, the EndNote filters provide a sort of safety net to catch inconsistently entered source data.

The tags and templates defined in the *Templates* panel are used first to import source data. If a source line in a data file does not match any of the options in the templates, then EndNote provides you with additional options for how to handle that. The first thing you need to do is to make sure that EndNote has correctly identified the journal article source tag.

Identifying the Source Tag

If the source tag for the Journal Article reference type in the *Templates* section of a filter is SO or JN, EndNote automatically identifies this tag as the source tag. However, if the source tag defined in your filter is something other than a "SO" or "JN", you must choose the appropriate tag from the *Journal Article Source Tag* list. (All of the tags that have been defined in the Journal Article template will appear in the "Source Tag" menu.)
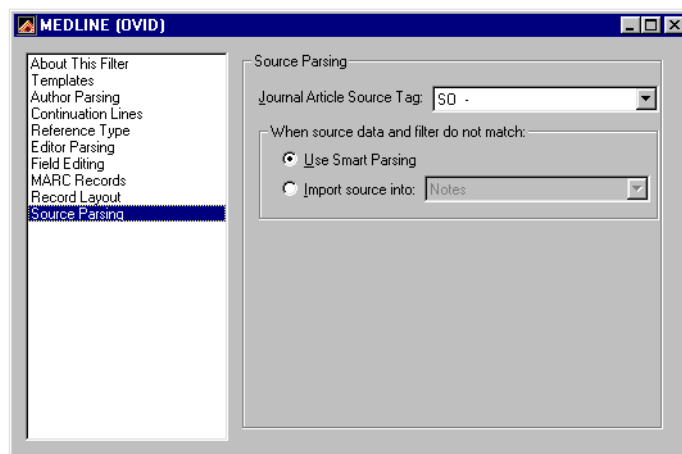
When source data and filter templates do not match

If a journal article's source line in your data file does not match a source line in your filter, you can choose how EndNote should treat the unmatched source line. The default option is *Use Smart Parsing*. EndNote's *Smart Parsing* does its best to distinguish the journal name, the volume number, the issue number, the page numbers, and the year, and import each into the corresponding EndNote field. Any information that is not identified as a journal, volume, issue, pages, or year is imported into the Notes field, along with the comment "Using Smart Source Parsing." (After importing, if you suspect that some references may not have matched the defined source template, it is helpful to use EndNote's *Search* command to search for the text "Using Smart Source Parsing" in the Notes field of the imported references. You may then check those specifically to see if EndNote correctly interpreted the data.)

If you choose the other option to import the source data into a separate field, EndNote does not attempt to parse the source information, and instead imports the entire unmatched source line into whatever field you have specified.

For any reference type other than a Journal Article, unmatched source lines are automatically imported into the Notes field. Therefore, if you have not defined an exact match for a source line found in a book record in your data file, EndNote imports the entire source line into the Notes field.

Importing MARC Records

What Are MARC Records?

"MARC" stands for <u>Ma</u>chine <u>R</u>eadable <u>C</u>ataloging format. It is a standardized format developed by the Library of Congress for producing machine-readable bibliographic records. It is much more difficult to read than regular tagged data formats, but it can still be imported in much the same way using EndNote's filters.

The MARC Format and Connection Files

Most connection files use the MARC format because it is specified as part of the Z39.50 standard. When creating a new connection file, the *Templates* and *MARC Records* portions of the connection file are automatically set up to import standard MARC data. If you need to customize these parts of the connection file, the instructions in this section would apply.

Unique Aspects of MARC Records

MARC records differ from all other bibliographic records in two important ways:

Sub-Fields

Each tagged line in a MARC record may contain any number of subfields. A subfield typically consists of two consecutive characters, the first of which is called a subfield delimiter. Examples of subfields are "$a" and "$x." Some tagged lines in MARC records may have information in each consecutive subfield, as in the first example below, while others may skip one or more consecutive subfields, as in the second example below, where "$b" is skipped.

```
245 10    $a When you realize you have too many
          kids: $b a guide / $c Hugh B Dunn.

245 14    $a The angel with a dirty mouth /$c Nick
          Steel ; illustrated by Melissa Fips.
```

Numeric Tags

The second way in which MARC records differ from all other bibliographic records is in their reliance on numeric tags, typically consisting of three digits followed by two spaces and two more digits. There can be any number of combinations of the last two digits in each MARC record's tag.

If you were creating a conventional filter for importing bibliographic records from a MARC database, you would have

to anticipate a vast number of possible combinations, both of tags and of subfields. Because it is all but impossible to anticipate every possible combination of subfields in your MARC records, and because there can be any number of variants in the last two digits in a MARC record's tag, EndNote provides you with a simplified way of creating filters for MARC records. The two sections that follow tell you how to create a filter specifically for MARC records, and then alert you to the different rules that EndNote uses when importing MARC records into an EndNote library.

Creating a Filter for MARC Records

Once you have created a new filter, or you have opened an existing filter, select the *MARC Records* panel in the Filter window.
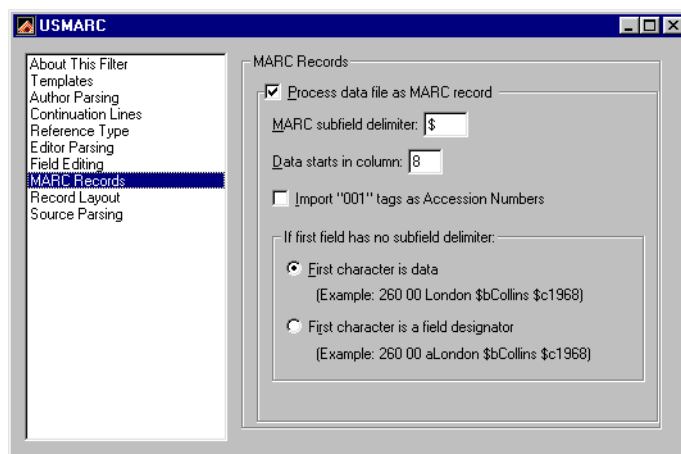
Click the "Process data file as MARC record" checkbox. The dollar sign ($) will appear in the "MARC Subfield Delimiter" box, since this is the subfield delimiter in most cases. If the subfield delimiter is something other than a dollar sign, delete the dollar sign and type in the appropriate delimiter.

Data Start Column

The reference data in a MARC reference normally starts in column 6 (that is, the sixth character from the left margin). If the MARC references in your data file start the actual reference data (as opposed to tags and subfield delimiters) in some other position, enter that number in the text box for *Data starts in column*.

Accession Numbers

The Accession Number is a unique number assigned by an information provider to each reference in their database. (It has nothing to do with the EndNote record number). These accession numbers (or unique identifier numbers) are downloaded as part of the reference in the data file. It is not uncommon to see these numbers added in a non-standard way to a MARC file. That is, they appear immediately after the "001" tag—without any subfield delimiter, and not in the standard data column position. In this case, you can still have EndNote import the number by checking the option to *Import 001"tags as Accession Numbers*. The data imports directly into the Accession Number field in the EndNote reference.

If first field has no subfield delimiter:

Normally the first character that precedes the reference data is the subfield delimiter (commonly a dollar sign $). If this subfield delimiter is not present for the first field of each tagged line, you will need to tell EndNote how to interpret the first character: is it part of the real data of a reference or is it a field designator (such as "a" or "b") that just happens to be missing the subfield delimiter?

Rules for MARC Import Filters

The *Templates* panel for a filter created for MARC records looks something like this:
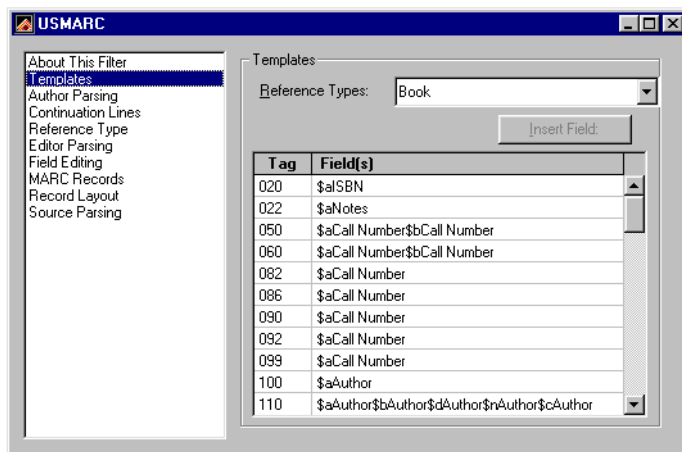
EndNote observes the following rules when importing MARC records:

◆ EndNote allows you to specify only the first three digits of the tag when designing a filter for MARC records. This means that you may disregard any spaces and digits appearing immediately after the first three digits. The tag for both of the following examples would be 245.

```
245 10   $a When you realize you have too many
         kids: $b a guide / $c Hugh B Dunn.
```

```
245 14   $a The angel with a dirty mouth /$c Nick
         Steel ; illustrated by Melissa Fips.
```

◆ You do not have to define all the subfields in a line of data. There may be some subfields that contain information you do not want to import into your EndNote library. EndNote will ignore any subfields that are not defined in your filter.

◆ Source lines cannot take advantage of the "Smart Source Parsing" option. You may, however, enter multiple variations of the subfields in a source line. Be sure to enter all subfields *after the same tag* (don't repeat the tag for each), and list the most complex subfield formats first.

◆ With the exception of the reference type tag, EndNote allows you to define a tag only once; therefore you should include all of the subfields that contain data you want to be imported. For example, the following line in a filter for MARC records would successfully import any or all of the three lines that follow:

```
245 | $a Title $b Title $c Notes
```

```
245 14 $a The hollow horn : $b Bob Dylan's
       reception in the United States and
       Germany / $c by Dennis Anderson.
```

```
245 10 $a Bob Dylan, spellbinding songwriter /
       $c Nathan Aaseng.
```

```
245 00 $a Down in the groove.
```

Example: Modifying an Existing Filter

Modifying an existing filter is useful if you want to create a new filter for a different database by the same provider. Although some information providers offer radically different formats for their different databases, there are others who provide fairly consistent tags and organized data across their databases.

Common reasons for editing a filter include adding a tag to import additional information; removing a tag or using {IGNORE} to omit unwanted data; or fine-tuning the current settings for how authors or journal source data are imported. All of the specifics for how to work with templates and options are described in the preceding sections of this chapter. This example is intended to provide a general overview of the process of editing a filter.

Adding a Tag and Field to a Filter

Let's say that you want to modify a filter to import the language of the publication into EndNote's Notes field. In this particular database, the language is preceded by the tag "LA-".


```
           TI- Zum Beginn des mathematischen Frauenstudiums in Preussen.|
           TI- <Translated> The beginnings of mathematical studies for
               women in Prussia|
           AU- Tobies. Renate
           JN- NTM Schr. Geschichte Natur. Tech. Medizin|
           SO- <JN> NTM Schriftenreihe fur Geschichte der Naturwissenschaften
               Technik und Medizin|
           SO- <PY> 1991|
           SO- <VO> 28|
           SO- <NO> no. 2,|
           SO- <PG> 151-172.|
Language ──(LA-)German|
Tag        DT- Journal|
```

To add the LA tag and direct its contents to the Notes field:

1. From the *File* menu, choose *Import Filters* and select *Open Filter Manager*. (The most recently used filter also appears as an option in the *Import Filters* submenu. You may choose *Edit <filter name>* to directly edit that filter as well.)

2. In the Filter Manager, select the filter that you want to edit and click *Edit.*

3. Click the mouse in any cell of the Journal Article template, and press ENTER to create to a new row.
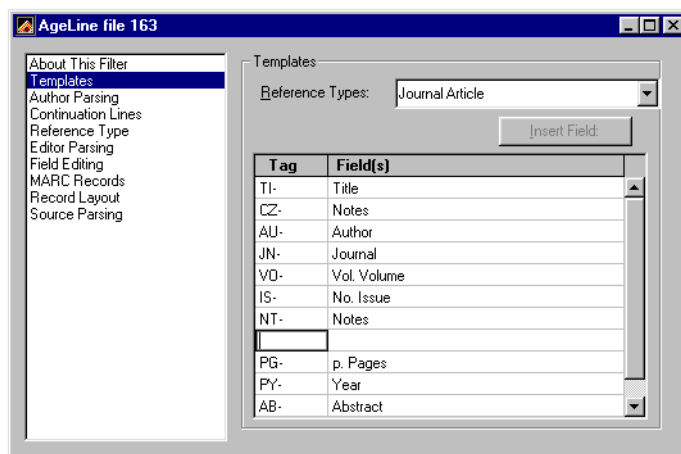
4. Type `LA-` in the Tag cell, then press a TAB to move to the Field cell. Insert the Notes field from the *Insert Field* menu. Doing so tells EndNote to import the language information into EndNote's Notes field.

5. You can add the `LA-` tag to the remaining Reference Type templates in the filter. Use the *Reference Type* list to switch to each reference type template in your filter and repeat the process described above. (Reference types with check marks next to them in the list are the ones that have templates defined for them.

6. To keep the original filter unmodified, choose *Save As* from the *File* menu, give the modified version of the filter a new name, and click *Save*. Or, to save the changes to the original filter, simply choose *Save* from the *File* menu.

Creating a New Filter

This section provides a general overview of how to create a new filter. It includes an example of a data file, and the templates portion of a filter to match it. Specific instructions for configuring templates and filter options can be found in the earlier sections in this chapter.

Overview

The basic steps to create a new filter are:

1. From the *File* menu choose *Import Filters*, and select *New Filter*.

2. If you'd like, you may enter a category for the filter (usually the information provider is used for the category), and any

other comments about what the filter is based on or what data it is used to import.

3. Click on the *Templates* option.

4. From the *Reference Types* list choose the first reference type that you would like to define, and enter the necessary tags and the corresponding fields into the reference type template. (See "Working with Filter Templates" on page 355.)

5. Define additional reference types, as necessary, by selecting them from the *Reference Types* list and entering the tags and fields for them as well.

6. Click on the *Reference Type* option in the list of panel names, and choose the default reference type for the filter.

At this point, you may have entered enough information to use the filter successfully. Try it out by choosing it as the import option to import your data file in to a new, empty library. Review the imported references to be sure that they imported correctly. Fine tune the filter as necessary (see "The Filter Options" on page 362).

NOTE: If you need a reference type that does not appear in the *Reference Type* list, see"Adding & Deleting Reference Types" on page 288.

Tips for Entering Tags and Fields

Not every tag in your data file needs to be in your filter.

There is no need to define every tag that appears in your data file, provided that the contents of the corresponding field start on the same line as the tag itself; and the records' continuation lines are not flush left. If you need to define every tag that appears in a record, but only want to import the information associated with certain tags, insert the {IGNORE} field from the *Insert Field* menu where appropriate.

NOTE: You do not need to specify all data fields, *unless* each tag appears on a line by itself, with the data starting below it on the next line. You may also want to specify all tags if the continuation lines in your records are flush left, in which case an undefined tag appearing immediately after a continuation line will be read in as text.

You might need to enter multiple variations of a source line.

You will often find more than one variation of a source line for a given reference type in a database, in which case you will need

to define a separate source line in your template for each such variant. The most complex source line should appear first, followed by source lines of decreasing complexity. In the case of Journal Articles, be sure to specify the appropriate *Source Parsing* option (refer to "Source Parsing" on page 375).

MARC formats are an exception. See page 379.

A colon, dash, space or other character that appears along with a tag is treated as part of the tag.

When defining tags in a filter, these characters need to be included in the tag column of the filter for EndNote to find an exact match. If spaces are inserted within a tag, as in "SO-<VO>," they need to be defined as part of the tag as well.

Example Data File and Templates

Below is a sample of a record in a data file and the filter *Templates* panel configured to import the data. See "Working with Filter Templates" on page 355 for details about configuring templates.

Sample Record from a Data File

```
FN- DIALOG MEDLINE file 155
AN- 08791562|
AN- <NLM> 94106562|
TI- Adaptive computer use for the visually
    impaired
AU- Buning ME; Hanzlik JR|
CS- School of Occupational and Educational
    Studies, Fort Collins, Colorado.|
JN- Am J Occup Ther; 47 (11) p998-1008|
CP- UNITED STATES|
PY- Nov 1993|
SN- 0272-9490|
JC- 3O4|
CN- MCJ-009105|
LA- ENGLISH|
DT- ANALYTIC; SERIAL|
JA- 9404|
SF- INDEX MEDICUS|
AB- A single-subject research design that used
    baselines across behaviors compared
    adaptations (e.g., the use of readers) to
    computer technologies for typical reading |
GS- Case Report; Human; Male; Support, U.S.
    Gov't, Non-P.H.S.; Support, U.S. Gov't,
    P.H.S.|
DE- *Microcomputers; *Vision,
    Subnormal--Rehabilitation--RH; Activities |
ID- EC 4.1.1.1   (Pyruvate Decarboxylase)||
```

NOTE: The trailing vertical bars at the end of each line will be stripped out by EndNote. *Do not include them in the filter.*

To create a template for the Journal Article reference type:

1. Type **TI-** in the tag cell, then press TAB to move to the Field column. Insert the Title field using the *Insert Field* button.

2. Press ENTER to move to the next line.

3. Type the next tag to import and insert the corresponding field. Continue entering the rest of the tags and fields until all of the necessary information is covered by the filter. Skip any tags for data that you are not interested in importing.

Here's what the resulting *Templates* panel of the filter looks like:
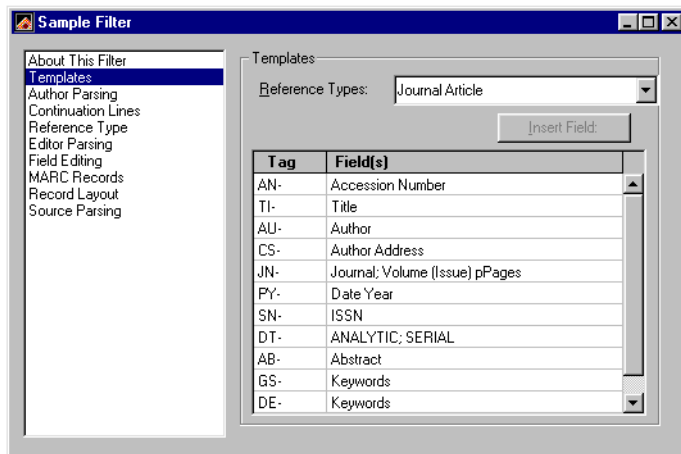
NOTE: It is important to remember that the source line in a filter must exactly match the source line in the data file for EndNote to distinguish one field from another. You will often find more than one variation of a source line for a given reference type in a database, in which case you will need to create a separate source line for each variant in your download, starting with the most complex source line and ending with the least complex source line. As a backup, select the appropriate *Source Parsing* option, as outlined in "Source Parsing" on page 375.

Chapter 17

Connection Files

Chapter 17   Connection Files

Introduction to Connection Files

The *Connect* command in EndNote's *File* menu connects you to online databases and library catalogs so that you may search them from within the EndNote program and retrieve references directly into EndNote. EndNote is able to make these connections using the information stored in the dozens of individual "connection files."

This chapter describes how to edit and create these connection files. The process of using the *Connect* command is described in Chapter 6.

NOTE: You can automatically download the latest connection files available from ISI ResearchSoft. See "Automatically Updating Files" on page 16.

What is a Connection File?

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

The connection files are located in the Connections folder in your EndNote folder. You can view all of the available connections by choosing *Connection Files* from the *File* menu and selecting *Open Connection Manager*.

The Connection Manager

EndNote provides dozens of connection files for a variety of sources. To peruse the list of available connection files in EndNote's Connections folder, choose *Connection Files* from the *File* menu, and select *Open Connection Manager*.

Click column headings to sort the list.

Click to search for files.

Click to display details about the selected file.
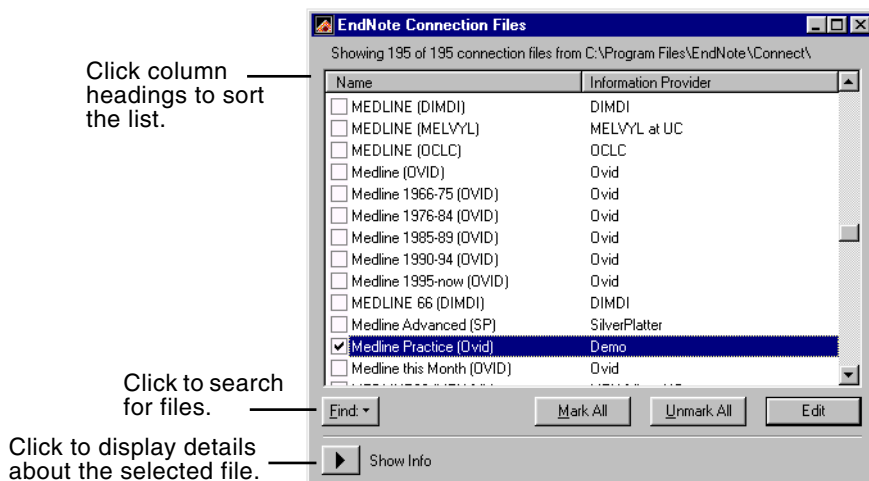
The Connection Manager lists the names of all of the connection files available in the Connections folder and gives you the options to edit them or select them as "favorites" for quick access when you use the *Connect* command.

Use these features to locate the connection file you want to use:

♦   If you know the name of the connection file that you want to use, start typing it to select the first file that matches what you type.

♦   Click the *Find* button and choose an information provider's name (such as Ovid or SilverPlatter) to find only the connection files for a specific information provider.

♦   Click the *Find* button, and choose *by Name* to search for the file by the name of the database. You can enter a partial name or the full name. EndNote displays all matching results.

♦   Click the *Find* button and choose *All Connections* to return all of the connection files to the displayed list.

♦   Click the column headings to sort the connection files by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

♦   Click the *Show Info* button at the bottom of the dialog to display additional information about the selected connection file.

Marking Your Favorite Connection Files

When you have found a connection file that you will want to use in the future, click the checkbox to the left of it to mark it as a

favorite. All connection files that are marked as favorites appear in a submenu when you choose *Connect* from the *File* menu. This gives you easy access to those files you use most often.
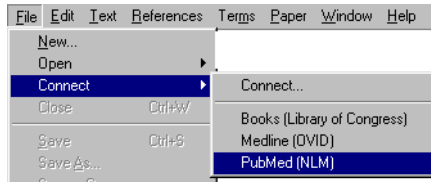
An easy way to mark a whole category of connection files (such as all of the connections for Ovid databases) is to click the *Find* button, choose a category from the list, and then when all of the files for that category are showing, click the *Mark All* button.

Editing Connection Files

If you would like to modify a connection file, select it in the list and click *Edit.* The remainder of this chapter goes into detail about how to work with connection files.

Copying Connection Files

There are two ways to copy connection files. Since each connection file is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Windows desktop.

To make a copy of a connection file from within EndNote:

1. Choose *Connection Files>Open Connection Manager* from the *File* menu to open the Connections Manager.

2. Select the connection file you want to copy and click *Edit.*

3. Without making any changes to the file, choose *Save As* from the *File* menu.

4. Give this copy of the file a new name, and save it in your Connections folder if you would like access to it from within EndNote. If you save the connection file outside of the Connections folder (such as on a floppy disk to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

After clicking *Save* to save the new copy of the file, the new connection file will remain open. The original connection file will be left untouched.

Saving Connection Files

To save a new or modified connection file, choose *Save* from the *File* menu when the Connection File window is open. Or, to save changes to a connection file while leaving the original connection file unchanged, choose *Save As* from the *File* menu (see "Copying Connection Files" on page 391).

When saving a new connection file, or saving a connection file under a different name, EndNote will automatically save the connection file to your designated Connections folder. (The Connections Manager within EndNote only provides access to the connection files that are in the designated connections folder). Your Connections folder by default is the folder called Connections in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 420.

NOTE: EndNote connection files use the file name extension of ".enz", as in "Medline (Ovid).enz.

Deleting Connection Files

To delete a connection file from within EndNote:

1. From the *File* menu, choose *Open Connection Manager*.

2. Select the connection file to be deleted.

3. Choose *Clear* from the *Edit* menu, or right-click on the connection file and choose *Delete* from the shortcut menu.

You can also delete an unwanted connection file by switching back to the Windows Explorer or by opening "My Computer", and opening the Connections folder in the EndNote folder. Then select the file to delete and choose *Delete* from the *File* menu or drag the file to the Recycle Bin

Basic Components of a Connection File

The basic components of a connection file are described in this section. This information is useful if you want to modify or create a connection file. To create a new connection file see "Creating Connection Files" on page 400.

Editing a Connection File

If you are editing a connection file and would like to keep the original file unchanged, choose *Save As* from the *File* menu immediately after opening the connection file for editing. Name the new copy of the connection file and save it in the Connections

folder. Your original connection file will remain untouched, and keep its original name. The newly named copy of that connection file will now be open for you to modify as you wish.

To edit a connection file:

1. From the *File* menu, choose *Connection Files* and select *Open Connection Manager*.

2. Select the file to edit and click *Edit*.

The most recently used connection file can also be easily edited by selecting *Connection Files* from the *File* menu, and choosing *Edit <connection file>*.

The Connection File Window

After choosing the option to edit an existing connection file or create a new one, EndNote opens the Connection File window.
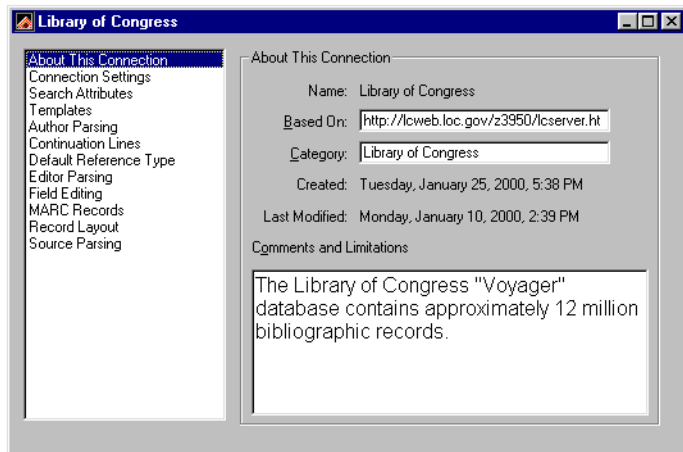
All of the different areas of the connection file are listed on the left side of the Connection File window. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you choose *Save* or *Save As* from the *File* menu.

If at any time you need to revert your changes back to the last saved copy of the connection file, choose *Revert Connection* from the *File* menu.

To close the Connection Editor window, choose *Close Connection* from the *File* menu, or click the close button in the top right corner of the window.

"About this Connection" Panel

The Connection Editor window opens to display the *About this Connection* information (shown in the preceding section). This panel contains descriptive information about the file. None of the information used in this panel has any impact on establishing the connection.

Name: Displays the name of the file as it appears in the Connections folder in the EndNote folder. The file name extension (.enz) is not displayed. The name of the file cannot be changed here; you would need to close this window and switch back to the Windows desktop to rename the file.

Based On: Enter any information about what documentation was used to create the file. Commonly the server documentation is available on the web, so you could enter a URL here to make it easy to later retrieve that information. If this connection file is a modified copy of another connection file, it may be helpful to enter the name of the original file in this field for future reference.

Category: The category is typically the information provider (such as Ovid or SilverPlatter), but you may enter anything that will help you categorize and organize your connection files. The category information is also listed in the Connection Manager window in the column next to the name of the file. In that window, you may sort connection files by category and also search for them by category.

Created: The date the file was installed or created.

Last Modified: The date the file was last modified.

Comments and Limitations: Enter any useful comments here that would help you remember how to search the remote database. Limitations to preconfigured connection files may be documented here as well.

All of the information in this panel is visible in the Connection Manager if you click the *Show Info* option at the bottom of the Connection Manager window. This is helpful because you do not need to edit a connection file to view the comments or other descriptive information. You may simply scroll through the available connection files in the Connection Manager window and view the information there.

The Connection Settings

Click on *Connection Settings* to view the panel where all the data is stored to establish a connection. The Connection Settings information is *required* for EndNote to be able to connect to the remote database. These terms and descriptions are part of the Z39.50 standard.
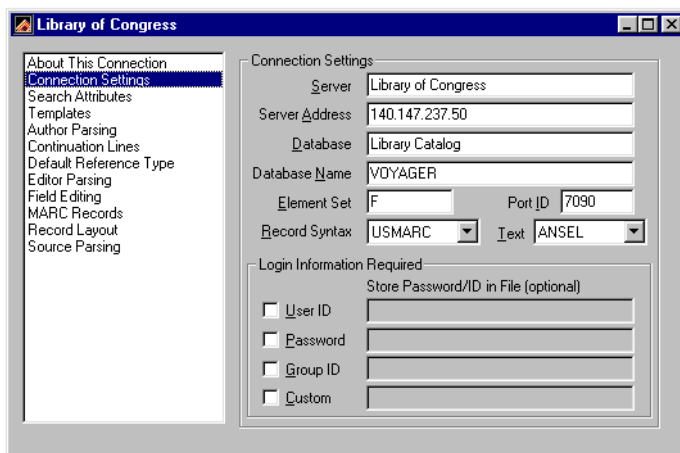
Server Description: The name of the information provider or institution. EndNote displays this name in the title of the Retrieved References window, it is also listed in the Connection Manager window. This information is not used to establish the connection.

Server Address: The server address for the remote database. This can be either a numerical IP address or a domain name.

Database Description: The name of the remote database. This name is displayed in the Title bar of the Retrieved References window to help you identify the database to which you are connected. It is not used to establish the connection.

Database Name: The command used to select the database on the remote server. This is often a four character code.

Element Set Name: This is normally F for "full" or B for "Brief." The Element Set Name determines the amount of information that is provided by the server for each retrieved reference. Not all servers support both options, and the fields returned for each option also vary.

Port ID: The TCP/IP port at the server that is used for a Z39.50 connection. For most Z39.50 connections this is port 210.

Record Syntax: USMARC (United States Machine Readable Cataloging), **UNIMARC**, **SUTRS** (Simple Unstructured Text Record Syntax), and **OPAC** (Online Public Access Catalog) formats are supported by EndNote. The USMARC format is a standard format commonly used by Z39.50 servers. When you create a new connection file in EndNote, the filter and record syntax are automatically set up to work with USMARC data. Consequently, the filter section for connection files using SUTRS, UNIMARC, and OPAC must be constructed manually. UNIMARC and OPAC use variations of the MARC format (OPAC commonly adds holdings data). The SUTRS format, because it is "unstructured," does not have a standard format among different databases. The SUTRS format often uses tags (such as "AU" or "Author") to identify the reference data.

Text: The *Text* option is used to specify how EndNote should interpret the incoming text. Choose from ANSEL and Latin-1. Choose ANSEL if the Record Syntax for the connection file is set to a MARC format (USMARC, UNIMARC, OPAC). Choose Latin-1 if the Record Syntax is set to SUTRS. It is uncommon, but some servers do use Latin-1 text encoding in their MARC format. If records retrieved using a MARC-based format appear with asterisks in place of common western diacritical characters, change the Text option to Latin-1.

Required Login Information: This section is divided into four separate options: Password, User ID, Group ID, and Custom ID Authentication String. Select the options required to login to the remote database in order to have EndNote prompt you for that information when you connect. You can also store your password and/or IDs in the connection file so that you don't have to enter them each time you connect. Simply type the password or ID into the box provided.

NOTE: Passwords and IDs may be saved in the connection file for convenience, but do so at your own risk: passwords are not protected or encrypted. If someone else copies or uses your connection file, they will be able to use your stored password.

Custom ID Authentication String

Sometimes a database server requires a custom format for presenting the password and IDs. For these situations, you may skip the regular password or ID option, check the "Custom ID Authentication String" option, and enter the text specified by your server's Z39.50 documentation. You may either enter your actual password and ID along with the text, or use one of the

following placeholders to have EndNote prompt you for the necessary items: ?PASSWORD, ?USERID, ?GROUPID.

For example, the California Digital Library's MELVYL system requires that passwords be presented by Z39.50 clients in the following manner:

```
pass=?PASSWORD/dla_ui=yes
```

If you wanted to store your password ("abc123" for this example) it would look like this:

```
pass=abc123/dla_ui=yes
```

Search Attributes

The Search Attributes section of a connection file contains a table that defines the various search options for a particular database.
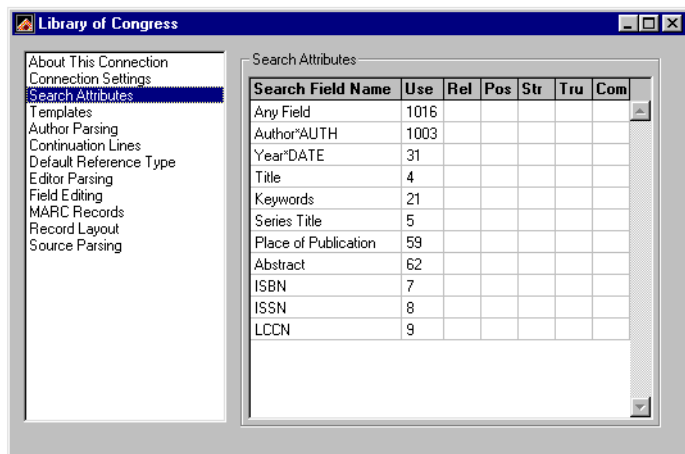
♦ **Search Field Name:** The first column identifies the name of a search. This is the word or phrase that appears in the menus in the Search dialog.

Use EndNote's Generic field names as the search field names whenever possible. Doing so makes it easier to have a search apply to various remote sources and local EndNote libraries.

EndNote's preconfigured connection files often use parenthetical text after the search field name to help describe the search, if necessary. This parenthetical text is not considered part of the search field name when you change the focus of the search and EndNote looks for a matching search field name. (See "Changing the Focus of the Search" on page 103. Generic field names are listed on page 291.)

♦ **Attributes**: The rest of the items in a particular row are the various search attributes that control what index is being used for the search, and how the search term is interpreted.

What is an "attribute"?

A Z39.50 **search attribute** is a value used to define the characteristics of a search term. For example, if your search term is "ebola virus," the various attributes would be sent to the server along with that term to tell the server where to look for "ebola virus" and what qualifies as a matching reference.

Available attributes, as defined by the Z39.50 standard, are:

1. Use	The index to be searched (such as Keywords)
2. Relation	The relation of the search term to the index (such as equal, greater than, or less than)
3. Position	The position of the search term in the MARC record field (first, last, anywhere, etc.)
4. Structure	The structure of the term, such as a word or phrase
5. Truncation	Available truncation options used to interpret the search term (for example: right truncation, wildcards, no truncation)
6. Completeness	Indicates whether or not the search term should be the complete subfield in the MARC record corresponding to the field searched

The "Use" attribute is the most important here, indicating which index will be searched to find the search term. The other attributes will all have varying default values for each remote database. These options are most often left blank to use the server's defaults, but the default attribute values can be overridden by entering another value for the attribute.

Each database has its own supported subset of Use attributes and associated combinations of the other attributes. Consult the configuration information for the remote database to determine which values for these attributes are supported. ISI ResearchSoft does not provide this information. You will need to obtain it from the organization (or "information provider") that maintains the server. Much of this information is also available at the EndNote web site (http://www.endnote.com/home/z3950.htm). Our Z39.50 resources page will link you to the server's original documentation whenever possible.

Tip for Editing Search Attributes

When modifying the search attributes in a connection file, it is useful to first test the search with the new attribute combination before actually changing the connection file. You can do this by entering the new attribute values using the command-line search method (see page 402). This lets you test new attribute combinations without having to edit and save the connection file, and reconnect to the server every time you want to test a modification.

Filter Information

The Filter section of the connection file contains the information used to import each reference and get the reference data into the correct EndNote fields.

For most connection files, the filter is set up to interpret references in the MARC format. When you create a new connection file, the Filter section will be set up to interpret references in a standard USMARC format.
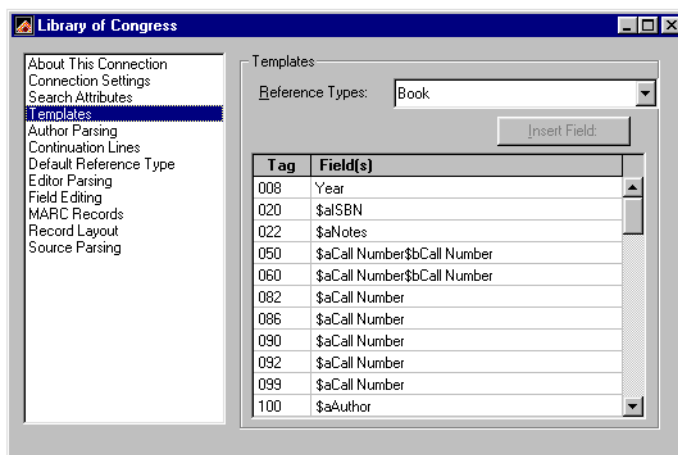
This part of the connection file is identical to the regular Filter window. For more information about editing a filter consult Chapter 16.

If the retrieved references aren't importing the way you would like, you should compare the filter settings of the connection file to the original text that EndNote receives from the remote database. To do so, choose *Show Connection Status* from the *Window* menu when retrieving references. Set the view in the Status window to show *Record Data* and compare the record data to what is in the filter. This record data is also stored in the log

file, Connect.log, which is located by default in the EndNote folder in the Windows Application Data folder. This file is simply a text file and may be opened in any word processor to view it.

To change the location of the Connect.log file, see "Online Preferences" on page 418.

Creating Connection Files

Before you begin actually creating or modifying a connection file, you must obtain the Z39.50 client configuration instructions for the database you want to access. Contact your librarian or information provider for this information.

If the database is not available on a Z39.50 server, you will not be able to use EndNote's *Connect* feature to access it directly. Follow the instructions in Chapter 7 instead to import references that have been downloaded to text files.

Steps to Create a New Connection File

Once you have the Z39.50 client configuration information in hand, follow these steps to create a new connection file:

Create the File and Enter the Basic Information

1. From the *File* menu choose *Connections Files* and select *New Connection File*.

2. The new Connection File window opens to display the *About this Connection* information panel. Enter any comments or descriptions here for your own use. (These comments do not affect how the connection functions.)

3. Click on the *Connection Settings* option and enter the connection information (see "The Connection Settings" on page 395).

4. Click on the *Search Attributes* option to modify the default search attributes if necessary (see "Search Attributes" on page 397).

5. Choose *Save As* from the *File* menu. Name the new connection file and save it in your Connections folder.

Test the Connection and Searching

6. From the *File* menu, choose *Connect* and select your new connection file. If the connection cannot be established, check the settings in the *Connection Settings* panel of the connection file, save your changes, and try again.

7. If the connection was established, the Search window should open automatically. Enter a simple search to see if the search attributes were correctly configured. If the Search doesn't work correctly or it returns an error, check the *Search Attributes* settings in the connection file. (If you modify the connection file at this point, you must save the connection file, then close the Retrieved References window and re-connect in order for your changes to take effect.)

Test the Filtering of Reference Data

8. Once you are able to connect and search, retrieve a dozen or so references to test how accurately they are filtered into the EndNote Reference windows. Double-click a retrieved reference to open it to verify that the data are in the correct fields.

    Note that if you are paying for the references you retrieve, these may not come through correctly, so it is best to retrieve only a few. All references retrieved are saved to a connection log file, so they are not lost. This log file is replaced the next time you run EndNote. See "The Log File" on page 108.

9. If the reference data is not being correctly filtered into the appropriate fields in the EndNote Reference window, you'll need to compare the downloaded data to the filter templates in your connection file.

    Close the Retrieved References window and open the Connect.log file in a word processor to view the original format of the retrieved references. (See "The Log File" on page 108 for information about the Connect.log file.)

    From the *File* menu, choose *Connections Files* and select *Edit <Connection File>* to edit the newly created connection file. Look at the *Templates* panel of the connection file and compare the templates there to the reference data in the Connect.log file. Make changes as necessary. See Chapter 16 for information about modifying filters.

Default Values for New Connection Files

When creating a new connection file, a few basic search attributes are entered by default. It is not guaranteed that these will work, as each database may only support its own subset of the Z39.50 attributes.

Consult the Z39.50 client configuration instructions from your information provider or your librarian to set up the connection file correctly for the remote database you want to access.

Default settings for a new connection file are:

Port ID: 210

Element Set Name: F (full)

Record Syntax: USMARC

Text: ANSEL

Search Fields (Use Attributes): Any Field (1016), Author (1004), Year (31), Title (4), Keywords (21), and Abstract (62).

Filter: USMARC filter settings are used. All references are import as the "Book" reference type. See "Filter Information" on page 399 to import additional reference types.

Using Z39.50 Command-Line Syntax

NOTE: This section is intended only for people who are familiar with Z39.50 terminology and have access to the Z39.50-client configuration information for their remote databases. The advanced search strategies are documented here only for more technical EndNote users; this knowledge is *not* required for basic searching of remote databases.

These command-line searches will not work with PubMed.

It is possible to set up a search of a remote database that is not supported by the EndNote Search window or the connection file you are using. For instance, if you know about the Z39.50 attributes supported by the remote database, you can enter a Z39.50 search which EndNote passes directly to the server, without any translation. This lets you use searches that aren't already supported by your connection file and is useful for testing various search attribute combinations when creating or modifying a connection file.

These advanced searches are entered directly into the search item just as you would enter a search term. EndNote ignores the search menu for that item when it detects that you've entered an advanced search. If other search terms are needed, enter them into the subsequent search items and select the appropriate "And", "Or", or "Not" connectors (just like any other search).

An advanced search uses the following format:

```
\\search term&/ATTRIBUTE TYPE/ATTRIBUTE VALUE
```

The first two characters (\\) tell EndNote this is an advanced search of a remote database. The next part, up to the ampersand, is the search term. The numbers of the Z39.50 attribute type and

values follow. They are entered first with a slash and the number for the attribute type, then a slash, and the attribute's value. Repeat that pattern for as many attributes as you want to specify. Not all attributes need to be included. (See "Search Attributes" on page 397).

The following is a common example that should work for most servers. This should find all references in which the title begins with "child."
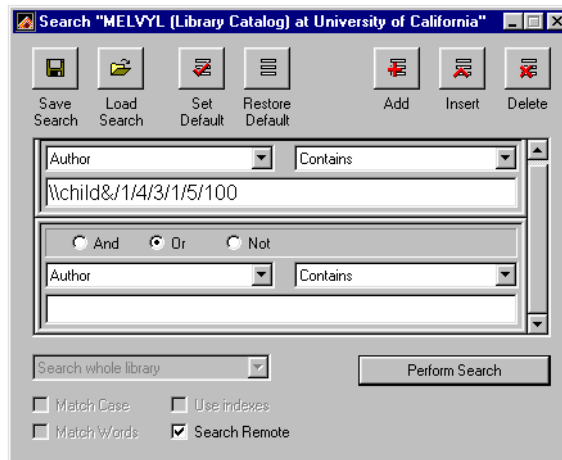
♦ A Use attribute (1) of 4 has been specified, so the search will be restricted to the Title for this database.

♦ A Position attribute (3) of 1 further narrows the search by having the search term be found as the first word in the field.

♦ A Truncation attribute (5) of 100 specifies no truncation at all so only "child" will be seen as a match, and words such as "children" and "childhood" will not.

Tip for Modifying Search Attributes

If you wanted to test how variations of the search attribute settings would impact your search, here's an easy way to do it— without having to edit your connection file.

1. With the connection already established, choose *Show Connection Status* from the *Window* menu. Keep the view set to *Status Messages*.

2. Start with a basic search using the Search window (without the command-line syntax). For example, search for "stress" in the Title field.

3. Look in the Status window, and you'll see which attributes are being used:

Search command using the command-line syntax (note that the "\\" prefix is not included here.)

Each item is listed separately as well.
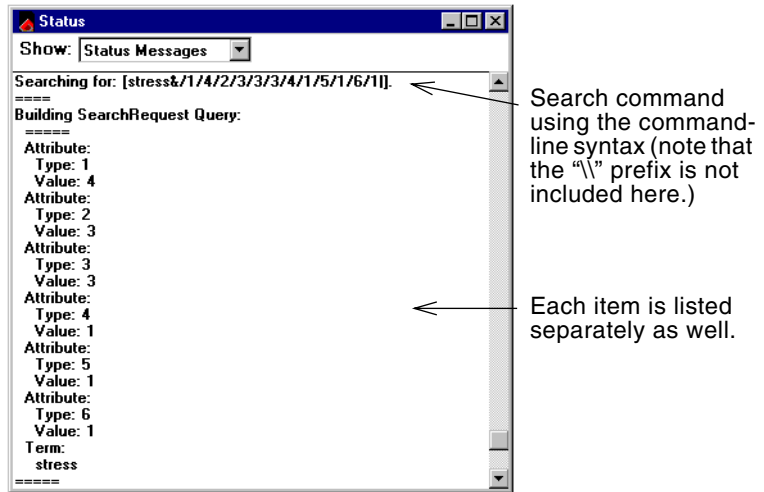
Now, you can try out other attribute configurations to see how it would change the search.

4. You can copy the search command out of the Status window, and paste it into the Search window (remember to add the "\ \" prefix to identify it as a command-line search), then add or modify the attribute values as necessary.

5. Click *Search* to try out your new combination of attributes.

6. When you have found a combination of search attributes that does what you need, edit your connection file and make those changes to the *Search Attributes* panel.

Chapter 18

Preferences, Toolbars, & Shortcuts

Chapter 18   Preferences, Toolbars, & Shortcuts

EndNote Preferences

The settings for configuring EndNote's display, formatting preferences, and other options are organized in the Preferences section of the EndNote program.

To access the EndNote preferences:

1. From the *Edit* menu, choose *Preferences*.

2. A list of the available preference panels appears on the left side of the window. Click on the name of a panel in the list that corresponds to the setting you would like to change.
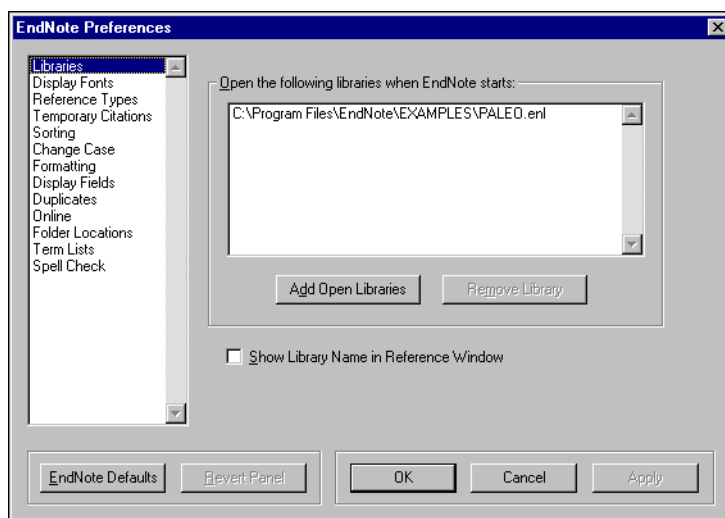
Saving or Discarding Your Changes

All of the preferences panels have the following three options:

♦ *EndNote Defaults*: Reverts the settings for just the current panel to the original EndNote settings.

♦ *Revert Panel*: Removes any changes made to the current panel since it was last saved.

♦ *OK*: saves all changes to the preferences and closes the Preferences window.

♦ *Cancel*: discards all changes to the preferences and closes the Preferences window.

♦ *Apply*: Saves and applies all changes to the preferences, and keeps the Preferences window open so that you can continue to modify the preferences as necessary.

Library Preferences

Setting Default Libraries

Use the Libraries preferences section to specify which libraries should open by default when EndNote starts. To add a library to this list:

1. If the library is not already open, open it by choosing *Open* from the *File* menu, and selecting the desired library.

2. Return to the Library section of the Preferences dialog, and click the *Add Open Libraries* button to add all open libraries to the list.
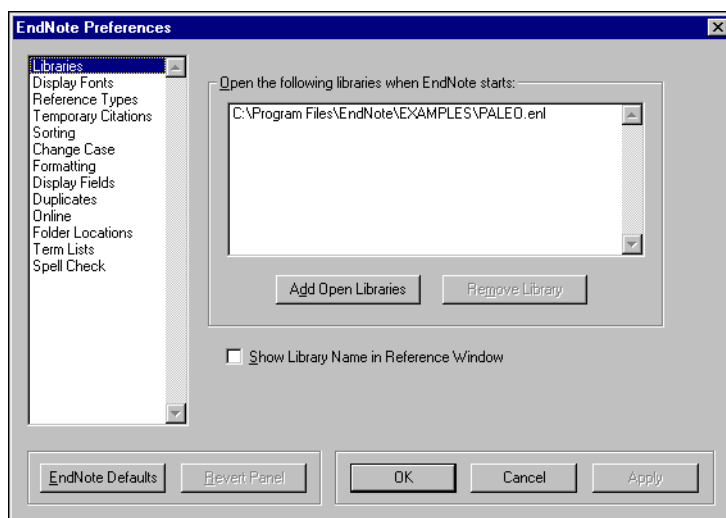
To remove a library from this list, simply select it in the Libraries panel, and click *Remove Library.*

Displaying the Library Name with Each Reference

Click the option to "Show Library Name in Reference Window" if you want the library name to appear at the top of each Reference window, as shown below.
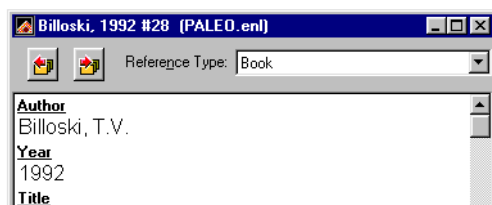
Display Fonts

The *Display Fonts* panel gives you the option of changing the font that EndNote uses to display much of the text throughout the program. The Library Display Font determines the font and size of the references listed in the Library window. The General Display Font changes the font used to display all other text that is typed into EndNote (such as in the Reference or Style windows). The General Display Font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed, exported, or copied directly from EndNote.

Changes made to the display fonts apply to all EndNote libraries opened on that computer. They do not affect the font used when you are formatting bibliographies in a word processing document. The normal font of the document is used for that.

To change the library display font:

1. From the *Edit* menu, choose *Preferences*.

2. Click the *Display Fonts* option in the list.
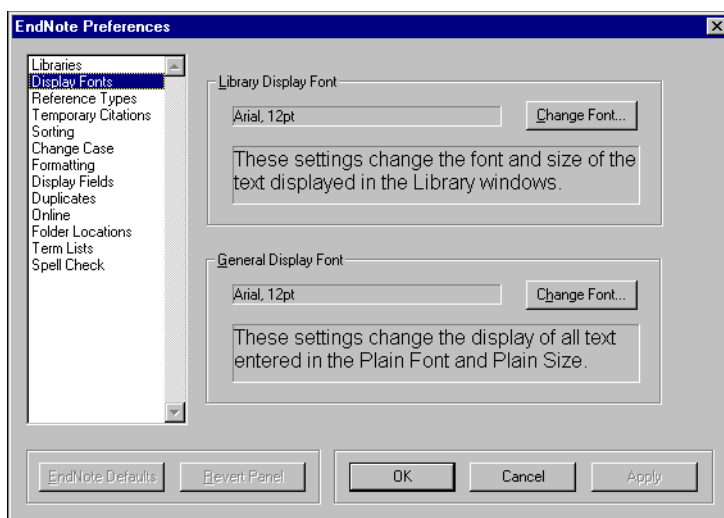
3. In either the Library Display Font or the General Display Font section: Click the *Change Font* button, and select a different display font and/or size from the *Font* and *Size* lists. Click *OK* to close the font selection dialog and return to the *Display Fonts* preferences panel.

4. Click *OK* to save the changes and close the Preferences dialog.

Reference Types

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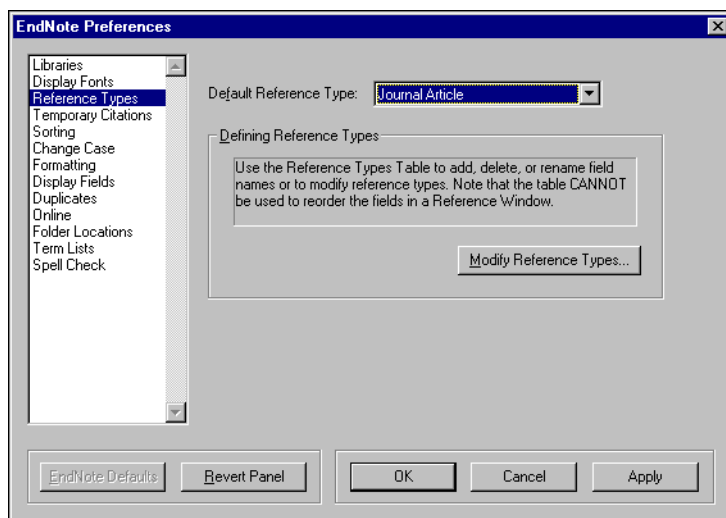
Default Reference Type

When you create a new reference in your EndNote library (by choosing *New* from the *References* menu), the new reference is set up for a journal article by default. If you would rather have new references automatically appear as books, patents, or some other reference type, you should change the "Default References Type" setting:

♦ Click the *Default Reference Type* list and choose from one of the available reference types.

If you need a reference type that is not in the list, you will need to create a new reference type for it and define it yourself (see "Adding & Deleting Reference Types" on page 288).

Defining Reference Types

If you need to modify any of EndNote's fields or reference types click the *Modify Reference Types* button. This opens the EndNote Reference Types table where you can add, delete, and rename EndNote's reference types and fields.

See Chapter 14 for more information about reference types and how to customize them.

Temporary Citations

A "temporary citation" is the name for the unformatted citation that EndNote inserts into your word processing document when you use the *Insert Citation(s)* command from WordPerfect or Word's *Tools* menu, or when you *Copy* and *Paste* a citation into a document. The temporary citation is just a placeholder that is later changed to a "formatted" citation, such as "(Smith & Jones, 1999)," after EndNote formats the paper.

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

```
{Smith, 1999 #24}
```

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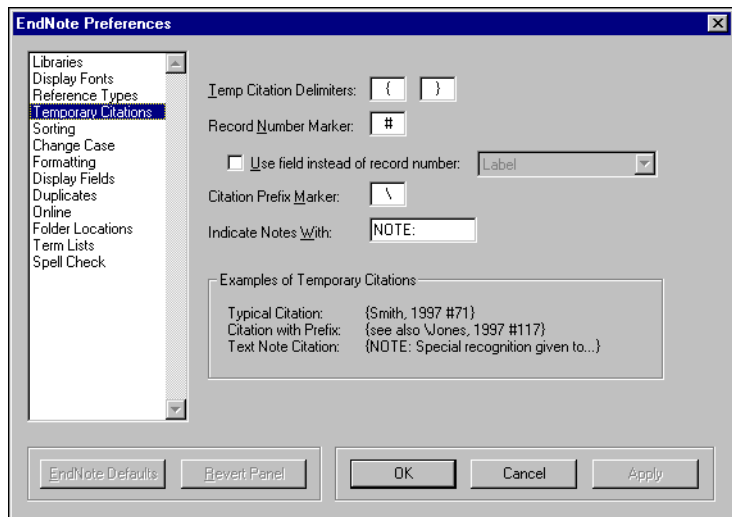
Temporary Citation Delimiters

Curly braces are used by default to indicate the start and end of each temporary citation. If you commonly use curly braces in your writing, you might want to select a different pair of markers for EndNote to use as Temporary Citation Delimiters. Enter the

desired markers into the appropriate boxes at the top of the
Temporary Citations preferences panel.

NOTE: When EndNote 4 users upgrade to EndNote 5, the EndNote 4
default delimiters migrate to EndNote 5. The default delimiters in
EndNote 4 were square brackets [].

Record Number Marker

The number sign (#) always precedes the record number in an
EndNote temporary citation. You may change this by entering
another character in the Record Number Marker box.

The EndNote record number is a unique number assigned to
each reference as it is added to a library. The number is specific
to that reference in that particular library. If you are
collaborating with other writers who have their own EndNote
libraries (or don't have an EndNote library at all), you might find
it easier to replace the Record Number in the temporary citation
with something else that uniquely identifies the reference but
isn't specific to your EndNote library. To do so, select the "Use
field instead of record number" option and select from either the
Accession Number field or the Label field.

♦ The Accession Number field is designed to contain the
   unique record number assigned to a reference from an online
   database.

♦ The Label field can be used to manually enter any unique
   code that you would like to use for each record.

Citation Prefix Marker

Use the Citation Prefix Marker to separate prefix text in a citation
from the citation itself. For example, if you wanted a citation to
be formatted as:

```
(see also Smith, 1999)
```

you would enter the text into the temporary citation as follows,
with the "\" indicating the end of the prefix text and the start of
the citation:

```
{see also \Smith, 1999 #24}
```

If you would prefer to use a different character as the Citation
Prefix Delimiter, you may enter it in this preferences panel.
Semicolons (;), letters, numbers, and characters already used as
other delimiters may not be used for the Citation Prefix
Delimiter.

Including Notes in the List of References

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

To identify text to be included as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.

2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

   ```
   {NOTE: The authors would like to acknowledge
   the support of...}
   ```

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

NOTE: With Cite While You Write, you can simply go to Word's *Tools* menu, go to the *EndNote 5* submenu, and choose *Insert Note*.

The way that these notes are identified may be changed in the Temporary Citations preferences. Enter a prefix that you'd like to use to signal that the text should be treated as a note.

Important Restrictions on the Use of the "NOTE" Feature

♦ This feature requires that a numbered style be used for the formatting; otherwise, the note will be left as it was entered in the body of the text.

♦ Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker and the prefix marker and the multiple citation separator may be used.

♦ These types of notes can not be combined with regular temporary citations within the same set of brackets. They should be cited separately—each in its own set of brackets.

Sorting

When EndNote sorts author names and titles, you have the option of identifying what words or names should be ignored for sorting purposes.

To add words to be ignored for sorting:

♦ Enter the term in the text box below either the "Author Fields" or "Title Fields" prompt, and click *Add.*

To remove a term from either list:

♦ Select the term and click *Remove.*

Click *EndNote Defaults* to revert both of the lists to the default settings.
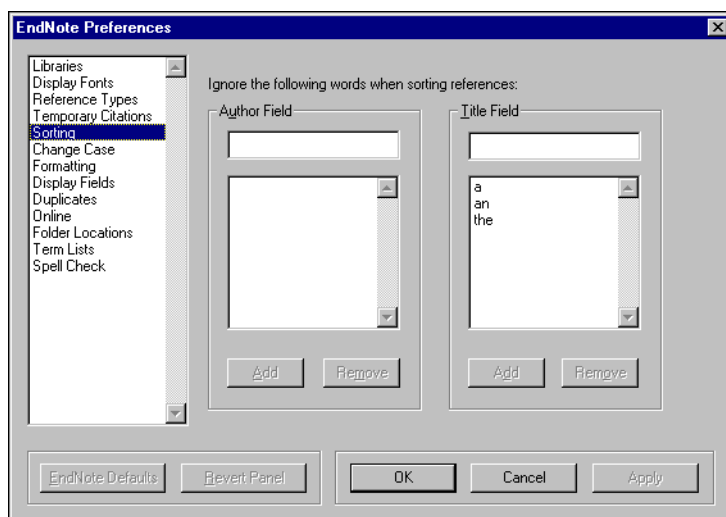
Authors

The Author Fields list is designed so that you may enter parts of author names that may be omitted for sorting purposes. For example, prepositions in names such as "von," "van," and "de" are included as part of the last name, but not considered part of the name for sorting purposes. The entries in the Author Fields list are case sensitive; that is, if you enter "von" it applies only to "von" and not "Von." These settings apply to the Generic fields for Author, Secondary Author, Tertiary Author, and Subsidiary Author. No names are entered by default.

Titles

When terms are added to the Title Fields list, the sorting routine ignores them when they appear at the start of the title. Capitalization does not matter for these word. That is, the word "the" can be entered (lowercase) and still apply to "The." These settings apply to the Generic fields for Title, Secondary Title

(includes the Journal field), Tertiary Title, and Subsidiary Title. The words "a," "an," and "the" are entered as defaults.

Change Case

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

To add words to the list:

♦ Enter the term in the text box at the top of the dialog, and click *Add.*

To remove an item from the list:

♦ Select the term and click *Remove*.
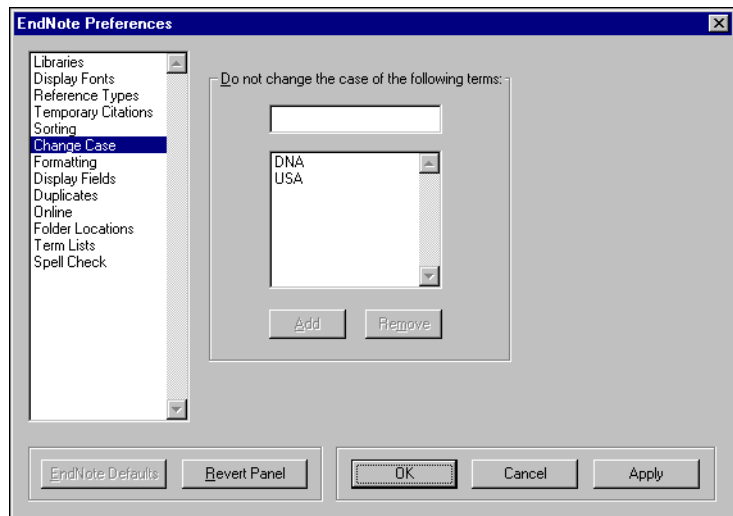
Formatting

The Formatting preferences panel contains the following options:

Suggest Formatting with EndNote's Cite While You Write/ Add-in if the Document Type is Supported

Cite While You Write or the EndNote Add-in integrate EndNote's formatting commands into WordPerfect and Microsoft Word's *Tools* menu. This is the way that documents created in Microsoft Word 95 or later and WordPerfect 7 or later should be formatted. When this option is turned on, EndNote

alerts you if you try to format a Microsoft Word document (version95 or later) or a WordPerfect document (version 7 or later) using the *Scan Paper* and *Format* commands from EndNote's *Paper* menu. These commands are reserved for documents that can't use Cite While You Write or the EndNote Add-in to integrate formatting commands into the word processor. This option is turned on by default.

See page 251 for information about the differences between using the Add-in or the commands in the *Paper* menu to format bibliographies.

Omit Author and/or Year from Formatted Citation if Removed from Temporary Citation

EndNote's default behavior is to remove the author or year from the formatted citation if you remove either of those items from a temporary (unformatted) citation. For example, "{, 1999 #24}" would format as just "(1999)" when using a style that creates (Author, Year) citations. If you prefer to type just the record number into your papers as the temporary citation, you should turn this preference off so EndNote won't remove the author and year from all of your formatted citations.

Merge Duplicates in Bibliography

When this option is selected, EndNote automatically omits duplicate references from a bibliography. It is a good idea to use this option if you are citing references from multiple EndNote libraries in one paper. In this situation, the same journal article reference might appear in two libraries and would have two different record numbers. EndNote will not identify the records as duplicates unless you have this option set to check for duplicates.

When this option is selected, EndNote checks the bibliography for duplicate references during the formatting process. If any duplicates are found, they are removed. References are considered duplicates if they are the same reference type (such as Journal Article or Book), and the following fields are identical: Author, Year, Title, Secondary Title (Journal, Newspaper, Magazine, Book Title, Series Title, Conference Name, etc.), Volume, Issue, and Pages.

NOTE: The *Duplicates* preferences setting does not apply to this feature. The criteria for determining duplicates is fixed for the "Merge Duplicates in Bibliography" setting.

Display Fields

Use the *Display Fields* preferences to choose which fields EndNote should display in the Library window. These settings apply to all libraries opened on the computer.
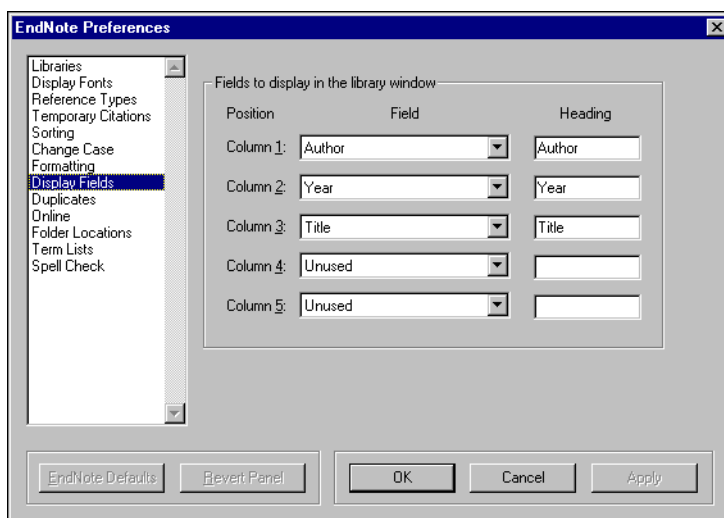
Choose the desired field from the *Field* list. You may select up to five fields to be displayed in the Library window. Select *Unused* instead of a field name if you want to show fewer than five fields.

By default, the column heading in the Library window is the same as the Generic name of the field. If you would like to change the name for the Library window display, you may do so by entering anew name in the Heading section next to the chosen field.

EndNote defaults to showing Author, Year, and Title fields only.

Duplicates

The *Duplicates* preferences panel corresponds to the *Find Duplicates* command in the *References* menu (that command is described on page 154).

By default, EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year, and Title fields. Use this panel to customize the way EndNote identifies duplicate references.

♦ To select the fields that EndNote should compare when finding duplicate references, click in the checkboxes to the left of the field names.

The "Generic" names of the fields are used here. For details about what the Generic field names correspond to for each reference type, see page 292. You may select as many fields as you want to make the duplicate detection more or less stringent.

Criteria

You may also set the "Criteria" to have EndNote compare the fields and look for an exact match or be more lenient in the comparison and ignore spacing and punctuation.
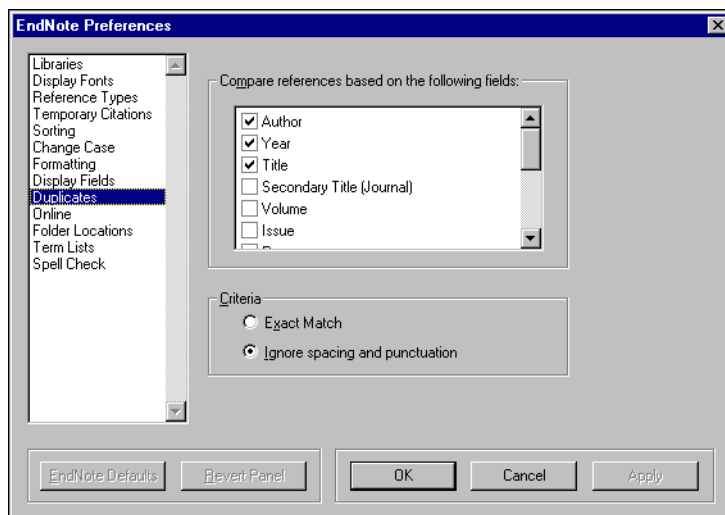
NOTE: These settings do not apply to the "Merge Duplicates in Bibliography" setting (page 416). That is a very specific comparison of the reference data used only to remove identical references from bibliographies.

Online Preferences

Web Browser Settings

Use the *Online* preferences panel to select the Web browser that should open when the *Open Link* command is activated or when you click on an active URL (Internet address).

♦ To select a web browser, click *Choose*, locate the web browser on your hard drive, and click *Open*. (EndNote does not include a web browser.)
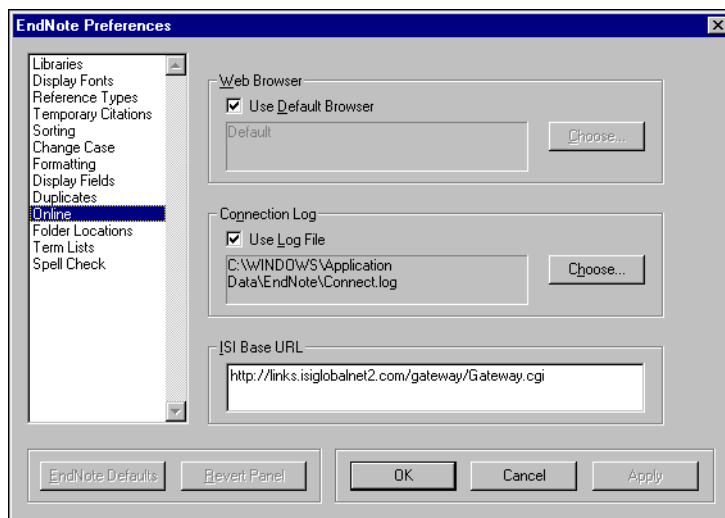
Click "Use Default Browser" to have EndNote use the browser that your System identifies as the default browser.

Connection Log File

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

We recommend keeping the option turned on because in the event that the references were not correctly retrieved or filtered into EndNote, you can always adjust the filter in the connection file, and import the Connect.log file instead of redoing the search and download (see page 109).

By default, the Connect.log file is stored in the EndNote folder of the Windows "Application Data" folder. You may change the name and the location of the Connect.log file by clicking the *Choose* button. In the dialog that appears, enter a new name for the file (if desired), and select the new location for the file.

ISI Base URL

When you export references from ISI's Web of Science to EndNote, EndNote creates a "Go to ISI" link in the URL field of each reference. These links take you back to the ISI source record where you can find related references, times cited, and other information. If your institution uses a locally mounted version of Web of Science, you should enter the URL for that server here in

EndNote's ISI Base URL preference. Otherwise, the links in references downloaded from Web of Science will take you to the main Web of Science server where you might not have access.

Folder Locations

The *Folder Locations* preferences panel is where you set the default location of your styles, import filters, and connection files. By default, EndNote sets these locations to be the Styles, Filters, and Connections folder in the EndNote folder.

All of the styles, filters, or connection files stored in the chosen folders are displayed in Styles, Filter, and Connection Managers. These Managers allow you to select individual files that you use most with EndNote.
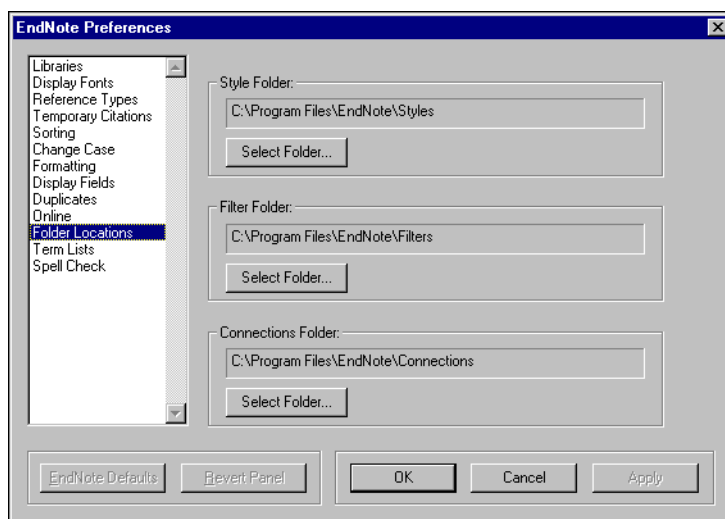
To change any of these folder locations, click the *Select Folder* button, open the folder that you would like to designate as the new Style, Filter, or Connection folder, and click *Select Folder.*

Term Lists

By default, every new EndNote library has three term lists associated with it: Authors, Journals, and Keywords. The term lists are automatically updated as you enter references into your library. The terms in these lists are also used to facilitate data entry using the "Suggest Terms as You Type" feature. This feature suggests terms as you type into fields with term lists linked to them. For example, as you type into the Author field, EndNote suggests author names from your Authors term list to help you with data entry. When you enter a new term that is not

currently in the associated term list, it appears in red text to indicate that it is a new term. This can point out typing mistakes or the use of an incorrect keyword if you thought you were entering a name or a term commonly used in your library. More information about working with term lists is provided in Chapter 9.

Any of the term list settings described above can be turned off using the settings for the *Term Lists* preferences.

Suggest Terms as You Type (Auto-Completion)

When selected, EndNote will automatically complete matching terms when you are typing into a field that is linked to a term list (see page 176).
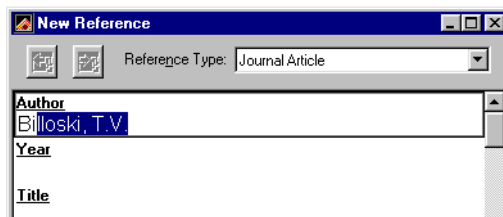
If you turn this feature off, you may still insert terms into a field by opening the desired term list from the *Terms* menu (or typing (CTRL+1), and double-clicking the desired term or typing (CTRL+J).

Update lists when importing or pasting references

When this option is selected, the term lists are automatically updated as you import references (using the *Import* command in the *File* menu), drag-and-drop references, or *Paste* references in to your library. If you turn this option off, you can always manually update your term lists using the *Update List* command in the *Terms* menu (see "Manually Updating Term Lists" on page 173).

Update lists during data entry

When this option is selected, the term lists are automatically updated as you type in new reference data. If you turn this option off, you can always manually update your term lists using the *Update List* command in the *Terms* menu (see "Manually Updating Term Lists" on page 173).

Spell Check

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

information about how to start spell checking a record, see "Spell Checking" on page 88.

General Options

You can access these Spell Check Options from the EndNote Preferences Spell Check panel or from the dialog that appears when you run Spell Check. Click the *Options* button.
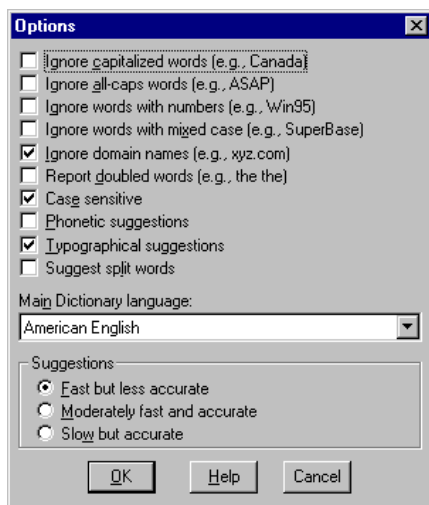
1. Select the check box next to each item you want to apply during spell checking.

2. Select a Main Dictionary language from the list of available dictionaries.

   For each language, EndNote uses a combination of dictionary files located in EndNotes's Spell folder. Select your primary language. To apply additional language dictionaries, see the next section, "Modifying Dictionaries".

3. Decide how fast and accurate you want spell checking to work.

4. Click *OK* to save the changes.

NOTE: For a complete description of each item on the Options dialog, click the *Help* button on the dialog.

Modifying Dictionaries

You can access the Dictionaries preferences from the EndNote Preferences Spell Check panel or from the dialog that appears when you run Spell Check. Click the *Dictionaries* button.
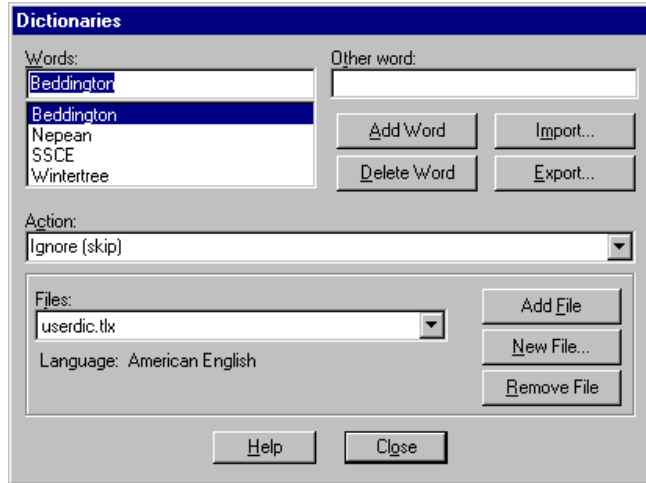
Use this dialog to view or edit the content of existing dictionaries, to add existing dictionaries for use, to create new dictionaries, and to remove dictionaries. The dictionaries listed under Files are currently in use (in addition to the Main Dictionary selected under Options).

NOTE: For a complete description of each option on the Dictionaries dialog, click the *Help* button on the dialog.

To modify dictionaries:

1. Under *Files*, select the file you want to view or modify.

    ♦   If it is already in the list, simply select it.

    ♦   If you need to locate an existing file to use, use the *Add File* button to locate the file on your computer and add it to the list. By default, dictionaries are kept in EndNote's Spell folder.

    ♦   To create a new dictionary, click *New File*.

    ♦   To remove a dictionary, display the file name in the list and click *Remove File*. This removes a dictionary from use, but doesn't delete the actual disk file.

2. The words in the selected dictionary appear in the top list.

- ♦ To add a word to the selected dictionary, type it under Words and click *Add Word*.
- ♦ To delete a word from the selected dictionary, select the word and click *Delete Word*.
- ♦ To change the Action applied to a word, select the word and then pick the new Action from the list.

Adding an Existing Dictionary

You may have selected English (or a different language) as your Main Dictionary Language, but want to apply an additional language during spell checking.

1. On the Dictionaries dialog, click the *Add File* button.

2. In EndNote's Spell folder, locate the dictionary file you want to use and Open it. The dictionary is added to the list under Files.

NOTE: For a list of supplied dictionaries with corresponding file names, see "Dictionaries Supplied with EndNote" on page 424.

Importing/Exporting a Dictionary

The Dictionaries dialog includes *Import* and *Export* buttons.

Use *Import* to locate and import a text file of terms into the current dictionary. The text file should contain a list of terms, with each term on its own line.

Use *Export* to save all terms from a dictionary to a plain text file, where each term starts on a new line.

Dictionaries Supplied with EndNote

These dictionaries are supplied with EndNote. When you select the main dictionary language, a combination of files are loaded, including files not listed here.

When you want to add additional languages, find the Dictionary you want to use from the left column, then look for the corresponding File Name. When you *Add* a dictionary, look for the appropriate File Name in EndNote's Spell folder.

Dictionary	File Name
User Dictionary: Contains English words that include non-ASCII characters	accent.tlx

Dictionary	File Name
User Dictionary: Contains common English misspellings and their correct replacements for auto correction	correct.tlx
User Dictionary: Sample user dictionary	userdic.tlx
American English	ssceam.tlx
American English Medical	sscema.tlx
British English	sscebr.tlx
British English Medical	sscemb.tlx
Danish	sscedu.tlx
Dutch	sscedu.tlx
Finnish	sscefi.tlx
French (European and Canadian)	sscefr.tlx
German	sscege.tlx
Italian	ssceit.tlx
Norwegian (Bokmal)	sscenb.tlx
Portuguese (Brazilian)	sscepb.tlx
Portuguese (Iberian)	sscepo.tlx
Spanish	sscesp.tlx
Swedish	sscesw.tlx

Cite While You Write and EndNote Add-in Preferences

You can access the Cite While You Write or EndNote Add-in preferences in one of two ways:

♦ From the *Tools* menu in your word processor, select *Cite While Yo u Write Preferences* or *EndNote Add-in Preferences*

♦ From EndNote's *Cite While You Write* or *Add-in* menu (which appears only when a word processor document is open), select *Preferences.*

Several EndNote preferences also directly affect Cite While You Write and the EndNote Add-in.

General Preferences

General preferences are useful when you always use your EndNote library along with your word processor, and you always use your word processor along with your EndNote library.

To access General preferences, go to Word's *Tools* menu and select *Cite While You Write Preferences* or *EndNote Add-in Preferences*.

Open EndNote When Starting Word or WordPerfect

Select this item to always open EndNote when you start your word processor.

Close EndNote When Leaving Word or WordPerfect

Select this item to always close EndNote when you leave your word processor. This works only when the EndNote program was launched with one of the Cite While You Write or EndNote Add-in commands from your word processor's *Tools* menu or if the *Open EndNote When Starting Word* or *WordPerfect* preference is selected.

Return to Document After Inserting Citations

Select this item to always make your document the active window after inserting citations with EndNote's *Insert Citation(s)* command. If this preference is turned off so that the document remains in the background, you will not see the inserted citation in the document until the document becomes the active window.

Install Commands On WordPerfect Toolbar

This option is available only from EndNote Add-in Preferences in WordPerfect. See "Adding EndNote Add-in Buttons to WordPerfect's Toolbar" on page 427.

Keyboard Shortcuts in Word

The default keyboard shortcuts for EndNote's Cite While You Write or Add-in commands are shown in EndNote's *Cite While You Write* or *Add-in* menu.

To add or change a keyboard shortcut:

1. From Word's *Tools* menu, select *Cite While You Write Preferences* or *EndNote Add-in Preferences*.

2. Click the Keyboard tab .
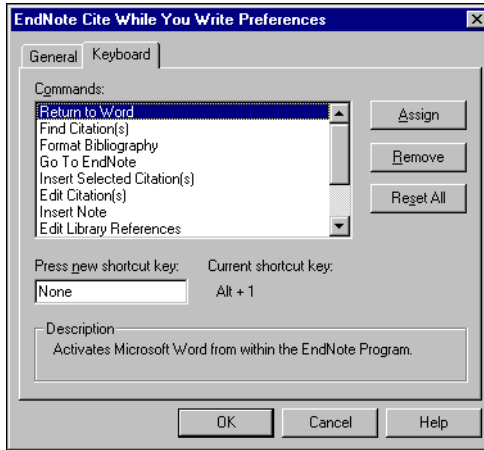
3. From the list of commands, select the command for which you would like to add (or change) a shortcut.

4. Under "Press new shortcut key," enter the new shortcut key combination on the keyboard.

   Keyboard shortcuts work in both EndNote and Microsoft Word; however some key equivalents will not appear on Word's *Tools* menu.5. Click *Assign* to assign the new shortcut.

Follow the same steps to remove an assigned shortcut key, except click *Remove* instead of *Assign*.

Click *Reset All* to remove custom key assignments.

Adding EndNote Add-in Buttons to WordPerfect's Toolbar

To add five standard EndNote commands to WordPerfect's Toolbar, choose *EndNote>Add-in Preferences* from WordPerfect's *Tools* menu. Check the preference to "Install Commands On WordPerfect Toolbar." This adds buttons for the following commands: *Go to EndNote, Insert Citation(s), Format Bibliography, Unformat Citation(s),* and *Open EndNote Reference(s).*

To add additional EndNote commands:

1. From WordPerfect's *Edit* menu, choose *Preferences*.

2. Double-click the Toolbar icon.

3. Select the name of the Toolbar and click *Edit*.

4. In the "Feature Categories" list, choose *Tools*.

5. Scroll through the "Features" list until you see the additional EndNote command you want (*EndNote Help, EndNote Prefs, Libs Used, Remove Codes*).

Using your mouse, click and drag the feature name to the toolbar, where it will turn into the image of a button. Release the mouse button when it is at the location on the toolbar where you want to button to appear. (If you just double-click the name of the feature, or select it and click the *Add* button, the button is automatically added to the end of the toolbar.)

When done, click *OK*, or if you make mistake, click *Cancel*.

Showing Word Processor Codes

The formatted citations and bibliography in your document are not plain text; they contain hidden data that make it possible for EndNote to unformat and reformat citations and bibliographies.

Microsoft Word's Field Shading

Formatted citations and bibliographies in Word documents are Microsoft Word fields. This gives EndNote the ability to uniquely identify them.

When you click on a field in Word (such as a formatted EndNote citation or the bibliography), it becomes shaded. You can change this behavior so that the fields are always shaded, shaded only when clicked on, or never shaded. To do so, choose *Options* from Word's *Tools* menu and select the *View* option. There you will see the options for field shading.

Using the Reveal Codes Command in WordPerfect

If you click on a formatted citation or bibliography, a shortcut menu appears that allows you to copy, cut, unformat, or edit the citation as text. EndNote takes advantage of WordPerfect's hypertext technology to do this; however, these codes are not true hypertext. They are not linked to anything.

If you choose *Reveal Codes* from WordPerfect's *View* menu after formatting a paper with EndNote, you will see "Hypertext" and "Third Party" codes around the formatted EndNote citations and bibliography. *Do not click on or edit these codes!* You risk damaging the citation if you do so. EndNote has placed these codes there in

order to facilitate formatting and unformatting your papers. If they become damaged, you will need to re-insert those citations.

NOTE: Do not click on the WordPerfect Third Party Hypertext codes that you see in WordPerfect's Reveal Codes window. This can damage EndNote's citations.

Related EndNote Preferences

Several other EndNote preferences directly affect Cite While You Write. To access EndNote preferences, go to the *File* menu in EndNote and select *Preferences*.

The related preference dialogs include settings for:

♦ *Temporary Citations*, described on page 411

♦ *Formatting*, described on page 415

These settings are stored with the EndNote program's preferences because they apply to formatting papers with Cite While You Write and the EndNote Add-in as well as using the *Scan Paper* and *Format* commands (required when formatting documents from other word processors).

Shortcuts to Make Using EndNote Easier

Contextual menus and toolbars can streamline your database building and citation processes.

To add or change Cite While You Write or EndNote Add-in keyboard shortcuts in Microsoft Word, see "Keyboard Shortcuts in Word" on page 426.

Shortcut Menus

As a convenience, EndNote provides shortcut menus for some of the most commonly used features. Shortcut menus appear when you right-click on something in the EndNote program (such as the Library window, or the Author field).
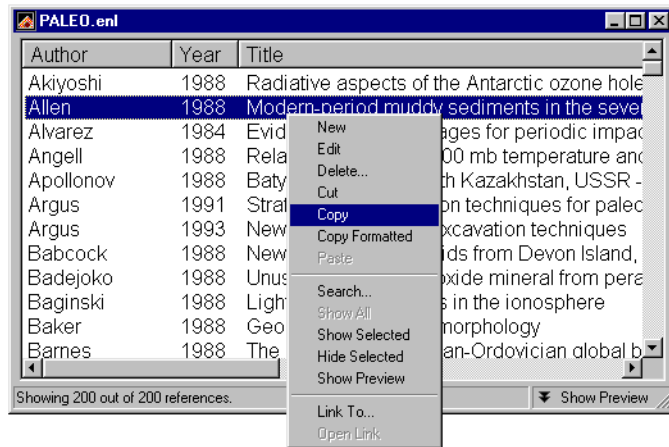
The contents of the menu depend on where you click and what options are available for that particular item. Only a subset of possible commands are displayed; these are intended to represent the most commonly used functions for the selected target. Choosing a command from the shortcut menus has exactly the same results as choosing the command from the main menu or the toolbar.

A shortcut menu appears wherever you click. It remains open until you choose a command from the list, click elsewhere, or press ESC.

Shortcut menus are available for the following windows: references, libraries, term lists, search, retrieved references, editing windows (styles, filters, and connections), and Managers (styles, filters, and connections).

Toolbars

Toolbars are available in EndNote to give you quick access to some of the commonly used commands. There are several toolbars (Main, Text, CWYW, and Add-in); each is described below. To display a particular toolbar, choose *Show Toolbars* from the *Edit* menu, and select the desired toolbar to show. If a toolbar is currently showing, it will have a checkmark next to its name in the *Show Toolbar* menu. At that point, choosing it from the *Show Toolbars* command will hide it.

Main Toolbar

Commands on the main toolbar include (from left to right): *New Library, Open Library, Print, Cut, Copy, Paste, Search, Sort Library, New Reference, Connect, Open Link, Import, Export, Spell Check* (available when a record is open for editing), a current style menu, and *Help*.

The style menu lists all the styles you have marked as "favorites" in the Style Manager, and displays the one that is currently selected to be used for the Library window preview, *Copy Formatted*, printing, exporting, or any formatting. If you don't see the style that you want in this menu, you can choose *Select Another Style* from the bottom of the menu to pick a new style. See also "The Style Manager" on page 300.

Text Toolbar

The text toolbar displays EndNote's text font and text size menus to change the font and size of the text in a reference or style. The buttons on the toolbar are (from left to right): *Bold, Italic, Underline, Plain Text, Superscript, Subscript*, and Symbol font. If a button is "pressed" that indicates that the text style represented by that button has been applied to the text that is selected (or where the cursor blinking)

CWYW and Add-in Toolbar

The CWYW and Add-in toolbar is available only when Microsoft Word or WordPerfect is running and either Cite While You Write or EndNote Add-in support is installed. The commands on the toolbar are (from left to right): *Insert Selected Citation(s), Format Bibliography*, and *Return to Word Processor*.

Appendix A

Making Backup Copies of Your EndNote Files

Appendix A   Making Backup Copies of Your EndNote Files

Backing Up Your EndNote Files

We strongly recommend that you keep several backup copies of all your critical computer files, especially your EndNote libraries and papers that you are writing. There are many ways that a file can be damaged: floppy disks and hard disks can fail, viruses can erase or corrupt files, and, of course, there is always human error and the possibility of accidentally throwing away your thesis or grant proposal the day before it is due. If you have any kind of disaster, big or little, backup copies can save you hours or days of work.

The simplest way to make a backup is to use the Windows Explorer or Windows desktop to copy your files to a floppy disk. This will work for your EndNote libraries until they are too large to fit on one floppy disk.

To backup larger files or automate the backup process, you can use a backup program. Windows 95/98/2000 include backup programs and there are a number of commercial backup programs available that make regular backups easy and efficient. These programs can scan your disk for files that you designate as important, keep track of when they have changed, and save you time by copying only the changed files. In addition, they can split large files, including EndNote libraries, among several disks. If you ever need those files, the backup programs can "restore" them from the various disks.

Important Files to Backup

The following list covers the important EndNote files to backup.

♦ **EndNote libraries**
The library is where all of your references are stored. Note that exporting data from your library is not a "backup." An export file is just a word processing document, whereas an EndNote library is a database.

♦ **Modified Styles, Filters, and Connection Files**
Modified styles are important to backup so that you do not have to recreate the bibliographic format if something happens to your customized style. Similarly, custom filters and connection files should be backed up so that you do not have to redo the work to get your references to import as you want them. If you haven't modified these files, it is not as important to make backups of them because you can always reinstall them from the EndNote Installer. The default locations for these files are the Connections, Styles, and Filters folders in your EndNote folder.

♦ **Word processing documents**
The papers you have written that include EndNote citations
should be kept with your EndNote backup files.

If you are using the EndNote program to format documents
(as opposed to Cite While You Write or the EndNote Add-in
for Microsoft Word or WordPerfect), you should keep a copy
of the *unformatted* paper as well as the formatted one because
you must use the unformatted version of the paper if you
ever want to reformat the paper.

Backup Suggestions

Keep at least two sets of backup disks, each at a different
location. We recommend that you have sets for alternate days, so
if you discover that something went wrong yesterday, you will
have the day-before-yesterday's version.

Make archival sets of the files listed above whenever you finish
an important document. An archival set should include all of the
files that are needed to recreate a final formatted paper. Label the
backup disks, lock them and keep them in a safe place far away
from your computer (preferably off-site). If you ever need to
recreate the document, you will have all of the necessary files.

Appendix B

Using EndNote On a Network

Appendix B: Using EndNote On a Network

Using EndNote On a Network

EndNote is a network-compatible product. This means that you can access an EndNote library or an EndNote program installed on a network server. However, there are several issues of which you should be aware before you use EndNote on a network.

Multi-Platform Networks

EndNote databases are directly compatible across DOS, Windows, and Macintosh platforms and do not require any special conversion procedures (see "Transferring Libraries Across Platforms" on page 59). Because of this, EndNote can be used in a mixed platform network environment very easily. We have successfully tested EndNote on mixed platform AppleShare, Novell Netware, and Windows NT networks, and PC-specific networks including Windows for Workgroups.

NOTE: The server on which you install EndNote, and the environment in which EndNote will be used, must support long file names.

Multi-User Database Access

Even though EndNote can be used across a network, it was not designed with specific networking capabilities in mind. EndNote does not perform record locking functions that would allow multiple users to *edit* one database at the same time. However, multiple users can *access* one EndNote database simultaneously as long as the database is restricted to **read-only** or **locked** status. This will allow the user to perform searches, copy information to their documents, and format their papers.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. One or two people should be assigned the responsibility for maintaining and updating the library; these users should be granted full access to the file. All other users should be granted read-only access.

Special Issues in Network Environments

Before installing EndNote in a network environment, network administrators should be aware that EndNote relies on Windows file locking protocols. Some Windows network client programs (for example, NFS clients used to connect to UNIX servers) do not fully support these protocols. Network clients other than those provided by Microsoft and Novell should be tested to ensure that file locking is enabled.

Installing EndNote on a Network

Assuming that you have purchased enough copies of EndNote, you have two basic configuration options:

♦ Install one copy of EndNote onto a shared server drive. Users can then run multiple copies of this installation.

♦ A separate network installation utility is provided for connecting individual workstations to the shared copy of EndNote.

♦ Install a copy of EndNote on a local drive for each workstation that will be using EndNote.

In either configuration, users can access a common library on a server or their own personal library. In addition they can edit their own styles, filters, and connection files and configure the EndNote preferences for their own requirements.

EndNote requires that a system be capable of running 32-bit Windows programs. Windows 95, 98, 2000, or NT 4 or later must be installed on each workstation that will be used to run EndNote, regardless of whether the program files are stored on a local hard disk or on a shared network volume.

NOTE: Installation on networks where users share a common Windows folder on a server has not been extensively tested.

Installing EndNote as a Shared Application

If you intend to use EndNote as a shared application, use the Setup program to decompress the program files and copy them to the server's hard disk. This can be done directly on a server that is capable of running a Windows program (such as Windows NT), but in most cases will be done on a Windows workstation connected to the server.

To install EndNote, the network administrator should:

1. Log on to the network using an account that has full (read/write) access to the network volume where EndNote will be installed.

2. Run the EndNote Setup program from the EndNote CD-ROM.

3. Enter the path to the shared network volume as the destination folder for the EndNote for Windows files.

4. After setup is complete, copy the network installation utility (NETSETUP.EXE, located in the \Extras subfolder of the EndNote CD-ROM) to the EndNote folder.

5. Set appropriate permissions on the EndNote for Windows files and folders after verifying that EndNote is installed correctly.

Connecting Workstations to a Shared EndNote Installation

The EndNote network installation utility (NETSETUP.EXE) creates program items for a shared installation of EndNote, establishes the registry settings needed by the program (including Cite While You Write and the EndNote Add-in), and registers the Cite While You Write and/or the Add-in with installed word processing programs.

To connect a workstation to a shared installation of EndNote:

1. Log on to the network using the account of the person who will be using EndNote.

2. Map the volume containing the EndNote program files to a drive letter, if necessary.

3. Run NETSETUP.

Netsetup can also be used to remove an existing connection to a shared copy of EndNote.

Appendix C

Troubleshooting and Limitations

Appendix C   Troubleshooting and Limitations

Limitations of EndNote

Word Processor Compatibility

Using Cite While You Write

To Cite While You Write, you must use Microsoft Word 97 or 2000.

This is the fastest, easiest way to cite and format references and create a bibliography in a word processing document. Cite While You Write integrates EndNote references and instant formatting into Word via Word's *Tools* menu. For more information about Cite While You Write, please see Chapter 10.

Using the EndNote Add-in

To cite and format references and create a bibliography with Microsoft Word95 or WordPerfect 7-9, you must use the EndNote Add-in.

The EndNote Add-in integrates EndNote's bibliographic formatting features into the *Tools* menu of Microsoft Word and WordPerfect. For more information about the EndNote Add-in, please see Chapter 11.

Formatting Papers Without Cite While You Write or the Add-in

EndNote can format any of the following word processor documents using the commands in EndNote's *Paper* menu: WordPerfect for Windows 5.0-6.x; Word for Windows 1.0-6.x; Microsoft Rich Text Format (RTF); HyperText Markup Language (HTML); and plain ANSI text files.

EndNote might be able to format files created by other word processors, if these files are saved in one of the supported formats. Copy references from the Library window, and paste the temporary citations into the papers; then, to format the papers, you must use the *Save As* command (or the *Export* command) in the word processor to save the document in a file format that EndNote *does* recognize. Use EndNote's *Scan Paper* command to format the document. After EndNote creates a formatted copy of the document, you will still be able to open it in your word processor using the *Open* command.

See Chapter 12 for details.

Font Limitations

EndNote supports only the basic fonts that are supplied with Windows. Text that is pasted into EndNote will revert to the General Display Font (the Plain Font). Although EndNote discards the original font information, it does not translate or change the character codes. The appearance of such text can be restored in formatted references by manually resetting the correct font.

Printing Limitations

When you choose the *Print* command in EndNote, the references print in the chosen General Display Font. Some fonts may not be supported by your printer so for best results, we recommend that you use a True Type font. True Type fonts can be identified in font selection dialogs by the double "T" to the left of the font name. For more information about choosing the General Display Font, see page 409.

The APA Styles

Tab vs. Hanging Indent in APA

The APA Submitted style inserts a tab at the beginning of each reference. The APA 4th edition requires that each reference in a bibliography begin with a tab in papers that are submitted for review or to be typeset before publication. Indent specifications for *submitted* publications were changed since the 3rd edition of the APA publication manual because a hanging indent is difficult to achieve in some word processors. However, if you are preparing a manuscript that must be "camera-ready" and/or does not require further typesetting, you may use the APA Published style instead.

Underlining vs. Italics in APA

When submitting a manuscript for publication to the American Psychological Association, they prefer that you use underlining instead of italics for journal names and book titles. This helps the typesetter identify what should be set to italics. If you want the final "camera-ready-look," italics are appropriate.

NOTE: For information about the APA style, contact the American Psychological Assn., 750 First St. NE, Washington, DC 20002, USA.

Troubleshooting EndNote

"The Add-in Cannot be loaded because another copy is already active."

If you see this message when you start Word, this means that there may be a stray EndNote Add-in on your computer from an older installation. To fix the problem, search your computer for ENWORD32.WLL. Keep one copy in the EndNote folder, and keep one copy in your Word Startup folder. Delete any other copies found by clicking on them with your right mouse button and choosing *Delete*. For additional information, check our Web site technical support database:

http://www.endnote.com/help/ENen_ts.htm

"Add-in is too old for this version..."

If you get a message about either the Add-in is too old or the EndNote program is too old, this means that you have 2 versions of EndNote installed on your computer. In this case, it would be best for you to backup any libraries or custom styles that you made in the earlier version of EndNote and uninstall it with the *Add/Remove Programs* command from your *Start>Control Panel* menu. If after uninstalling the older version of EndNote you still see these messages, you may have a stray ENWORD32.WLL file in a Word Startup folder. Search your computer for ENWORD32.WLL and check the properties of each to see which one is the old version. Remove any older versions.

Error Messages During Installation

"Install: Could not write file..."

Solution (1): You are trying to install EndNote on a compressed drive that does not contain enough free space. If you are installing on a compressed drive, the actual amount of disk space reported to *Setup* may not be accurate. Use the utilities that came with your compression software to determine the *actual* amount of disk space you have. You will need to delete files on your hard disk to free up the amount of space needed. Start with deleting files in your \temp folder that do not have today's date on them.

Solution (2): You are trying to install EndNote to a protected network volume. If this error occurs during installation of the EndNote program or files, ask you network administrator to identify a drive that is not protected.

"Encountered Fatal Error" Message

See if you can reproduce the error message with the sample "Paleo.enl" file found in the EndNote "Examples" folder. If not, then this could indicate that your library is damaged. Contact technical support for assistance. See "Contact Information" on page 5.

EndNote Commands Do Not Appear on Word or WordPerfect's *Tools* Menu

Microsoft Word: When this manual was written, EndNote commands were available in Word 95, 97, and 2000. In Word 97 and 2000, EndNote commands appear on the *Tools* menu in an *EndNote 5* submenu. For current compatibility information, contact ISI ResearchSoft or visit our web site (http://www.endnote.com).

If you upgraded your version of Word *after* installing EndNote, you will need to re-run the EndNote Setup program from the installation CD, choose *Custom Installation*, highlight the Add-in Support option, click the Change button, and make sure the proper support is installing for your version of Word.

NOTE: You need to have full read and write access to Word's Startup folder in order to install EndNote commands.

If EndNote commands still do not appear under Word's *Tools* menu, do the following:

From Word's *Tools* menu, choose *Options*. Click the *File Locations* tab to check the current *Startup* folder. Make sure this folder actually exists. If it does not, click *Modify* and select the valid Word Startup folder. Once the folder is set, re-run Setup as described in the installation instructions.

Or, if your EndNote installation disks aren't handy, you can:

♦ For Word 95: Copy the ENWORD32.WLL file from the EndNote folder to your Word Startup folder.

♦ For Word 97 or 2000: Copy the files ENDNOTE5.CWYW.WLL and ENDNOTE.CWYW.DOT from EndNote's CWYW folder to your Word Startup folder.

When word processor support is correctly installed, EndNote commands appear under the *Tools* menu in Word.

WordPerfect: When this manual was written, the EndNote Add-in was compatible with only WordPerfect for Windows 7-9.0. For future versions of WordPerfect, contact ISI ResearchSoft. If you

use WordPerfect 6.1 or earlier, you do not have access to the Add-in commands.

If you upgraded your version of WordPerfect *after* EndNote was installed, you need to re-run the EndNote Setup program from the installation CD, choose *Custom Installation*, highlight the Word Processor Support option, click the Change button, and make sure the proper support is installing for your version of WordPerfect.

If you still do not see the *EndNote* submenu under WordPerfect's *Tools* menu, exit all programs, restart Windows, and re-run the full installation of EndNote. If this fails, contact technical support for help.

"Language specific initialization failed"

This happens in some cases when the EndNote Add-in attempts to load in MS Word and cannot find the file ENLOCALE.DOC. Search for this file to see if it is present in the EndNote folder. If not, re-install EndNote to see if it appears. If not, contact ISI ResearchSoft for a copy of this file.

If you are not using a foreign version of Word, the following steps may correct the problem:

1) Try loading the Add-in (ENWORD32.WLL) manually. From Word's *File* menu, choose *Templates and Add-ins,* select the ENWORD32.WLL in the EndNote folder, and add it.

2) If the EndNote program has been moved to another location after installation, the file location listings in the Windows registry are incorrect. Reinstall EndNote to fix this problem.

If you still have problems, check our web site tech support database or call our tech support staff for further instructions.

http://www.endnote.com/help/ENen_ts.htm

EndNote+.cit, EndNote+.bib Errors

"Macro endnote+.cit not found" or "Macro endnote+.bib not found"

This message could indicate that the WordPerfect Add-in is not loaded. If you do not see *EndNote* on WordPerfect's *Tools* menu, quit all programs, and re-install EndNote from the installation disks. Choose *Custom Installation* and install just the Add-in for your version of WordPerfect.

If *EndNote* is on the *Tools* menu, you may disregard the error.

Troubleshooting Connections

When connecting with a remote database, there are at least two computers involved in completing the tasks you wish to perform: yours and the database server. Most often, there are intermediary computers as well, such as Domain Name Servers (DNS), proxy servers, or firewalls.

Needless to say, with more than just your computer involved, things can and sometimes do get quite complicated. This section attempts to give you the understanding necessary to solve problems that arise with connections. If you don't find the information that you need here, please contact EndNote technical support.

The most basic problem you can encounter with connections is the failure to connect at all. There are four ways you may experience this problem:

♦ EndNote cannot initialize sockets.

♦ EndNote cannot find the host.

♦ EndNote cannot connect to the host.

♦ EndNote cannot communicate with the host.

Problems Initializing Sockets

In general, if you are able to use a web browser or other Internet software, you should also be able to connect with EndNote. Socket errors can occur if you don't have the right software on your computer for accessing the internet.

You must have the correct versions of the Windows socket files (Winsock.dll and Wsock32.dll) installed. If you think this may be the source of your problem, and you can't fix it yourself, please contact EndNote technical support.

If you connect to the internet through a modem connected to your telephone line, you also must have dialup software properly installed on your computer. You need the Windows dialup connections software installed.

In most cases, trying to connect in EndNote will start up your dialup software automatically. Some networking packages require you to establish the dialup connection manually before trying to connect in EndNote.

Problems Finding the Host

There are a few possibilities for what could be wrong if EndNote cannot find the host:

♦ The domain name specified in the connection file is wrong.

♦ Your network software does not have the correct address for the Domain Name Server

♦ Your Domain Name Server isn't working.

If the connection file has worked in the past, the problem may lie with the Domain Name Server. If you've just made the connection file yourself and it's never worked before, you probably entered the wrong Server Address.

If you suspect problems with the Domain Name Server, contact your network administrator.

Problems Connecting

Once the host is found, EndNote tries to connect. It sends a connection request to the host and waits for up to two minutes for a reply. It may receive none, or it may receive a refusal immediately. In the first case you'll see a time-out error message, and in the second case you'll see a "host refused connection" error message.

If you wait for two minutes and receive a time-out message, the remote computer is down for some reason. Try again later.

If you receive a refusal message, and this happens no matter which connection file you try to use, you are most likely behind a firewall.

Firewalls

One way to tell if you are behind a firewall is to ask your network administrator.   A do-it-yourself way is to look in the configuration of your web Browser. Look for "proxies" or "proxy server".

In Netscape, you'll find it under *Preferences...* in the *Options* menu. In Internet Explorer, you'll find it under *Options…* in the *View* menu (go to the *Connection* panel). The configuration for a proxy server has two pieces of information, an address, and a port. If your browser is configured to connect through a proxy server, you are behind a firewall.

To connect to PubMed from behind a firewall:

1. Get the proxy information from your browser: the address and the port.

2. From the *File* menu, choose *Connection Files* and select *Open Connection Manager*. Select the PubMed connection file and click *Edit*.

3. In the Connection File window, click on the *Connection Settings* option.

4. In the Server Address field, enter the proxy server address you got from your browser.

5. In the Port field, enter the proxy server port number you got from your browser.

NOTE: These instructions work for the PubMed connection only.

To connect to databases other than PubMed from behind a firewall, you have only one option. You cannot fix the problem yourself; you cannot edit the connection file to make it work. You must ask your network administrator to allow communication through the firewall.

Before you contact your network administrator, check the connection file to obtain the address of the server and the port specified. To do this, edit the connection file as described above for PubMed. You'll find the server address and the port in the *Connection Settings* panel.
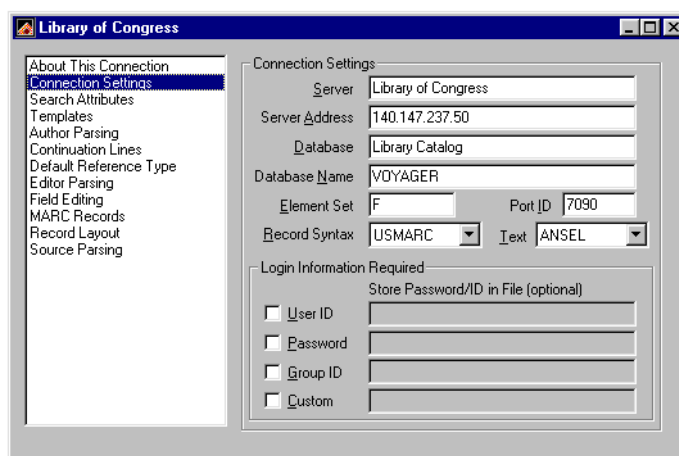
Depending upon the configuration of the firewall, the administrator may allow communication to all computers outside the firewall on the requested port, or communication to a specific server and port.

Communicating with Local Database Servers or Gateways

Many universities and organizations license Z39.50 databases for use on their own servers, or for access from a local gateway. The company providing the databases will include client software for accessing the databases. Some Z39.50 servers are designed to respond only to requests from this client software. In other cases, the server must be configured to allow requests from software other than the supplied client program.

If your organization maintains Z39.50 databases, but you are unable to connect to them with EndNote, ask your network administrator if the database server supports client software other than that supplied by the database provider.

Problems Communicating with the Host

The most common problem in communicating with a host server once connected is a password problem. Check your password and user ID. Check the upper or lower case requirements. Melvyl passwords, although not case sensitive when you connect through telnet, must be typed in EndNote using all capital letters. If a password is rejected, you'll see an error message that says something like "Server has rejected initialization."

The Connection Error Dialog

When searching a remote database, if there is a problem with the database, the search terms, or the connection file, EndNote presents an error message describing the source of the problem.The connection error dialog displays the original Z39.50 error message, if available, EndNote's translated version of that error, and any other message being sent directly from the server.

Errors Encountered While Retrieving References

For various reasons, some references do cause errors during retrieval. If EndNote encounters an error while retrieving references from a remote source, it stops the retrieval process. In order to get the rest of the references, it is best to submit the search again, and this time request the references start downloading with the one after the reference which might have caused an error. For example, if the error appeared while the tenth reference out of fifty was being retrieved, submit the search again, and when prompted, ask only for references 11 through 50 to be retrieved.

Problems With Retrieved Data

Blank Records

If blank records appear in your Retrieved References window, it could be due to a number of causes. One thing to check is whether your filter settings in the connection file match the format of the retrieved records. Edit the connection file and change the view to *Filter Settings.* Also show the Connection status window, and change its view to show *Record Data*. The two formats need to match in order for the data to import.

Sometimes, when viewing the record data in the Connection Status window, you will notice that there is no bibliographic information for a reference that was retrieved. This happens sometimes where duplicate or blank entries remain in the remote database. These can be ignored.

Asterisks in Author Names or Titles

For some databases, diacritical characters in the author names and titles cannot be interpreted correctly when EndNote retrieves the references. In such cases, the diacritical characters are replaced with an asterisk (*). Use the *Change Text* command in the *References* menu to change the names with the asterisks to the name with the diacritical characters as they should be. See "Entering Special Characters" on page 84 for information about entering diacritics.

Alert Messages When Formatting With the Add-in (for Microsoft Word & WordPerfect)

Mismatched Citations

Ideally, every citation that is found in the document matches exactly one reference in the currently open library (or libraries). If a citation matches more than one reference, or if it matches no references at all, it is considered a "mismatched citation." (Any text enclosed in citation delimiters is considered to be a possible citation; and any previously formatted citations are also checked during the formatting process to ensure that they correctly match one reference in the library or libraries.)

EndNote warns you about mismatched citations during the formatting process, and asks if you want to continue.
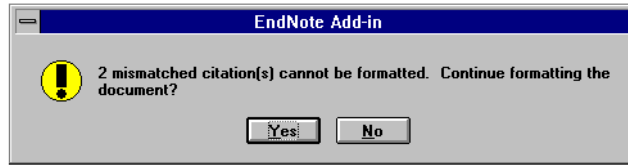
♦ If you click *Yes*, EndNote continues with the formatting process, but none of the mismatched citations are formatted. If a mismatched citation was previously formatted, EndNote unformats it. After the formatting is complete, you can view the Matches window in EndNote to see the mismatched citations.

♦ If you click *No*, EndNote stops formatting and leaves the Matches window open.

See "Understanding Mismatched Citations" on page 459 to determine the source of the problem and correct it.

Reformatting Edited Citations

When EndNote is formatting a paper, if it encounters a formatted citation that has been modified since EndNote formatted it, EndNote presents a dialog asking what you want to do. EndNote cannot both retain your changes to the citation *and* reformat it, so it asks you to choose which it should do. (Your dialog may look slightly different depending on what platform you are running on and whether you use Word or WordPerfect.)
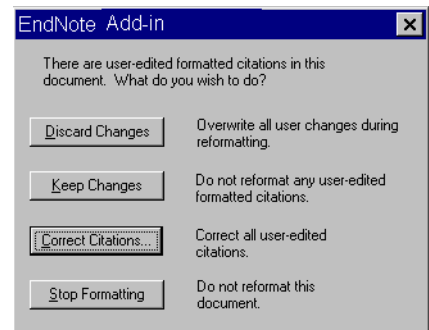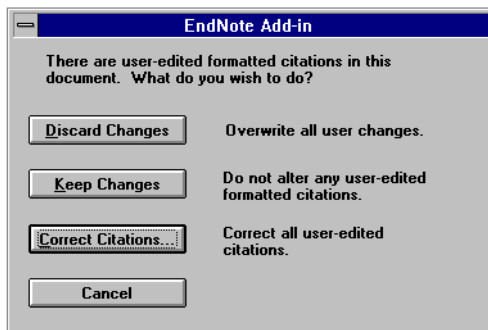
Discard Changes

EndNote continues with the formatting process and discards all modifications made to previously formatted citations. No

additional warnings are given about modified citations during the formatting process.

Keep Changes

EndNote continues with the formatting process and does not change any of the formatted citations that were modified. *No changes are made to these citations—they remain exactly as they were before formatting.* Do not choose this option when reformatting the paper with a different style, because all modified citations will remain formatted in the previously used style.

Correct Citations

EndNote continues with the formatting process and stops at each occurrence of a modified formatted citation to let you correct the citation. Choose this option if you want to redo your changes to the citation *and* have EndNote reformat the citations. This option does require that you fix each of the citations that were incorrectly edited; however, once they are fixed this way, EndNote will not bother you about them again when you reformat the document.

For example, let's say that you incorrectly added suffix text to a citation that was already formatted:

(4) → (see also 4)

When EndNote encounters this citation during the formatting process, it presents a dialog showing the unformatted citation for you to correctly modify.You should correctly enter the desired changes to the unformatted citation in the last box in the dialog, and click *Use Correction*. Select the Cancel option to cancel the formatting process.

In Microsoft Word:
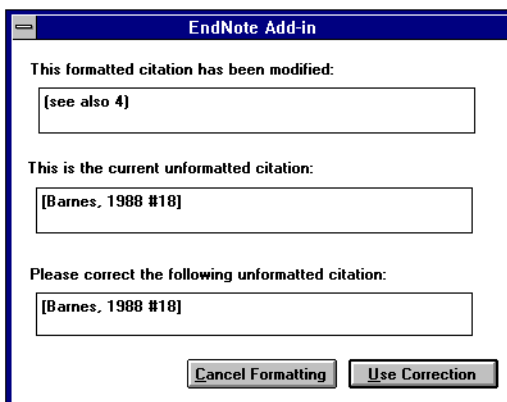
In WordPerfect:

The incorrectly modified citation appears selected in the text and the Add-in presents a dialog with the same citation in its unformatted state. You should correctly modify the unformatted citation and then select *Use Correction*.
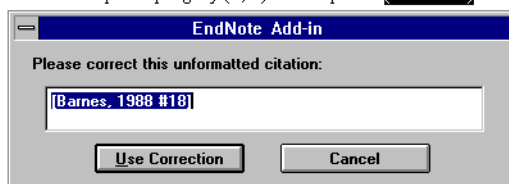
Reformatting an Edited Bibliography

If after editing your bibliography you choose *Format Bibliography*, EndNote will present a warning that the

bibliography has been changed and give you three options for how it can proceed:
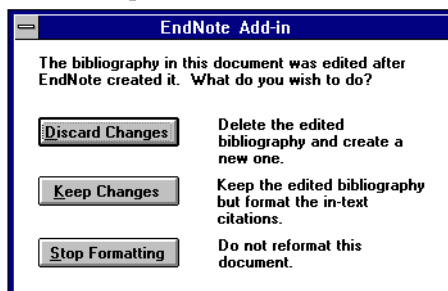
Discard Changes

Select this option to continue the formatting process and replace your existing (modified) bibliography with a new, updated bibliography. All of your changes will be discarded, but the new bibliography will be an accurate reflection of the citations in your paper and the selected style.

Keep Changes

Select this option to update all of the citations in the body of the text, but leave the bibliography exactly as it was prior to formatting. All changes to the bibliography will be maintained, but new references cited since the last formatting will not be added to the bibliography, nor will any style changes be introduced. WARNING: this could cause the citations and the bibliography to not match—especially if they are numbered.

Stop Formatting/Cancel

Select this option to cancel the formatting process. Some citations may already be formatted at this point.

Citations & Bibliography Appear as {ADDIN EN} Codes

This only applies to users of Microsoft Word. If the citations and the bibliography show up on the screen as {ADDIN ENRef} and {ADDIN ENBib} you have turned on the Word option to view field codes. Turn this off by selecting *Options* from Word's *Tools*, selecting the *View* tab, and un-checking the option to show field codes. If the citations and the bibliography are printing as codes, you will need to turn off the Word option to print field codes. Choose *Options* from the *Tools* menu. Select the *Print* tab and un-check the option to print field codes.

Understanding Mismatched Citations

When you are using the EndNote Add-in or the Scan Paper command, a citation matches window identifies unmatched and ambiguous citations.

This section applies only to the EndNote Add-in and Scan Paper command. When you use Cite While You Write, ambiguous citations are listed and resolved as they are inserted.

The Citation Matches Window

The Matches window opens in the EndNote program after you format a paper (or if the formatting process is canceled). It lists all of the citations found in a document, in the order in which they appear in the paper.
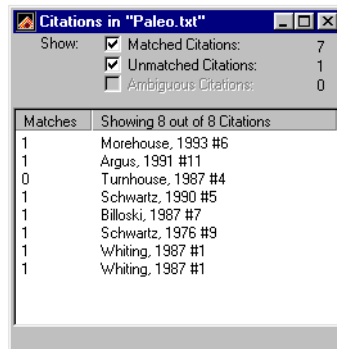
In the Matches window, EndNote brings special attention to unmatched and ambiguous citations. You can choose from the options at the top of the window to show only the Matched Citations, Unmatched Citations, or Ambiguous Citations.

The Matches window lists all of the citations found in the document and displays the number of matching references for each citation.

If any number other than a 1 appears in the Matches column, the corresponding citation will be left unformatted in the document and will not be included in the bibliography EndNote generates.

Ambiguous Citations (Matches Greater than 1)

A number greater than 1 indicates that multiple references in the currently open library (or libraries) match the citation and EndNote does not know which reference to use. (The EndNote Add-in automatically checks the matching references to see if any are duplicates. If so, they are not listed as separate possible

matches.) To see which references are considered matches, select the citation in the Matches window and choose *Find Matches* from the *Paper* menu. Reinsert the correct citation into the paper.

Unmatched Citations (A "Zero" Match)

A zero in the Matches column indicates that there is no matching reference in any open library for that particular citation. The Author, Year, and Record Number (if used in the temporary citation) must all match the Author, Year, and Record Number of a reference in the library in order for EndNote to consider it a match.

If text in your document is surrounded by citation delimiters (such as "{sic}"), EndNote will treat the text as a mismatched citation. You can ignore the warning about it being a mismatched citation, and EndNote will simply leave the text as it was before formatting. (See "Changing the Citation Delimiters" on page 463.)

Uncheck the "Unmatched Citations" box at the top of the Matches window to hide these items from view if you have numerous sections of bracketed text in your document and the corresponding unmatched citations are just cluttering the Matches window.

Correcting Mismatched Citations

Mismatched citations must be corrected either in the word processing document or in the EndNote library—whichever contains the incorrect information. Normally, the easiest way to fix a mismatched citation is to search the word processing document for the mismatched citation (use the *Find* command in your word processor's *Edit* menu), delete it, and then reinsert the citation from the library.

If there is a citation for which EndNote lists multiple matches, you can select the citation in the Matches window, and choose *Show Matches* from the *Paper* menu. EndNote displays the matching references in the Library window. You may then select the appropriate reference and reinsert it into the paper. Mismatches of this type are only possible when the record number has been omitted from the temporary citation in the text.

After you have corrected the mismatched citations and saved your changes to the paper:

♦ **If you are using the EndNote Add-in:**
    Choose *Format Bibliography* from EndNote's *Add-in* menu (or from your word processor's *Tools* menu) and the alert should

not reappear if all citations are correctly matched. (The Matches window is still available after formatting if you want to see the list of citations.)

♦ **If you are using the *Scan Paper* command:**
Choose *Rescan Paper* from the *Paper* menu and take another look at the matches in the Matches window. (If the Matches window had previously been closed, you will need to choose *Scan Paper* again, because the *Rescan Paper* option will not be available.

The best way to avoid citation mismatches:

♦ Keep all of your references in one main library.

♦ Copy and paste your citations from EndNote to your word processing documents instead of typing them.

There are several reasons why EndNote might not find exactly one match for each temporary citation in your paper. Listed here are typical problems and possible solutions. If a solution below involves changing a reference in your library, be sure to close or save all Reference windows before formatting to ensure that changes to your references are saved. If you are using the *Scan Paper* command (not the Add-in), you should also remember to save your changes to the paper before using the *Rescan Paper* command described below; and use the *Recheck List* command to update the matches after changing a reference.

No Citations Found (Empty Matches Window)

♦ **Possible Cause:** No citations were found because the citation delimiters used in the paper no longer match the markers specified in the *Temporary Citations* panel of the *Preferences*.

Solution: Open the paper in your word processor and check which citation delimiters appear around the unformatted citations (for example, "{" and "}"). Then, switch back to EndNote and choose *Preferences* from the *Edit* menu, and select the *Temporary Citations* panel. Change the temporary citation delimiters in that panel so that they match the citation delimiters used in the paper. Rescan the paper and the citations should be found.

♦ **Possible Cause**: *For the Scan Paper command only; this does not apply to formatting with the Add-in (using the Format Bibliography command).* You had EndNote scan a paper that was already formatted, and therefore there were no temporary citations in the document, only formatted citations.

Solution: Go back to your word processor, and check to see if the paper you just scanned is already formatted. If it is,

then find the original document with the unformatted citations (such as {Argus, 1994 #36}). That is the document you should scan.

Unmatched Citations ("0" Matches)

A "0" in the Matches column means that EndNote could not find a reference in the library to match the temporary citation. You can still format your paper when there are zeros in the Matches column, however any zero match is ignored and left unformatted. If the unmatched reference is part of a multiple citation, *none of the entries in the multiple citation will be formatted*. If you used citation delimiters for text other than citations, the "0" match is not a problem and can be ignored.

♦ **Possible Cause:** Either the temporary citation or the EndNote reference has been modified so that there is a discrepancy between the two.

  Solution: Find the reference in the library and open it. Look at the top of its Reference window, and verify that the reference's author, year, *and* record number are identical to the unformatted citation in your paper. Correct any discrepancies.

♦ **Possible Cause:** A citation marker has been used in a paper for something other than a citation, such as {3H} or {sic}.

  Solution: If the "citation" that appears in the Matches window is just bracketed text, then ignore the "0." See also "Changing the Citation Delimiters" on page 463.

♦ **Possible Cause:** The reference you have cited has been deleted from the library.

  Solution: Search for the reference in your library to verify that it is missing. If it is, create a new reference and re-enter the data into your library. The reference will now have a new record number. Reinsert the citation into the paper to replace the old citation.

Matches Greater Than 1

EndNote cannot format a citation that does not have a unique match to a reference in your library. If you see a number greater than 1 in the Matches column, EndNote was able to match more than one reference in the library to that citation, and it is therefore not unique.

♦ **Possible Cause:** You have typed incomplete citations into your paper, perhaps with just the author and the year and *not* the unique record number, and there is more than one citation that matches that author and year.

Solution: Select the ambiguous citation in the Matches window and choose *Find Matches* from the *Paper* menu. This will display the matching references. Copy the correct one, and then go back to the paper, delete the ambiguous one, and paste the complete temporary citation in its place.

♦ **Possible Cause:** A citation marker has been used in your paper for something other than a citation, and that text happens to match an author's name in your library.

Solution: If this occurs once in a while, temporarily change the notation in your paper that was mistaken for citation delimiters. For example change {Hall} to (Hall), then format the paper and redo the notation later. If this problem arises frequently, then it might be better to change the Citation Delimiters from "{" and "}" to "[" and "]". If you do this, you must also change the markers for all temporary citations in your paper. (See "Changing the Citation Delimiters" on page 463.)

Finding the Matches to a Citation

Select the ambiguous citation in the Matches window and choose the *Find Matches* command in the *Paper* menu to display the Library window with all of the matching references showing.You may also double-click the citation in the Matches window to find the matching references. This helps you locate the intended reference so you can reinsert it into your paper.

To replace an ambiguous citation in your paper, select the reference you want to cite and choose *Copy* from the *Edit* menu. Open your paper, delete the ambiguous citation from the text of the document, and paste the correct citation in its place. If you are using the EndNote Add-in, you may also use the *Insert Citation(s)* command to insert the selected reference into the paper.

The *Find Matches* command can also be used to find the reference for a citation with a "1" in the Matches column.

Changing the Citation Delimiters

By default, when EndNote scans your paper, it looks for citations enclosed in curly braces, "{ }". If you frequently use curly braces in your writing or incorporate backslashes into your citations, you can change the EndNote citation delimiters to other delimiters.

To change the citation delimiters:

1. Choose *Preferences* from the *Edit* menu, and click the *Temporary Citations* option.

2. In the Citation Delimiter section, delete the curly braces and type another set of delimiters such as "[" and "]" or "<" and ">". Beginning and ending citation delimiters must be different. Letters, numbers, semicolons, commas, and the number sign (#), and "@" cannot be used as citation delimiters. You can also change the citation prefix marker in this dialog (see page 411 for details). Citation Prefixes are described on page 207.

3. Click *OK*.

The new citation delimiters are used when you copy and paste citations and when EndNote scans the paper.

If you change citation delimiters while in the process of writing a paper, you might create a situation where you have some citations using the old citation delimiters and some that use the new markers. This will cause a problem when EndNote formats the paper, since it will only find the citations that use the currently specified citation delimiters. To avoid this problem

If you're using the EndNote Add-in for Word or WordPerfect:

1. Format the document by choosing the *Format Bibliography* command *before* you change the citation delimiters.

2. Then, change the citation delimiters as described above.

3. Choose *Unformat Citation(s)* (if desired) to unformat the citations and display them with the new citation delimiters.

If you are not using the Add-in:

1. Make a backup copy of your unformatted paper before you begin.

2. Open the unformatted copy of your paper in the word processor.

3. Using the word processors *Find and Replace* or *Change Text* command, search for the old citation delimiters and replace them with the new ones.

The EndNote Glossary

Add-in
EndNote Add-in software is installed with the EndNote program for use with Microsoft Word 95 and WordPerfect 7-9. It integrates EndNote commands into the *Tools* menu of Microsoft Word and WordPerfect and allows for a streamlined formatting process to cite references and create a bibliography.

Cite While You Write
Cite While You Write software is installed with the EndNote program for use with Microsoft Word 97 and 2000. It integrates an *EndNote 5* submenu of commands into the *Tools* menu in Word for quick and easy insertion and formatting of citations and bibliographies. Instant formatting and a traveling library that contains full reference information make Cite While You Write the easiest and most efficient way to cite references and create a bibliography.

Connection Files
Connection Files are EndNote files used to store the information necessary to connect to and search online databases. Connection Files are stored in the Connections folder in your EndNote folder and can be browsed using the Connection File Manager (from the *File* menu, choose *Connection Files* and select *Open Connection Manager*). Open a Connection File to establish a connection to an online database. Internet access is required.

Continuation Line
Continuation lines are second or subsequent lines of data belonging to a single tag; typically described in the context of a data file to be imported by EndNote. EndNote uses the indent level for continuation lines to distinguish text containing reference data from text containing instructions, prompts, and other miscellaneous text from your database's interface. Continuation lines need to be consistently indented the same number of spaces from the left margin. For example, the continuation lines below are indented four spaces from the left margin.

```
AB- A single-subject research design that used multiple baselines
    across behaviors compared traditional adaptations to adapted
    computer technologies.
```

Data File
A data file consists of the records captured or saved from a reference database, whether from an online database or from a CD-ROM. A data file must be a **text file** in order for its records to be imported by EndNote into an EndNote library.

Database
A database is a file consisting of one or more records, each containing one or more fields of information, such as the name of the author, title of publication, year of publication, and so on. In the context of EndNote, databases are typically collections of bibliographic data.

Delimiters
Delimiters are punctuation that separates one term or field (or any piece of data) from another. Delimiters are used in the context of temporary citation markers (the curly braces are default delimiters that identify the temporary citations in the body of your text) and term lists.

Display Fonts
EndNote has a concept of "Plain Font," as well as "Plain Size," and "Plain Style."All references in your EndNote library should be stored in the plain font, size and style, unless a specific change is necessary (such as the use of Symbol font or italics for emphasis of a word). The appearance of the plain font is determined by the General Display Font setting. This changes the font used to display the references, as well as being the font that is used when printing or exporting references directly from EndNote. The Library Display Font is the font used to display references in the Library window. Both display fonts may be changed using EndNote's preferences.

Field
A field refers to a part of an EndNote reference, such as the author, year, or title. In the EndNote Reference window, each field is displayed as its own section, containing a separate piece of information, such as author names or keywords. Fields are arranged in EndNote styles to show how the data should be formatted. They are arranged in EndNote import filters to show how the tagged data should be imported. EndNote allows for up to 38 fields in each reference.

Field Codes
Cite While You Write and the EndNote Add-in insert hidden field codes around and inside your formatted citations in Word. These hidden codes contain reference information, and allow EndNote to format, unformat, and re-format citations within Word.

Filter
A filter is a file consisting of one or more **Reference Type templates** that instruct EndNote how to interpret and import data into the corresponding fields in EndNote. Filters are selected as import options when you choose the *Import* command from EndNote's *File* menu. EndNote comes with a variety of filters, each designed for a specific database. You may also create your own filters, or modify any of those supplied with the program. Filters are stored in the Filters folder in the EndNote folder; you may browse the list of filters by choosing *Import Filters* from the *File* menu and selecting *Open Filter Manager*.

Generic fields & reference types
The Generic reference types includes the complete set of 38 fields that are available in EndNote. It is "generic" in that it is not specialized for a specific type of reference (such as a book or a journal article). EndNote has a fixed set of "generic" fields that provides the basis for all specific fields used in the different reference types. The generic field names are not worded to be reference type-specific (for example, the generic field name "Author" is equivalent to "Reporter" for a newspaper article or "Artist" for the Artwork reference type). Generic field names are used throughout EndNote (for example, in the Sort Library and Search dialogs) to refer to a similar category of fields that can be found in the different reference types. When you choose a Generic field name in any of these dialogs, it refers to all fields in that row of the Reference Types table (see page 291).

Information Provider
An information provider is a service that provides access to one or more databases, whether to an online or CD-ROM database. Examples of information providers include Ovid, ISI, SilverPlatter, and STN.

In-text Citation

An in-text citation is the brief citation to a reference that appears in the body of the text of a paper. Typically this is just the author name and year in parentheses, or a bibliography number.

Library

In the context of using EndNote, a "library" is the term for your EndNote database of references. It is a collection of records of reference material. When you choose *Open* from EndNote's *File* menu, you open a library. The references are displayed in the Library window.

Literal Text

Literal text consists of any text in a data file that does not correspond to a **field** in EndNote. Literal text must be included in a filter in order for EndNote to parse multiple pieces of information found in a single tag in a record to the corresponding field or fields in EndNote. Examples of literal text include punctuation used to separate one piece of information from the next, as well as any identifying text, such as "vol." for Volume, or "pp." for Pages.

Log file

When using the *Connect* command to search and retrieve references from online remote databases, EndNote maintains a log file to record communication status messages with the remote database as well as a log of the references that were retrieved. The location of the log file can be determined (and changed) by choosing *Preferences* from the *Edit* menu, and clicking the *Online* option.

MARC (MAchine Readable Cataloging)

MARC is a standardized format developed by the Library of Congress for producing machine-readable bibliographic records. MARC uses numeric tags such as tag 100 for Personal Author, and tag 245 for the Title.

Mnemonic Tag

A mnemonic tag is an abbreviated way of identifying the contents of the data that follows. Mnemonic tags frequently use the first two characters of the corresponding data, as in "AU-" for AUthor, "TI-" for TItle, or "SO-" for SOurce. Other mnemonic tags use a combination of the two naming conventions, as in "SO-<PY>" for the SOurce's Publication Year.

Reference Types

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

Remote Database

A remote database is the term used for databases available online using EndNote's *Connect* command. These are typically databases that are accessible on a Z39.50 server. They include library catalogs and other bibliographic reference databases. An internet connection is required to access a remote database.

Retrieved References window
The window that appears when a connection to an **remote database** is established. This workspace displays the connection status as well as the references retrieved from your searches. Use this workspace to store retrieved references as you continue searching the remote database. When your searching is complete, copy the references from the Retrieve References window to the Library window to save them.

Styles
Styles are the files that EndNote uses to determine how to arrange references for a wide variety of bibliographic formats. Styles are typically for specific journals, though they can also be based on more general style guides such as the Chicago Manual of Style or the MLA Handbook. EndNote provides more than 400 preconfigured styles in the Styles folder of your EndNote folder. To preview and browse through these styles, choose *Output Styles* from the *File* menu, and select *Open Style Manager*. Styles are used to determine the format of references in the preview pane of the Library window as well as when you use the *Print, Export, Format, Format Bibliography*, and *Copy Formatted* commands.

Subscription Databases
Online bibliographic databases which require payment or some form of authorization to enable you to connect (as opposed to "free" databases or library catalogs). For more information about these databases, contact the individual information providers.

Tagged Data
Tagged data consists of an identifier, typically a **mnemonic tag**, in the left margin of a **data file**, followed by text for one or more **fields** of information. Data must be consistently tagged if it is to be read by EndNote into the appropriate fields in EndNote

Templates
Templates are used in both **styles** and **filters** to show EndNote how to output or import bibliographic data. The templates use field names to represent the actual bibliographic data as it should be arranged in a bibliographic entry (in the case of styles), or in a data file to be imported (in the case of filters). Typically, a different template is constructed for each **reference type**.

Term Lists
Each library has preconfigured term lists for authors, journals, and keywords. The term lists maintain a list of the names or words entered into the corresponding fields. They are used to help with data entry by suggesting terms as you type. The Journals term list can also be used to store various abbreviations of the journal names and later use those abbreviations as needed in bibliographies.

Text File
A text file consists entirely of characters that can be typed in from a standard keyboard. A text file may contain any character from the English alphabet, punctuation marks, spaces, and numbers. A text file cannot contain any control characters or text styles used by a word processor to format text. EndNote can only import records captured or saved as text files, and cannot read files saved in a word processor format.

Traveling Library
When you use EndNote's Cite While You Write commands in Word, each formatted citation in your document is saved with field codes that embed reference data in the document. The paper contains a "traveling library" of EndNote references cited. This makes it easy to use your document on other machines and share your document with colleagues.

URL
A URL or Uniform Resource Locator can be used to specify the location of any resource available on the Internet (typically for Web pages or FTP sites). A common format for a URL for a Web page is http://www.endnote.com.

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

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