

## Introductory Guide to EndNote

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## What is EndNote?

EndNote is a software application that can be of considerable help in several key aspects of your work – those that involve keeping track of, and making good use of, the references on which much of your work is based:

1. EndNote gives you a database foundation in which to store, organise and retrieve reference data. This is like a very sophisticated card file in which you can keep track of what you have read, search for relevant references to read, download and store full-text articles, and share your reference data with colleagues.
2. EndNote is an on-line search tool. If you or your library have access to on-line bibliographic resources you can search them and retrieve appropriate data directly into your reference database.
3. EndNote provides powerful assistance in generating text citations and bibliographies in articles that you are writing. Its “CWYW” (“Cite While You Write”) facilities are of enormous help in the otherwise tedious preparation of citations and bibliographies accurately formatted in the particular style of the publication for which you are writing

There are other examples of bibliographic software available on the current market, but EndNote is at present by far the most widely used, particularly in Australia and New Zealand. Almost all universities in this region have site licences enabling them to distribute free working copies to their staff and students, as do many other educational institutions, government departments and business organisations. Single or multiple-licence copies can be purchased from Crandon Services Pty Ltd ([info@crandon.com.au](mailto:info@crandon.com.au)), who also provide free technical support to Australian or New Zealand users.

## Where to look for help?

If convenient, you might like to start by going to [www.crandon.com.au](http://www.crandon.com.au). On the home page, you will see a list of links headed **Tutorials**, and in that list a link to **Help & Tutorials**. Click on that link to the **Help and FAQs** page with a **YouTube Tutorials** link, under the Help submenu, which should take you to a series of brief tutorials that you may find to be very helpful. Try the first (**Bibliographies Made Easy**) for a simple introduction to the main features of EndNote as a bibliographic writing tool.

You may be able to find the same tutorials on-line at [www.endnote.com](http://www.endnote.com), if you go to **Support and Services** and then to **Guides and Information > EndNote Xx > Basics On-Line Tutorial**.

If you have a copy of EndNote installed on your computer (see below for a brief discussion of installation procedure), check the EndNote program/application folder for a file called **GettingStartedGuide.pdf**. This guide, which covers approximately the same ground as these notes, is also easily readable and we strongly recommend that you take advantage of it. If you don't yet have access to an installed copy of EndNote, you can download a copy of the Getting Started guide from

[http://endnote.com/support/helpdocs/ENX4\\_GettingStartedGuide\\_WinMac.pdf](http://endnote.com/support/helpdocs/ENX4_GettingStartedGuide_WinMac.pdf)

or go to [www.endnote.com](http://www.endnote.com) > **Support and Services** > **Guides and Information** > **EndNote Xx** > **Getting Started Guide**.

When you do indeed have EndNote installed on your computer, do not forget its very comprehensive **Help** file, which is much more detailed than the Getting Started document. If you don't yet have EndNote installed but would like to check the more detailed file, you can download a copy from

<http://endnote.com/support/helpdocs/EndNoteX4Help.pdf> (Windows)

<http://endnote.com/support/helpdocs/EndNoteX4MacHelp.pdf> (Macintosh)

or go to [www.endnote.com](http://www.endnote.com) > **Support and Services** > **Guides and Information** > **EndNote Xx** > **Help Documentation** (separate Windows or Macintosh versions).

## **Getting Started – Installation**

1. If necessary, first obtain and install an EndNote-compatible word processor. In principle EndNote can work with any word processor that can save its documents in RTF format, and that includes nearly all of them. In practice, however, it is particularly convenient to use one of the word processors that can work with EndNote's "CWYW" ("cite while you write") facility, which is limited to Microsoft Word on Windows or Macintosh platforms, Apple Pages on a Macintosh, or OpenOffice Writer in Windows. Use of either Pages or OpenOffice Writer also has some significant limitations by comparison with Word and for most practical purposes Word is at present thought to be more convenient.

We recommend that you work if possible with the most recent versions of both EndNote and Word. At the time of writing EndNote X4 (Macintosh) is compatible with Word 2004, 2008 and 2011, and EndNote X4 (Windows) is compatible with Word 2003, 2007 and 2010. If for any reason you are obliged to work with a different word processor, feel free to contact Crandon Services for advice on possible limitations and workarounds. *The following notes assume a valid EndNote/Word configuration.*

2. Now you can obtain and install a copy of EndNote. The installation procedure is straightforward, but if you have no previous experience with EndNote, or only

limited experience with application installation on your computer, we strongly advise you to begin by reading the Installation chapters in EndNote's GettingStartedGuide.

Almost all universities in Australia and New Zealand currently have EndNote *site licences* for their staff and (most of them) for their students, as have many government departments and commercial enterprises. If you are fortunate enough to have access to one of these licences then you should be able to get a copy that you can use free of charge during the term of the licence. Alternatively single copies or multiple-copy licences can be purchased from Crandon Services Pty Ltd ([www.crandon.com.au](http://www.crandon.com.au)). You can download a free trial copy (from Crandon or from the EndNote home site at ([www.endnote.com](http://www.endnote.com)) which is fully functional but will revert in 30 days to limited capabilities. It should prove to be perfectly adequate for trial purposes, and it can be upgraded to a licensed copy without losing any of your trial results.

Remember, *you must install Word (as a component of Microsoft Office) first, and then and only then install EndNote*. It is important to install in this order, as when EndNote is installed it looks for compatible word processors and then automatically installs the necessary links. If you install EndNote first these essential links will not be established.

### **Installing EndNote on a Windows platform**

The installation procedure for a Windows platform is as follows (the procedure for a Macintosh installation follows below):

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

The OpenOffice.org Quickstarter may appear in your System tray. Right-click on the icon and choose *Exit Quickstarter*.

2. Start the EndNote installation program.

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

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

The EndNote Setup program will start. If you do not have Autoplay enabled, choose *Run* from the Start menu, type

"d:\setup" (use the drive letter appropriate to the drive containing the installation CD) and press ENTER.

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

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

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

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

**User Information:** Enter your name and organization. If you are upgrading from a previous version, you must also enter your previous EndNote serial number.

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

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

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

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

**Select Destination:** By default, EndNote is installed in the C:\Program Files\EndNote Xx folder (e.g. EndNote X4). You can use the *Browse* button to change the folder selection if you wish. If a previous installation of EndNote is found in the same folder, you will be given the option to either back up or overwrite the older files. If you back up files, they are placed in a Backup folder in the installation folder.

**Select Components:** (Custom installations only) If you selected a Custom installation, see the Installation chapter in EndNote Help.

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

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

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

### **Checking a Windows Installation of EndNote:**

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

First, a dialog may ask whether you want to open a new EndNote Web account or integrate with an existing EndNote Web account. EndNote Web is a valuable component of the EndNote system and you should become familiar with it as soon as your experience permits. However to keep things reasonably simple it is not treated in this brief introduction. Decline the invitation for now. You can set-up an EndNote Web account at any later time from within EndNote.

Next, a dialog may ask you to open a library file. You can create a new library or open an existing EndNote library, or choose *Cancel* or *Close*. A shortcut to the Sample Library is provided in the Examples folder, normally listed at the end within the EndNote Program folder, to help you get familiar with EndNote. Navigate to the Examples folder (in the EndNote Program folder) and double-click *Sample\_Library\_X4.enl* to open it. If you don't see the .enl file in the Examples folder, look for its .enlx compressed equivalent. Double-click that and it will automatically expand to the regular working version.

Note that when expanded the library actually consists of an .enl file and a *Sample\_Library\_Xx.Data* folder. EndNote libraries always consist of .enl library files, each accompanied by a matching Data folder. If copying a library file from one computer to another always be sure to copy the .Data folder too – much of the information stored in the library may actually be stored in that folder..

To check the version number of EndNote that you have installed, choose *About EndNote* from the Help menu. Click the splash screen to clear it.

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

To see whether Cite While You Write is correctly installed, start Microsoft Word (or the OpenOffice.org Writer if that is your word processor of choice).

In Word 2003, click on the **Tools** menu and you should see EndNote's CWYW commands on an **EndNote Xx** submenu. In Word 2007 and 2010, you should see them accessed from an **EndNote tab**. In OpenOffice.org Writer, you should see EndNote commands on an **EndNote Xx** menu.

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

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

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Make sure that all Microsoft Office and OpenOffice.org applications are closed, including any Quickstarter applications. The OpenOffice.org Quickstarter may appear in your System tray. Right click on the icon and choose *Exit Quickstarter*.
3. From the Windows **Start** menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
4. Choose *Add or Remove Programs*.
5. Highlight *EndNote X4* and click *Change*.
6. Select *Repair* and click *Next*.

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

**Installing EndNote on a Macintosh**

The installation procedure for the Macintosh platform is as follows:

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

**If you downloaded the EndNote installer:** Double-click the disk image to display an EndNote X4 folder.

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

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

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

Spotlight searching.

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

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

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

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

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

**User Information:** Enter your name and organization. If you are upgrading from a previous version, you will also need to enter your previous EndNote serial number.

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

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

**Product Registration:** Please register your copy of EndNote!

When you start EndNote, a Customizer automatically installs Cite While You Write files for Microsoft Word 2004, 2008 or 2011 if any of them has been found on your computer.

### **Checking a Macintosh Installation of EndNote:**

To run EndNote, double-click the EndNote Xx icon found in the EndNote Xx folder, within the Applications folder on your hard drive.

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

Next, a dialog may ask whether you want to open a new EndNote Web account. EndNote Web is a valuable component of the EndNote system and you should become familiar with it as soon as your experience permits. However to keep

things reasonably simple it is not treated in this brief introduction. Decline the invitation for now.

A dialog will ask you to open a reference library file. You can create or open an EndNote library, or choose *Close*. A Sample Library is provided in the Examples folder, within the EndNote Program/Application folder, to help you get familiar with EndNote. Navigate to the Examples folder (/Applications/EndNote Xx/Examples/) and double-click Sample\_Library\_Xx.enl to open it. If you don't see the .enl file in the Examples folder, look for its .enlx compressed equivalent. Double-click that and it will automatically expand to the regular working version.

Note that when expanded the library actually consists of a .enl file and a Sample\_Library\_Xx.Data folder. EndNote libraries always consist of .enl library files, each accompanied by a matching Data folder. If copying a library file from one computer to another, always be sure to copy the .Data folder too – much of the information stored in the library may actually be stored in that folder.

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

### **Checking to see whether Cite While You Write has been correctly installed:**

Start EndNote, then start Microsoft Word, and then select Word's **Tools** menu.

You should see EndNote's Cite While You Write commands on an **EndNote Xx** (e.g. X4) submenu in Word. If you do not see these commands, Word support was not correctly installed in EndNote. Try any of the following three ways to re-install CWYW (after each attempt, start EndNote and then Word to check for an EndNote submenu on the Tools menu in Word):

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

### **A note on installed content files (Windows and/or Macintosh):**

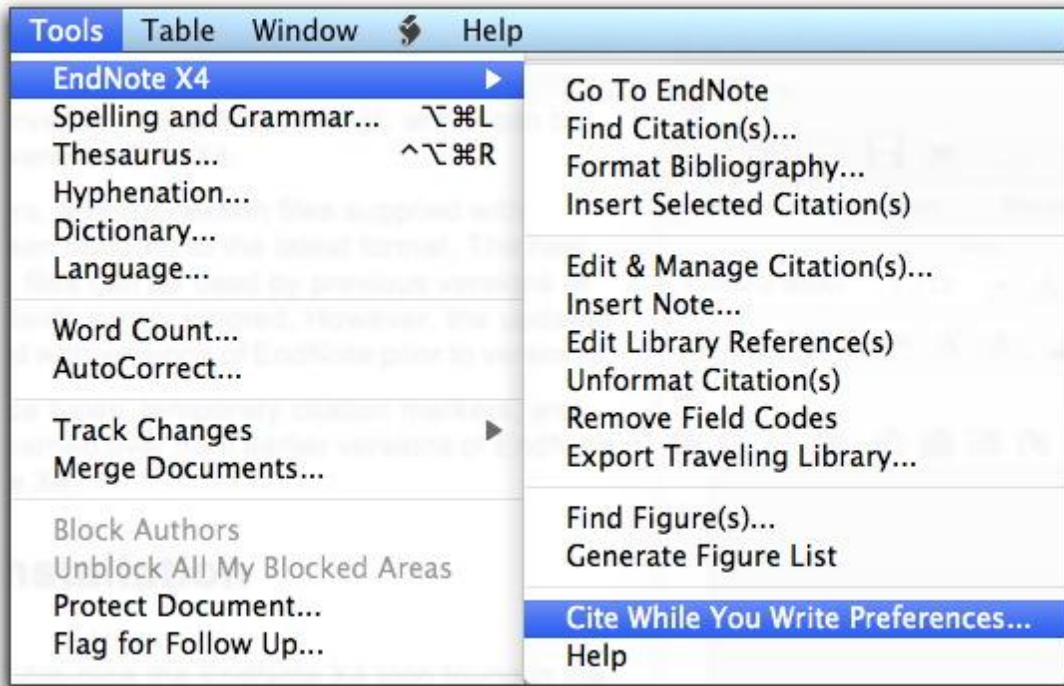
Over the years the EndNote team has developed and updated literally thousands of what it calls “content files”. These files contain information that EndNote uses to connect with external bibliographic databases (“connection” files), to filter bibliographic data imported from an external source (“filter” files) or to format citations and bibliographies in word processor documents (“style” files). At present, for example, there are almost 5,000 style files alone, each appropriate to one particular publication medium (e.g. one journal). Clearly there is no point in transmitting and installing all of these content files for any one user, or even one group of users. No one user is ever going to use more than a few of them at most.

Accordingly the installation procedure will install only the most popular of each type of file, adding up to some hundreds rather than thousands of content files. Any of the remainder can be easily downloaded from the EndNote web site at [www.endnote.com](http://www.endnote.com). Go to **Support and Services** and choose from the **Downloads** options. If you download one or more Style files, for example, copy them into the Styles folder in the EndNote Program/Application folder, and they will then be accessible to EndNote’s style selection tools (likewise for Filter or Connection files, which each have their own folders in the EndNote group).

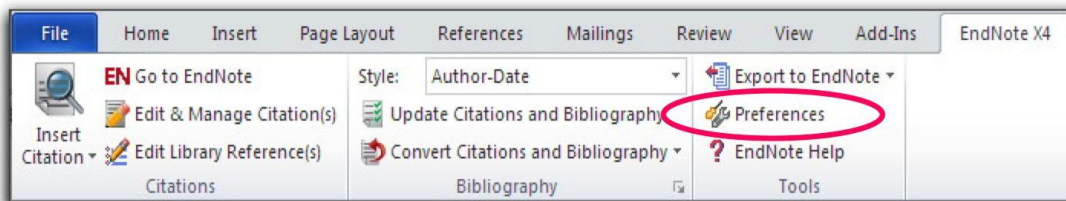
### **Cite While You Write preferences**

When you are satisfied that EndNote has been properly installed and that Word can access it from the Tools menu, you may wish to specify some basic preferences for CWYW operation. This can be done from that Tools menu, as follows:

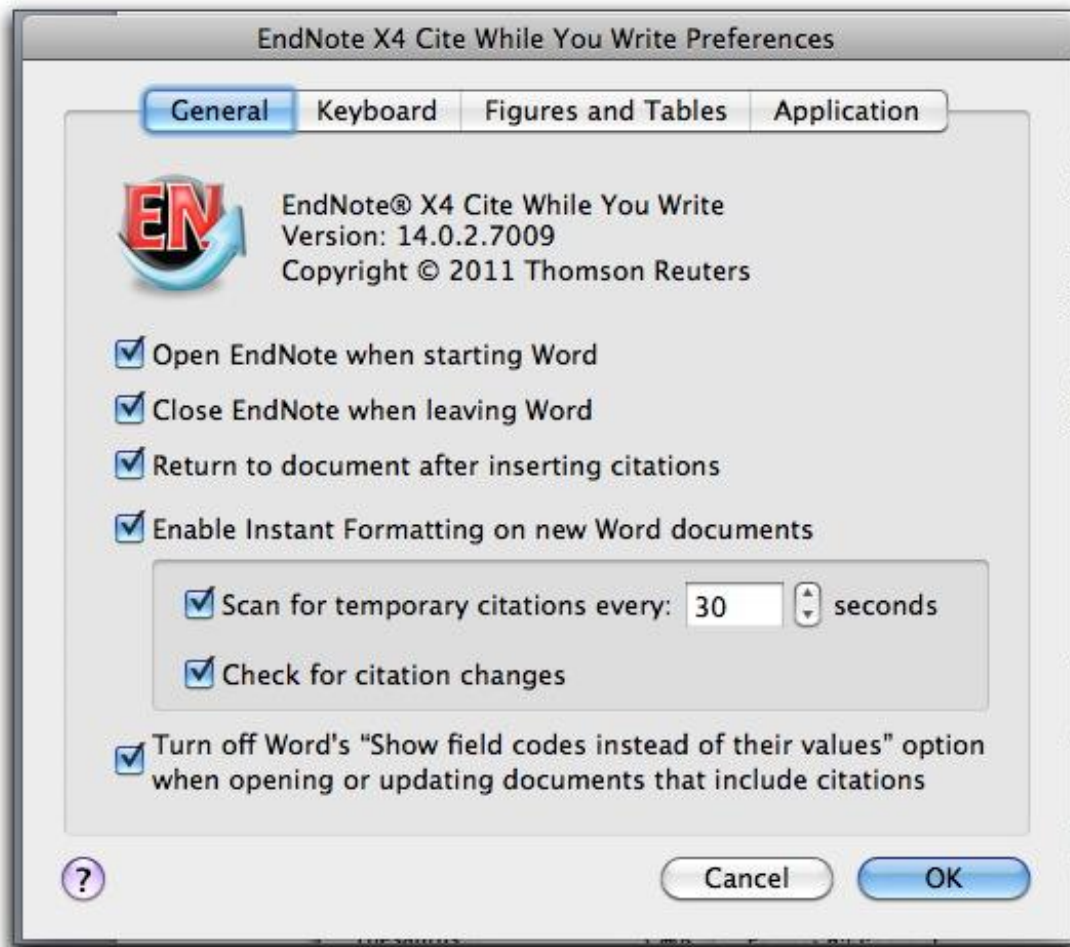
**Word 2003 (Windows), 2004, 2008 or 2011 (Macintosh):** From Word’s **Tools** menu, select the **EndNote Xx** sub-menu (e.g. **EndNote X4**), and from that sub-menu select **Cite While You Write Preferences...** :



**Word 2007 or 2010 (Windows):** These versions of Word have no Tools menu. Instead the EndNote CWYW commands are accessed from an **EndNote Xx** tab, on which you can click the *Preferences* command:



Either of these methods will produce a dialog for setting some routine operational parameters for calling and using CWYW within Word:



The **General** settings are mostly self-explanatory. Depending on which boxes are checked, Word will or will not automatically start EndNote whenever it is started itself, and/or close EndNote automatically when Word is closed. Some users find these facilities convenient, particularly when doing a lot of manuscript preparation. At other times they can become irritating – e.g. always opening EndNote when you only opened Word to write a short letter. Even if the first box is unchecked, EndNote can always be quickly accessed from Word's Tools menu, and it can always be closed with no more than one mouse-click if Word doesn't do the job itself. Just choose the preference that suits you.

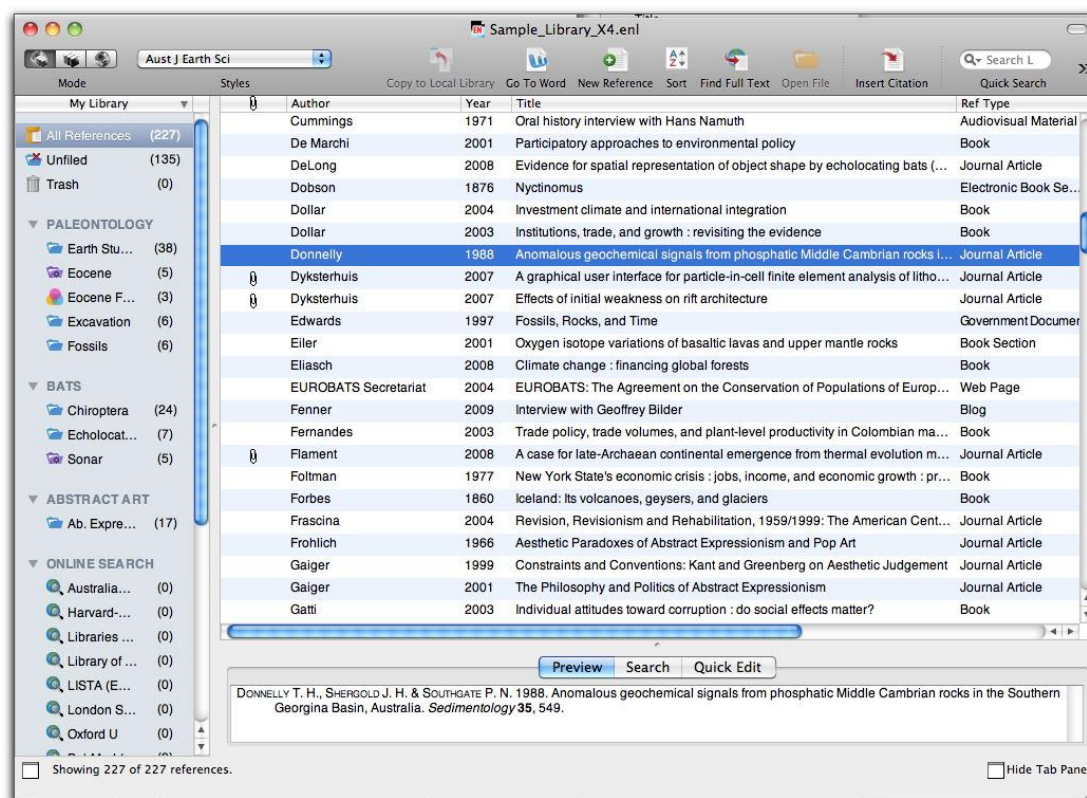
We suggest that you leave the other five boxes checked for the time being, and leave the scan time at 30 seconds. You can always come back and change these later if you wish.

The **Keyboard** preference tab allows you to set keyboard equivalent commands for each of the basic CWYW operations. The **Figures and Tables** tab lets you specify whether to use default or custom placement of figures and tables relative to the remaining text. Again we suggest that you should leave these options as is until you have gained a little practical experience.

Finally, the **Application** pane offers a choice between EndNote and EndNote Web as the application in which you are currently planning to use CWYW. Leave this one at EndNote until you later get involved with EndNote Web.

## The EndNote Library window

When you open an EndNote library, such as the Sample Library installed with the EndNote program, it will look something like this:



(Note: This figure shows a typical Macintosh display. Windows displays differ a little in detail – e.g. in the actual icons in the top toolbar – but not in purpose.)

This window has several key components (“panes”):

Across the top of the window is a toolbar containing icons for some of the most common EndNote functions. These functions, which are user-selectable for the display (see later notes on setting general preferences), are also accessible from an EndNote **Tools** menu (not the same as the Word Tools menu). Those that you are most likely to use in routine operation are the New Reference, Insert Citation and Go To Word icons, whose purposes are self-explanatory. Note particularly the Style Selection drop-down menu, near the left end of the toolbar. You will use this menu frequently to select or change the formatting style for EndNote to use.

On the left side of the window is the Groups pane. This is used to control the establishment, display and maintenance of sub-groups of references within the

main database. In the figured library, groups have been established for references in the main library pertinent to Palaeontology, Bats, Abstract Art and references obtained from on-line searches. Further sub-groups have been established for each of these groups.

Across the bottom of the window a **Tab Pane** displays a *Preview* tab to view formatted references, a *Search* tab for searching either the current library or an online database, and a *Quick Edit* tab allowing you to quickly edit a reference. In the figured example, the Tab pane is set to Preview a selected reference, in this case the Donnelly et al 1988 reference, in the style selected in the toolbar menu, in this case the formatting style for the journal Australian Journal of Earth Sciences.

The main part of the window is the *Reference List* pane, which displays a multi-column list of the references contained within the library. In the example the first column is set to show a paperclip icon for any references that include an attached file (e.g. a text or PDF file). The second column is the last name of the (first) author, the third the year of publication, the fourth the article title, and the fifth an indication of the reference type (i.e. journal article, book, book section, report, patent, thesis or any other of the 48 “standard” reference types that EndNote recognizes – it also has room for you to define more of your own if you wish!).

The actual columns in this display and the order in which they are displayed are user-selectable. Any of the columns can be used to provide a basis for sorting the library simply by clicking the column heading. A small triangle in the selected heading indicates the direction of the sort order by pointing up or down; just click on it to reverse the sort order if you wish.

To choose the fields (columns) displayed, and the order in which they are displayed, go to the **Edit** menu (Windows) or the **EndNote Xx** menu (Macintosh), choose **Preferences**, and then select **Display Fields**.

From that same **Preferences** menu you can also choose **Display Fonts** to change the fonts used in the References List pane (click on the **Library** tab in the resulting dialog and select the font you want). Note: The Display Fonts preference dialog also allows you to change other fonts used by EndNote (General, Labels, Search tabs), e.g. for text typed in or for the display of other text outside the References List pane. We suggest that you leave these in their default settings until you are more familiar with EndNote. In particular we strongly advise you not to change those settings that by default use EndNote’s Plain Font and Plain Size. If it ain’t broke, no need to fix it!

## **Individual Reference Data**

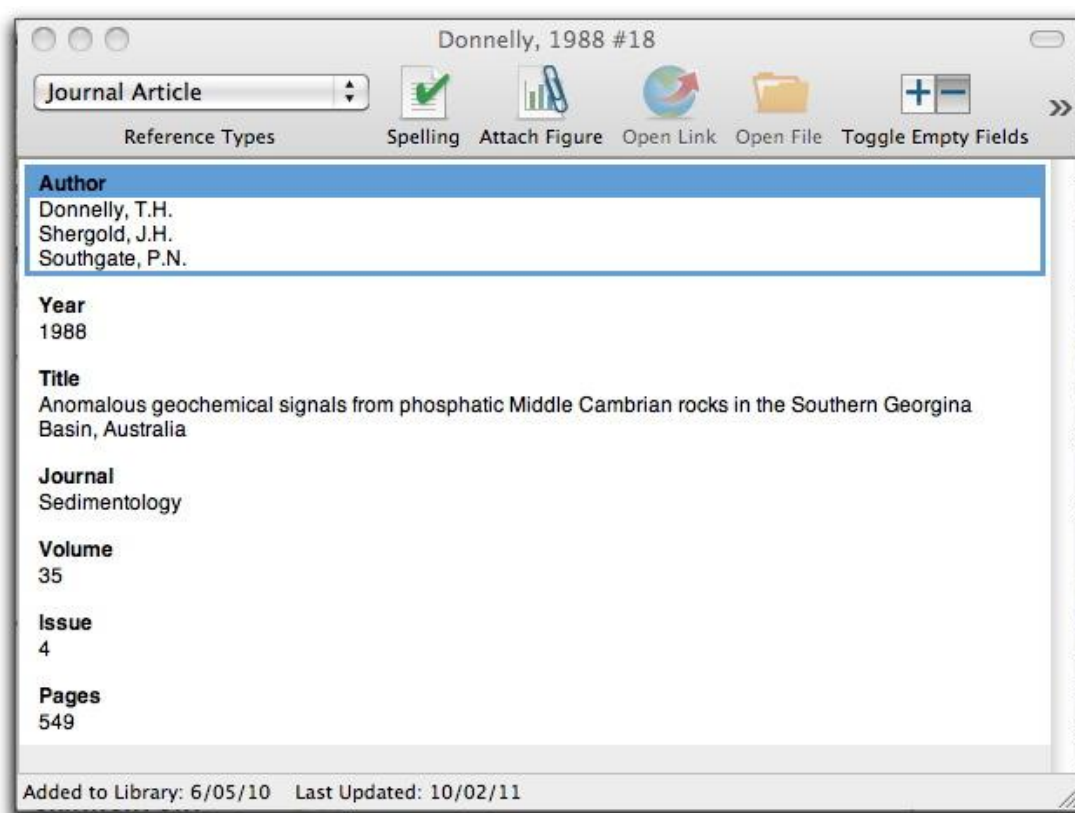
The Reference List pane of the library window only displays a small part of the information for each reference that may be stored in the library. To see more of

the complete details, you might begin by selecting (highlighting) a reference in the List window and checking the Preview pane at the bottom of the window. (If you don't see that Preview pane, which has Preview, Search and Quick Edit tabs, then you should see a toggle labelled *Show Tab Pane* at the bottom right of the display window. Click on that box and the Preview pane should appear.)

If necessary click on the Preview tab, and the selected reference will be displayed, formatted according to the style which is currently selected in the drop-down menu at top left of the display window. By default only a small number of styles will be displayed initially in the drop-down menu, but you can choose **Select Another Style...**, which will take you automatically to the contents of EndNote's Styles folder, from which you can select others from the default list supplied. (And if none of those meets your requirements, you can download others from the thousands accessible from EndNote's web page at [www.endnote.com](http://www.endnote.com).)

The Preview display is a great feature that you will use frequently when checking references for inclusion in a manuscript – but it still shows only that information which is necessary to format a reference for publication, unless you choose a style called *Show All Fields* from the Styles folder — try that one too!

Alternatively, double-click on any desired reference in the List pane, and it will expand to a new window of its own:



You can select a desired reference before expanding it by scrolling the List window, by using the up- and down-arrow keys to move through the list, or by

typing the appropriate first few characters in the field by which the list has been sorted. For example, if the list is sorted by author name then typing “Don” at the keyboard, with the List window active, will change the list display to show only those references whose (first) author has a surname starting with those three letters. If there should then be more than one, it’s easy to locate and double-click the one you want.

In the example figured above, the window heading of “Donnelly, 1988 #18” indicates that the data displayed is for a reference which has Donnelly as the (first) author, was published in 1988, and is no. 18 (record 18) in the library database. A toolbar at the top of the window has a drop-down menu at the left showing the reference type, and several icons for quick access to some of the reference editing or display functions. This toolbar is also user-configurable.

The icon labelled “Toggle Empty Fields” is worth special mention. As you will see when you begin to enter your own reference data (see below), Endnote makes provision for many kinds of data that will not necessarily be entered for any one given reference. For example, it has an Abstract field for Journal Article references, but the information to fill that field will not always be available, and it is not usually required for bibliography-formatting purposes.

Altogether EndNote allows for over 50 data fields for any one reference type, but for most references only a small proportion of those fields will ever be used. That means that a very large window would be required to show them all, even though most of them would be empty. However if you click on the “-“ side of the “Toggle Empty Fields” icon, empty fields will not be displayed when any reference is expanded. The resulting windows are usually more manageable. Feel free to experiment with this – whatever selection you toggle can easily be instantly reversed.

Note that each *reference* in the library (each “record”, in database terminology) is made up of a number of *fields*. If you spend a few minutes looking at several different references, of different reference types, you will see that there are some fields common to all reference types, and some that are specific to individual types. For example, a Journal Article will have a field called *Journal*, in which it stores the name of the journal in which that reference was published. A Book reference has no such field, which would be totally irrelevant, but has other fields pertinent to books rather than other reference types. On the other hand, fields like *Author* (name) and *Year* are common to many different types.

When looking at a few different references, notice some key features that will become very relevant when you are entering reference data for your own libraries. For example, you will see that for references with multiple authors, each author name *is on a separate line* in the *Author* field. Check also the use of commas in the entered names of individual authors. You may find that some names are entered with no comma at all (e.g. “Robert D. Smith”), while some have one comma (e.g. Smith, Robert D.) and you may even see some with two commas (e.g. “Smith, Robert D., jnr). Think about this – and consider the problem

of a dumb computer trying to decide which part of a name is the surname, which part is the first name(s), and so on. We will come back to this question later.

When you have finished reviewing a reference, close its window. Click on the *Close* button at the top of the reference window (careful – not the Close button for the whole List window, which will probably be just behind it!). Or select **Close Reference** from EndNote's **File** menu. Or press **Control-W** on the keyboard (Windows) or **Command-W** on the keyboard (Macintosh). As usual, just pick the method that suits you best.

## **Entering a Reference to a Library**

There are several different ways in which you can add reference data to an EndNote library:

1. You can enter the relevant data from the keyboard. This is relatively slow and it can become tedious, but it may be the only method available to you. You should at least gain some experience with it to increase your familiarity with the EndNote files and to help you with the ability to edit data obtained in other ways.
2. You can connect to some databases on-line, search them, and retrieve information from them for one or more relevant references, importing that information directly into EndNote without having to type anything. These services comply with a data transmission protocol called "Z39.50". An example is Thomson-Reuters' *Web of Knowledge*. For biological, particularly medical, applications, the best-known by far is the *PubMed* database, administered by the U.S. National Library of Medicine. If you work in the earth sciences, for example, you may be able to access the *GeoRef* database, maintained by the American Geological Institute, or its *AusGeoRef* subsidiary database (maintained by the AGI in conjunction with Geoscience Australia). Many other fields of knowledge maintain similar databases; check with your library if you are fortunate enough to have one.

In such cases you don't need to type anything other than your search criteria, and you can enter the data for dozens of references in a few minutes (though some editing may be required). However the on-line databases must themselves contain the data that you seek, and they are mostly commercially based, so that you need to have legal and practical access to them (*PubMed* access is free). If you work in a large tertiary institution your library may be able to arrange access for you, although not all universities, for example, subscribe to *GeoRef* or to the *Web of Knowledge*.

Examples of this approach will be demonstrated below. If you believe that you may have access to one or more of the Z39.50 services then you should check with your library. You may also need to check with your network administrators to ensure that you will have on-line access through a proxy server, or whatever security system that your institution uses.

3. Similarly, a wide variety of organisations maintain bibliographic databases in formats other than the Z39.50 protocol required for the kind of direct access described in (2) above. These provide access to their databases either on-line or on regularly distributed CD-ROMs. You can search the databases for references relevant to your needs and you can download them to your own computer, but you cannot import the results directly into your own EndNote library as you can with the Z39.50 sources. Instead you must pass the downloaded data through an EndNote *filter*, which examines their text contents and translates them into a form that EndNote can recognise. You can then import the translated files into EndNote. Again virtually no typing is required, but the relevant services are all commercial and access to them is not free. Perhaps you have access to some of them through an institutional library, although few (if any) libraries can afford to subscribe to them all.

These services include OCLC, OvidSP, Ebsco, Thomson Reuters and many others. EndNote comes with filters pre-constructed for most of them, and also with the tools to write your own filters or edit those already available.

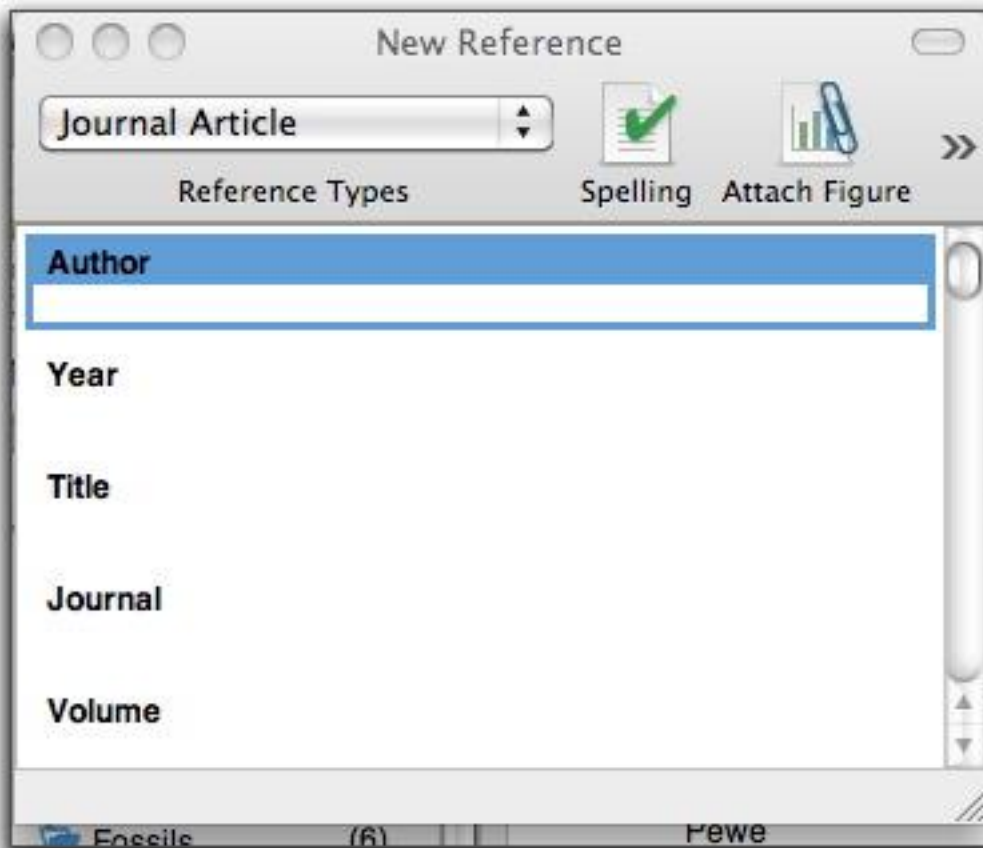
### **Keyboard entry of reference data**

For a quick exercise on keyboard entry, open EndNote and open the Sample Library. Once any library is opened you can add references to it or delete references from it. Of course you can also open any existing reference in the library file and edit it.

Now open a new (empty) reference, using any of the following:

1. Select **New Reference** from Endnote's **References** menu.
2. Click on the *New Reference* icon in the List window toolbar.
3. Press Command-N (Macintosh) or Control-N (Windows).

An empty reference window will appear, populated with the fields appropriate to the default reference type, and all you have to do is to select the correct reference type and then type the correct information into each appropriate field:



(This is a Macintosh example; the Windows equivalent will differ only in minor detail).

The first sample reference to enter in this brief exercise is to a journal article, so make sure that this reference type is selected in the drop-down menu at top left.

The *Author* field should be highlighted by default. If not click in it to highlight it.

1. Now type in the name of the first author for the new reference:

**Yund, R.A.**

Enter everything into the EndNote library in plain text (i.e. do not use italics or bold face; if EndNote needs them for formatting it will apply them itself. You can, however, enter subscripts or superscripts if appropriate).

Now press Return/Enter to set a new line in the Author field, and enter a second author:

**G. Kullerud**

This (real) sample reference has only these two authors, so press Tab to advance to the *Year* field.

Notice that the two authors have been entered in different formats, one without any contained comma, and the other with one comma. EndNote will interpret them in this way. If there is no comma, *the last word entered is the last name* (surname), and anything before the last word is the first name(s). If there is one comma, then *anything before the comma is last name*, and anything after it is first name(s). If an entered name contains two commas, EndNote will assume that *anything before the first comma is last name*, anything between the two commas is first name(s), and anything after the second comma is a supplementary title, as in the name "J. P. Smith jnr", which would be entered as "Smith, J. P., jnr".

When formatting a reference in a bibliography, EndNote is clever enough to abbreviate a full first name to its initial, if that is what the formatting style requires. However it can't do the reverse – if you enter only an initial then EndNote obviously can't expand that automatically to the correct full name. So you should always enter authors' full first names if possible. If it is necessary to enter initials, be sure to put either a space or a period between consecutive initials. That is, enter Smith J.O., or Smith, J O, or Smith, J. O. – but *not* Smith, JO. EndNote will think that the latter is somebody whose first name is "Jo".

These rules – a separate line for each author, and careful attention to the commas (if any) – are inflexible and responsible for some common entry errors. Are they important? Think now – how would you enter the name of Charles de Gaulle? In that form, without any comma, EndNote will assume that the last name is "Gaulle" and first names are "Charles de". In a bibliography sorted alphabetically by last name, as normal, then that name will be listed in the Gs. If you want him in the Ds, as in "de Gaulle, Charles" then you *must* enter the name in that form, with the single comma. EndNote will then treat "de Gaulle" as the last name.

The first time you enter a name in your EndNote database it will be shown on the screen in red. EndNote keeps close watch on names, and thereafter any time the same name is entered for another reference it will be shown in black (and when you start to type it in EndNote will leap ahead and suggest the rest of the name, which you can accept if you wish by pressing Tab).

2. Now type **1966** in the *Year* field. Do not enter dates in the day-month-year or related formats in this field – just the publication year. If the detailed date is important, as it may be, for example, for reference to web pages or publications, then there is a separate *Date* field further down the list that you can use for that purpose.

3. Press Tab to advance to the *Title* field, and enter the article title:

### **Thermal stability of assemblages in the Cu-Fe-S system**

Titles should be entered without a period/full stop or any other terminating punctuation. EndNote will add it automatically if a specific formatting style

requires it. Do not press Enter/Return to create a new line for long titles – type the title as one line, allowing it to wrap to successive lines if needed.

EndNote has some capability to control capitalisation when formatting, but it is best to enter each title with the capitalisation that you think you will most often need. Most journals seem to use “sentence” style for bibliographic titles (use a capital only for the first word or any subsequent proper nouns).

4. Press Tab and then in the *Journal* field type the journal name:

### **Journal of Petrology**

You also have the option, with this and many other journal names, of entering the journal name in an abbreviated format such as **J. Petrology** or **J Petrology**. There is no flat rule – some journals like to use an abbreviated form in their bibliographies, while others insist on the full title. When you set up a formatting style, how can you tell EndNote which to use for the bibliography that you’re formatting right now? The answer to that one lies in what EndNote calls a *journals terms list*, which is a file that you can tuck into your EndNote library that lists full-name and several abbreviated-name equivalents for many journals. In setting up a formatting style for a particular journal you can then tell EndNote which one to use.

If the journal requires, say, full journal names but you have some abbreviated names in your library, EndNote can consult the terms list and choose the correct format to use for each reference – automatically. To be successful in this respect you will have to find a suitable journals terms list that somebody has compiled for your field of study, and the journal in question must be included in that terms list. For more information, go to [www.crandon.com.au](http://www.crandon.com.au) and check the home page links to “Terms list Earth Sciences” and “Terms Lists UQ”.

Now press Tab and enter **7** in the *Volume* field, Tab twice to skip *Issue* (not relevant to this reference) and enter **454-488** in the *Pages* field. Page ranges can be entered either in full (e.g. 454-488) or abbreviated (e.g. 454-88).

This is all the information necessary for basic bibliography formatting of a reference to a Journal Article, and you need no more for this exercise. However you should scroll down the New Reference window to see the other fields that might be added where appropriate. Note the Abstract and Notes fields, in which you may or may not ever wish to type an entry (but Abstract at least is often filled by on-line downloads). If necessary these fields can hold about 64k of characters, equivalent to around 10 – 12 typed pages. If that’s not enough, EndNote also allows you to attach an independent text file to any reference, and you can put anything within reason into such an attached file (see below).

When you are ready, select **Close Reference** from EndNote’s **File** menu. You should now be able to see the reference data you have just entered in the Preview Tab Pane, formatted in whatever style you have selected in the drop-

down menu at top left of the List window. Try selecting a few different styles in that menu and noting the effects on the formatting of the reference data.

Now see how you get on entering the data for another new reference:

**Park, C.F., jr, 1968. Affluence in Jeopardy. Freeman, Cooper and Company, San Francisco.**

(Hint: Be careful – this is a *Book*, not a *Journal Article*!)

And finally try this one, which is a chapter in an edited book; EndNote treats it as a *Book Section* type:

**Barton, P.B., jr, Skinner, B.J., 1967. Sulfide Mineral Stabilities. In: Barnes, H.L. (Ed.), Geochemistry of Hydrothermal Ore Deposits. Holt, Rinehart and Winston, Inc, New York, pp. 238-326**

See how each formats in the Preview pane. Did you note that you didn't need to enter the "In: " in the last reference? EndNote does it for you when formatting. And if you've got this far OK then you should be getting the idea by now!

### **Attaching a File to a Reference**

You may have noticed, when scanning the fields available for the entry of a new reference, that way down the list (after Keywords, Abstracts, Notes etc) there is a field called *File Attachments*. You can make use of this field to attach almost any kind of file to the reference – maybe a photograph or a figure, or perhaps some external text notes relevant to that particular reference. In fact you can make use of this field to attach up to 45 different files to any one reference. In particular you can use it to attach PDF files, possibly a copy of the complete original reference. You place a link in the File Attachments field to the attached file, which is stored in the library Data folder. It can be accessed at any time by clicking on the icon representing that link.

To try this out, make sure that you have access to a suitable file somewhere on your computer. Any file will do, but a PDF file provides a good demonstration. If you don't have any others readily available, you can use the *GettingStartedGuide.pdf* file installed in the EndNote Program/Application folder when you installed EndNote. Make sure you know how to navigate to the chosen file.

Now open a sample reference – say one of the references that you created in the exercise above. Of course it will not actually be relevant to the PDF file, or vice versa, but here we are only looking at the procedures involved.

Choose **File Attachments > Attach File...** from EndNote's **References** menu. This will bring up a dialog box which should contain a check box labelled "Copy this file to the default file attachment folder and create a relative link". Make sure

that this box is checked. Then simply navigate to your chosen PDF file, click on it to select it, and click **Open** in the file attachment dialog. You should see an icon with the PDF file name appear in the *File Attachments* field of the open reference. Close the reference window to save the link, and then re-open it.

Double-click that icon, and you should see the chosen PDF file immediately open automatically in whatever application you have set up on your computer to open PDFs (or whatever file type you used for this exercise)

More and more referenced articles are being made available on-line as PDF files, some of them by the publishers of the original article (typically at some expense, but this may well be warranted for key articles) and others by the authors concerned or some other organization. If the on-line file has been properly prepared with complete document identification EndNote may be able to find it on-line and add it to the appropriate reference. "Complete document identification" means that the file must include a properly-prepared, valid "DOI" ("Digital Object Identifier"). This is usually supplied by the publisher, and many PDFs do not have it.

### **Downloading references from on-line sources**

There are several possible ways in which you can search for relevant reference data in different on-line sources, and download the results of your searches directly into an EndNote library. This can sometimes provide you access to references that you didn't even know about. The downloads in many cases contain full abstracts, and in a growing number of cases it is even becoming possible to download full-text versions of the original publications.

Such download procedure avoid much of the tedium of typing involved in manual data entry, although some editing of the downloads is sometimes required for best results.

The catch is whether or not you have access to any of the on-line sources that might be relevant to your personal interests. As noted earlier, most of them are commercial and access to them requires some kind of licence, which is usually not inexpensive. The libraries of most major educational institutions often subscribe to the more popular on-line sources, and you may be fortunate enough to have access to some of them through this channel. It is impossible to generalise, and we can only recommend that you search out your own options. However we include here a brief exercise, based on the free PubMed database, to demonstrate the possibilities to you.

Although primarily a medical-health database, PubMed is not without some versatility, as this exercise will show. However you should not expect it to be of much help with topics in mining engineering (other than broken bones!). The following exercise will show you the kind of results that you can get from any of several different ways of seeking information on-line. It assumes, of course, that you have Internet access from your computer, and also that you will not

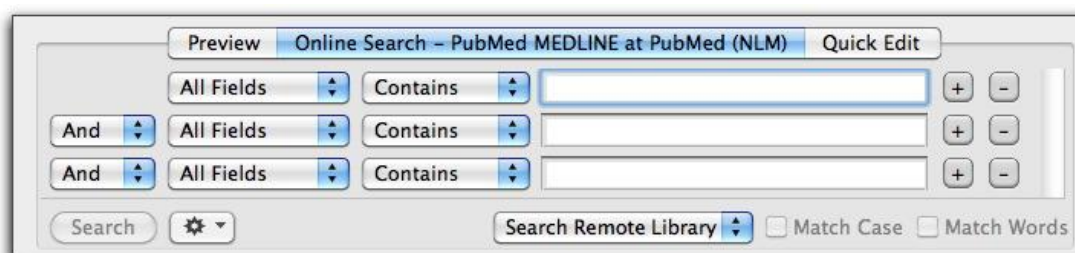
encounter problems with a proxy server on your institutional network, set up to protect against unauthorised access to the network. If you encounter these problems you will need to resolve them with your network administrator.

(And a quick check showed that at the time these notes were written PubMed actually yielded nearly 20,000 references containing the word “mining” in key fields!)

## PubMed import

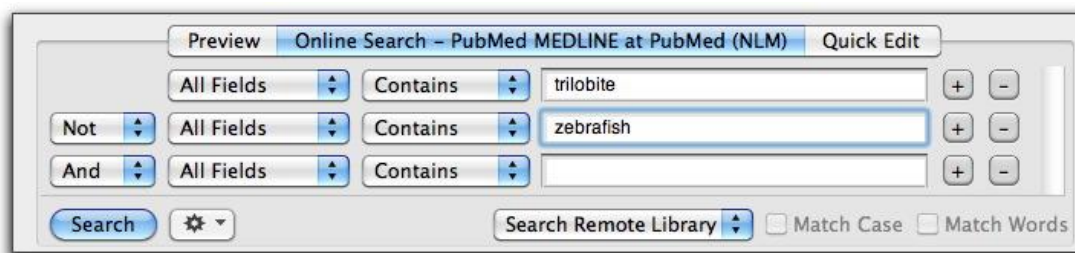
You should probably pass up this exercise if you happen to have dial-up internet access; the downloading involved may take up lots of time. A faster ADSL or wireless connection is to be preferred.

1. Open an EndNote library. You can use the Sample Library for this exercise, or you can open a new library (from EndNote’s **File** menu select **New**, name the new library and specify where it is to be stored), use it to experiment, and delete it later.
2. From EndNote’s **Tools** menu, select **On-Line Search...** . This should bring up a dialog with the list of *connection files* stored in your EndNote folder. Again it is an **abbreviated list, and the on-line source you want may not be listed there. If so**, check the files available for download on the <http://www.endnote.com> site (under Support and Services).
3. For the present, just scroll to **PubMed (NLM)**, click on it to select it, and then click on the **Choose** button. The Tab pane at the bottom of the library List window should then change to look something like this:



Notice that the Search tab at the top of this pane now reads “**Online Search – PubMed MEDLINE at PubMed (NLM)**” (instead of just “Search”). The drop-menu at the bottom of the pane reads “**Search Remote Library**”.

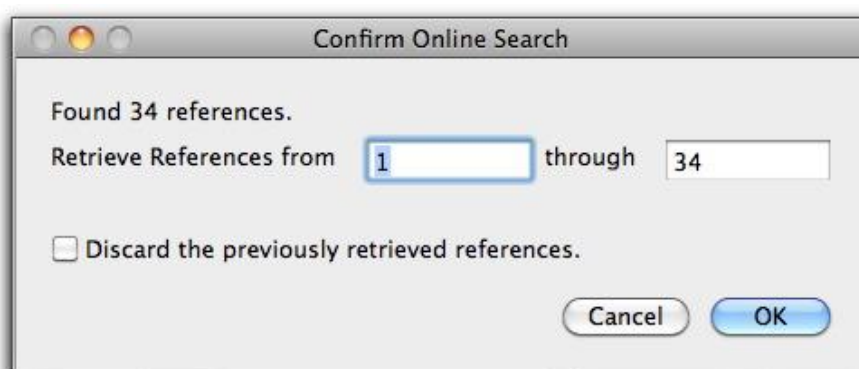
4. For the first line of search criteria, leave (or set) the first two fields to “**All Fields**” and “**Contains**”. In the third (blank) field type the word “trilobite”.
5. In the second search line, change the “**And**” to “**Not**”, and in the blank field type “zebrafish”. The pane should now look like this:



So you are asking PubMed to search its reference database for any references that contain the word “trilobite” in any field, but *not* including those that also have the word “zebrafish” in any field.

6. The **Search** button at lower left should now be highlighted. Click on it to start searching a very large database way over on the other side of the world. So the search may take a few seconds (5, maybe 10?).

7. A dialog will report the results of the search and ask if you wish to import the found references into your EndNote library:



8. If you click on **OK** EndNote will open a new window in the open library and the references will be imported into that new window (so that you can inspect the references one by one, if you wish, and delete any unwanted ones before the search results are actually added to your library). Open a few of the downloaded references to check the range of information that you get.

The remote database link will remain open until you close the library or shut down your internet connection.

A reminder — this exercise is purely illustrative, to show the power of on-line access by using a database that everyone can access. However PubMed will prove to be of limited value if you work outside the medical-biological area, and you will need to make your own investigation to find the databases of more direct interest to your own needs. When ready, you are strongly urged to read the relevant sections of the GettingStartedGuide.pdf document, and also the

more detailed EndNote Help file, for more information on the use of on-line sources.

At the time of writing, another free access database in the form of Google Scholar (ask for it in Google) is in a promising beta development stage. Keep an eye on it – you may already find it to be very useful. It can download search-located references to EndNote (you need to set this option in its Preferences) and already has a fairly good database to draw on. Right now, as this is being written, it has a minor drawback in that it can only download one reference at a time, but hopefully this limitation will disappear in the future.

### **Writing a paper with EndNote and Word**

Please work through this exercise only if you are using a relatively recent version of EndNote (we suggest version X1 or later) with one of the following:

Microsoft Word for Windows 2003, 2007 or 2010, or

Microsoft Word for Macintosh 2004, 2008 or 2011.

If you are using EndNote with OpenOffice.org Writer (Windows) or with Apple's Pages (Macintosh) you will find detailed instructions for using EndNote's cite-while-you-write ("CWYW") facility in the EndNote Help manual. If you are using another word processor with RTF document formatting you can also find instructions in the Help support, either on-screen or by downloading a printable PDF version of the manual from EndNote's web site at [www.endnote.com](http://www.endnote.com) (go to **Support and Services** and check the **Downloads** listing).

While you can always switch from your word processor to EndNote or back again while writing in any word processor, the CWYW facility actually inserts EndNote commands into Word's Tools menu (or an EndNote tab in later versions of Word for Windows), so that you can perform key formatting functions as you write, without leaving Word and without having to close the document in Word, open it in EndNote to process it, and then close it in EndNote and re-open it in Word to see the results. The savings in time and convenience are considerable.

Begin by opening Word and EndNote (remember that if the CWYW preferences have been set appropriately Word will automatically open EndNote when it is started itself). If EndNote is not open, open it by going to Word's **Tools > EndNote Xx > Go to Endnote** (or go to the EndNote tab in Word 2007 or 2010).

For this exercise it is convenient to use the same procedures as the GettingStartedGuides because the appropriate references are present in the Sample\_Library. So make sure that the Sample\_Library is open; if necessary open it from EndNote's **File** menu.

**Word 2003 (Windows), 2004, 2008 or 2011 (Macintosh):** From Word's **Tools** menu, select the **EndNote Xx** sub-menu (e.g. **EndNote X4**), and from that sub-menu select **Cite While You Write Preferences...** :

**Word 2007 or 2010 (Windows):** Remember, these versions of Word have no **Tools** menu. Instead the EndNote CWYW commands are accessed from an EndNote tab, on which you can click the Preferences command:

Uncheck the box labelled *Enable Instant Formatting on new Word documents*:



(We suggest you do this initially – though only temporarily – to give you a clearer idea of the formatting process that CWYW will subsequently perform automatically.)

In EndNote (you can click on any exposed portion of the EndNote screen window to switch to EndNote; click anywhere on an exposed part of Word's screen window to switch back to Word), select **Author-Date** as the current style in the drop-down menu at top left of the library List window.

(If this style doesn't appear in the drop-down menu, click on **Select Another Style**, locate *Author-Date* in the list of attached styles, click on it to select it, and click on the **Choose** button – this procedure should add Author-Date to the list of styles immediately available to EndNote.)

Now open a new Word document, in which you can enter some manuscript text and some citations of references in the Sample\_Library. Begin by typing the following text (the same example as used by the GettingStartedGuide):

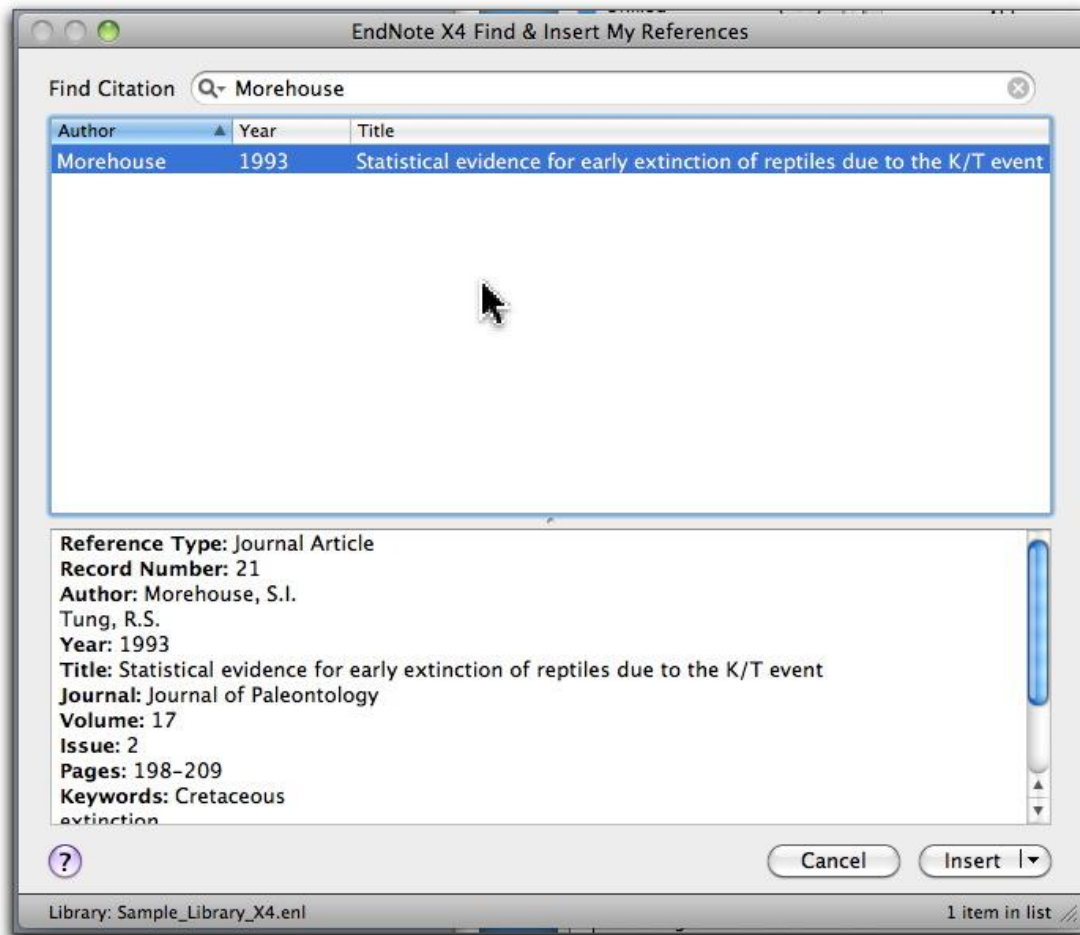
The fossil in question was generally considered to be the 220 million year-old remains of *Tyrannosaurus*. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species.

Type a couple of blank lines, then the bibliography title "References", and another blank line. Return the cursor to the end of the last word ("species"), and insert a space before the period/full stop. Leave the cursor there – it is the mark to tell EndNote where you want to place a reference citation in the text.

Now we need to enter a citation to Morehouse's paper. If you are using a version of Word that has a **Tools** menu, select **Find Citation(s)** from the **EndNote Xx**

sub-menu. (You could also click the Find Citations icon on the EndNote toolbar in Word (Macintosh). If you have no Tools menu, click **Insert Citation** in the **Citations** group on the **EndNote** tab.

The *Find & Insert My References* dialog should appear. Type the author name Morehouse in the text box at the top of the dialog, and press Enter/Return on the keyboard:



You will see that the upper part of the dialog displays a list of all of the references in the Sample\_Library (in this case only one) that contain “Morehouse” in any of the Author or Title fields. The lower part of the dialog displays all the data from the Morehouse entry in the Sample-Library, so that you can be sure that this is indeed the reference that you want.

Now click on the **Insert** button, and you should find that your typed text now reads:

The fossil in question was generally considered to be the 220 million year-old remains of *Tyrannosaurus*. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species {Morehouse, 1993 #120}.

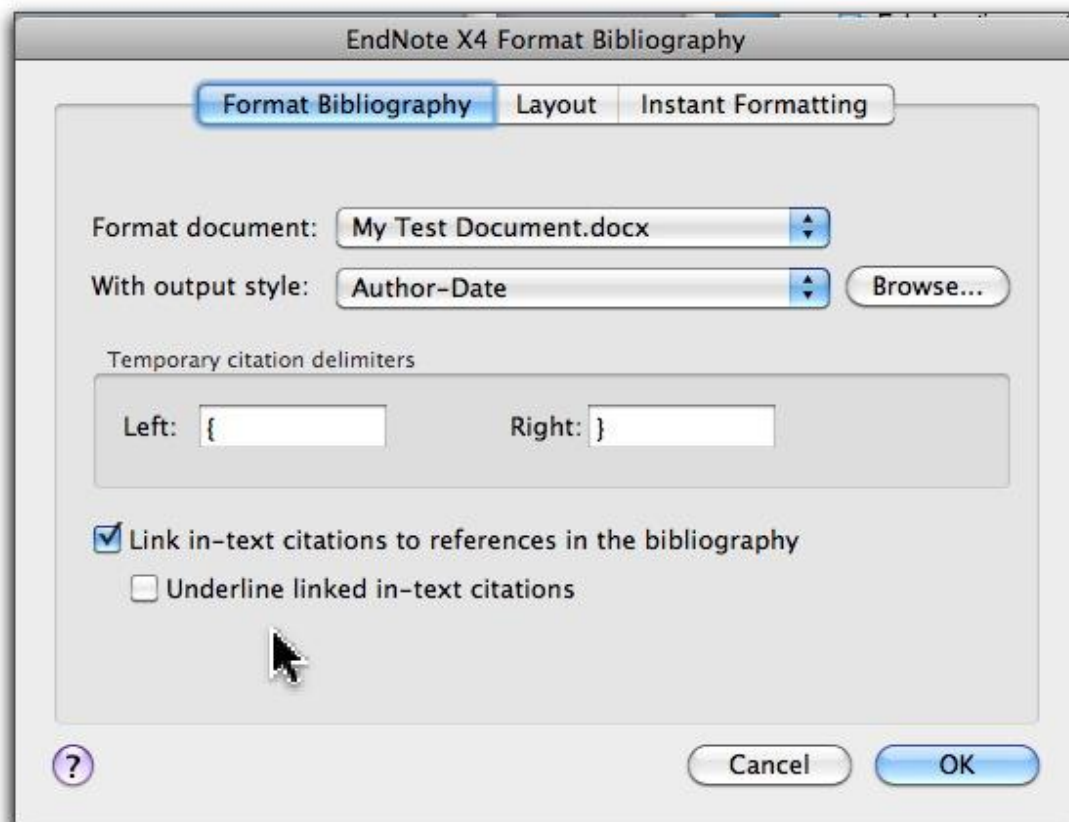
## References

Save the document under a suitable name – e.g. **My Test Document.doc(x)**.

What EndNote has done has been to insert a *temporary citation* at the cursor position. The temporary citation is to a reference in the Sample\_Library which has Morehouse as the first (or only) author, the year of the reference, and the number of the record for that reference in the library database – in this case #120 (yours may have a different number, although probably not unless you have played around with the Sample\_Library).

This information has been enclosed within *curly braces* { } and inserted in the Word text. The use of curly braces instead of regular parentheses ( ) or square brackets [ ] is critical. Curly braces are what EndNote uses by default to recognize an EndNote temporary citation in the text. If you use them for anything else in your text you will produce error messages when EndNote is formatting citations, as it tries to make bibliographic sense out of whatever you have put between them (and will almost invariably fail). You can in fact set EndNote preferences to use other citation markers, but you should then be equally careful not to use those markers for anything other than EndNote citations.

Now go to Word's **Tools** menu, if your version of Word has one (otherwise go to the EndNote tab – see below), select **EndNote Xx** and **Format Bibliography ...** from the sub-menu. This should produce a new dialog



Check that the Format Bibliography tab is highlighted and that the document name and formatting style are correct. Click the **OK** button.

If your Windows version of Word has no Tools menu, click on *Update Citations and Bibliography* in the EndNote tab.

You should now find that your document changes magically to a new version in which the in-text citation has been formatted to the specifications of the Author-Date style, so that it now appears as (Morehouse and Tung 1993), with regular curved parentheses, and the full reference has been added to the bibliography, also formatted to Author-Date specification:

The fossil in question was generally considered to be the 220 million year-old remains of *Tyrannosaurus*. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species (Morehouse and Tung 1993).

#### References

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

(Author-Date is an EndNote style designed to serve for the popular "Harvard" style, for which there are in fact many ill-defined variants.)

Now return briefly to the **Format Bibliography** dialog (**Tools > EndNote Xx > Format Bibliography...**(or access it from the EndNote toolbar, or the EndNote tab in Word). Click on the **Instant Formatting** tab, click the button to **Turn On** instant formatting, and click **OK**. If you don't have a Tools menu, select *Preferences* from the EndNote tab and check *Enable Instant Formatting on new Word documents*. EndNote should now format your citations instantly, as you enter them, instead of requiring a separate formatting process.

Next, add another sentence to the text of your manuscript:

It is now the undisputed progeny of the species at hand

As usual, leave the cursor at the end of the word "hand", with one intervening space. Here you wish to add a citation to a reference supporting this statement. Go to **Tools > EndNote Xx > Find Citations ...**, and type 1987 (+ Return/Enter) into the search text field at the top. Or go to *Insert Citation > Find Citation* in the EndNote tab in Word 2007 or 2010, type 1987 in the search text field at the top of the resulting dialog, and click on **Find**. The paper you want to cite was published by Turnhouse in that year. EndNote will display all the references in the Sample\_Library with 1987 as their publication date, and Turnhouse's paper should be one of them. Click on it to select it, and click on the **Insert** button.

With Instant Formatting now turned on, you will probably have no more than a very brief glimpse of the temporary citation inserted at the cursor position. Instead CWYW will almost immediately format the citation in the text, and add the formatted bibliography entry to the reference list. All done! (From here on you will probably have very little need or desire ever to turn instant formatting off.)

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

#### References

- Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." Journal of Paleontology**17**(2): 198-209.
- Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." Journal of Paleontology**75**(6): 11-15.

You can format, and re-format, and re-format a manuscript as many times as you like, in the same or different styles (with a little diligence you can experiment with up to nearly 5000 different styles, although those delivered with your EndNote installation should be more than enough for simple experimentation).

### **Editing Citations**

From time to time you will need to make adjustments to some of the citations in your manuscript, or to insert citations in different ways. Suppose, for example, that you decide to express the last sentence in another form which is common in many publications. You would like it to read

Turnhouse (1987) showed that it is now the undisputed progeny of the species at hand.

In your manuscript, delete the last sentence and replace it with

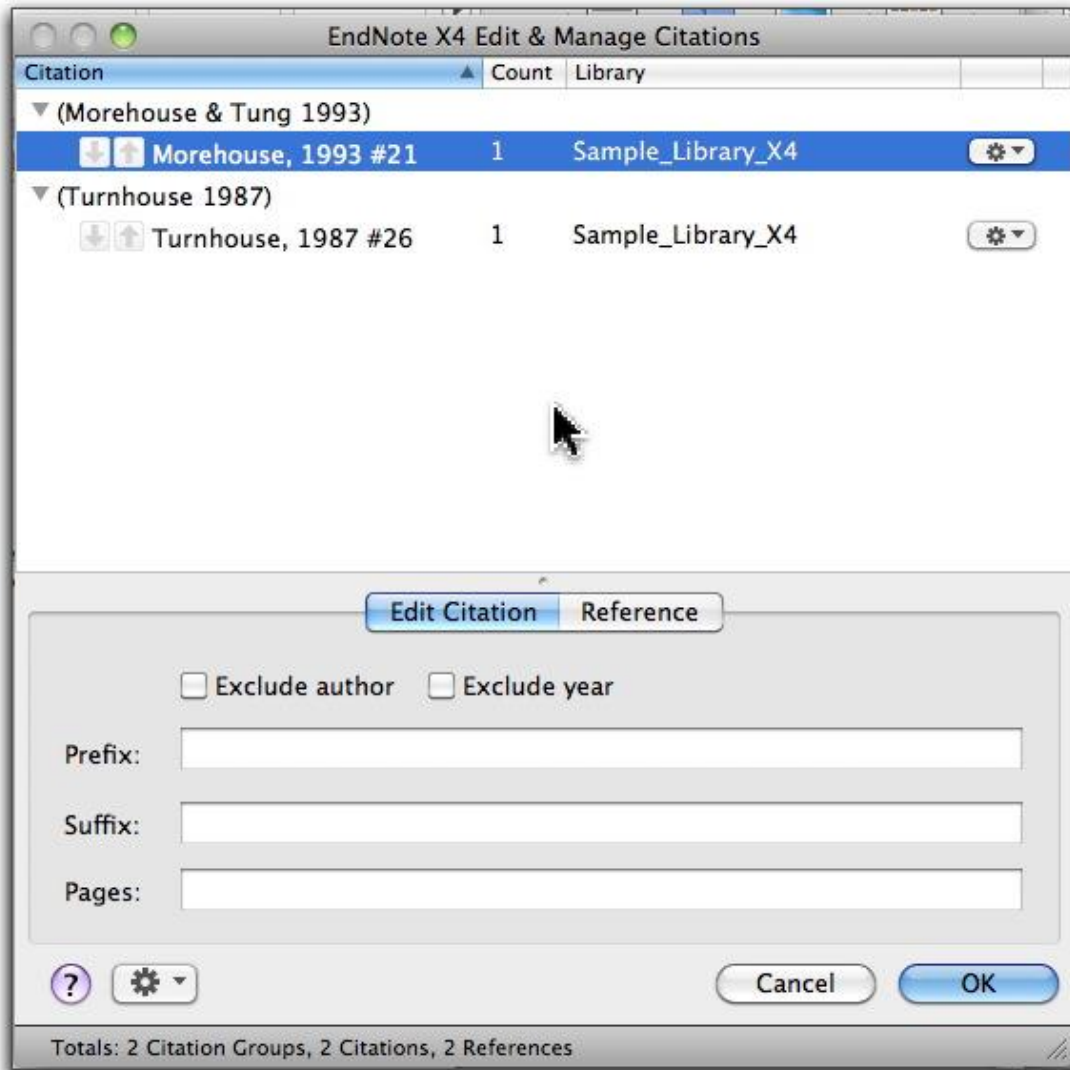
Turnhouse | showed that it is now the undisputed progeny of the species at hand

leaving the cursor in the position shown after the word "Turnhouse" - with one space either side. Now use the Find Citations procedure to locate and insert the Turnhouse citation, exactly as you did before. The manuscript should now read

Turnhouse (Turnhouse 1987) showed that it is now the undisputed progeny of the species at hand

which is not yet quite what you wanted. The year is fine, but not the repeated author name. You might also want to add a prefix or a suffix to the year citation, for example to have it read “Turnhouse (1987, p. 205) ...”

So now go to **Tools > EndNote Xx > Edit & Manage Citations ...** (or *Edit & Manage Citation(s)* on the EndNote tab):



(As usual, the Windows version will be slightly different in appearance, but not in essential content.)

Click on the Turnhouse reference to select it, and check the *Exclude author* box. Then in the *Suffix* text field, type “, p. 205” (don’t type the quotes, and remember to type a leading comma and space before the “p. 205”).

Click OK, and you should have what you wanted:

The fossil in question was generally considered to be the 220 million year-old remains of *Tyrannosaurus*. Several

years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species (Morehouse and Tung, 1993). Turnhouse (1987 p. 205) showed that it is now the undisputed progeny of the species at hand.

## References

- Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." Journal of Paleontology**17**(2): 198-209.
- Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." Journal of Paleontology**75**(6): 11-15.

Note that you also have the option to exclude the year from an in-text citation, or even to exclude both author and year. Why would you ever want to exclude both? Because that would result in the reference being included in the bibliography without being visibly cited in the text. You may have reasons for wanting to do this, although most editors would be unhappy if you do!

As usual, there are other ways of editing citations to produce these special results, but the procedure listed above is easy to remember and apply. The important thing to remember is that you should not try to edit formatted citations directly in the text, using normal word-processing procedures. To edit citations, always use EndNote's built-in citation editing procedures.

## Multiple citations

You will often need to cite several different references at the same point in your manuscript. You use exactly the same procedure as that outlined above for a single reference, but first collect all the desired references and insert them together.

For example, type a further sentence at the end of your hypothetical manuscript:

Most authorities now agree with this interpretation |

And leave the cursor one space after the last word.

Go to **Tools > EndNote Xx > Find Citation(s)...** and enter "dinosaur" in the Search text field, followed by the Return/Enter key to make the search. The resulting dialog should show a number of "dinosaur"-bearing references in the Sample\_Library. Select several of them by clicking on each while holding down the Control key (Windows) or Command key (Macintosh), and then click on **Insert**. You should get something like this:

The fossil in question was generally considered to be the 220 million year-old remains of *Tyrannosaurus*. Several years ago, however, Morehouse overturned this hypothesis

with the discovery of yet another species (Morehouse and Tung 1993). Turnhouse (1987 p. 205) showed that it is now the undisputed progeny of the species at hand. Most authorities now agree with this interpretation (Schwartz 1976; Whiting, Billoski et al. 1987; Schwartz and Billoski 1990; Billoski 1992; Billoski 1993)

## References

- Billoski, T. V. (1992). Introduction to Paleontology 2. New York, Institutional Press.
- Billoski, T. V. (1993). "Debate II." Science**77**: 5-6.
- Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." Journal of Paleontology**17**(2): 198-209.
- 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. Lovecraft. New York, Barnes and Ellis: 175-189.
- Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." Journal of Paleontology**75**(6): 11-15.
- Whiting, J. R., T. V. Billoski, et al. (1987). "Herding instincts of cretaceous duck-billed dinosaurs." Journal of Paleontology**75**: 112-132.

Note that the Author-Date style specifies that multiple in-text citations are to be sorted chronologically, not alphabetically by author name. Other styles may specify the opposite. The Author-Date style also specifies the use of "et al." for citations to references with more than two authors; other styles vary widely in this respect, but EndNote allows these variations to be controlled with appropriate settings in the style specifications.

You are again free to go to **Tools > EndNote Xx > Edit & Manage Citation(s)** (or *Edit & Manage Citations* on the EndNote tab in Word 2007 or 2010) to make editing changes to any citation, even individual citations within a multiple group (try it to see, and experiment if you wish). If you are not happy with the sorting within a multiple citation, you can move individual citations up or down in the sort order, but be careful if you feel the need to do this. Make sure that the order you specify is indeed the order that your publisher requires. If the EndNote style specification is incorrect, it would be better to edit the style itself so that it will always use the correct order.

## Direct access to a library reference

Although it is usually convenient to do so, you do not need to use the formal **Find Citations** procedure. You can simply go directly to your EndNote library list

window, locate one or more references in the list, click on them to select them (individually or together in a multiple citation group), return to Word and go to **Tools > EndNote Xx > Insert Selected Citation(s)** (or *Insert Citation > Insert Selected Citation(s)* on the EndNote tab). This may be quicker and more convenient if you know exactly which reference(s) in your library that you wish to cite at a given point in your manuscript

Instead of always going to the **Tools** menu, you are sure to find that there is a convenient choice available in the icons on the EndNote toolbar in Word (Macintosh) or the Citations group on the EndNote tab (Windows), or at the top of the List window in EndNote. These are well worth a little more experimenting.

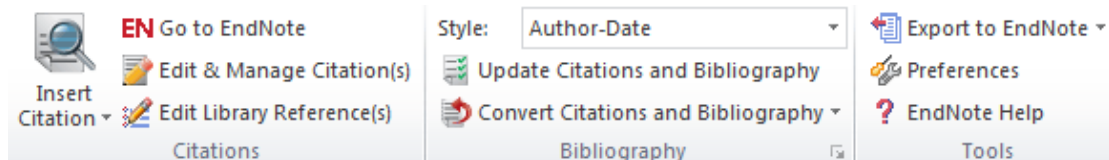
### Quick access to CWYW functions

Many times in the procedures outlined above you have been urged to go to Word's **Tools** menu and select some function from the **EndNote Xx** sub-menu, or to make similar selections from the Endnote tab in Word 2007 or 2010. All of these functions are easily accessible simply by clicking on an icon in the EndNote toolbar that you should find somewhere on the Word screen (Macintosh), or the EndNote tab in Word (Windows):



- |                             |                              |
|-----------------------------|------------------------------|
| 1 Go To EndNote             | 8 Unformat Citations         |
| 2 Find Citations            | 9 Remove Field Codes         |
| 3 Format Bibliography       | 10 Export Travelling Library |
| 4 Insert Selected Citations | 11 Find Figure(s)            |
| 5 Edit & Manage Citations   | 12 Generate Figure List      |
| 6 Insert Note               | 13 CWYW Preferences          |
| 7 Edit Library Reference(s) | 14 Help                      |

(Macintosh)



(Windows)

If the Macintosh EndNote toolbar is not showing in the Word window, but everything else seems to be O.K., go to Word's **View** menu, select **Toolbars**, and ensure that an **EndNote Xx** toolbar is shown in the toolbars list and checked. If it

is not in the list there has been a problem with your EndNote installation. If it is on the list and checked, have another close look around the Word window – it's probably there somewhere!

### **Submission of your manuscript**

When your manuscript is finished and you wish to submit it to a journal for editorial consideration, you have several options. The one you choose will depend on editorial policy, and obviously you need to check on what that policy is.

1. If your editor has EndNote facilities and is willing to accept manuscripts in EndNote-formatted form, then by all means submit a copy of your final MS, as is. Before submitting, be sure to make at least one backup copy (two is better!), and also a backup copy of your EndNote library file at the time you completed writing; preferably get the backup copies off-site (see below). You should also check that the editor is using the same, or very nearly the same version of Word that you are (some Word versions may be mutually incompatible).

Once upon a time it was necessary to send a copy of your EndNote library file to the editor, along with any EndNote-formatted manuscript. This is no longer the case, as every EndNote-formatted Word manuscript now contains a *Travelling Library* – a compact, built-in version of your library, containing all the essential bibliographic information used in your manuscript. Your editor can use the travelling library to make any necessary corrections to your citations or bibliography.

2. On the other hand, if the editor does not have EndNote facilities available, or does not wish to edit submitted documents at the EndNote level (e.g. modifications to citations or bibliographies) then you will need to strip the hidden EndNote codes from your manuscript. Under certain conditions those codes can create considerable confusion if they are handled outside normal Word/EndNote control. (Specifically, EndNote inserts its instructions into the Word manuscript in the form of what are called *field codes*. Word commonly has its preferences set to hide these field codes so that the user doesn't see them – only their formatting effects. However if the Word preferences are not correctly set, you will see the codes rather than their effects. The manuscript then appears to be full of absolute gobbledygook.)

In this case, you should submit your manuscript with the field codes removed and only their formatting effects permanently displayed instead. First make at least one backup copy of the manuscript and store it in a safe place. Then open the manuscript in Word, go to **Tools > EndNote Xx** and select **Remove Field Codes**. EndNote will then delete all of the CWYW field codes (but not other field codes, which Word also uses for other purposes) and it converts all of the formatted citations and bibliography to text.

In Word 2007 or 2010 (Windows), go to the EndNote tab, and, in the

Bibliography group, select *Convert Citations and Bibliography* . Then *Convert to Plain Text* . A copy of the document, without field codes, appears in a new document window.

The conversion process is not reversible – once the codes are gone they are gone, and you cannot use EndNote to reformat the document. So EndNote recognizes this and actually makes a copy of the document with codes removed, retaining the original. But it was a good idea to make that backup first! Note that removing the field codes also removes the Travelling Library. You will not be able to use CWYW for any further re-formatting of the “stripped” document, which is why you must be very careful of saving the original. You can always go back to that, as long as you still have the corresponding EndNote library.

After the field codes have been removed by either of the above procedures a new copy of your document, with codes removed, will appear in a new document window. Save it in the usual way. Use the **Save As...** to give the “stripped” document a new name. Don’t attempt to save it with the same name as your EndNote-formatted manuscript, as you might then over-write and lose the latter.

Removing field codes can have some effects on EndNote’s in-text figure citations. Consult EndNote’s **Help** file for details.

### **Final advice**

Our parting advice to you consists of three words:

**Backup ..... Backup ..... BACKUP!!!**

Unfortunately at Crandon Services we still get far too many panic-stricken service calls along the lines of “my thesis is due in two days and I’m trying to do the final formatting and my EndNote library has disappeared or has refused to function since I spilled half a cup of coffee on my keyboard and I don’t have another copy — please help me!”

Sadly, we usually can’t. Please make determined efforts to maintain adequate backup copies of your EndNote libraries and your Word documents. And remember – a second copy on the same hard disk as the first is not a very satisfactory backup. If the disk crashes, which is not so common these days but is certainly not unknown, you will lose both copies and be left with nothing.

Always try to backup to a physically separate disk, or to a USB flash drive or equivalent that you can take away and keep in a completely separate place. A Dropbox might be a good idea – if you don’t know about Dropboxes ask around. And back up frequently – at least whenever it will take you more than an hour or two to repeat what you have done since the last backup. Everybody agrees with the frequent backup philosophy, but far too many people still fail to practise it!