



EndNote[®] 2

...Bibliographies Made Easy[™]

Search bibliographic databases on the Internet

Organize references, images and PDFs in a snap

Construct your paper with built-in templates

Watch your bibliography, table and figure lists appear as you write!

Getting Started Guide

EndNote®

Version X2 for Windows

Copyright © 2008 The Thomson Corporation

All rights reserved worldwide. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means, without written permission from The Thomson Corporation or Thomson ResearchSoft.

Trademark Information:

EndNote is a registered trademark of The Thomson Corporation (Thomson). Cite While You Write is a trademark of Thomson. Palm OS, Palm Powered, HotSync, and the HotSync logo are trademarks or registered trademarks of PalmSource, Inc. Palm, PalmOne, Treo, Tungsten, and Zire are trademarks or registered trademarks of Palm, Inc. Microsoft, Windows, Windows Mobile, Pocket PC, and ActiveSync are registered trademarks of Microsoft Corporation. All other product and service names cited in this manual may be trademarks or service marks of their respective companies.

NOTICE REGARDING LEGAL USE OF DOWNLOADED REFERENCE DATA

EndNote gives you the capability to import references from online databases and store them in your personal EndNote libraries. Some producers of online reference databases expressly prohibit such use and storage of their data, others charge an extra fee for a license to use the data in this way. *Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database.* Note that different databases from the same provider may have varying restrictions.

Contents

Introduction	Welcome to EndNote	5
Chapter 1	Windows EndNote Installation	11
Chapter 2	Introduction to an EndNote Library	25
	Start EndNote, open a reference library, sort the library, select, open, and close a reference, and save references to a custom group. These skills prepare you for the rest of this guide.	
Chapter 3	Setting EndNote Preferences	37
	Learn how to access EndNote preferences, how to set a default library to open automatically, and how to change the display fonts.	
Chapter 4	Entering a Reference	41
	Manually insert a reference, and attach files to the reference.	
Chapter 5	Searching an Online Database	49
	Use EndNote to search databases and library catalogs available online. This feature requires that you have a connection to the Internet.	
Chapter 6	Importing Reference Data into EndNote	57
	Import a tagged text file of references downloaded from an online database or CD-ROM.	
Chapter 7	Searching an EndNote Library and Previewing a Bibliography	69
	Search for references and preview a formatted bibliography in EndNote.	
Chapter 8	Using EndNote While Writing a Paper with Microsoft Word	73
	Learn how to insert bibliographic, figure, and table citations in Microsoft Word, and have EndNote generate bibliography, figure, and table lists for the paper. (If you use a different word processor, learn about citing references and creating bibliographies in your papers by choosing <i>Contents</i> from the <i>Help</i> menu in the EndNote program, and selecting <i>Scanning and Formatting Files</i> .)	
Index		85

About this Guide

This guide provides a basic overview of installing and using EndNote. It assumes that you know how to use your word processor and the Windows operating system. For help on these topics, consult your computer guide or your word processor manual.

For additional information about using EndNote, consult the full EndNote.PDF manual found in your EndNote X2 folder or the online help. From EndNote's *Help* menu, select *Contents* to view help topics. While using EndNote, press F1 to view a help topic about the current window.

Introduction: Welcome to EndNote

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 and library databases.)
- ◆ EndNote is a reference and image database—it specializes in storing, managing, and searching for bibliographic references in your private reference library. You can organize images—including charts, tables, figures, and equations—and assign each image its own caption and keywords.
- ◆ EndNote is a bibliography and manuscript maker—it formats citations, figures, and tables in Microsoft® Word with the Cite While You Write™ feature. Watch the reference, figure, and table lists grow as you insert citations in your manuscript. Microsoft Word templates guide you through the exacting manuscript requirements of publishers.

You can also create bibliographies using Format Paper with other word processors.

See “What’s New in EndNote X2” on page 9 for a list of the most recent features added to EndNote.

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

About The Demo Version of EndNote and the EndNote Viewer

If you are working with the demonstration version of EndNote X2, you have 30 days after you first use the program to evaluate EndNote and all of its features. After those 30 days, the Demo version will revert to a feature-restricted *EndNote Viewer*.

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

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

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

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

To purchase an unrestricted version of the EndNote program, please contact Thomson ResearchSoft.

About This Getting Started Guide

This guide provides a basic overview of installing and using EndNote. It is not a complete user's guide, but rather is intended as a guided tour to show you the highlights of the EndNote program.

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

Often there is more than one way to select a command in EndNote. A single command may be available from one of the main menus, from a context-sensitive right-click menu, from a toolbar icon, or with a keyboard command. In most cases, this manual gives instructions for selecting commands from the main menus. If a menu command has a keyboard equivalent, the keyboard command appears next to the menu item.

The following representations for key combinations are used:

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

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

Customer Services

Register Your Copy of EndNote

If you haven't done so already, please fax or email your registration to Thomson ResearchSoft (go to <http://www.endnote.com/encontact.asp>). You also have the opportunity to register during installation. Even if you purchased EndNote directly from Thomson 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

The EndNote Manual and Online Help

The EndNote Manual: The complete EndNote manual is available as a PDF file, and is installed in your EndNote folder.

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

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

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

Customer Service

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

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

Sales Information

Phone: 760 438 5526 (country code is 01)

Fax: 760 438 5573 (country code is 01)

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

Customer Support (Orders, Billing, and Shipping)

Phone: 800 336 4474 (country code is 01)

Fax: 215 386 2911 (country code is 01)

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

Technical Support

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

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

For hours and holiday closures, please see:

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

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

International Customer and Technical Support

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

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

The EndNote Website

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

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

The EndNote Discussion Forum

If you wish to join an ongoing forum of EndNote users like yourself, go to the EndNote website at <http://www.endnote.com>, click on *Support and Services*, and then scroll down and click on the link to go to the *EndNote Discussion Forum*. You can browse several EndNote message lists, easily search for topics, and join to add messages.

ADA VPAT

Thomson ResearchSoft is dedicated to developing software products that are usable for everyone, including those with physical challenges and disabilities. EndNote was designed to adhere to the ADA (Americans with Disabilities Act) Section 508 accessibility standards.

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

What's New in EndNote X2

EndNote X2 includes these new and enhanced features:

- ◆ Start a search with the Search tab on the Tabs pane of the Library window. See “The Search Tab” in Chapter 8 of the full EndNote manual.
- ◆ Quickly initiate an online search by selecting from your list of favorite connection files in the Groups pane. See “How to Search on Online Database” in Chapter 6 of the full EndNote manual.
- ◆ Use Smart Groups to view and manage subsets of references in your library. Set up a custom search strategy to automatically add references to a Smart Group. See “Smart Groups” in Chapter 9 of the full EndNote manual.
- ◆ Use several new reference types: Aggregated Database, Blog, Catalog, Pamphlet (such as a drug circular), Serial (for serialized books in a collection), and Standard. See “Reference Types and Fields” in Appendix C of the full EndNote manual.
- ◆ Look for the full text of a referenced work, and attach the file (typically a PDF file) to your EndNote reference. See “Finding Full Text for a Reference” in Chapter 6 of the full EndNote manual.

- ◆ References now include automatic date stamp information. Each reference includes an Added to Library date and a Record Last Updated date in the footer of the reference. See “Date and Auto Date Stamp” in Chapter 5 of the full EndNote manual.

For references entered with EndNote version X1 or earlier, the “Added to Library” field is left blank and the “Record Last Updated” field displays the date of conversion to EndNote X2. For new installations, the former “Last Modified Date” field has been renamed “Custom 8” (existing reference type settings are retained).

- ◆ Compress your library and automatically attach it to an email. See “Saving a Compressed Copy of a Library” in Chapter 4 of the full EndNote manual.
- ◆ View a Library Summary that recaps library statistics. See “Library Summary” in Chapter 4 of the full EndNote manual.
- ◆ View a Record Summary that recaps statistics for a particular reference. See “Record Summary” in Chapter 5 of the full EndNote manual.

Chapter 1: Windows EndNote Installation

Before You Install EndNote

Please read this section before you proceed with the installation.

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

Program Requirements

Both the full EndNote program and the EndNote Demo are available on CD or by downloading. If you have a CD you need a CD-ROM drive to install the program.

System Requirements:

EndNote runs under the following operating systems:

- ◆ Windows XP, with Service Pack 2
- ◆ Windows Vista

Hardware Requirements:

- ◆ A personal computer with a Pentium (or compatible) 450-MHz or faster processor
- ◆ A minimum of 256 MB of available RAM
- ◆ A hard drive with at least 180 MB of free space
- ◆ In order to use EndNote's Online Search feature for searching online databases, an Internet connection is required. To use the *Open Link* command to access a website, 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 Thomson ResearchSoft directly. You must do so within 30 days of purchase.

Word Processor Compatibility

As of June 2008, EndNote for Windows is compatible with:

- ◆ Microsoft Word for Windows 2003 or 2007
- ◆ RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice, StarOffice, and WordPad.

- ◆ Open Document Format (ODT) documents created with the OpenOffice Suite.

Microsoft Word:

EndNote installs Cite While You Write commands in Microsoft Word. Word 2003 displays an EndNote submenu of commands on Word's *Tools* menu. Word 2007 displays Cite While You Write commands on an EndNote tab. Cite While You Write allows EndNote to format citations and create a bibliography for the document that is open in Word. You can format, unformat, and reformat a document—without exiting your word processor.

In order for Cite While You Write to install properly, Microsoft Word 2003 or 2007 must be correctly installed on your computer *prior to* installing EndNote.

If a supported version of Microsoft Word is installed on your computer, the appropriate Cite While You Write files are installed automatically for the current user when you run the EndNote installation. This feature can be used with a shared copy of Word or on a network.

RTF and ODT Documents:

For word processors other than Word, first write your paper and insert in-text citations. If the file format is anything other than an ODT document, save as an RTF file. Then, use EndNote's Format Paper feature to format the citations and bibliography from your ODT or RTF file. See Chapter 12 in the full manual for details.

EndNote for Handheld Devices

If your computer has software installed to allow synchronizing with a Palm OS[®] handheld device or a Windows Mobile[®] device such as a Pocket PC[®], the EndNote installation program will attempt to install EndNote for your handheld device.

Requirements for running EndNote for the Palm Operating System include:

- ◆ Handheld device
- ◆ Palm Operating System 4.x or later
- ◆ Serial or USB communication for HotSync operations
- ◆ 16 MB RAM, with at least 8 MB available

NOTE: EndNote for Palm is not compatible with Palm desktop software version 6.2 or later, and will not install when Palm 6.2 or later is detected. We do not recommend configuring EndNote for Palm on Windows Vista due to Vista and Palm incompatibilities.

Requirements for running EndNote on a Windows Mobile device include:

- ◆ Windows Mobile handheld device, such as a Pocket PC (not including Smartphones)
- ◆ Windows Mobile operating system 5 or later
- ◆ Serial or USB communication for ActiveSync operations
- ◆ 16 MB RAM

For information about how to install and use EndNote on a handheld device, see the EndNote Help file. In EndNote, go to the *Help* menu and choose *Contents*. See the Help topics in the “Palm OS Handhelds” book or the “Windows Mobile Device (Pocket PC)” book.

EndNote Installation

Follow these instructions to install the EndNote program.

If you are upgrading from a previous version of EndNote, please see “Upgrading from an Earlier EndNote Version” on page 19.

Please see Chapter 23, “Networks and Volume Installations” in the full EndNote.PDF manual for information about using EndNote in a network environment, licensing, and performing mass installations.

Installing EndNote

To install EndNote:

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

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

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

The EndNote Setup program will start. If you do not have Autoplay enabled, choose *Run* from the *Start* menu, type “d:\setup” (use the drive letter appropriate to the drive containing the installation CD) and press ENTER.

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

Welcome: Thank you for selecting EndNote!

Registration Information: If you are installing the full version of EndNote, enter your EndNote product key. You must enter a valid product key to continue with installation of the full version of EndNote. The product key can be found in the EndNote X2 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.

Palm and Windows Mobile Read Me Information: Read late-breaking news about EndNote for the Palm OS and 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: We recommend that you select *Complete* to make sure you install all options, although you can choose *Custom* to hand pick the file groups to install.

Select Destination: By default, EndNote is installed in the C:\Program Files\EndNote X2 folder. The Demo version is installed in the C:\Program Files\EndNote X2 Demo folder. You can use the *Browse* button to change the folder selection if you wish.

If a previous installation of EndNote is found in the same folder, you will be given the option to either back up or overwrite the older files. If you back up files, they are placed in a Backup folder in the installation folder.

NOTE: If the installer detects a full version (not a demo version) of EndNote on your computer, it will give you the option to continue with the installation or quit. If you continue, be advised that you will need to reinstall your non-demo version of EndNote to use it after you run the EndNote X2 Demo version.

Select Components: (Custom installations only) If you selected a Custom installation, see “Selecting Features” on page 18.

Select Default Citation Manager: (Microsoft Word 2007 only) If the installer detects Microsoft Word 2007, it asks whether to “Use EndNote as my default citation manager.” Cite While You Write will be installed in Word 2007 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 X2 is Successfully Installed” dialog, click *Register* to register your copy of EndNote, click *Finish* to close the installation program, or click *Run* to start EndNote.

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

Installed Files

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

Program Folder

C:\Program Files\EndNote X2

- ◆ EndNote X2.exe application file
- ◆ EndNote.chm help file
You can double-click the file to view it. In the EndNote program, select *EndNote X2 Help* from the *Help* menu. Pressing the F1 key on your keyboard or clicking a *Help* or ? button in the program brings up a context-sensitive topic.
- ◆ Readme.txt text file contains late-breaking news
- ◆ EndNote.pdf is the full electronic manual
- ◆ GettingStartedGuide.pdf gives a tour of the program
- ◆ Examples shortcut folder
This is a shortcut to an Examples folder that contains sample files to follow the guided tour found in Chapter 3 and the Getting Started Guide, and to experiment with while learning EndNote.
- ◆ Styles folder
This folder contains the full collection of over 3,000 bibliographic styles.

- ◆ **Connections folder**
This folder contains thousands of connection files to connect to and search online bibliographic databases.
- ◆ **Filters folder**
This folder contains hundreds of import filters for importing text files downloaded from online bibliographic databases.
- ◆ **Terms *Lists* folder**
This folder contains journal abbreviation term lists. These lists contain thousands of journal names and standard abbreviations. Import a list into your library's Journals term list to use the abbreviations in your bibliographies.
- ◆ **Spell folder**
This folder contains spell check dictionaries for the EndNote spell checker.
- ◆ **Templates folder**
This folder contains Microsoft Word templates to quickly set up your papers for electronic submission to publishers.
- ◆ **Palm and Pocket PC folders**
These folders contain Read Me files and support files that allow you to keep an EndNote library on a Palm handheld device or a Windows Mobile device.
- ◆ **Various additional folders and files are installed to support the EndNote program and to integrate EndNote with other software programs.**

Shared Folder

Open the Shared Documents or Public Documents folder in Windows Explorer to find the EndNote folder located at:

Windows XP: Documents and Settings\All Users\Shared Documents\EndNote

Windows Vista: C:\Users\Public\Public Documents\EndNote

- ◆ **Examples folder**
This folder contains a sample library and other sample documents and graphics to use while learning EndNote.
- ◆ **You may want to use the shared EndNote folder to store your libraries, so that they are available to all users on your computer.**

Personal Folder

Open the My Documents or Documents folder in Windows Explorer to find the EndNote folder located at:

Windows XP: C:\Documents and Settings\[UserName]\My Documents\EndNote

Windows Vista: C:\Users\[UserName]\Documents\EndNote

These folders are created when you create or modify a file:

- ◆ Styles folder contains new or modified bibliographic styles
- ◆ Connections folder contains new or modified connection files
- ◆ Filters folder contains new or modified import filters

While the program folder contains all of the default styles, connection files, and filters, your personal EndNote folder contains those files that you have created or modified. This prevents changes to the original files, and assures that you will not inadvertently delete a customized file when you remove or upgrade the EndNote program. It also allows you to make changes to files even though you may not have administrator access to modify files in the Program Files folder. EndNote displays a single list of the files found in both locations. If a file of the same name appears in both locations, EndNote will display only the file found in your personal folder.

You can change your personal folder locations; see “Folder Locations” in Chapter 19 of the full EndNote.PDF manual.

Preferences Folder

Depending on your settings, these folders may be hidden from view in Windows Explorer.

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista: C:\Users\[UserName]\App Data\Roaming\EndNote

While many EndNote preferences are stored in the Windows registry, some are stored in your personal preferences folder. It contains the connect.log file that records your latest online search, the RefTypeTable.xml file that stores your reference type preferences, saved search strategies, and various other settings.

Custom Installations

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

To do a new custom installation:

1. Follow the instructions for “EndNote Installation” on page 13.
2. On the dialog titled “Select Installation Type,” select *Custom*.
3. When you get to the dialog titled “Select Features,” read the section below, “Selecting Features” to determine what you would like to select/deselect for installation.

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

To install components after EndNote X2 is already installed:

1. Start the installation program as you would for a new installation.
2. On the “Application Maintenance” dialog, select the *Modify* option and click *Next*.
3. When you get to the “Select Features” dialog, read the section below, “Selecting Features” to determine what you would like to select/deselect for installation.

Selecting Features

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

The components you can select for installation include:

EndNote Application

- ◆ EndNote Program
- ◆ Sample Files
- ◆ EndNote Help
- ◆ PDF Manual

Word Templates/Add-ins:

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

Styles: These formats for creating bibliographies are grouped by type.

Connections: These files for directly retrieving references from online reference databases are grouped by information service provider.

Filters: These files for importing text files of reference data are grouped by information service provider.

Spelling Dictionaries: These are dictionaries available for the spelling checker.

EndNote for Palm OS and Windows Mobile: These are files required for using EndNote for the Palm operating system or the Windows Mobile operating system.

To select or deselect an item for installation:

Click the plus sign next to each category to display a detailed list of items. For each category or subcategory, click the triangle next to the name to select from the available installation options. The options may include:

- ◆ Will be installed on local hard drive.
- ◆ Entire feature will be installed on local hard drive.
- ◆ Will be installed to run from network.
- ◆ Entire feature will be installed to run from network.
- ◆ Feature will be installed when required.
- ◆ Entire feature will be unavailable.

Upgrading from an Earlier EndNote Version

Before you begin, back up any custom styles, import filters, and connection files that you do not want overwritten.

While it is not required, we recommend that you uninstall any earlier version of EndNote before you install EndNote X2. See “Uninstalling EndNote” on page 23.

NOTE: During installation, you will need to enter both your new EndNote X2 product key, which is found in the EndNote X2 CD packaging or on the order confirmation for your digital product, and your old EndNote serial number. (The Demo version of EndNote does not require these.)

Install the upgrade just as you would a new installation. See “EndNote Installation” on page 13. By default, EndNote X2 is installed into the C:\Program Files\EndNote X2 folder.

Backing Up or Replacing Files

If Setup detects an earlier copy of the EndNote program in the installation folder, it alerts you and gives you two options. If you continue with the installation to install EndNote X2 into your existing EndNote folder, Setup removes the older EndNote application and word processor support files. You need to select what it should do with the styles, filters, and connection files from your older copy of EndNote. No matter which option you choose, your libraries will not be deleted; nor will any non-EndNote files in the EndNote folder.

- ◆ **Backup older files:** EndNote X2 provides complete, updated sets of style, filter, and connection files. But if you want to keep any of your older modified files to use with EndNote X2, 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 X2.
- ◆ **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 X2. Do *not* choose this option if you have custom styles, filters, or connection files that you want to save. If they have the same names as any of the files to be installed, the installer will overwrite them with the new files.

Opening and Converting Old EndNote Libraries

EndNote X2 opens and uses libraries created with EndNote 8 and later. It converts libraries created with even earlier versions of EndNote to the latest file format.

To convert an old EndNote library (created before version 8):

1. Start EndNote.
2. From the *File* menu, select *Open* and then *Open Library*.
3. On the file dialog, locate and highlight the old library, and click *Open*.

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

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

NOTE: Once you have opened and used a library with EndNote X2, you should use the library only with version X or later.

Using Old Style, Filter, and Connection Files

EndNote X2 can use custom styles, filters, and connection files that were created with EndNote versions 4.0.1-X2. Once you edit and save one of these files with EndNote X2, it is converted to the latest format, which can be used with EndNote versions 8 to X2.

All of the styles, filters, and connection files supplied with EndNote X2 have been updated to the latest format. The new filter and connection files can be used by previous versions of EndNote, with new fields simply ignored. However, the updated styles *cannot* be used with versions of EndNote prior to version 8.

Checking Your Installation

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

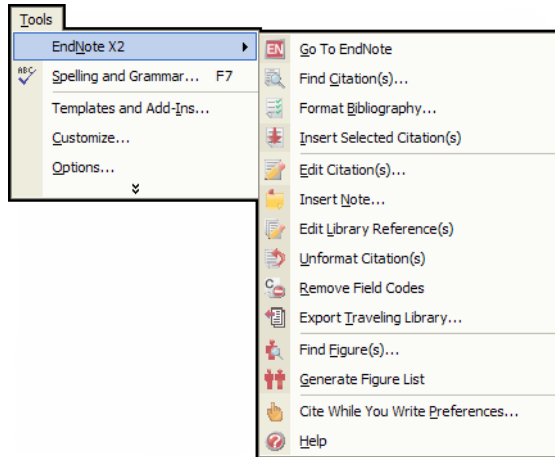
A dialog may ask you to open a library file. Choose *Cancel* or *Close*. To check the version number of EndNote, choose *About EndNote* from the *Help* menu. Click the splash screen to clear it.

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

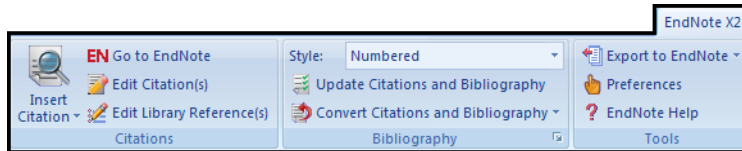
Checking Microsoft Word Support

To see whether Cite While You Write is correctly installed, start Word.

In Word 2003, click on the *Tools* menu and you should see EndNote commands on an *EndNote X2* submenu.



In Word 2007, you should see an *EndNote* tab.



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

If Cite While You Write commands do not appear in Word, repair the EndNote installation:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
3. Choose *Add or Remove Programs*.
4. Highlight *EndNote X2* and click *Change*.
5. Select *Repair* and click *Next*.

Your entire EndNote installation is checked and repaired as needed.

Automatically Updating Files

You can automatically update EndNote X2 when incremental program enhancements are available.

To update your copy of the EndNote program:

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

The wizard checks for an update, lets you know whether an update is available, and then downloads the file(s) and applies the update to your EndNote installation.

NOTE: You can download the latest content files at any time from our website at <http://www.endnote.com>. We continually update output styles, filters, connection files, and Microsoft Word templates.

Uninstalling EndNote

Before you remove EndNote, back up your libraries and any other files you have created or customized.

For volume and site license installations, see Chapter 23, "Networks and Volume Installations" in the full manual.

Uninstalling Palm OS Support and Word 2007 Settings

Palm OS files and Word 2007 settings are typically registered during installation of the EndNote program, and in those cases they will also be uninstalled along with the program. You can jump to the next section, "Uninstalling the EndNote Program."

If you used the Configure EndNote utility for a specific user account, to register Palm OS files and/or suppress the "Citations and Bibliography" group on the References tab in Word 2007, you should use that utility again to uninstall.

To uninstall Palm OS support and Word 2007 settings:

1. Log on to the workstation as the current user. You do not have to be an administrator.
2. Launch the Configure EndNote utility. You can do this in one of these ways:
 - ◆ From the Windows *Start* menu, choose *All Programs>EndNote>Configure EndNote*.
 - ◆ Go to the EndNote program folder and double-click "Configure EndNote.exe."
3. Select *Remove all EndNote components for me* and click *Next*.

4. Continue through the uninstall process as instructed.

This uninstalls only Palm OS support and a single Word 2007 setting, and only for the current user.

Uninstalling the EndNote Program

To uninstall EndNote:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
3. Select *Add or Remove Programs*.
4. In the list of currently installed programs, select *EndNote X2*.
5. Click the *Remove* button.

Or, you can uninstall by using the EndNote installation program:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From your EndNote CD, run *Setup.exe*.
3. On the “Application Maintenance” dialog, select *Remove* and click *Next*.
4. Click *Next* again to begin removing EndNote.

The uninstall procedure removes only files, groups, and icons installed by the EndNote installer the *last* time it was run. For example, if you used the *Custom* installation option to reinstall only style files, the Uninstall program removes only style files.

To remove any modified EndNote files that remain:

We purposely do not to remove any EndNote libraries or customized files. You can manually delete these files with Windows Explorer. Once you are sure you do not want any of the files contained in the following folders, you can delete them:

Windows XP

C:\Program Files\EndNote X2
C:\Documents and Settings\All Users\Shared Documents\EndNote
C:\Documents and Settings\[UserName]\My Documents\EndNote
C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista

C:\Program Files\EndNote X2
C:\Users\Public\Public Documents\EndNote
C:\Users\[UserName]\Documents\EndNote
C:\Users\[UserName]\App Data\Roaming\EndNote

Chapter 2: Introduction to an EndNote Library

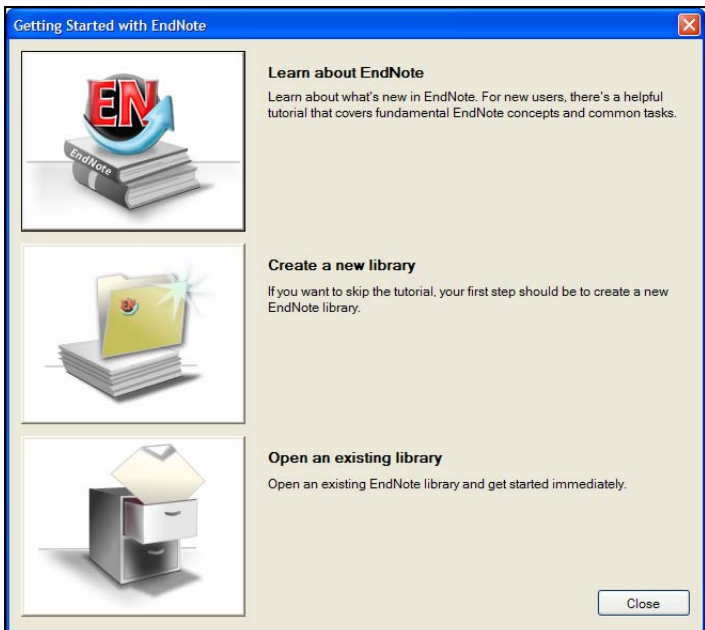
This chapter covers the basics of working with EndNote. In particular, you will learn how to:

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

Start EndNote

To start the EndNote program and open the sample library:

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



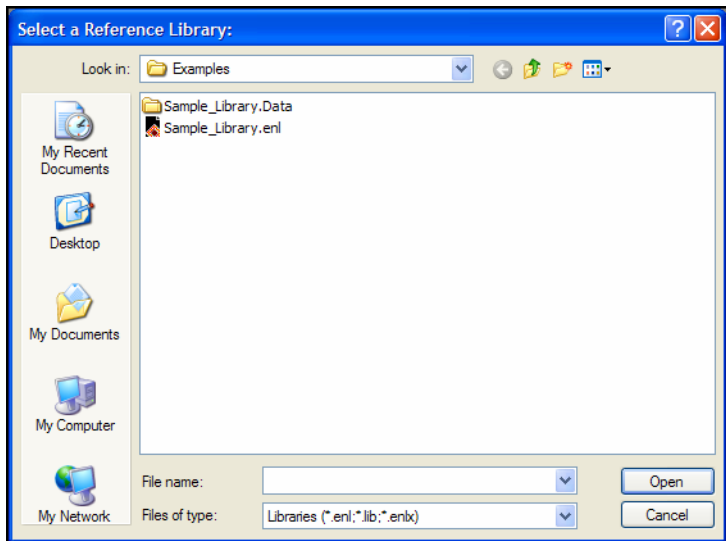
NOTE: If you have set a favorite library to open automatically, that library will open instead of the dialog shown above. If this happens, close the library, choose *Open* from the *File* menu, and continue with step 3.

2. Select *Open an existing EndNote library*.

3. To open the library, do one of these:
 - ◆ Select `Sample_Library.enl` in the drop-down list, and click *OK*.
 - ◆ If `Sample_Library.enl` does not appear in the drop-down list, click *Browse* to locate it. A file dialog will appear, prompting you to locate and open a reference library.

Use the “Look in:” list to find the EndNote X2 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 X2 folder.

Select the Examples shortcut that points to the Examples folder, and click *Open*. You should now see the file “`Sample_Library.enl`,” the example EndNote library. (Your folder View settings may or may not be set up to show the extension `.ENL`.) Select `Sample_Library.enl` and click *Open*.

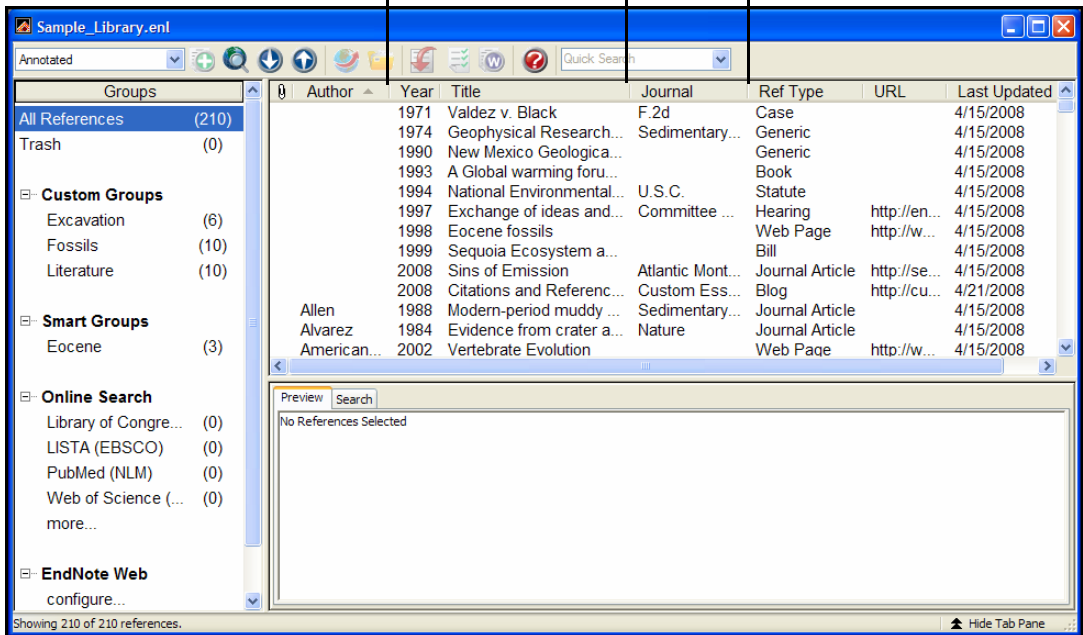


NOTE: You can open a library from within EndNote by choosing *Open* from the *File* menu.

The Library Window

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

Move column dividers to adjust column widths



The Library window includes three panes:

The **Reference List pane** displays a multi-column list of references. By default, the first column in the reference list shows a paper clip icon for references that include an attached file in the File Attachments field. Then, the first author's last name, the year, the title, the journal name or secondary title, the reference type, the URL, and the Last Updated date are displayed for each reference.

The **Groups pane** at the left of the window lists various groups of references for easy retrieval.

The **Tab pane** displays a Preview tab to view formatted references and a Search tab for searching either the current library or an online database.

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

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

Preview References

You can easily see more detail about a reference by highlighting the reference and viewing the Preview tab at the bottom of the Library window.

To preview a reference:

1. First, if you do not have a Tab pane in the window, click on the *Show Tab Pane* button at the bottom of the window and then click on the Preview tab.
2. For this example, click on the reference titled “Geophysical Research Letters.”

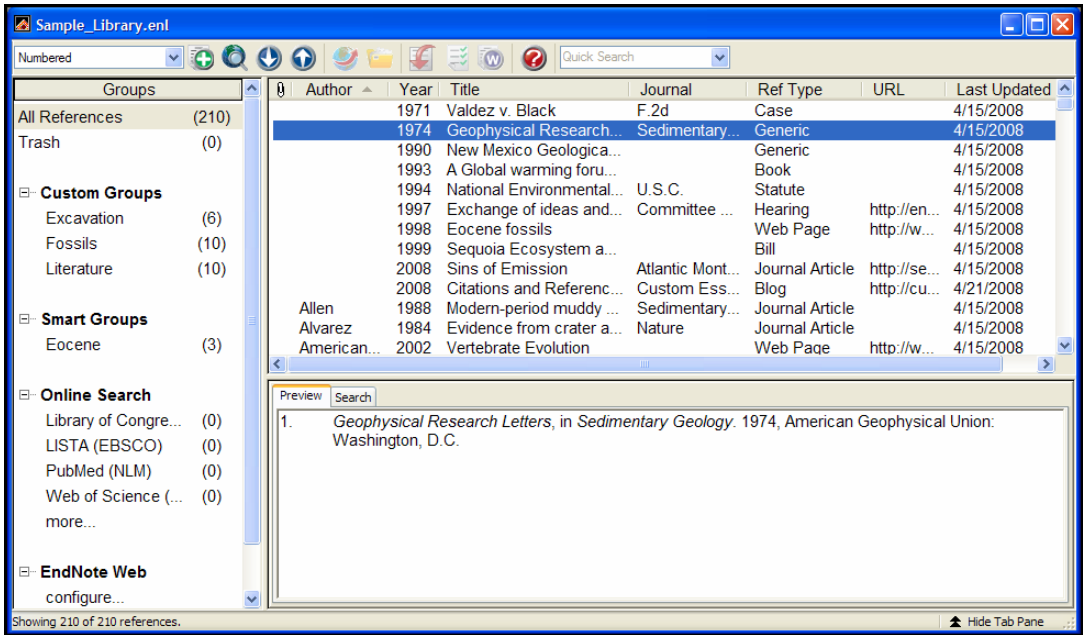
The Preview tab uses the current **output style** to display the selected reference as it will be formatted for a bibliography. EndNote’s output styles (or just **styles**) represent the rules for creating bibliographies for a variety of journals and other publications. The styles determine how your references look when you print, export, preview, or create bibliographies.

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



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

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



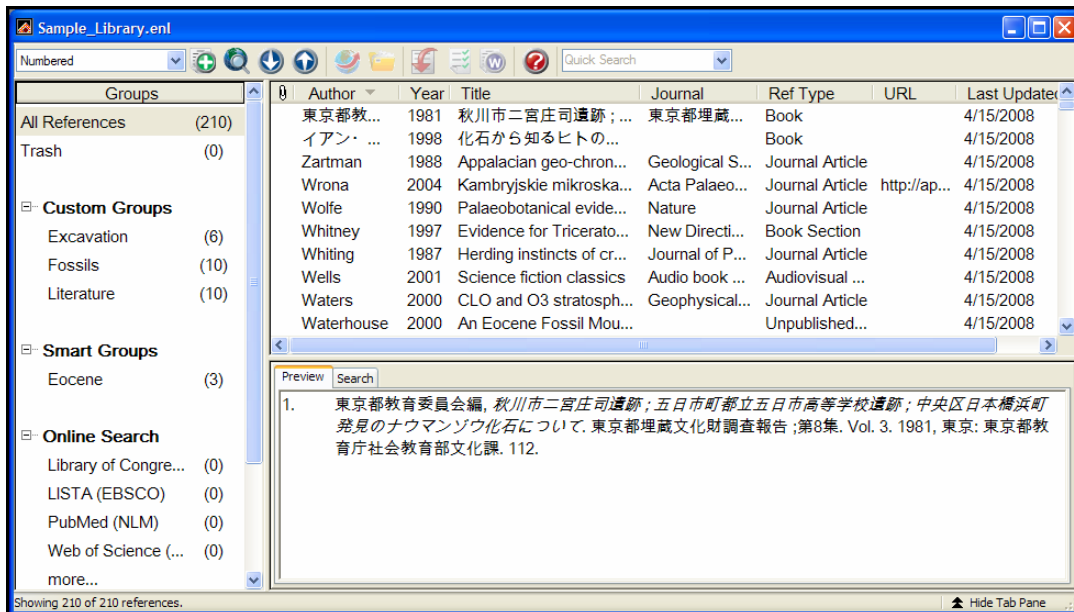
When the Tab pane is showing, a *Hide Tab Pane* button is available at the bottom of the window. You can click *Hide Tab Pane* to hide the Preview tab if you wish. The name of the button will toggle to *Show Tab Pane*.

Sort 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 Author column heading to change the current Author sort from ascending order to descending order.



NOTE: This example shows references that include Japanese characters. EndNote uses Unicode to encode special characters, so that data is easily translated between platforms, programs, and languages. If boxes appear instead of characters, you may need to change the EndNote display fonts to a Unicode font. You will learn how to do this in the next chapter, "Setting EndNote Preferences." For some display elements, you may need to install special Windows Language Packs. Consult your Windows documentation for more information about Language Packs.

2. Click the Year column heading to see the references sorted in ascending order based on the year of publication.
3. Click the Year column heading again (a second time) to reverse the sort order and see the references sorted in *descending* order.
4. Now, click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

Select and Open a Reference

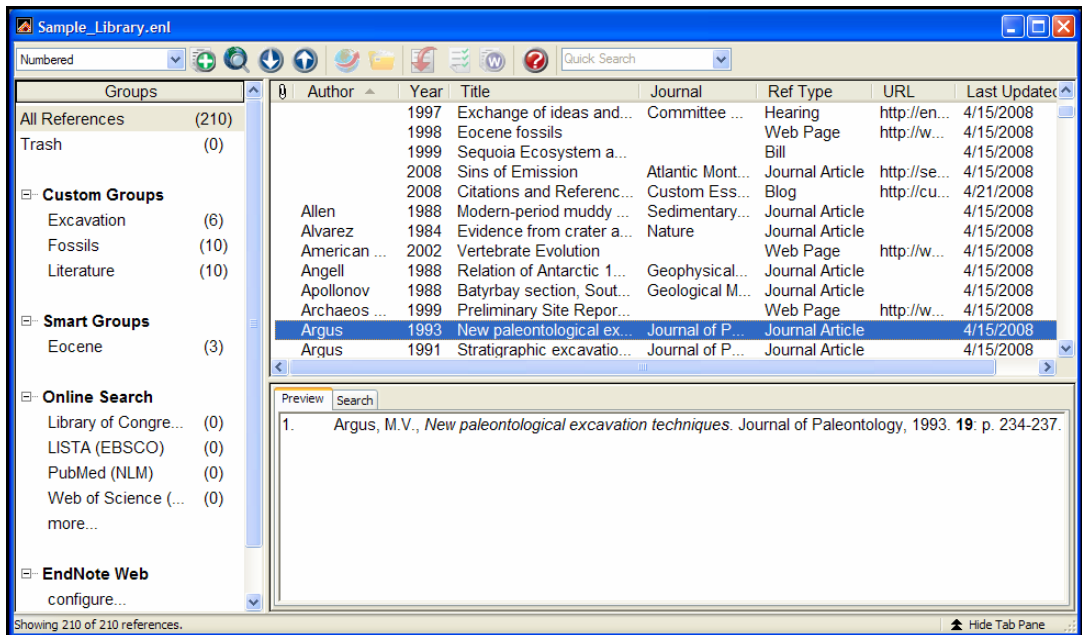
To work with specific references you must first select them in the Library window.

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

To see how this works, click *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 first Argus reference in the list by clicking in the list and then typing "arg" without pausing between letters.

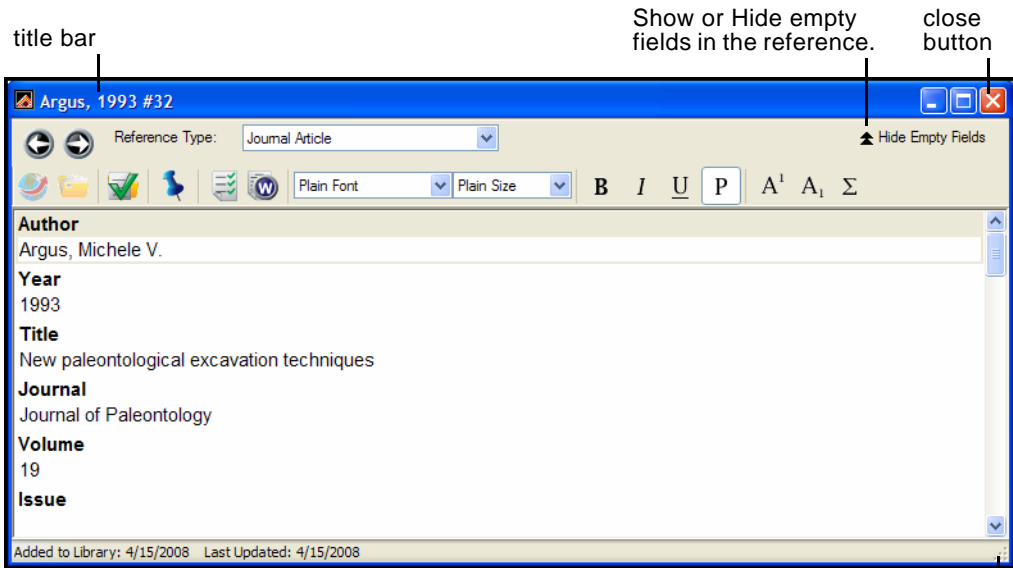


Now that the reference is selected, there are a number of things you can do with it, such as view its contents, copy, cut, delete, or edit it. For now, just open the reference to view the contents.

2. Open the selected Argus reference by pressing the ENTER key or by using the *Edit References* command on the *References*

menu. You can also open a reference by double-clicking on it in the reference list.

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



Click and drag to resize the window.

This is where you enter or edit information for a reference. The citation information is displayed at the top of the Reference window in the title bar, “Argus, 1993 #32.” This information—the first author’s last name, year, and record number—is used by EndNote to match citations in a paper to references in a library.

To view the rest of the reference, use the mouse to scroll down the Reference window, or press the TAB key to move forward from one field to the next. Press SHIFT+TAB to move backwards through the fields. Click the *Show Empty Fields/Hide Empty Fields* button to toggle between showing all fields in the reference and only those fields that contain data.

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

Next, close the reference. You can do this in one of these ways:

- ◆ Click the close button in the upper corner of the Reference window.
- ◆ From the *File* menu, choose *Close Reference*.

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

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

Save References to a Custom Group

The left pane of the library window lists groups of saved references. In a new library, only the *All References* group contains references, and displays all of the references in the library. However, you can add up to 500 custom and smart groups to a library.

A custom group is built by specifically adding individual references to the group. A smart group is compiled automatically, and is based on a search strategy.

The sample library has several custom groups of references. Click on the group names under Custom Groups in the left pane of the library window to view the references in each group. Then, click *All References* to display all of the references in the library again.

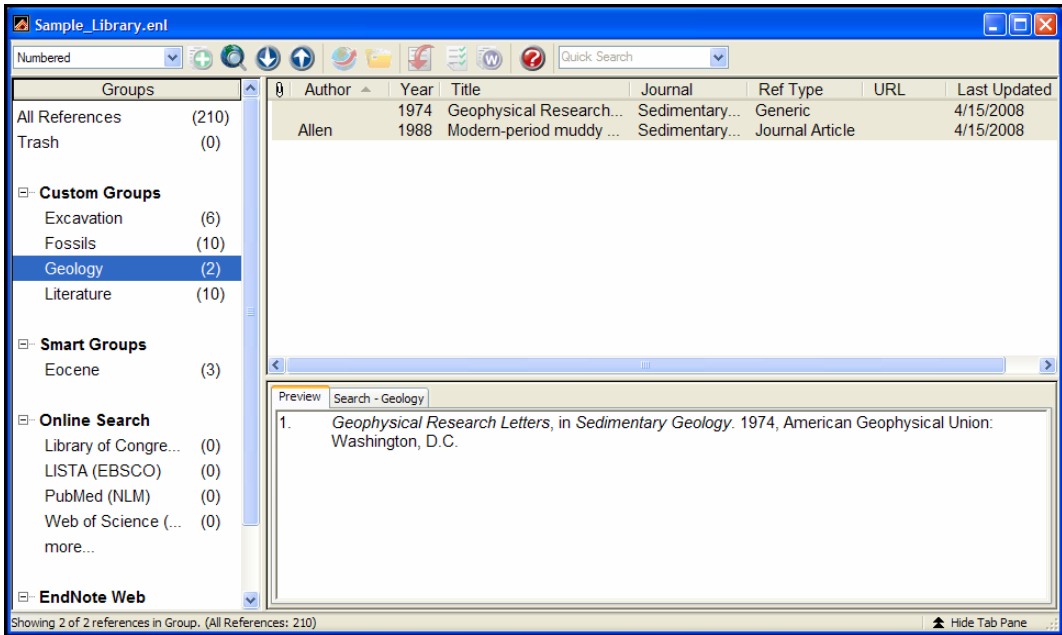
To create a custom group and add references to it:

1. From the *Groups* menu, select *Create Group*. (Or, you could right click under Custom Groups in the Groups pane to display a context-sensitive menu, and then select *Create Group*.)

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

2. Type "Geology" as the group name, and then press ENTER or click in the reference list area to save the change. The reference list is blank, as there are no references in this new group.
3. Click on the *All References* group to display the entire library again.
4. In the Journal column, look for the first two references to *Sedimentary Geology*, and highlight them. To select non-contiguous references, hold down the CTRL key as you click on them.
5. Drag the selected (highlighted) references to the new Geology group and drop them on the title of the group. (Or, you could go to the *Groups* menu and choose *Add References To>Geology*.)

- Click on the *Geology* group to display the two references now included in the group.



Click on *All References* to display all of the references in the library again.

To delete a group:

- Right click on the *Geology* group name to display a context-sensitive menu, and select *Delete Group*.
(Or, you could click on the group name and then select *Delete Group* from the *Groups* menu.)
- When you are asked to verify the deletion, click *Delete*.

Only the Group subset is deleted; no references are deleted from your library.

Many of the commands for managing groups are available both from the *Groups* menu and from the right click context-sensitive menu.

If you do not want to continue with the next chapter (Setting EndNote Preferences), go to the *File* menu and choose *Exit* to close the program. Otherwise, you can continue with the tour.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ Learn how to change the display of the Library window in Chapter 4, “The EndNote Library.”
- ◆ To learn more about sorting, see “Sorting the Library” in Chapter 8.
- ◆ To learn more about creating and managing groups, see Chapter 9, “Using Groups.”

Chapter 3: Setting EndNote Preferences

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

- ◆ Display EndNote Preferences
- ◆ Set a favorite library to open each time you start EndNote.
- ◆ Change the display fonts.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl) as shown under “Start EndNote” on page 25.

Access EndNote Preferences

To view or change the EndNote preferences:

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

Many of these preferences are stored in your Windows registry, although there are exceptions.

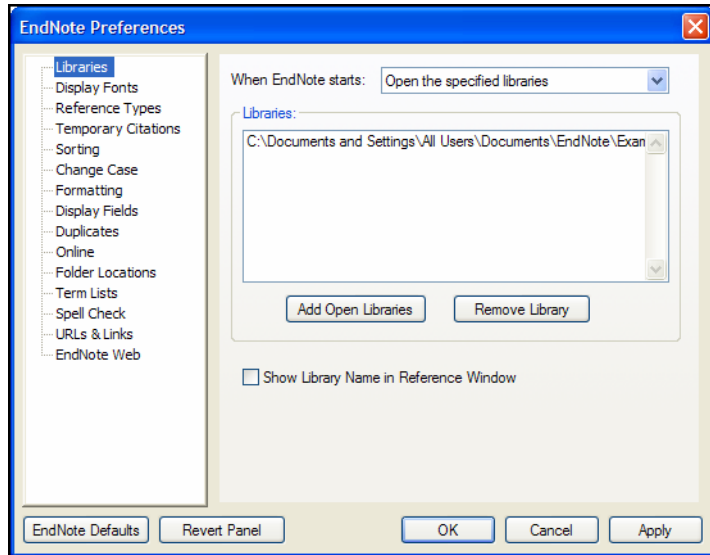
Set a Default Library

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

To set a favorite library:

1. If you haven't already, go to the *Edit* menu and choose *Preferences*.
2. In the list on the left, click *Libraries*.
3. Next to “When EndNote starts,” use the drop-down list to select “Open the specified libraries.”

4. Click *Add Open Libraries*. You should see the full path and filename of the sample library (Sample_Library.enl) listed at the top of the box.



5. Click *Apply* to save this change.

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

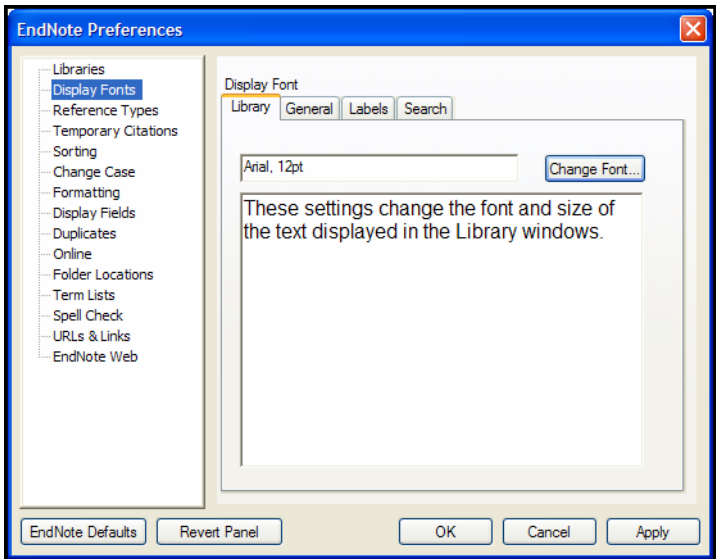
Change the Library Display Font

Next, pick a different font to display text in the Library window and the Reference window.

To change the display fonts:

1. If you aren't currently viewing the EndNote Preferences window, go to the *Edit* menu and choose *Preferences*.
2. In the list on the left, click *Display Fonts*.
 - ◆ The Library font determines the font and size of the references listed in the Reference List pane of the Library window.
 - ◆ The General font changes the font used to display most text that is typed into EndNote (such as in the Reference or Style windows). The General font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed or copied directly from EndNote.
 - ◆ The Labels font determines the font and size used for the Reference window field labels.

- ◆ The Search font determines the font and size applied to user-entered text on the Search tab.



3. On the *Library* tab, click the *Change Font* button.
4. In the Font list, select *Arial Unicode MS* (or another Unicode font that supports Japanese characters) and click *Apply* to save the change.

EndNote uses Unicode to correctly handle extended characters. By selecting a Unicode font here, you can view extended characters in the Library window, such as the Japanese characters found in the sample library.

5. On the *General* tab, click the *Change Font* button.
6. In the Font list, select *Arial Unicode MS* (or another Unicode font that supports Japanese characters) and click *Apply* to save the change.
7. Click the red close button or *OK* to leave the Preferences dialog.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ Learn how to change the display of the Library window in Chapter 4, “The EndNote Library.”
- ◆ The Preferences panels provide many ways to customize your version of EndNote. For example, you can ignore articles when sorting, set duplicate detection options, etc.

See Chapter 19 for more information about setting preferences.

Chapter 4: Entering a Reference

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

- ◆ Enter a reference into a library.
- ◆ Attach a figure and other types of files to a reference.

In this part of the tour, you are going to enter a journal article reference that includes attached files.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.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:

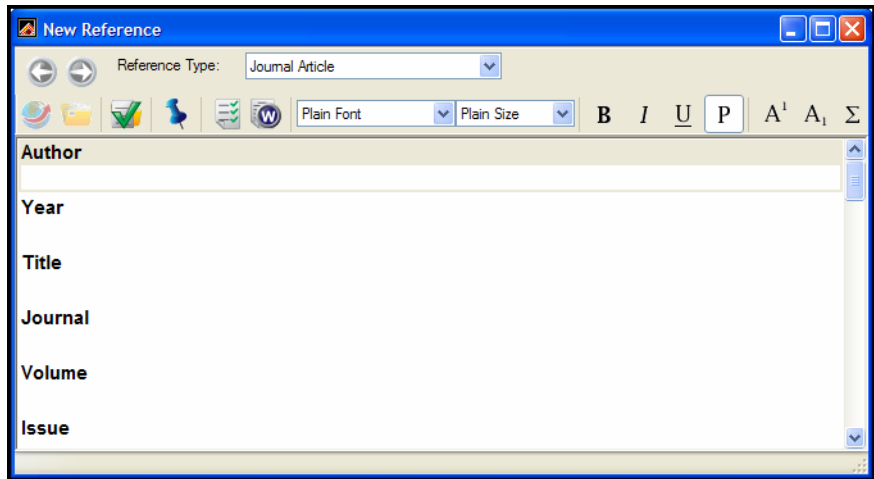
- ◆ Type the reference information into the Reference window.
- ◆ Connect to an online bibliographic database and retrieve the references directly into EndNote, as demonstrated in Chapter 5: “Searching an Online Database.”
- ◆ Import text files of references that have been downloaded from online bibliographic databases, as demonstrated in Chapter 6: “Importing Reference Data into EndNote.”

This example demonstrates how to type reference information into EndNote.

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

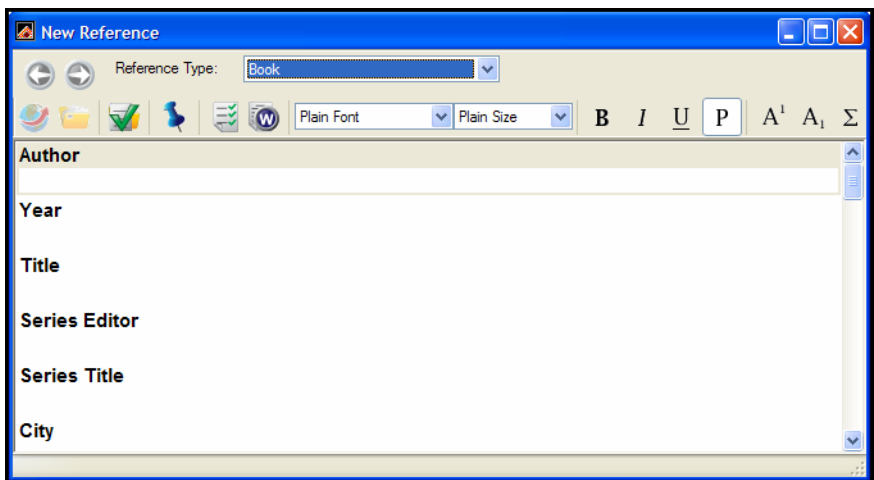
1. Click in the reference list and then, from the *References* menu, choose *New Reference* (CTRL+N). An empty Reference

window opens with the words “New Reference” displayed at the top.



New references appear as journal articles (unless you change the default setting) but can be changed to any other type of reference using the *Reference Type* list at the top of the window.

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



Notice that the field list changes to reflect the type of bibliographic information you would record for a book. You are welcome to select other reference types from the list to see how the list of fields changes for each type of source.

Three reference types—Figure, Chart or Table, and Equation—are available specifically for cataloging picture files and object files, although you can add File Attachments, Figures and Captions to any reference type.

When you are done looking at different reference types, set the reference type back to the *Journal Article* reference type. You are now ready to enter reference information, beginning with the author names.

3. Enter author names for the reference. Individual author names *must* be entered one per line.
 - a. Enter a personal author name with the first name first. With the cursor in the Author field, type:

Tiberius Rex

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

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

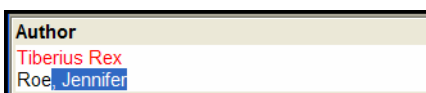
The name you are entering, Tiberius Rex, is a new author in this library, so keep typing until you complete the name and then press the ENTER key.

The name appears in red text to indicate that it is a new name in the Author term list for this library. When you close the reference, it will be added to the Author term list and the red text will change to black. You can read more about term lists (and how to turn these options on or off) in Chapter 10 of the full EndNote.PDF manual.

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

Roe, Jennifer

This author is already in the sample library, so as you start typing the last name, you will see EndNote complete the name for you.



Press ENTER to accept EndNote's suggested author name.

- c. For the third author, enter:
de Young, John Robert, Jr.

The first comma separates the last and first name. The second comma is inserted before suffix text, to make it clear that it is not part of the author's name for manipulation of name order or stripping to initials. Suffix text will always print after the other information for this author.

- d. Enter the fourth author's name, which in this case is a corporate author:

University of California,, Berkeley

Corporate author names are entered with a following comma, so they will not be manipulated like personal author names. In this case, the corporate author name has a comma within the name. We inserted two commas to allow for correct formatting. The first comma makes it clear that text up to that point should not be manipulated, and the second comma indicates that there is no "first name," yet includes suffix text.

4. Press TAB to accept the author name and move to the Year field. In the Year field, type:

2006

5. Continue entering the reference as shown below, using the TAB key to move to the next field, and SHIFT+TAB to move to the previous field, if necessary. You can also use the mouse to click in the desired field. If information is not provided for a particular field, leave that field empty.

Title: The scale and the feather: A suggested evolution

Journal: Paleontology

Volume: 3

Issue: 1

Pages: 125-128

Date: November 22

Keywords: Feathers
Evolution
Birds

No extra punctuation (such as parentheses around the year) or text styles (such as bold or italic) are entered into the reference. EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

While we are not entering any text into the Abstract or Notes fields, you could enter 64 K into each of these fields, which amounts to 10-12 pages text.

6. Next, attach a PDF file to the reference. You can attach just about any type of file to the File Attachments field of a reference.

Scroll to the File Attachments field, and from the *References* menu, select *File Attachments* and then *Attach File* to display a file dialog. On the file dialog:

- a. Navigate to the folder Program Files\EndNote X2.
- b. Notice the check box titled "Copy this file to the default file attachment folder and create a relative link." Make sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.
- c. Highlight the file titled EndNote.PDF. This is the full EndNote manual located in the EndNote program folder.
- d. Click *Open* to insert the file into the File Attachments field. A file icon will appear in the field.



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

7. Next, attach a figure file. Attached figures can be cited and displayed in Microsoft Word, which we will do later in the tour. You can attach a single figure file to each EndNote reference.

Microsoft Word recognizes many file types as figures. Some valid file types include these graphic files:

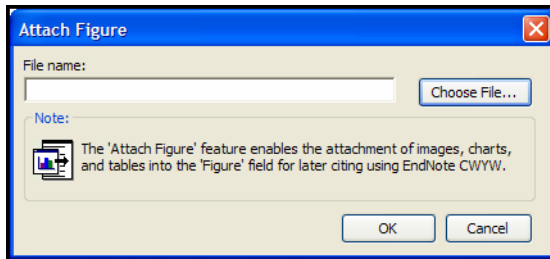
- ◆ Windows Bitmap (BMP)
- ◆ Graphics Interchange Format (GIF)
- ◆ JPEG File Interchange Format (JPEG)
- ◆ Portable Network Graphics (PNG)
- ◆ Tag Image File Format (TIFF)

You can also insert object files, such as:

- ◆ Audio files (WAV, MP3)
- ◆ Microsoft Access files

- ◆ Microsoft Excel files
- ◆ Microsoft Power Point files
- ◆ Microsoft Project files
- ◆ Microsoft Visio files
- ◆ Microsoft Word files
- ◆ Multimedia files (MOV, QuickTime)
- ◆ Technical drawing files
- ◆ Text files (TXT, RTF, HTML)

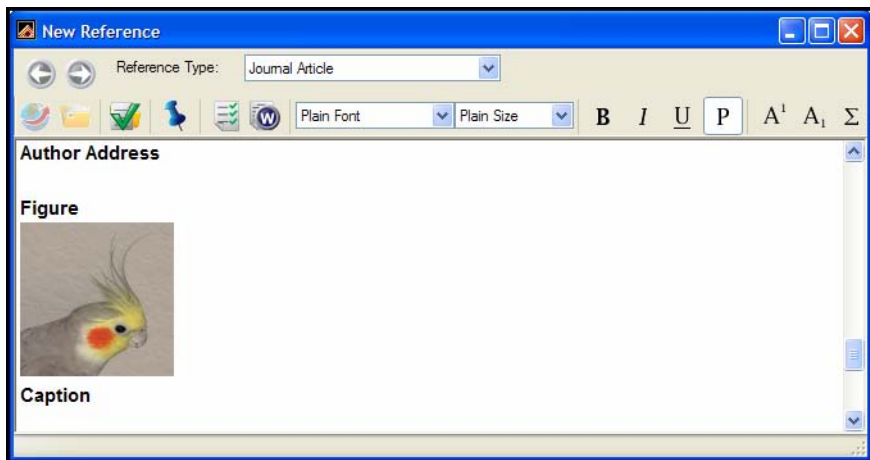
Scroll to the Figure and Caption fields, and from the *References* menu, select *Figure* and then *Attach Figure*.



Click *Choose File* to display a file dialog.

On the file dialog:

- a. Navigate to the folder: Program Files\EndNote X2\Examples. (The Examples folder found here is a shortcut to a shared location.)
- b. Highlight the file titled Feather2.BMP.
- c. Click *Open* to insert the file into the Figure field.



The graphic appears as a thumbnail in the reference. EndNote copied the file to a .DATA folder stored with the Sample_Library library, and linked the copied graphic to this reference.

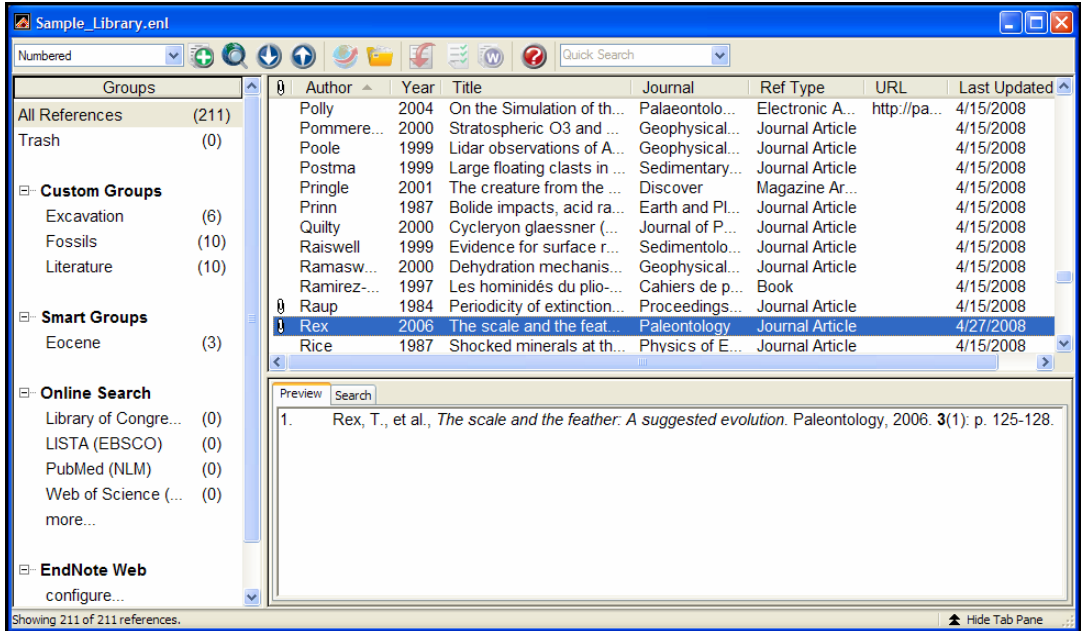
In the Caption field, enter:

Cockatiel Crest Feathering

Always enter a caption for your image. It assists in locating images, and it labels figures in your Microsoft Word documents.

8. Close the Reference window by clicking the close box (the X in the upper right corner of the Reference window), or by choosing *Close Reference* (CTRL+W) from the *File* menu.

All information is automatically saved when you close the reference window. Your new reference will appear in the Library window.



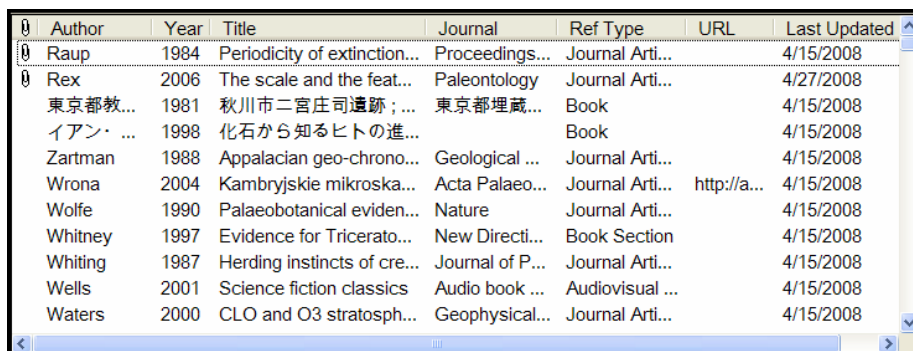
A paper clip icon appears next to the reference to indicate an attached file. You could also modify the reference list to show a column for attached figures, but that is not a default setting.

Locate References That Contain Attached Files

You can easily locate those references that contain attached files.

To locate the references containing attached files:

Click the paper clip icon in the first column heading twice to sort records containing attached files at the top of the list. References that include a paper clip have one or more attached files.



Author	Year	Title	Journal	Ref Type	URL	Last Updated
Raup	1984	Periodicity of extinction...	Proceedings...	Journal Arti...		4/15/2008
Rex	2006	The scale and the feat...	Paleontology	Journal Arti...		4/27/2008
東京都教...	1981	秋川市二宮庄司遺跡；...	東京都埋蔵...	Book		4/15/2008
イアン・...	1998	化石から知るヒトの進...		Book		4/15/2008
Zartman	1988	Appalacian geo-chrono...	Geological ...	Journal Arti...		4/15/2008
Wrona	2004	Kambryjskie mikroska...	Acta Palaeo...	Journal Arti...	http://a...	4/15/2008
Wolfe	1990	Palaeobotanical eviden...	Nature	Journal Arti...		4/15/2008
Whitney	1997	Evidence for Tricerato...	New Directi...	Book Section		4/15/2008
Whiting	1987	Herding instincts of cre...	Journal of P...	Journal Arti...		4/15/2008
Wells	2001	Science fiction classics	Audio book ...	Audiovisual ...		4/15/2008
Waters	2000	CLO and O3 stratosph...	Geophysical...	Journal Arti...		4/15/2008

You can double-click on an individual reference if you would like to view the complete reference. When you are done viewing a reference, click the close button to close it.

Click the Author column heading to again order the list by author names in ascending (A to Z) order.

This concludes Chapter 4 of the guided tour. Chapter 5 demonstrates how to search remote databases and save your search results to an EndNote library. If you do not have an Internet connection, skip Chapter 5 and move on to Chapter 6: "Importing Reference Data into EndNote" on page 57.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ If you are eager to begin creating your own library, see Chapter 4, "The EndNote Library."
- ◆ Chapter 5, "Entering and Editing References," provides more detail about typing references into your library and inserting images.

Chapter 5: Searching an Online Database

With the EndNote *Online Search* command, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer. And to make it even easier, the results of your searches are saved as references in your own EndNote library.

This section will guide you through these basic steps:

- ◆ Connect to an online database.
- ◆ Search the database and download the references into an EndNote library.

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

About the PubMed Database

For this lesson, you will connect to PubMed, the National Library of Medicine's online public access version of their MEDLINE database. PubMed is the **online database** you will be searching; the National Library of Medicine is the **information provider**.

For Users With "Dial-up" Internet Connections

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

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

Disconnecting: EndNote disconnects from an online database as soon as a search is completed, but will not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using EndNote's *Online Search* feature.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown under "Start EndNote" on page 25.

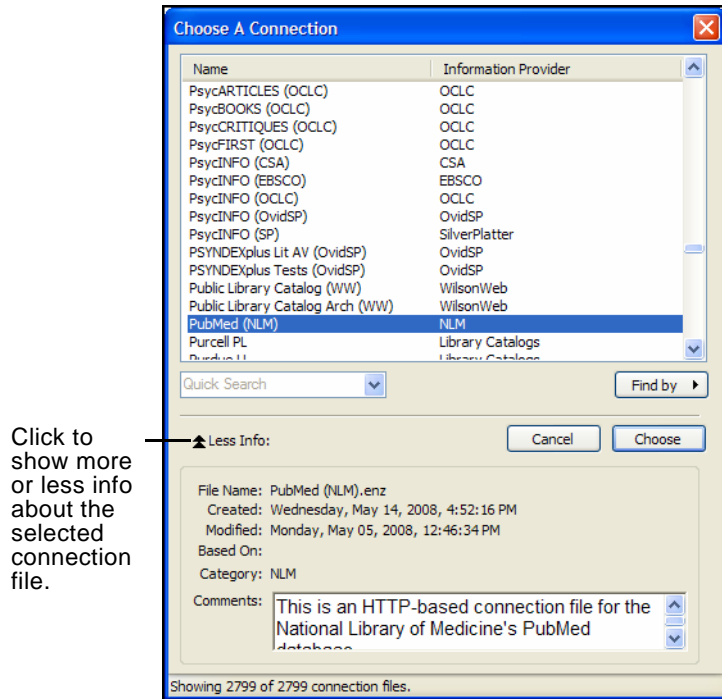
Connect to an Online Database

The first step in searching an online database is connecting to it.

To connect to the PubMed Database:

1. Go to the *Tools* menu and select *Online Search* to see the available list of online databases. You could also look under Online Search in the Groups pane and click *more*.

(The Groups pane will remember databases you have connected to in the past for easy access under Online Search. You can also customize a list of favorite databases to search by using the Connection Manager.)

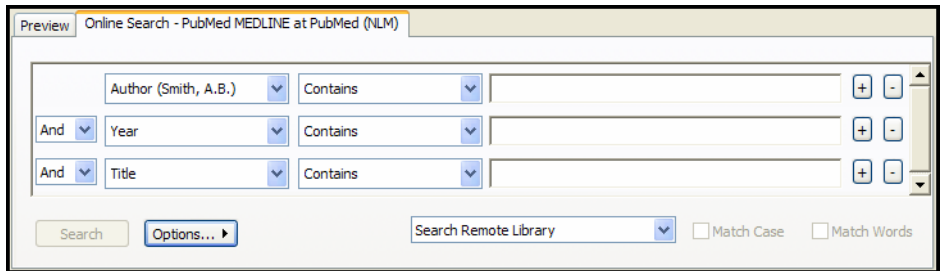


NOTE: This window displays all of the connection files available in your Connections folder. Use the *Find by* button to quickly view various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box and press Enter.

2. Select the *PubMed* connection file (you can start typing the file name to quickly jump to it in the list), and click *Choose*.

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

When the connection has been established, EndNote displays a Search tab. Note that the search tab is titled, "Online Search - PubMed MEDLINE at PubMed (NLM)." The PubMed MEDLINE database is selected and EndNote is ready to search.



NOTE: If you previously set a default configuration for the Search tab, the search field lists display the fields you selected as your defaults. If one of these fields appears italicized in the Search tab lists, that indicates it is not a valid option for this particular online database.

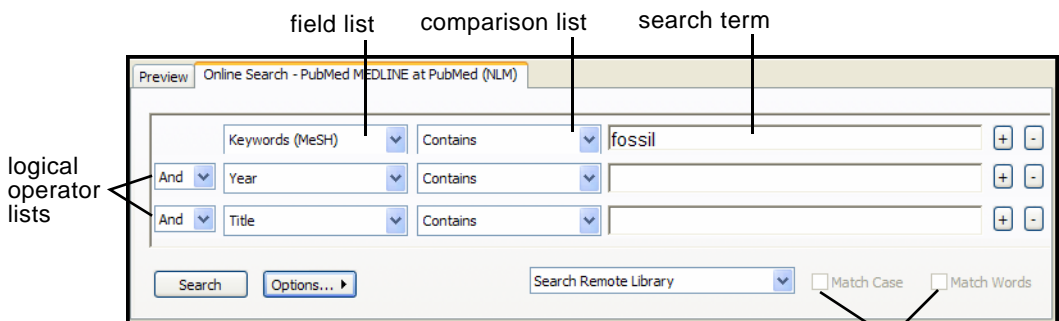
Search the Database

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

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

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

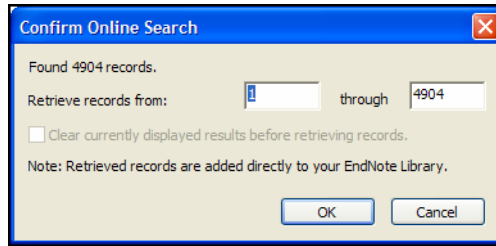
1. Set the field list for the first line to *Keywords (MeSH)*, and enter "fossil" into the search text field. The comparison list for online searches is always set to *Contains*.



Match Case and Match Words are not available for online searches

2. Click *Search*.

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

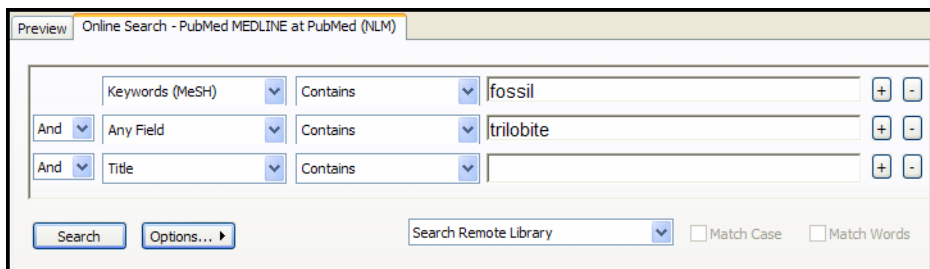


The dialog displays the number of references that were found to match your search request, and gives you the option to retrieve them.

NOTE: PubMed is updated regularly, so you may find a different number of references than illustrated here.

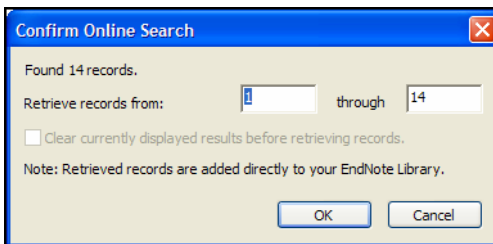
If the result set seems too big, you can always refine the search to get closer to exactly those references you want. Let's refine this search by looking for just those references that include mention of a "trilobite," a group of extinct marine animals that were abundant in the Paleozoic era.

3. Click *Cancel*, and you are returned to the Search tab.
4. Set the operator at the beginning of the second search line to *And*.
5. In the second search line, select *Any Field* from the field list and type "trilobite" as the search text.



6. Click *Search*.

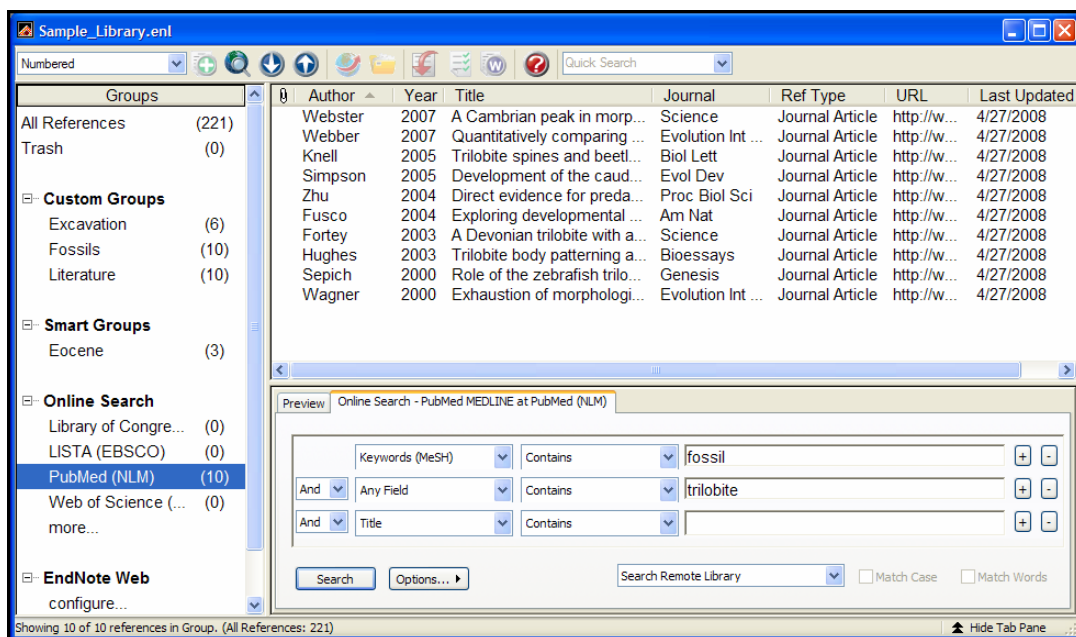
This time only 14 references were found.



7. For our purposes, limit the download even further. Change the number in the second box to "10" to limit our download to the first 10 records.
8. Click *OK* to retrieve and save the matching references.

The references are downloaded into your library and appear both in the All References group and in a temporary group for the PubMed database connection.

You can halt a retrieval in progress by clicking the *Cancel* button on the Search tab. Records that have been processed up to that point already exist in the library.



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

Review the References

At this point you can peruse the retrieved references to make sure you want to keep all of them. You may find that some of the references are not helpful for your research.

While you could open each reference individually to scan through the bibliographic data, you can also use the Preview tab.

To quickly look at the new references:

1. Click on a reference in the reference list.
2. In the Tab pane, click on the Preview tab to display a reference preview.
3. On the toolbar, select the *Show All Fields* output style from the output style list.

The Show All Fields style is not bibliographic, but represents all of the fields in your references. On the Preview tab, you can scroll through the data in the selected reference.

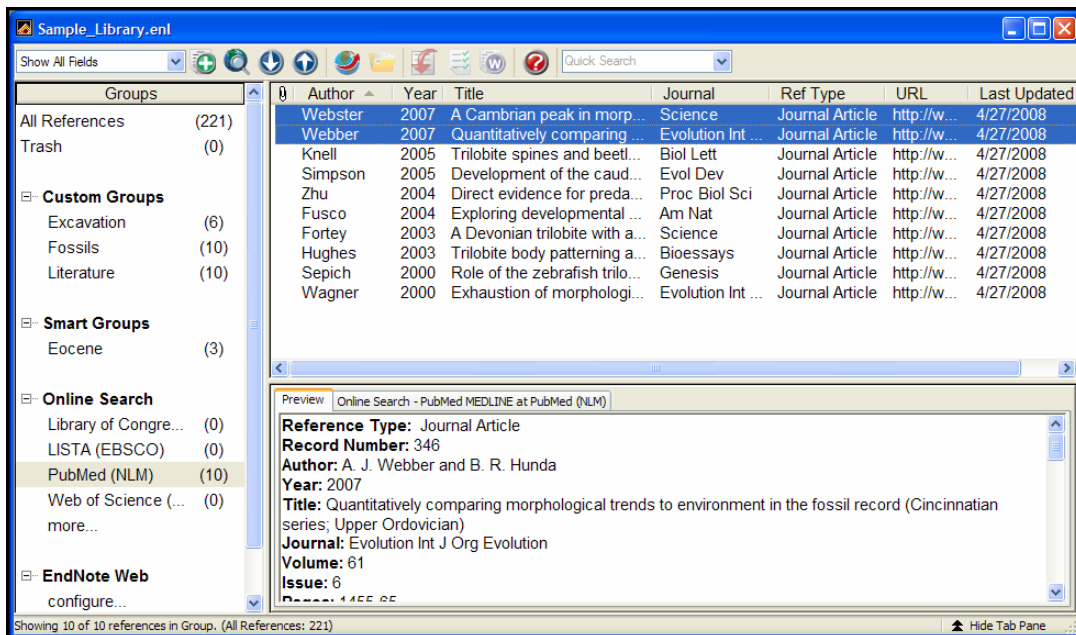
Delete Unwanted References

Once you identify references you do not want, you can delete them.

To delete references:

1. In the PubMed (NLM) group, select two of the displayed references by holding down the CTRL key and clicking on the

individual references. (Use SHIFT+click, or click and drag, to select a range of references.)



- From the *References* menu, select *Move References to Trash*. The selected references are removed from the library and put in the Trash group.

While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be cited), they are not completely deleted until you go to the *Groups* menu and choose *Empty Trash*. Until you choose *Empty Trash*, you can still drag references from the Trash group back to your active library.

- Because you are sure that you want to delete the references, click on the Trash group and then go to the *References* menu to select *Empty Trash*.
- Confirm the deletion by clicking *OK*.
- Click the All References group to return to the full reference list, and on the toolbar, set your output style back to *Numbered*.

If you wanted to do another search of PubMed at this point, you could display the PubMed group, enter another search strategy, and click *Search* again. On the Confirm Online Search dialog, you are asked, "Clear currently displayed results before retrieving records?" This check box simply removes the previous

downloaded references from the PubMed group; they still exist in the library. It is an easy way to see just those references downloaded with the current search strategy.

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

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ See Chapter 6 for details about establishing connections, searching for references, and retrieving references.
- ◆ Read "Selecting a Connection File" in Chapter 6 to learn about the connection files that are available with EndNote.
- ◆ See "Troubleshooting Connections" in the Troubleshooting appendix if you encountered any problems establishing a connection.
- ◆ See Chapter 18, "Connection Files" for information about creating and editing connection files.

Chapter 6: Importing Reference Data into EndNote

Online searching, described in the previous section, is the easiest way to retrieve references from online databases, but not all information providers offer that option.

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

In this part of the guided tour you will learn about:

- ◆ Downloading data in a tagged output format.
- ◆ Selecting an import filter and importing data into EndNote.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown under "Start EndNote" on page 25.

Search the Database and Save the References

Often when you search a database, the matching references are displayed as text, with no clear indicator between each piece of bibliographic information. The PubMed reference below, saved in a Citation format, is an example. There is no clear indicator for EndNote to be able to differentiate a title from an address or an abstract.

```
Am J Med Genet A. 2005 Mar 9; [Epub ahead of print]
```

```
Reconstructing the behaviors of extinct species: An excursion into comparative paleoneurology.
```

```
Rogers SW.
```

```
Salt Lake City VA-Geriatrics Research, Education and Clinical Center and Department of Neurobiology and Anatomy, University of Utah School of Medicine, Salt Lake City, Utah.
```

```
How can the behavior of an extinct species be reconstructed-say a dinosaur such as Allosaurus? Despite the relatively abundant
```

fossilized remains of this and other dinosaurs, the incompleteness of the fossil record has permitted room for considerable speculation, mythology, and perhaps a bit of unsettling reflection on what factors contributed to the eventual fate of these remarkably successful animals. (continued)
(c) 2005 Wiley-Liss, Inc.

PMID: 15759265 [PubMed - as supplied by publisher]

To use this information effectively, each piece of bibliographic information must be consistently tagged so it can be directed to the correct EndNote field.

Database providers typically offer several different download formats. Regardless of which system you are searching, you need to save the references in a tagged format to a text file.

For this tour, we will use a text file of PubMed references that were previously downloaded in the tagged MEDLINE format. The file Pubmed-dinosaur.txt is provided in the EndNote Examples folder. A single reference in the file appears like this:

```
PMID - 15759265
OWN - NLM
STAT - Publisher
DA - 20050310
PUBM - Print-Electronic
IS - 1552-4825
DP - 2005 Mar 9
TI - Reconstructing the behaviors of extinct
species: An excursion into comparative
paleoneurology.
AB - How can the behavior of an extinct species
be reconstructed-say a dinosaur such as
Allosaurus? Despite the relatively
abundant fossilized remains of this and
other dinosaurs, the incompleteness of
the fossil record has permitted room for
considerable speculation, mythology, and
perhaps a bit of unsettling reflection on
what factors contributed to the eventual
fate of these remarkably successful
animals. (continued) (c) 2005 Wiley-Liss,
Inc.
```

```

AD - Salt Lake City VA-Geriatrics Research,
    Education and Clinical Center and
    Department of Neurobiology and Anatomy,
    University of Utah School of Medicine,
    Salt Lake City, Utah.
AU - Rogers SW
LA - ENG
PT - JOURNAL ARTICLE
DEP - 20050309
TA - Am J Med Genet A
JID - 101235741
EDAT - 2005/03/11 09:00
MHDA - 2005/03/11 09:00
AID - 10.1002/ajmg.a.30538 [doi]
PST - aheadofprint
SO - Am J Med Genet A 2005 Mar 9;.

```

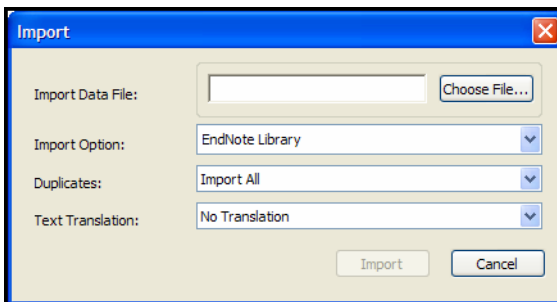
Each tag can be mapped to a corresponding EndNote field. If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately.

Choose the Correct Import Filter and Import into EndNote

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

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

1. View the Library window in EndNote.
2. From the *File* menu, choose *Import*.

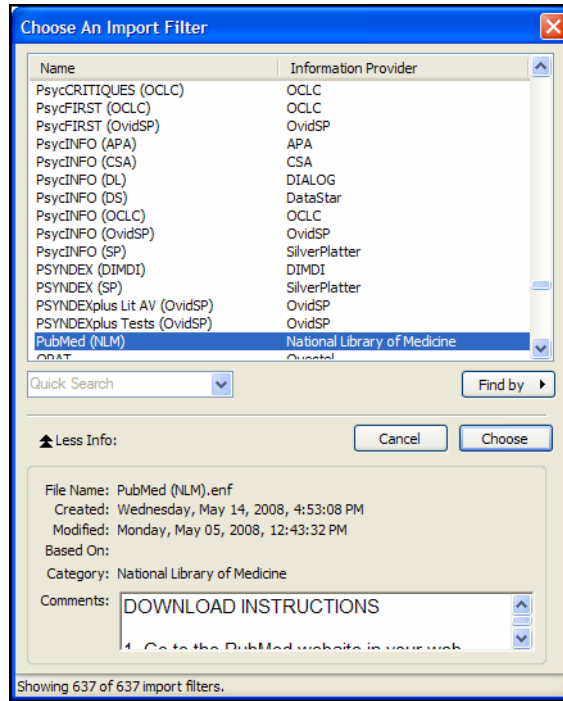


3. Click the *Choose File* button to display a file dialog.
4. Browse to the EndNote X2\Examples folder and then highlight and *Open* the Pubmed-dinosaur.txt file.

- From the *Import Option* list, select *Other Filters* to display the list of filters supplied in the EndNote Filters folder. (You may experience a delay before EndNote displays the full list of filters.)

You may want to peruse the list, to get an idea of what filters are supplied. You can create new filters or copy and edit existing filters.

- Begin typing “PubMed” to jump to that filter in the list.



If the *More Info* button is available, click it and notice that the Comments section at the bottom of the window gives tips for downloading references from the selected source.

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

Duplicates: Import All

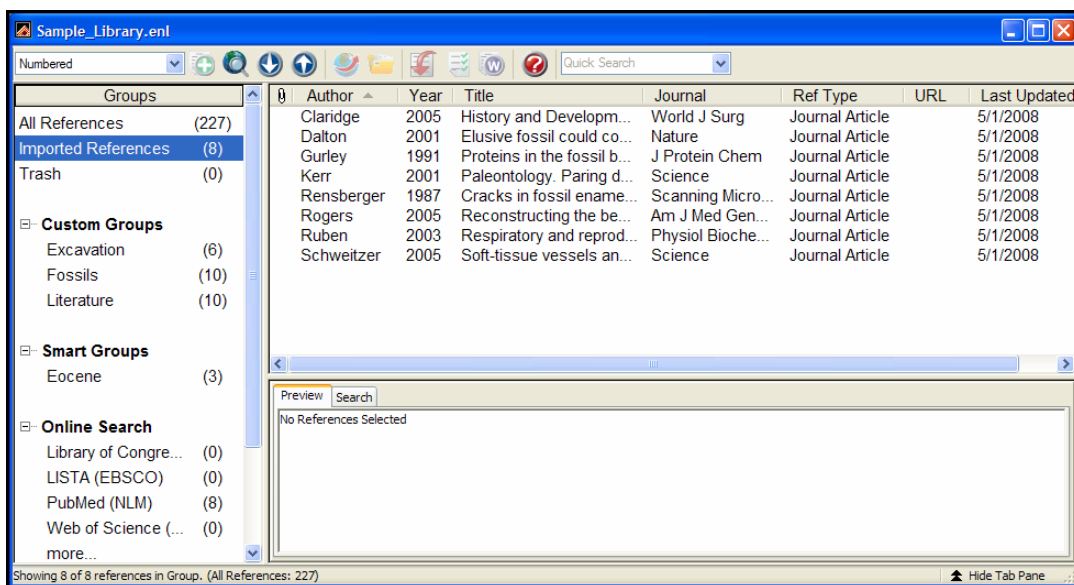
By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under EndNote Preferences. We will import all references regardless of duplicates.

Text Translation: No Translation

This option allows you to specify the text character encoding of the file you import. This is important when you import references in languages that include extended characters. You would typically contact your database provider for the appropriate setting.

9. Click *Import* to import the file.

When the process is complete, only newly imported references display in the reference list. This is a good time to peruse the new references to make sure they imported as expected. You can display the Preview tab to view the formatted references, you can open individual references to make sure all information transferred to the correct fields, and you can easily edit or delete the new references.



Notice that the focus in the Groups pane has switched from the All References group to a new Imported References group.

The Imported References group is a temporary group. It is replaced each time you import a new set of references, and it is removed when you close the library. The references themselves remain in the library unless you specifically delete them.

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

Summary of Output Formats and Corresponding Import Options

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

NOTE: Some of the services listed in this table, such as EBSCO and WilsonWeb, have an alternate, easier way of transferring references into an EndNote library. See “Direct Export from Web Pages” on page 67.

Copyright Issues and Fair Use of Downloaded Data

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

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
AARP AgeLine (http://research.aarp.org/ageline/home.html)	There is no method for downloading data from this database. Instead, save the results screen as a plain text file with your web browser's <i>Save</i> command. The resulting text file contains tags which are preceded by 18 spaces.	Ageline (AARP) filter
ACM Digital Library (Association for Computing Machinery)	Users with subscription access to this website can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format. Non-subscribers can download one record at a time: <ol style="list-style-type: none">1. Create a search.2. Click on an article.3. Scroll half-way down the page and select DISPLAY EndNote. Limitations: Since only plain text files can be imported into EndNote, you cannot import images, graphics, etc. Before importing, you may need to edit the file to insert a comma after corporate author names. Otherwise, EndNote will not be able to distinguish corporate authors from personal authors.	EndNote Import
CAS SciFinder	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
CSA (formerly Cambridge Scientific Abstracts)	From the CSA search results screen, click <i>Save/Print/Email</i> . On the "Save/Print/Email" screen, select: Record Format: Full Record Save File Format: PC Click <i>Save</i> . Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*.txt) file.	Various filters for CSA databases are provided in the EndNote Filters folder.
DIALOG	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". You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.	Various DIALOG filters are provided in the EndNote Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
EBSCOhost	<p>After adding selected references to your folder, click “View Folder” or “Folder has items” to see its contents.</p> <p>On the Folder Content page, click <i>Export</i>. On the Export Manager page, select “Generic bibliographic management software” to save a file to disk. Click <i>Save</i>.</p>	<p>Various EBSCO filters are provided in the EndNote Filters folder.</p>
EDINA	<p>Use the “Name” format, where data is tagged with words such as “Author” rather than “AU.”</p> <p>Because there are so many different formats used for source data, you may need to manually edit source data after importing.</p> <p>EndNote cannot parse author names that are not clearly delimited, such as “S Hughes B Reynolds S A Bell & C Gardner.” You will need to manually edit author names.</p>	<p>Various EDINA filters are available in the EndNote Filters folder.</p>
Emerald	<p>Display the marked list, click “display for download (ASCII),” and then save as a plain text file.</p> <p>The filter provided works for these Emerald databases:</p> <p>Emerald Management Reviews at http://www.emeraldinsight.com/revs/</p> <p>Computer Abstracts International Database at http://www.emeraldinsight.com/caid</p> <p>International Civil Engineering Abstracts at http://www.emeraldinsight.com/icea/</p> <p>Computer & Communications Security Abstracts at http://www.emeraldinsight.com/ccsa/</p> <p>Current Awareness Abstracts at http://www.emeraldinsight.com/caa/</p> <p>Limitations:</p> <p>Page numbers are separated by a hyphen with spaces on either side of it. You will need to manually remove the spaces after importing.</p>	<p>Emerald filter</p>
InfoTrac (Gale)	<p>From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to “citation;” do not choose “full article.”</p> <p>Limitations:</p> <p>Records often have extraneous information in the title field, which must be removed manually after importing.</p>	<p>InfoTrac (GALE) filter</p>

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
INIST	<ol style="list-style-type: none"> 1. Click the <i>Enregistrer</i> button. 2. Select the records you wish to download. 3. Under “Quels champs?” choose “Tous les champs.” 4. Under “Incluez” choose “Numéro de notice et nom de la base de données” and “Libellés abrégés.” 5. Click the <i>Sauvegarde de notices</i> button. 	Various INIST filters are provided in the EndNote Filters folder.
INNOPAC	Save references in the “EndNote” format.	EndNote Import
Knowledge Finder	Place document in the Save file, and select the document. Choose <i>Export Selected Documents</i> from the <i>File</i> menu.	Various Knowledge Finder filters are provided in the EndNote Filters folder.
Medscape	After selecting the desired records and adding them to your clipboard, click the <i>Save or Email Clipboard</i> link. Save or email your clipboard in PC or Mac MEDLARS format as a plain text (*.txt) file.	MEDLINE (Medscape) filter
NERAC	Save your file as plain text (*.txt).	NERAC
OCLC FirstSearch	<ol style="list-style-type: none"> 1. Mark the records you wish to download. 2. In the navigation pane, click <i>Export</i>. 3. Click the radio button next to “The marked records” or “A range of records.” 4. Click the radio button next to “EndNote.” 5. Click <i>Export</i> and save to a Text file. 	Various OCLC filters are provided in the EndNote Filters folder.
Ovid	<ol style="list-style-type: none"> 1. After selecting the references you wish to download, click <i>Results Manager</i>. 2. Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) 3. Click the <i>Email</i> or <i>Save</i> button. 4. Save the file as plain text (*.txt). 	The appropriate Ovid filter will be selected automatically when using the <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
ProQuest	<ol style="list-style-type: none"> 1. Select the desired references and then click the “My Research Summary” tab. 2. Click the “Documents and Bibliography” tab. 3. Choose “Export,” then either “Export directly to ProCite, EndNote or Reference Manager,” or “Download in a format compatible with ProCite, EndNote, Reference Manager and RefWorks.” If you choose the former, make sure your data is displayed in a tagged format before saving as a text file. 	ProQuest filter
PsycINFO http://www.apa.org/psycinfo	After marking the records you wish to download, choose <i>Full PsycINFO Record</i> then click the <i>Display Marked Records</i> button. Select the text, then copy and paste it into a text editor, saving the file as plain text (*.txt).	Use the PsycINFO (APA) filter.
PubMed	<ol style="list-style-type: none"> 1. From the drop-down menu next to the <i>Display</i> button, choose <i>MEDLINE</i>. 2. From the “Send to” menu, choose <i>File</i> and save the file as a plain text file (*.txt). <p>Note that the PMID will transfer to the Accession Number field in EndNote.</p>	PubMed (NLM) filter
SilverPlatter WebSPIRS	<ol style="list-style-type: none"> 1. Once you've obtained your search results, click <i>Save</i>. 2. Select the following “Save Records” options: Which fields?: All fields Include: Record number and database name Field labels: Short labels. 3. Click the <i>Save Records</i> button. 4. Use your Web browser to save the page as “Text Only” (do not save in HTML format). 	Various SilverPlatter filters are provided in the EndNote 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 the EndNote Filters folder.
UnCover (Ingenta)	Using your email software, save references emailed to you as a “Plain Text” or “Text Only” file.	UnCover (INGENTA)
VHL (Virtual Health Library)	<ol style="list-style-type: none"> 1. After selecting the desired references, scroll to the bottom of the page and click “Your collection” (or “Su selección”). 2. Cancel the print dialog, and then save the screen as a plain text file. 	Various VHL filters are provided in the EndNote Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
Web of Knowledge Web of Science	Display your marked references. Then, look under Output Records and select the option to output <i>Full Records</i> . Next, click <i>Export to Reference Software</i> to have the references exported directly to EndNote. You may also choose <i>Save to File</i> to save the references to a text file and import them into EndNote.	ISI-CE filter
Wilson	<ol style="list-style-type: none"> 1. Click <i>Print Email Save</i>. 2. Click <i>Export to Bibliographic Software</i>. 3. Choose <i>The EndNote Filter</i> and click <i>Export</i>. 4. Save to a text file. 	WilsonWeb filter
WorldCat (OCLC FirstSearch)	<ol style="list-style-type: none"> 1. Mark those references to be saved and click <i>Export</i>. 2. Choose Text File. 3. Click <i>Export</i>. 	WorldCat (OCLC) filter

Direct Export from Web Pages

Certain websites contain a download button that will send your search results directly to EndNote, pick the correct import filter, and start the import process automatically. Start by opening the EndNote library into which the data should be imported. This “direct export” or “direct download” method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter.

The systems listed below provide a direct export of references into EndNote. A detailed table of instructions can be found in Appendix D of the full EndNote manual. The list keeps growing, so contact your information provider to find out whether they participate!

ALEPH	Los Alamos National Laboratory
American Psychological Association, PsycInfo Online	MicroPatent
Bibliotech.dk	Nature
BioMedCentral	Nerac
BioOne	NISC
Blackwell Synergy	OCLC
BMJ	OhioLink
Buffalo University	OVID

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

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

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ See Chapter 7, "Importing Reference Data into EndNote," for details about import options and about importing references from other bibliographic software programs.
- ◆ Read Chapter 17, "Filters," to learn how to create or modify filters that map downloaded references to corresponding fields in EndNote. You can enter tags and map them to specific EndNote fields.
- ◆ See Appendix D, "Direct Export Formats and Import Formats" for detailed tables of instruction for importing reference data from various online systems.

Chapter 7: Searching an EndNote Library and Previewing a Bibliography

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

- ◆ Search an EndNote library for a subset of references.
- ◆ Preview a bibliography in EndNote.

In this part of the tour, you will search for a set of related references and preview them formatted in a bibliographic style.

Open the Sample Library

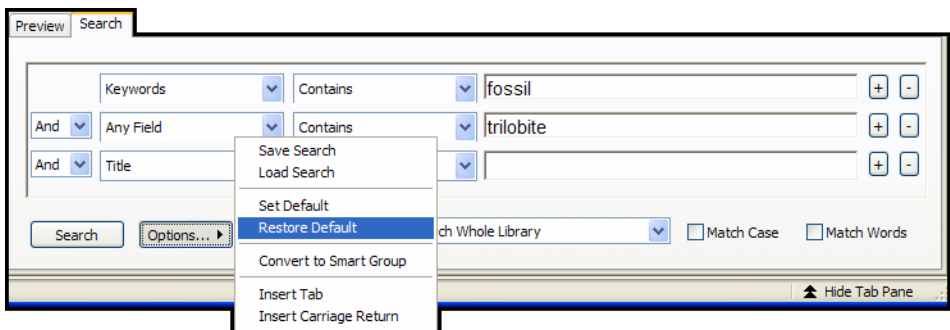
If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown under “Start EndNote” on page 25.

Search for a Set of References

Let us assume that you want to generate a list of all references found in the sample library about extinction that were published from 1990 to 1999.

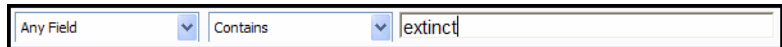
To search for references:

1. Make sure that the All References group is displayed.
2. In the Tab pane, display the Search tab.
3. The Search tab remembers the last search you entered. To clear it, use the *Options* button to select *Restore Default*.



4. On the first search line:
 - a. In the first drop-down list, the **field list**, select *Any Field*. This means that EndNote will search all fields.
 - b. In the next drop-down list, the **comparison list**, the *Contains* comparison operator means that EndNote will search for the string of text anywhere in the field.

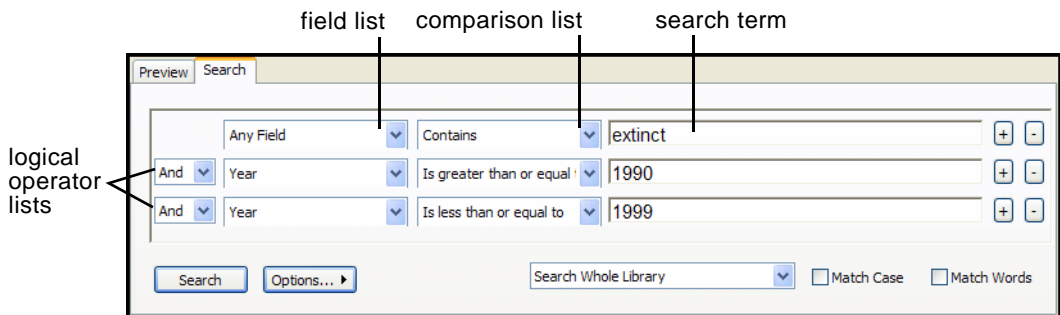
c. Type “extinct” as the first **search term**.



Next, set up the search to find references dated from 1990 to 1999.

- From the **field list** in the second search line, choose *Year*; from the **comparison list**, choose *Is greater than or equal to*; and type 1990 as the search term for the second search line.
- If you do not have a third search line available, click the plus sign button (+) next to the last search line to insert another line. You can also click and drag the top of the pane to view more of the Search tab.
- From the **field list** in the third search line, choose *Year*; from the **comparison list**, choose *Is less than or equal to*; and type 1999 as the search term.
- Notice the “And, Or, Not” logical operator list at the beginning of each search line. Select the “And” logical operator between the three search lines.

Your search tab should look like this:



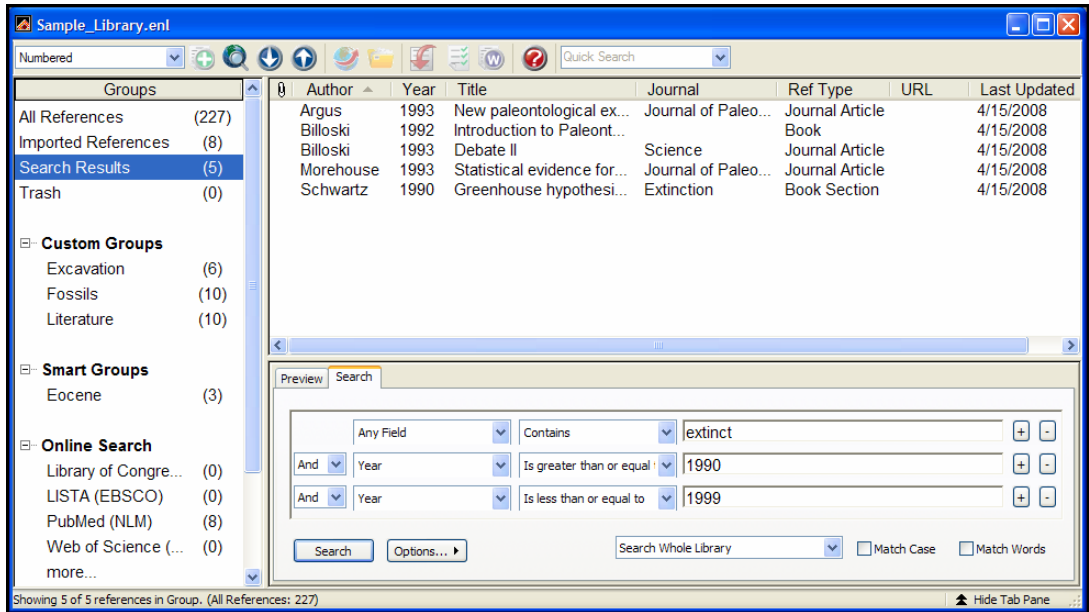
This search will find all references containing the text “extinct” that also were published between 1990 and 1999.

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

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

Match Words: This option would limit matches to full words, with no truncation. The word “extinction” would not match our search.

- Click the *Search* button to begin the search. In a moment, EndNote displays the search results.



The status area at the bottom of the Library window should read, “Showing 5 of 5 references in Group.”

Notice in the Groups pane that these search results are automatically retained in a Search Results group. This makes it easy to display other sets of references, but still go back and display your most recent search results. This temporary Search Results group will be replaced the next time you run a search on the library. When you close the library, this group is removed.

Now that you have located all of the desired references, you are ready to preview them.

Preview the Found References

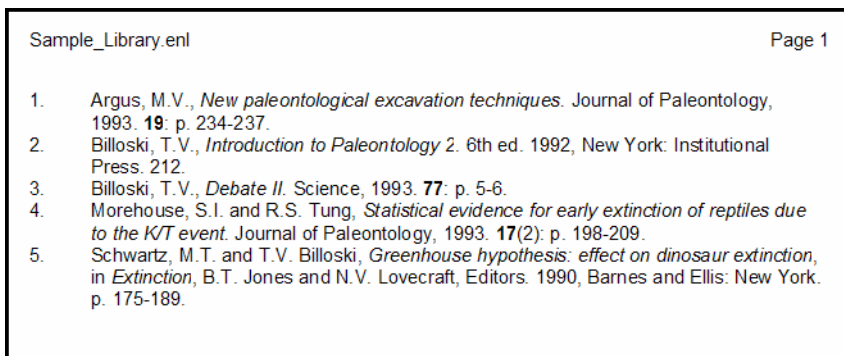
In order to format your references, you need to select an output style. Styles determine how your references look when you print, export, preview, or create bibliographies.

To preview the bibliography:

- On the Main toolbar, select an output style from the output style list. For this example, you can leave the *Numbered* style selected.
- If you want to further limit the references to preview, select (highlight) those references you want to include. To select all

references in the list, first click in the list, then go to the *Edit* menu and choose *Select All*.

3. From the *File* menu, choose *Print Preview* to display the bibliography on your computer screen.



4. You can use the buttons along the top of the window to walk through the pages of the bibliography.
5. When you are done previewing, click the *Close* button.

You may want to return to the full list of references in the sample library. To show all references again in the library window, click on the *All References* group.

This concludes this part of the guided tour. Chapter 8 demonstrates how to write a paper and cite references and figures in Microsoft Word.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ More information about searching the EndNote library can be found in Chapter 8, "Searching and Sorting in EndNote."
- ◆ Read Chapter 13, "Creating an Independent Bibliography," about creating reference lists directly from your EndNote library, including printing your bibliography and saving your bibliography to an RTF file.
- ◆ See Chapter 16, "Bibliographic Styles," for information about modifying and selecting styles.

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

NOTE: Continue with this part of the tour only if you use Microsoft Word 2003 or 2007. If you use a different word processor, or if you have an older version of Word, turn to Chapter 12 in the full EndNote.PDF manual to learn how to cite EndNote references and create bibliographies in your papers.

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

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

- ◆ Insert EndNote bibliographic citations into your paper and create a bibliography.
- ◆ Edit citations to suppress author names and add cited pages.
- ◆ Insert EndNote figure citations into your paper. (This section uses the figure reference that was inserted while following Chapter 4.)

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown under "Start EndNote" on page 25.

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

Open a Microsoft Word Document

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

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

templates, see “Using Predefined Manuscript Templates” in Chapter 11 of the full EndNote.PDF manual.

Cite EndNote References

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

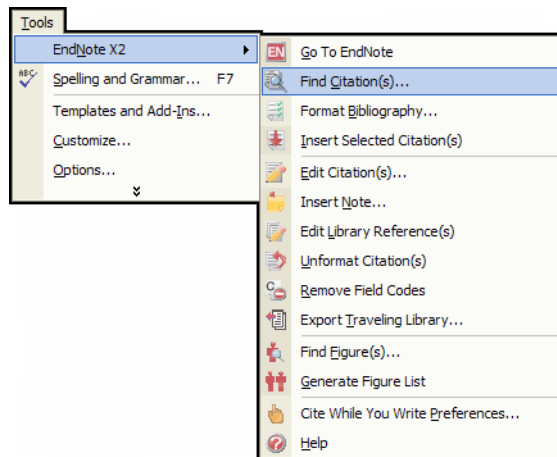
To start writing your paper and inserting citations:

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

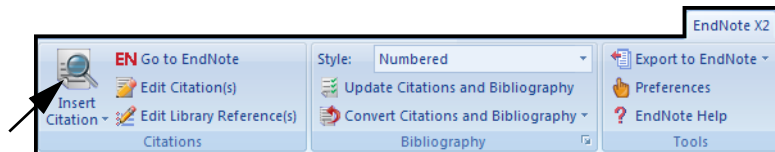
The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species.

Now you are ready to insert a citation.

2. **Word 2003:** From the *Tools* menu, go to the *EndNote X2* submenu and then *Find Citation(s)*.

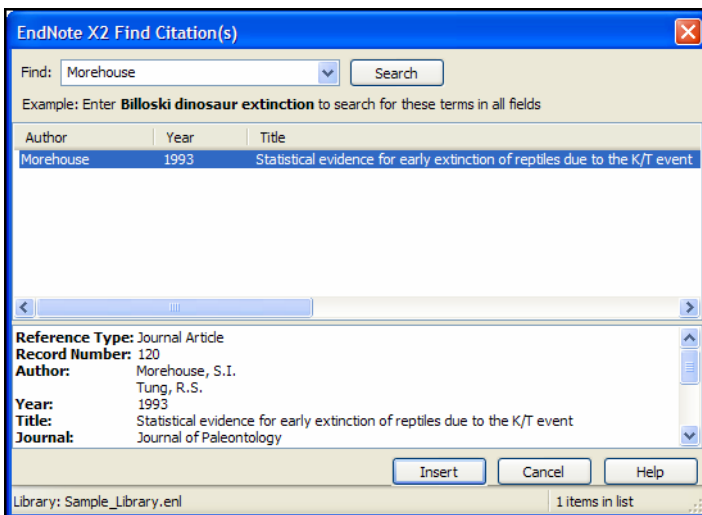


Word 2007: On the EndNote tab, in the Citations group, click the *Insert Citation* icon.



3. The EndNote Find Citations dialog appears. Type the author name “Morehouse” in the “Find” box and click *Search*.

EndNote lists the matching references. In this case, a single reference matches the search.



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

EndNote not only inserts a citation, but Instant Formatting formats the citation in the currently selected *Numbered* style and adds it to a formatted bibliography at the end of the paper.

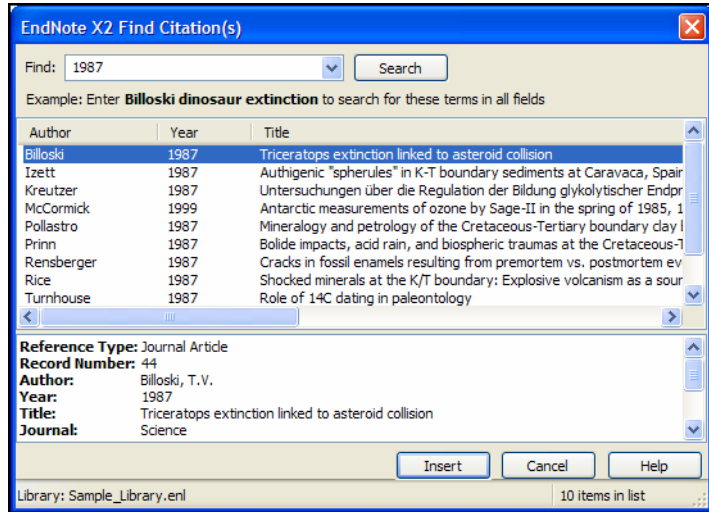
5. Add more text to the paper:

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

6. **Word 2003:** From the *Tools* menu, go to the *EndNote X2* submenu and then *Find Citation(s)*.

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

7. Type the date “1987” into the find box and click *Search*. EndNote searches all fields and lists the matching references.



8. Scroll down the list of matching references, select the reference by the author Turnhouse, and click *Insert*. EndNote inserts the citation, and Cite While You Write technology formats it and adds it to the bibliography at the end of the paper.

Your document text should now look like this:

The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. [1] It is now the undisputed progeny of the species at hand. [2]

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

NOTE: You can shade each of the Cite While You Write citation and bibliography fields so they are easy to locate. This is set with Microsoft Word’s Field Shading option. The shading is for on-screen help only, and does not print.

9. Assume that you have finished inserting citations in your paper.

Word 2003: From Word's *File* menu, choose *Save* to save your document.

Word 2007: Click the Office icon and select *Save*.

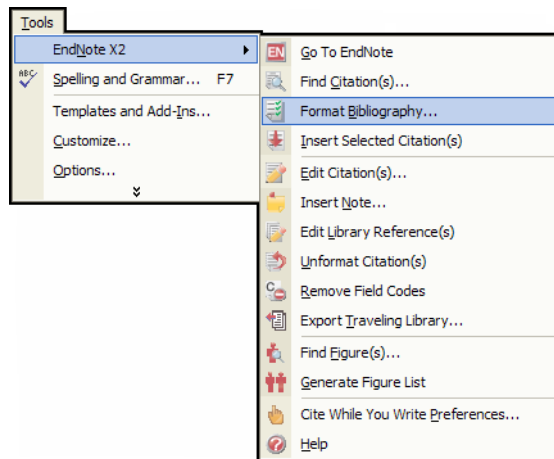
NOTE: You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the EndNote citation in the footnote. Word controls the placement and numbering of the footnote, and EndNote formats the citation based on the current style. You must select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

Select a Bibliographic Style

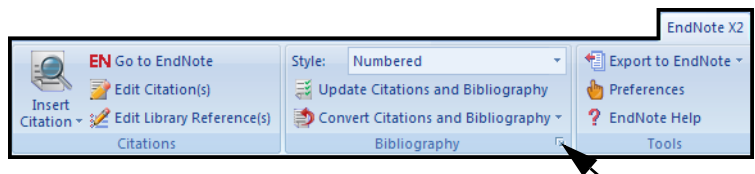
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

To select the bibliographic style used for formatting:

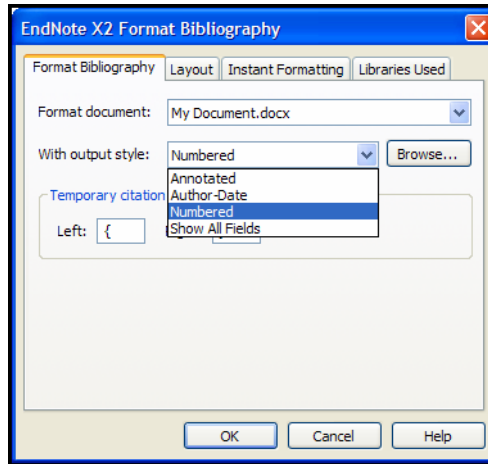
1. **Word 2003:** From Word's *Tools* menu, go to the *EndNote X2* submenu and choose *Format Bibliography*.



Word 2007: on the EndNote tab, in the Bibliography group, click the bottom corner arrow.



A Format Bibliography dialog appears, where you can select a bibliographic style.



Styles contain instructions for how EndNote will format citations and the bibliography. For the previous example, we illustrated the Numbered style, which sequentially numbers citations and then inserts a numbered reference list at the end of the paper.

As you can see, there are many other formatting options available here; you can make changes that override the settings in the current output style.

2. For this example, click the *Browse* button next to “With output style” to display the list of output styles supplied with EndNote.
3. Select the *APA 5th* style and click *OK*.
(To locate the APA 5th style, click in the list and type “APA.” You can sort the list of styles by Name or by Category by clicking on a column header.)
4. Click *OK* to leave the Format Bibliography dialog.

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

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

NOTE: More than 3,000 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *Edit* menu in EndNote and select *Open Style Manager*.

Edit a Citation

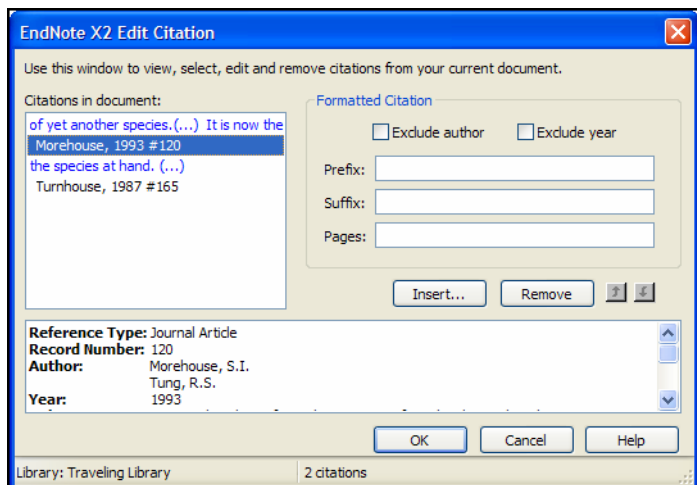
If you directly edit a citation or the bibliography, the changes will be lost when you *Format Bibliography* again because EndNote reformats according to the rules of the selected output style. To make and retain changes to all citations and/or the bibliography, modify the output style. However, if you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

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

To edit an individual citation:

1. Click anywhere on the Morehouse citation.
2. **Word 2003:** From the *Tools* menu, go to the *EndNote X2* submenu and then *Edit Citations*.

Word 2007: On the EndNote tab, in the Citations group, select *Edit Citations*.



3. In the Formatted Citation section, select the *Exclude Author* box.

4. Next to *Pages*, type “34-35”.

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

5. Click *OK* to update the citation in your paper.

The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. (1993, pp. 34-35) It is now the undisputed progeny of the species at hand. (Turnhouse, 1987)

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

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

Insert Figure Citations

Next you are going to insert two figure citations—one inserted and numbered as a figure, and one inserted and numbered as a table. This section uses the reference inserted in Chapter 4: “Entering a Reference,” as well as another reference in the sample library.

All figure citations are inserted in the same way; the EndNote reference type determines whether it is inserted and numbered as a figure or a table. Images found in the *Chart or Table* reference type are inserted as tables, while images found in any other reference type are inserted as figures.

To find and insert figure citations:

1. First, add more text to your paper:

As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers.

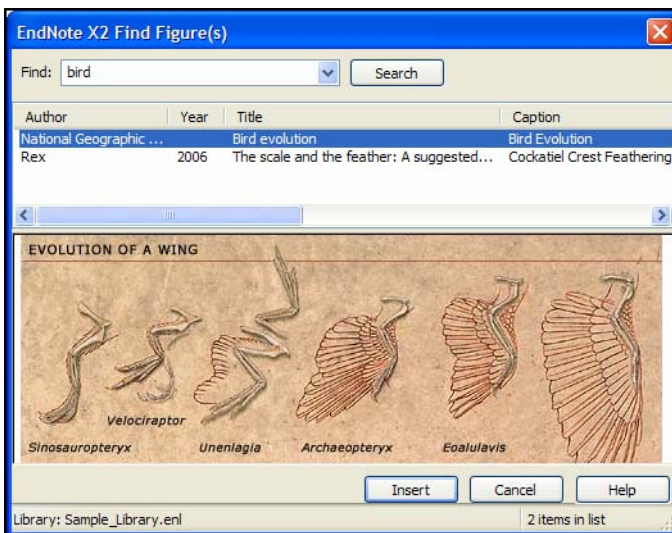
Now you are ready to insert a figure citation.

2. **Word 2003:** From the *Tools* menu, go to the *EndNote X2* submenu and then *Find Figure(s)*.

Word 2007: On the EndNote tab, in the Citations group, click on the *Insert Citation* text and select *Find Figure*.

The EndNote Find Figures dialog appears.

3. Type the search term “bird” in the “Find” box and click *Search*.



EndNote lists only references that match the search text *and* contain an image. As you highlight a reference, the graphic stored within the reference is displayed below the reference list. (Object files display a file icon.)

You can use your mouse to move the column dividers to set column widths and to drag the lower right corner of the window to adjust the size of the window.

4. Select the reference with the Caption “Cockatiel Crest Feathering,” a reference inserted earlier in this guided tour, and click *Insert* to insert the figure citation.

As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers. (Figure 1)

5. Next enter the text:

While exploring the evolution of dinosaurs and birds, it is interesting to also explore a parallel time line of extinctions.

Now you are ready to insert a reference to a Microsoft Excel file that was saved in the Figure field of an EndNote reference that uses the *Chart or Table* reference type.

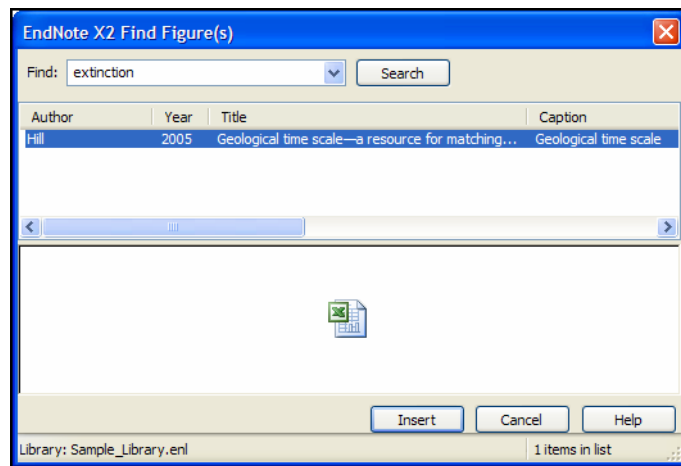
6. **Word 2003:** From the *Tools* menu, go to the *EndNote X2* submenu and then *Find Figure(s)*.

Word 2007: On the EndNote tab, in the Citations group, click on the *Insert Citation* text and select *Find Figure*.

The EndNote Find Figures dialog appears.

7. Type the text “extinction” in the “Find” box and click *Search*.

EndNote displays a single matching reference. The file attachment icon shows that the figure is in a Microsoft Excel document.



8. Click *Insert* to insert the citation. (It may take some time for Word to import the file.)

The image was found in the *Chart or Table* reference type, so it was added to Word and numbered as a table.

As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers. (Figure 1)

While exploring the evolution of dinosaurs and birds, it is interesting to also explore a parallel time line of extinctions. (Table 1)

9. Scroll to the end of the document, and you will find that EndNote used Word bookmarks to place the images under labeled List of Tables and List of Figures sections as defined by the APA style.

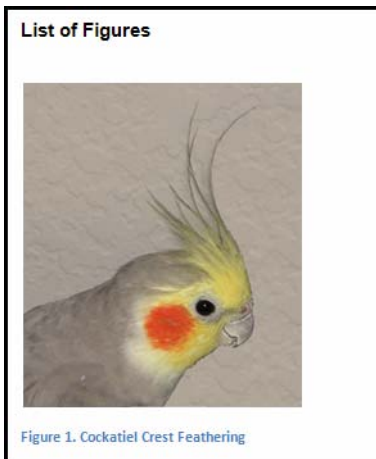
10. You may want to resize your figures to fit on the page appropriately. Click on an image, and then hold down the Shift key while you drag a corner of the figure to resize it proportionally.

List of Tables

Table 1.
Geological time scale

Eon	Era	Period	begin - end (Mya)
Phanerozoic Eon: PH	Cenozoic Era: CZ	Neogene N	23.0 - 0.00
		Paleogene E	65.5 - 23.0
	Mesozoic Era: MZ	Cretaceous K	146 - 65.5
		Jurassic J	200 - 146
		Triassic T	251 - 200
		Permian P	299 - 251
		Carboniferous C	359 - 299
		Devonian D	416 - 359
		Silurian S	444 - 416
		Ordovician O	488 - 444
Paleozoic Era: PZ	Cambrian C	542 - 488	
	Neoproterozoic NP	1000 - 542	
Proterozoic PR	Mesoproterozoic MP	1600 - 1000	
	Paleoproterozoic PP	2500 - 1600	
	Neoarchean NA	2800 - 2500	
Archean AR	Mesoarchean MA	3200 - 2800	
	Paleoarchean PA	3600 - 3200	
	Eoarchean EA	3800 - 3600	
	Early Imbrian EI	3850 - 3800	
Hadean HA	Nectarian NC	3950 - 3850	
	Basin Groups BG	4150 - 3950	
	Cryptic CY	- 4150	

11. You can also reduce the size of the Cockatiel Crest Feathering graphic.



As you are working, remember to often *Save* your document. You can continue adding text, bibliographic citations, and figure

citations to the paper, and EndNote will continue adding to the lists of references, figures, and tables!

This completes the guided tour. You can close Microsoft Word:

Word 2003: Exit Word by choosing *Exit* from the *File* menu.

Word 2007: Click the Office icon and then *Exit Word*.

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

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ The process of citing references and figures and creating bibliographies with Cite While You Write is covered in Chapter 11.
- ◆ More than 3,000 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *Edit* menu and select the *Style Manager*. See "Accessing Styles in Other Places" in Chapter 16 for information about how to access other styles.
- ◆ Chapter 16, "Bibliographic Styles," includes instructions for editing output styles.

Index

A

- AARP AgeLine 63
- Access files, inserting 46
- accessibility 9
- ACM Digital Library 63
- ActiveSync 13
- ADA 9
- APA 67
- Arrow keys 28
- ascending order 29
- attaching
 - figures 45
 - files 45
- author names
 - corporate 44
 - entering 43
- automatically update EndNote files 23

B

- bibliographies
 - previewing 71
 - reformatting (CWYW) 78
- Bibliotech.dk 67
- billing inquiries 8
- BioMed Central 67
- BioMedNet 67
- Blackwell Synergy 67
- BMJ 67
- BMP files, inserting 45
- boxes 30
- browsing references 28
- Buffalo University 67

C

- CABI-Direct 68
- Cambridge Scientific Abstracts 63
- Canadian Journal of Communication 68
- canceling reference retrieval 53
- CAS SciFinder 63
- CCLR 68
- Chemistry term list 16
- citations
 - editing 79
 - inserting figures 80

- Cite While You Write
 - editing citations 79
 - inserting figure citations 80
 - selecting a style 77
- citing references in Word 74
- Close Reference command 32, 47
- closing
 - EndNote 34
 - references 32, 47
- column headers, paper clip 48
- compatibility, libraries 20
- Connect command 50
- connection files
 - getting the latest 23
- corporate author names 44
- creating bibliographies from a paper (CWYW) 73
- creating groups 33
- CSA 63
- custom groups 33
- custom installation 18

D

- deleting groups 34
- deleting references 54
- Delphion 68
- descending order 29
- DIALOG 63
- dial-up Internet connection 49
- DIMDI 63
- direct export from Web pages 67
- display font 38
- downloading updated EndNote files 23

E

- EBSCO 68
- EBSCOhost 64
- EDINA 64
- Edit command, references 31
- editing citations 79
- EI Engineering 68
- Elsevier 68
- EMBASE 68
- Emerald 64
- Empty Trash 55

- End key 28
- EndNote, closing the program 34
- EndNote Discussion Forum 9
- EndNote files, updating 23
- EndNote preferences 37
- entering references, example 43
- ERIC 68
- ESDS 68
- Excel files, inserting 46
- Exiting EndNote 34

F

- favorite library 37
- figure citations 80
- figures
 - attaching 45
 - locating 48
- figures and tables in Word 80
- files, attaching 45
- files installed 15
- filters, getting the latest 23
- FirstSearch 65
- folders
 - personal EndNote 17
 - preferences 17
 - program 15
 - shared 16
- folders installed 15
- formatting papers (CWYW) 77
- forum 9

G

- Gale 64
- GIF files, inserting 45
- Google Scholar 68
- groups 33
 - deleting 34
 - Online Search 50
 - Trash 55
- Groups pane 27
- guided tour
 - entering references 41
 - importing references 57
 - searching and printing from EndNote 69
 - setting preferences 37
 - using Cite While You Write 73

H

- HAPI 68
- hardware requirements 11
- Help file 3
- help! 8
- highlighting (See selecting)
- Highwire Press 68
- Home key 28
- HoteSync 12
- Humanities term list 16

I

- IEEE 68
- import filter, choosing 59
- import filters 57
- import options
 - duplicates 60
 - text translation 61
- importing
 - importing references 57
 - options 62
- importing references 59
- information provider 49
- InfoTrac 64
- Ingenta 66
- INIST 65
- INNOPAC 65
- installation
 - custom 18
 - files installed 15
 - Windows 11
- installing EndNote 13
- international distributors 8
- Internet address 8

J

- JAMA 68
- Japanese characters 30
- JPEG files, inserting 45
- JSTOR 68

K

- Karger Publishing 68
- key commands 28
- Knowledge Finder 65

L

libraries

- compatibility 20
- opening 25
- opening old versions 20

Library window 27, 71

- navigating 28

library, setting a favorite 37

locating figures 48

Los Alamos National Laboratory 67

M

manuscript templates 73

Medical term list 16

Medscape 65

menu, Reference Types 42

MicroPatent 67

Microsoft files, attaching to a reference 46

Microsoft Word

- Cite While You Write Installation 12
- citing references 74
- compatibility 11
- CWYW/Add-in installation for Windows 22
- figures and tables 80
- manuscript templates 73

modems 49

Move References to Trash 55

MP3 files, inserting 45

multimedia files, inserting 46

N

Nature 67

NERAC 65, 67

new references 41

new features 9

NISC 67

O

OCLC 67

OCLC FirstSearch 65

ODT files 12

OhioLink 67

online database searching 50

online help 3

Online Search 50

Online Search group 50

opening

- old libraries 20

- references 31

OpenOffice 11

OVID 67

Ovid Technologies 65

Oxford Press Journals 68

P

Pacific Northwest Labs 68

Page Down key 28

Page Up key 28

Palm OS 12

paper clip column header 48

Patent Cafe 68

PDF files 45

personal folders 17

PILOTS 68

PNAS Online 68

PNG files, inserting 45

Pocket PC 12

PowerPoint files, inserting 46

preferences 37

- display font 38

previewing bibliographies 71

previewing references 28

product key 14

program folder 15

ProQuest 66, 68

PsychInfo 67

PsycInfo 66

PubMed 66

PubMed Practice Database 49

Q

quitting EndNote 34

R

Reference List pane 27

Reference Types menu 42

Reference window 32, 41

- moving between fields 32

references

- citing in Word 74
- closing 32, 47
- deleting 54
- new 42

- opening 31
- previewing 28
- searching 69
- selecting 31
- sorting 29
- remote database 49
- remote database searching 50
- remote databases, searching 49
- requirements, Windows 11
- ResearchSoft contact info 7
- resize figure 83
- RLG 68
- RTF files, compatibility 11
- running Setup 13

S

- sales information 7
- Science Magazine 28
- SciFinder 63
- Scopus 68
- scroll bar 28
- Search tab 51
- searches
 - guided tour of EndNote searching 69
 - remote databases 49
- searching remote databases 49
- searching EndNote 69
- section 508 9
- selecting references 31
- serial number 14
- shared folder 16
- Show All Fields style 54
- SilverPlatter 66
- Smartphone 13
- sorting references 29
- St. John of God, Ireland 68
- Stanford University 68
- StarOffice 11
- starting EndNote 25
- STN 66
- styles
 - getting the latest 23
 - selecting 77
- support, technical 8
- System requirements
 - Windows 11

T

- Tab pane 27
- tables 80
- technical drawing files, inserting 46
- technical support 8
- Telemed 68
- Templates folder 16
- term lists 16
- Terms folder 16
- Thieme 68
- Thomson ResearchSoft contact info 7
- TIFF files, inserting 45
- training 8
- Trash 55

U

- UnCover 66
- Unicode 30
- uninstalling EndNote 24
- updating EndNote files, filters, styles, connection files 23

V

- VHL 66
- Virtual Health Library 66
- Visio files, inserting 46
- VPAT 9

W

- WAV files, inserting 45
- Web of Knowledge 67
- Web of Science 67, 68
- WebFeat 68
- website, EndNote 7, 8
- WebSPIRS 66
- Wilson 67
- WilsonWeb 68
- window
 - close 33
 - open 32
 - reference 32
- Windows Mobile 12
- Windows Mobile operating system 13
- WordPad 11
- WorldCat 67
- www.endnote.com 7, 8