

# EndNote® v8

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Organize references, images and PDFs in a snap

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**Guided Tour**

**THOMSON**  
—★—™

# EndNote®

## Demo Version 8 for Windows

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## About this Guide

This guide, supplied with each Demo version of EndNote, 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 online help. From EndNote's *Help* menu, select *Contents* to view the various 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, CD-ROMs, 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 RTF Document Scan with other word processors.

See “What’s New in EndNote 8” on page 9 for a list of the most recent features added to EndNote.

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### About This Demo Version of EndNote

This is a demonstration version of EndNote 8. You will have 30 days after you first use the program to evaluate EndNote and all of its features. After those 30 days are up, the Demo version will revert to a feature-restricted *EndNote Viewer*.

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

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## The EndNote Viewer

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 ISI ResearchSoft.

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## About This Guided Tour

This guide provides a basic overview of installing and using EndNote. It 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.

The following representations for key combinations are used:

<b><u>Instruction</u></b>	<b><u>Explanation</u></b>
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.

The complete EndNote manual is also available as a PDF file in your EndNote folder.

## Customer Services

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## Online Help

For additional information about using EndNote, consult the online Help file. From EndNote's *Help* menu, select *Contents* to view the various topics.

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## Customer Service

Contact Sales for general product information, pricing, quantity discounts, and referrals to dealers. Contact Customer Service for orders and shipping/billing status.

### Sales Information

**Mail:** Thomson ISI ResearchSoft  
2141 Palomar Airport Road, Suite 350  
Carlsbad, CA 92009 U.S.A.  
**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 Service (Orders, Billing, and Shipping)

**Mail:** Thomson ISI ResearchSoft  
3501 Market Street  
Philadelphia, PA 19104 U.S.A.  
**Phone:** (800) 336-4474 (country code is 01)  
**Fax:** (215) 386-2911 (country code is 01)  
**Web/Email:** <http://www.endnote.com/encontact.asp>

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## Technical Support

Contact Technical Support if you encounter problems while using EndNote. First, 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.

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

**Mail:** Thomson ISI ResearchSoft  
800 Jones Street  
Berkeley, CA 94710 U.S.A.  
**Phone:** (408) 987-5609 (country code is 01)  
**Fax:** (510) 559-8683 (country code is 01)  
**Web/Email:** <http://www.endnote.com/encontact.asp>

Technical support tips are also available from the EndNote Web site and the endnote-interest e-mail forum (see below).

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## **International Customer and Technical Support**

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

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

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## **The EndNote Web Site**

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

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## **The *EndNote- Interest* E-mail Forum**

If you wish to join an ongoing email forum of EndNote users like yourself, go to the EndNote Web site at [www.endnote.com](http://www.endnote.com), click on *Support and Services* and then scroll down for instructions on how to subscribe to the *EndNote Interest List*.

There are two types of subscriptions: The first delivers the endnote-interest messages individually, so that every time a user sends a message to endnote-interest, it is redirected to each member of the list. The second option, which we recommend, is to subscribe to the endnote-interest-digest—a daily compendium of endnote-interest messages.

In general, ISI ResearchSoft does not answer questions posted to endnote-interest, but lets users answer each other's questions. Contact ISI ResearchSoft directly for a guaranteed response from technical support staff.

## What's New in EndNote 8

EndNote 8 includes these new features:

- ◆ Take advantage of Unicode support. Use and properly display extended characters throughout EndNote, including reference entry and display, searching, Cite While You Write, output styles, and more.
- ◆ Keep building your library, with no size limit!
- ◆ Enter long abstracts and notes—up to 50KB, or approximately 10 pages of text.
- ◆ Enter references into these new reference types: Classical Work, Conference Paper, Electronic Journal, Electronic Book, Government Report/Document, Legal Rule/Regulation, Online Database, Online Multimedia, and Unpublished Work.
- ◆ Track and print critical information with these additional fields: Electronic Resource Number, Link to PDF, Access Date, Last Modified Date, Translated Author, Translated Title, Name of Database, Database Provider, Research Notes, and Language.
- ◆ Use EndNote on any handheld device (PDA) that uses Palm OS 4.1-5.x.



# Chapter 1: Windows EndNote Installation

## Before You Install EndNote

The EndNote Demo is available on CD or by downloading. If you have the CD you need a CD-ROM drive to install the program.

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### Program Requirements

#### System Requirements:

EndNote runs under the following operating systems:

- ◆ Windows 2000
- ◆ Windows XP

#### Hardware Requirements:

- ◆ A personal computer with a Pentium (or compatible) 450-MHz or faster processor
- ◆ A minimum of 128 MB of available RAM
- ◆ A hard drive with at least 180 MB of free space
- ◆ In order to use EndNote's *Connect* command to search remote databases, an Internet connection is required. To use the *Open Link* command to access a Web site, you also need a Web browser installed.

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### Word Processor Compatibility

As of June 2004, EndNote for Windows is compatible with:

- ◆ Microsoft Word for Windows 2000, XP (2002), 2003
- ◆ WordPerfect for Windows 10 (2002), 11 (Check [www.endnote.com](http://www.endnote.com) for WordPerfect 12 compatibility information.)
- ◆ RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice, StarOffice, and FrameMaker.

#### Word and WordPerfect

Microsoft Word uses Cite While You Write, and WordPerfect uses the EndNote Add-in. These functions put an EndNote submenu of commands on Word or WordPerfect's *Tools* menu. They also allow EndNote to format citations and create a bibliography for the document that is open in Word or WordPerfect. You can format, unformat, and reformat a single document—without ever exiting your word processor.

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

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

- ◆ Microsoft Word 2000, XP, or 2003 – or WordPerfect 10 or 11 – must be correctly installed on your computer *prior to* installing EndNote.
- ◆ For Word, the EndNote installer must be able to locate the Word Startup folder. You need to have full read and write access to Word's Startup folder in order to install EndNote commands.

### **RTF Documents**

For word processors other than Word or WordPerfect, write your paper, insert in-text citations, then save to an RTF file and use EndNote's RTF Document Scan feature to format the citations and bibliography.

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## **EndNote for Palm OS Requirements**

If your computer has software installed to allow synchronizing with a Palm OS<sup>®</sup> handheld device, the EndNote installation program will ask whether you want to install EndNote for Palm OS.

Requirements for running EndNote for the Palm Operating System include:

- ◆ Handheld device
- ◆ Palm Operating System 4.1-5.x
- ◆ Serial or USB communication for HotSync operations
- ◆ 16 MB RAM

For information about how to use EndNote for Palm OS on your 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.

# Installing EndNote

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## Installing the Demo Version

### To install EndNote:

1. Log in to the local machine with administrative rights. Make sure no applications are running, including virus protection software.
2. **If you downloaded the EndNote demo installer:** Double click the installer file to start the EndNote Setup program.

**If you received the EndNote demo version on a CD:** Insert the CD into your CD-ROM drive. The installer program should start automatically. If it does not, double-click on Setup.exe.

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 purchasing EndNote!

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

**Palm Read Me Information:** Read late-breaking news about EndNote for the Palm operating system.

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

**Select Installation Type:** The *Typical* installation is selected by default, and is recommended. If you wish, you can select *Complete* to make sure you install all options, or *Custom* to hand pick the file groups to install.

**Select Destination:** By default, EndNote is installed in the C:\Program Files\EndNote 8 folder. You can use the *Browse* button to change the folder selection if you wish.

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**NOTE:** If the installer detects a full version (not a demo version) of EndNote on your computer, it will give you the option to continue with the installation or quit. If you continue, be advised that you will need to reinstall your non-demo version of EndNote to use it after you run the EndNote 8 Demo version.

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**Select Components:** (Custom installations only) If you selected a Custom installation, see “Selecting Components” on page 15.

**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 8 is Successfully Installed” dialog, 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 16.

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## Custom Installation Options

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 just certain EndNote components.

### To do a new custom installation:

1. Follow the instructions for “Installing the Demo Version” on page 13.
2. On the dialog titled “Select Installation Type,” select *Custom*.
3. When you get to the dialog titled “Select Components,” read the section below, “Selecting Components” 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 8 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 Components” dialog, read the section below, “Selecting Components” to determine what you would like to select/deselect for installation.

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## Selecting Components

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
- ◆ EndNote Help
- ◆ PDF Manual
- ◆ Additional Converters
- ◆ Sample Files

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

- ◆ Add-in for Microsoft Word
- ◆ Add-in for Corel WordPerfect
- ◆ Templates 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®:** These are files required for using EndNote for the Palm 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.

# Checking Your Installation

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

A dialog will ask you to open a reference library file. Choose *Cancel*. To check the version number of EndNote, choose *About EndNote 8* from the *Help* menu. Click on the splash screen to clear it.

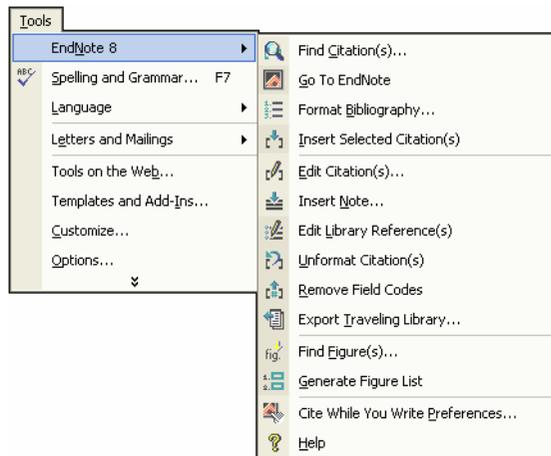
If you have trouble accessing the program, repeat the installation steps to verify that the program was correctly installed.

---

## Checking Microsoft Word Support

To see whether Cite While You Write is correctly installed, start Word and click on Word's *Tools* menu. In Word 2000, XP, or 2003 you should see EndNote commands on an *EndNote 8* submenu.

### Word 2000, XP, or 2003 *Tools* menu and *EndNote 8* submenu

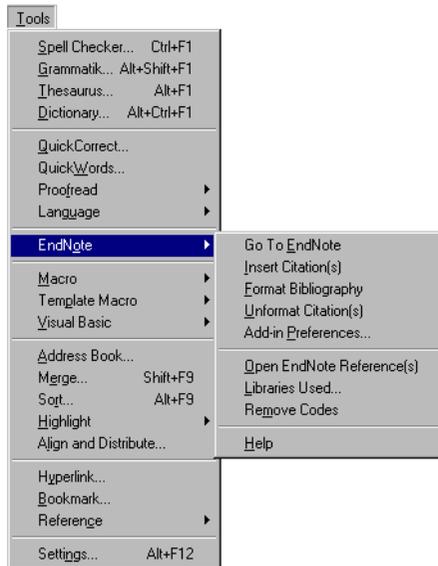


---

## Checking WordPerfect Support

To see if the EndNote Add-in is correctly installed, start WordPerfect and click on the *Tools* menu. You should see an *EndNote* submenu with various EndNote commands.

### WordPerfect 10 or 11 *Tools* menu and *EndNote* submenu



Commands on your *Tools* menu vary between different versions of WordPerfect. Commands can also vary if the menu has been customized.

# Uninstalling EndNote

Uninstall EndNote by using the “Add/Remove Programs” function in the Windows Control Panel.

## **To uninstall EndNote:**

1. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*,
2. Select *Add or Remove Programs*.
2. In the list of currently installed programs, select *EndNote 8*.
3. Click the *Remove* button.

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

1. From your EndNote Demo CD, run *Setup.exe*.
2. On the “Application Maintenance” dialog, select *Remove* and click *Next*.
3. Click *Next* again to begin removing EndNote.

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

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

# Chapter 2: Introduction to an EndNote Library

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

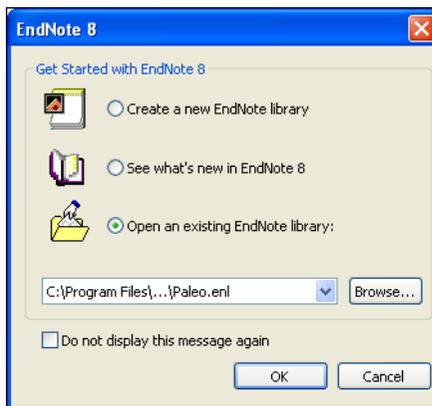
- ◆ Start EndNote and open a library.
- ◆ Sort the references in the library window.
- ◆ Select a default library to open automatically.
- ◆ Select and open references in the EndNote library.
- ◆ Close references.
- ◆ Quit from the EndNote program.

---

## 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*. A dialog appears prompting you to open a reference library.



---

**NOTE:** If you have set a default 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.

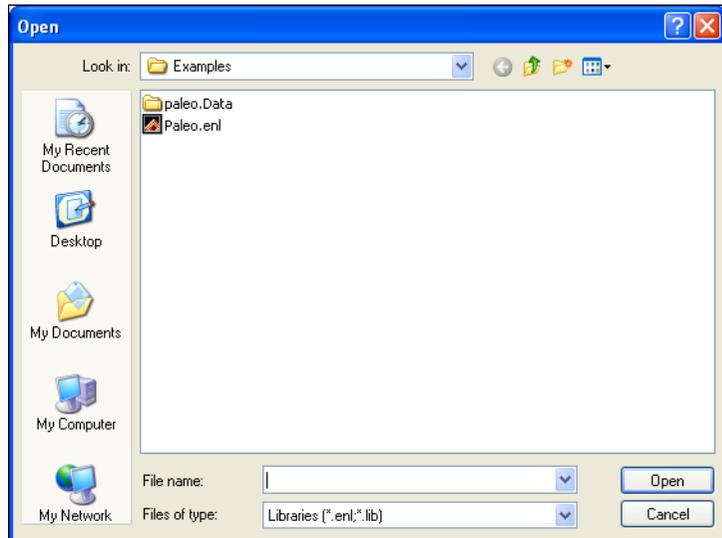
---

2. Select *Open an existing EndNote library*.
3. To open the library, do one of these:
  - ◆ Select *Paleo.enl* in the drop-down list, and click *OK*.

- ◆ If Paleo.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 8 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 8 folder.

Select the Examples folder and click *Open*. You should now see the file “Paleo.enl,” the example EndNote library. Select Paleo.enl and click *Open*



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

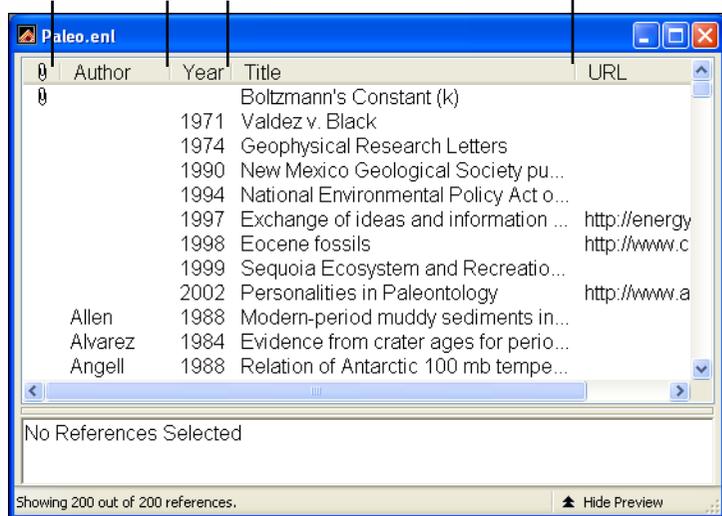
---

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## The Library Window

When you open the Paleo 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 displays a multi-column list. By default, the first column shows a paper clip for references that include attached graphics, figures, or files. Then, the first author's last name, the year, the title, and the URL are displayed for each reference. The information displayed here in the Library window, as well as the font used for the display, can be changed using the EndNote Preferences.

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

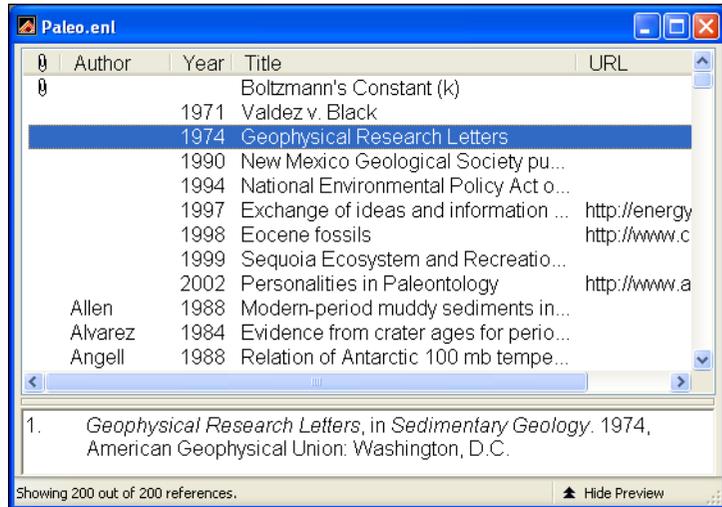
You can easily see more detail about a reference by highlighting the reference and viewing the Preview pane at the bottom of the Library window.

### To preview a reference:

1. For this example, click on the reference titled "Geophysical Research Letters."

The preview pane uses the current **output style** to display the selected reference as it will be formatted for a bibliography.

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



Only one reference is displayed in the preview pane at a time. If multiple references are selected, only the first one is displayed. The format of the reference in the preview pane can be changed at any time by choosing a different output style.

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

---

## 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 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, the Japanese language pack may be required to view these characters. You may be able to view most Unicode characters by changing the EndNote display fonts to a Unicode font, such as Arial Unicode MS.

---

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 ascending, alphabetical list sorted by the author names.

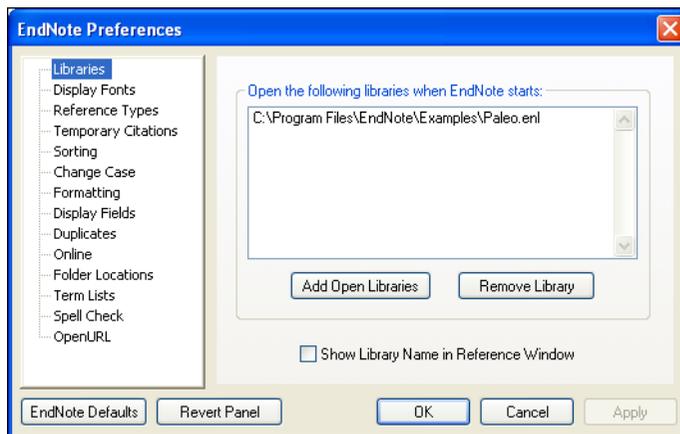
---

## 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 Paleo Library (PALEO.ENL) as your default library for now. Later, when you create your own library, you can set it as the default library.

### To set a default library:

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



3. Click *Apply* to save this change.
4. While you could make changes to other EndNote preferences, for now you can click *OK* to leave the Preferences dialog.

---

## Select and Open a Reference

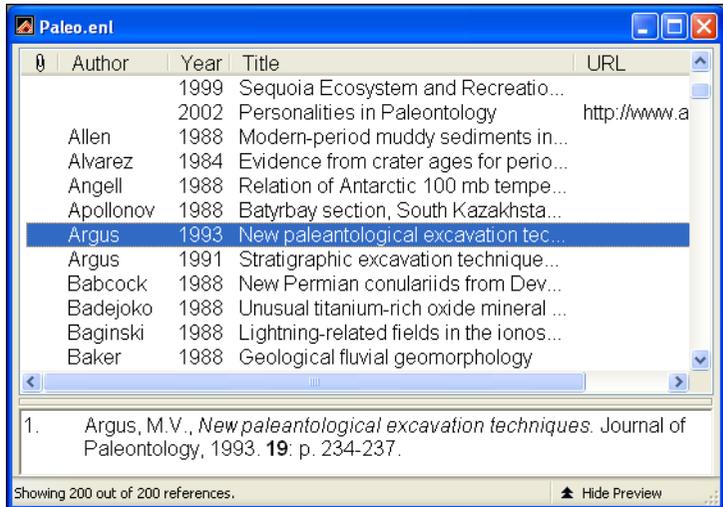
To work with specific references you must first select them in the Library window.

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 of the field by which the library has been sorted.

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

## To quickly find and display a reference:

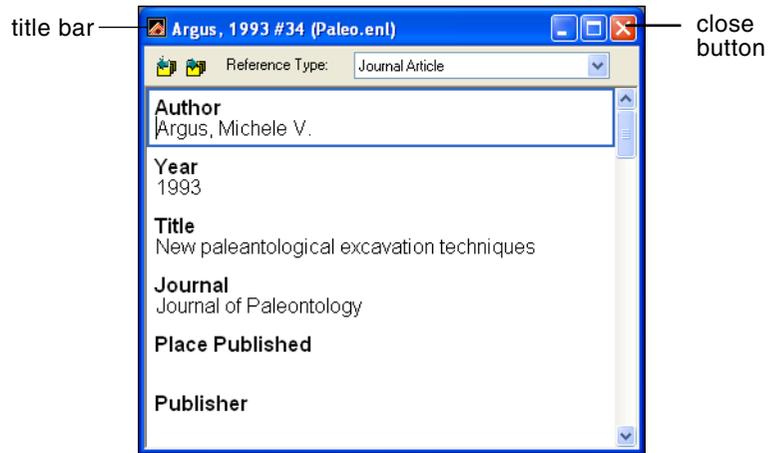
1. Select the first Argus reference in the list by typing “arg” without pausing between letters.



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

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

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



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 #34." This information is used by EndNote to match citations in a paper to references in a library.

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

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

---

## Close the Reference

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.

If you do not want to continue with the next chapter (Entering and Managing References), go to the *File* menu and choose *Exit* to close the program. Otherwise, continue with the tour.

# Chapter 3: Entering and Managing References

In this chapter you will learn how to:

- ◆ Enter references into a library.
- ◆ Insert graphics and files into references.
- ◆ Search for a subset of references.
- ◆ Print an annotated bibliography.

In this section, you are going to enter references: first a typical book reference, and then references that contain images.

Next you will search for a group of references and print them, as though to share the information with a colleague.

---

## Open the Paleo Library

---

If EndNote is not already running, start it and open the Paleo library as shown under “Start EndNote” on page 19.

---

## Create a New Reference

---

There are various ways to add references to an EndNote library:

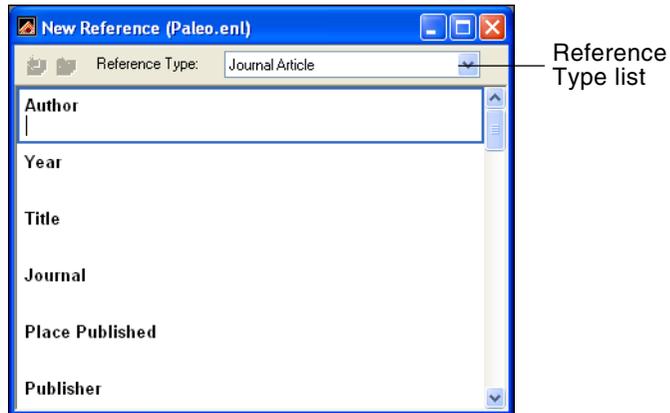
- ◆ Type the reference information into the Reference window.
- ◆ Connect to an online bibliographic database and retrieve the references directly into EndNote.
- ◆ Import text files of references that have been downloaded from online bibliographic databases or CD-ROMs.

This example demonstrates how to type reference information into EndNote. Chapter 6: “Searching Remote Databases” and Chapter 7: “Importing Reference Data into EndNote” cover the other methods.

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

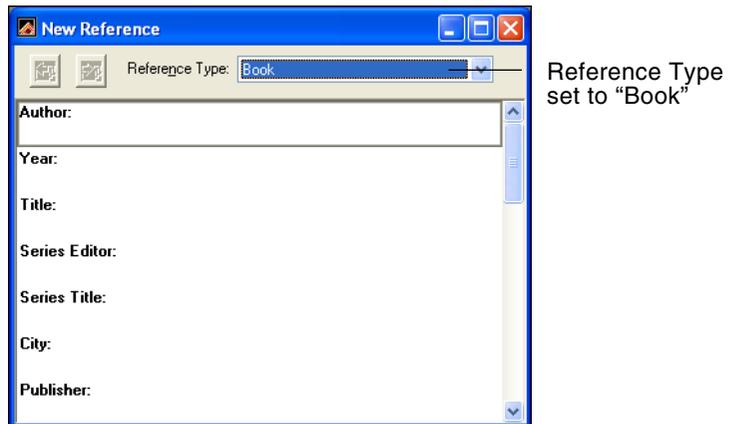
1. From the *References* menu, choose *New Reference*. Or, from the keyboard, you could use CTRL+N.

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 Reference window. For this example, create a Book reference.

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



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

3. With the cursor in the Author field, type:

Jacobson, Carol

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

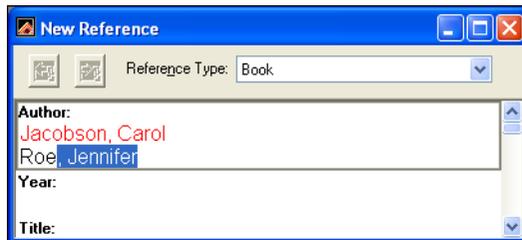
4. The name you are entering, Carol Jacobson, is a new author in this library, so keep typing until you complete the name and then press the ENTER key.

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 or save the reference, it will be added to the Author term list and the red text will change to black. (You can turn these options on or off.)

5. Now enter the second author's name:

Roe, Jennifer

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



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

1999

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

**Title:** Impacts of meteorites on Earth

**City:** New York

**Publisher:** Blackcourt Press

**Number of Pages:** 100

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

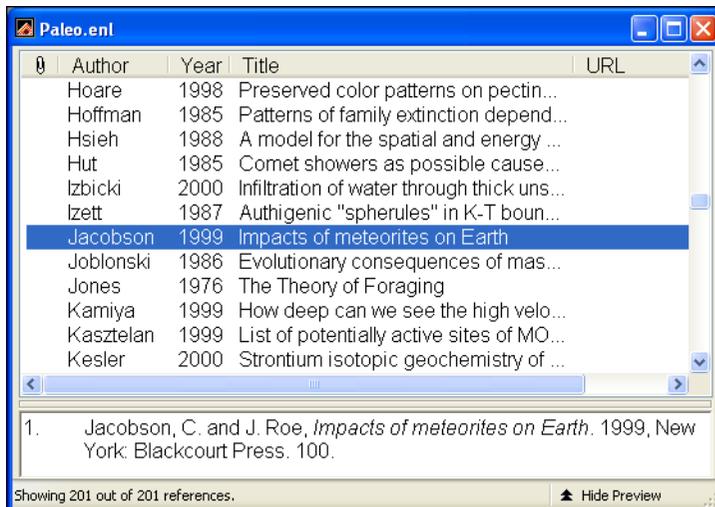


This book does not have a Series Editor or a Series Title, so those fields are left empty.

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

7. Close the Reference window by clicking the close button or by choosing *Close Reference* from the *File* menu.

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



---

## Enter References That Contain Images

EndNote helps you organize both reference information and images. Three reference types—Figure, Chart or Table, and Equation—are available specifically for cataloging graphics and files, although you can add Images and Captions to any reference type.

In this section, you are going to enter a journal reference that includes a graphic.

### To enter a reference that includes a graphic:

1. From the *References* menu, choose *New Reference*. An empty Reference window opens with the words “New Reference” displayed at the top. The Reference Type should appear as *Journal Article*.
2. Enter 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.

**Author:** Tiberius Rex

**Year:** 1995

**Title:** The scale and the feather--a suggested evolution

**Journal:** Paleontology

**Volume:** 23

**Issue:** 9

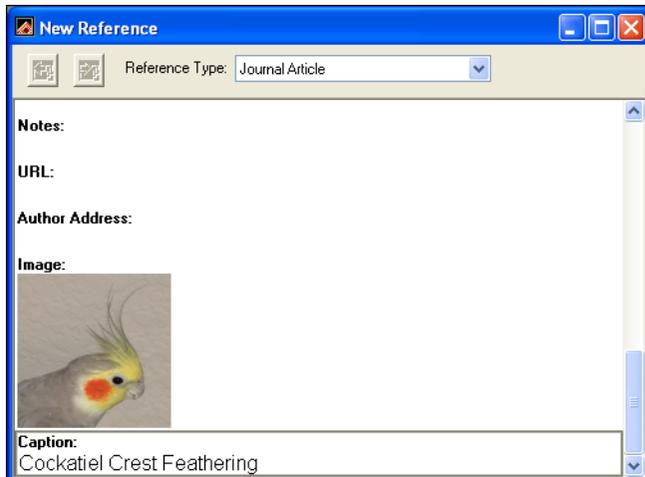
**Pages:** 23–45

**Keywords:** Feathers  
Evolution  
Birds

**Abstract:** This article discusses the evolution of bird feathers from reptilian scales.

3. Scroll down to the bottom, where you can see the Image and Caption fields.
4. From the *References* menu, select *Insert Picture* to display a file dialog.
5. On the file dialog:

- a. Navigate to the folder: Program Files\EndNote 8\Examples
- b. Highlight the file titled Feather2.BMP.
- c. Click *Open* to insert the file into the Image field.



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

6. In the Caption field, enter:

Cockatiel Crest Feathering

Always enter a caption for your image. It helps you locate images, and it labels figures in your Word documents.

7. Click the close button to close and save the reference and return to the library window.

**Next, enter a reference that includes an attached file:**

1. From the *References* menu, choose *New Reference*. An empty Reference window opens.
2. Click the *Reference Type* list and choose *Chart or Table*.
3. Enter the reference text as shown below.

**Created By:** Milkirk, Marie

**Year:** 2002

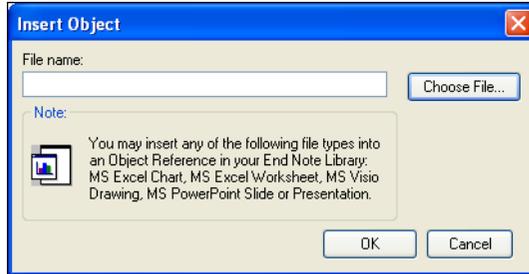
**Title:** Hominid Timeline

**Image Source Program:** Microsoft Excel

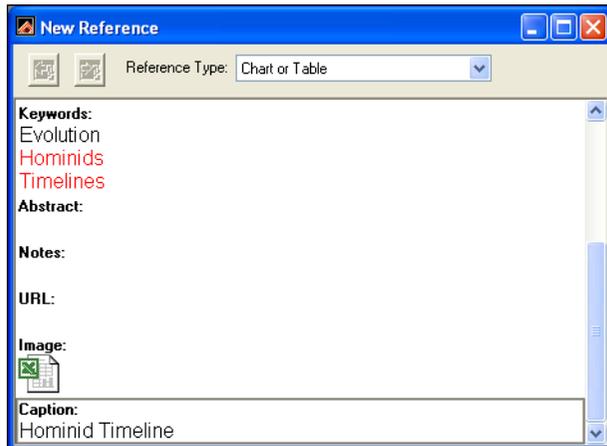
**Date:** May 9

**Keywords:** Evolution  
Hominids  
Timelines

4. From the *References* menu, select *Insert Object*.



5. Click *Choose File* to display a file dialog. On the file dialog:
  - a. Navigate to the folder: Program Files\EndNote 8\Examples
  - b. Highlight the Microsoft Excel file titled *Hominid Evolution.xls*.
  - c. Click *Open* to insert the file into your new reference.



The file appears as an attachment in the image field. EndNote copied the file to the DATA folder stored with the Paleo library, and linked the copied file to this reference.

6. In the *Caption* field, enter:

Hominid Timeline
7. Click the close button to close and save the reference and return to the library window.

### To easily locate the references containing images:

Click on the Image column heading (the paper clip) once to sort records containing images at the bottom of the list, and then click it again to move them to the top of the list.



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. Sort in ascending (A to Z) order.

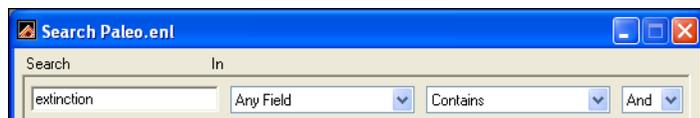
---

## Search for a Set of References

Now you are ready to print a list of references that you want to share with your colleague. Let's assume you want to generate a list of all references about extinction that were published in 1990 or later.

### To search for references:

1. From the *References* menu, choose *Search References*. Remember that you could also use the keyboard command, CTRL+F.
2. Type "extinction" as the first **search term**.

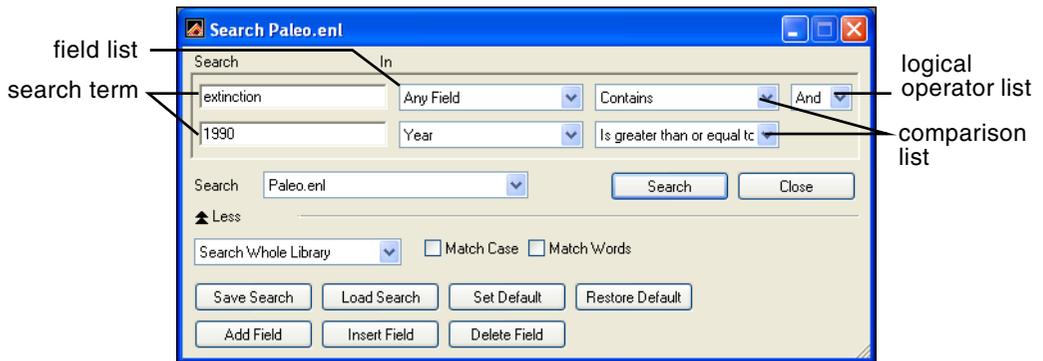


The words *Any Field* next to "extinction" mean that EndNote will find references that have the word "extinction" in any

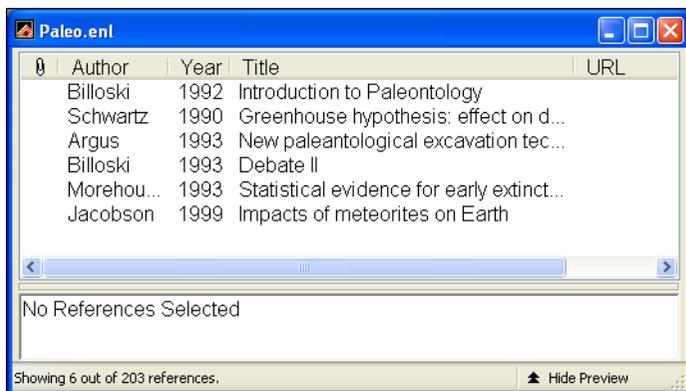
field. The *Contains* comparison operator means that EndNote will search for this exact string of text anywhere in the field.

Now set up the second search line to find references from 1990 or later.

3. Type **1990** as the search term for the second search line. From the **field list** in the second search line, choose *Year*; and from the **comparison list**, choose *is greater than or equal to*.
4. Notice the “And, Or, Not” logical operator list between the two search lines. Select “And” to set up the search to find all references about extinction that are also published in 1990 or later. The Search window should now look like this:



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



The status message area at the bottom of the Library window should now read, “Showing 6 out of 203 references.” (You are looking at the same Paleo library as before, but EndNote has restricted the view to display only the results of the search.)

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

---

## Select a Style That Includes Abstracts

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

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

- ◆ On the Main toolbar, select *Annotated* from the output style list to print the references with abstracts.

If you do not see the *Annotated* style in the output style list, you can select any style and go on to the next step. Any bibliographic style can be modified to make an annotated bibliography.

---

## Print the Found References

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

### To print a bibliography:

1. From the *File* menu, choose *Print*. A standard print dialog appears.
2. Click *Print* or *OK* to begin printing.

You can also use the *Export* or *Copy Formatted* commands to create a word processing document with these references if you would prefer to have the bibliography on disk rather than on paper.

- ◆ To show all references again in the library window, go to the *References* menu and select *Show All References*.

If you do not want to continue with the next chapter, go to the *File* menu and choose *Exit* to close the EndNote program.

# Chapter 4: Using EndNote While Writing a Paper with Microsoft Word

The Cite While You Write (CWYW) process is available only for Microsoft Word 2000, XP, or 2003. If you use a different word processor, or an older version of Word, see the EndNote online Help file to learn how to format references and create a bibliography. From the *Help* menu in the EndNote program, choose *Contents*.

- ◆ For Windows WordPerfect 10 (2002) or 11, read the topics under *Citing References with WordPerfect*.
- ◆ For other word processors, or other versions of Word or WordPerfect, read the topics under *Scanning and Formatting RTF Files*.

---

**NOTE:** Follow this chapter only if you use Microsoft Word 2000, XP, or 2003.

---

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

In this chapter, you will learn how to:

- ◆ Use a manuscript template to set up your paper.
- ◆ Insert EndNote bibliographic citations into your paper and create a bibliography.
- ◆ Insert EndNote figure citations into your paper. (This section uses the image references that were inserted while following Chapter 3.)

---

## Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library as shown under "Start EndNote" on page 19.

EndNote looks for matching references in the currently open libraries. While EndNote can automatically 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.

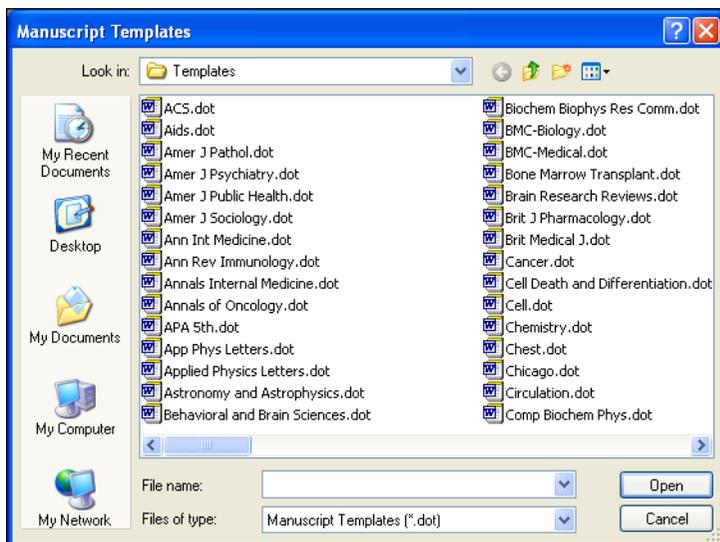
---

## Create a New Document with the Manuscript Template Wizard

Manuscript templates make it easy to set up your paper for electronic submission to a publisher. For this example, pretend you are writing a paper about evolution that you plan to submit to the publishers of *Nature*.

### To create a new Word document:

1. From EndNote's *Tools* menu, choose *Manuscript Templates*.



2. From the list of Word templates, highlight the **Nature** file (or **Nature.dot** if your file dialog displays file extensions), and click *Open* to start the manuscript template wizard.

---

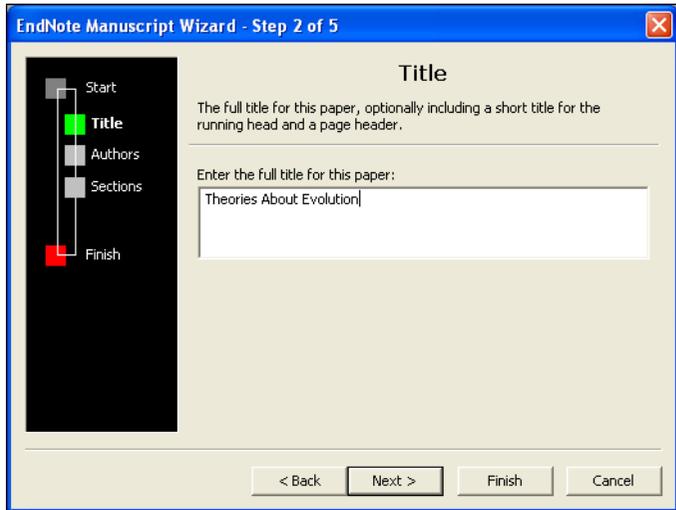
**NOTE:** The first time you launch the manuscript template wizard, you may receive a notice about macros. Accept macros to continue with the wizard. Select *Always trust macros from this source* to avoid future alerts.

---

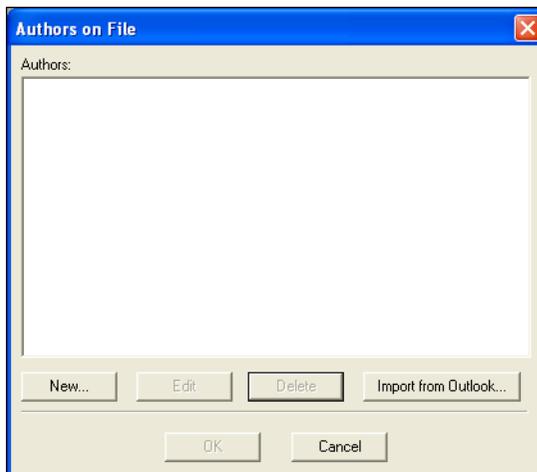
3. On the opening window, click *Next*.

4. Enter a full title for this paper:

Theories About Evolution



5. Click *Next* to display a list of contributing authors. In this case, the list is blank.
6. To enter the author of this document, click *Add Author*. If you have not yet added any author names for manuscript templates, the Authors on File list will be blank.

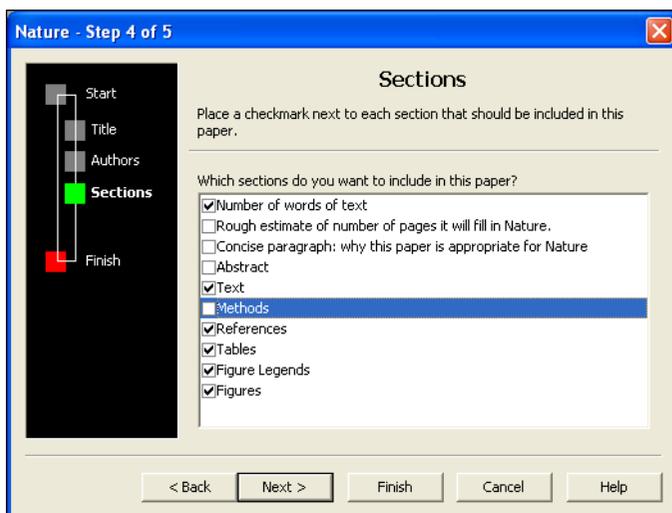


7. Click *New* to add an author to the list.

The screenshot shows a dialog box titled "Add Author". It has a blue title bar with a close button. The dialog is divided into two main sections. The first section, "Author Information", contains several text input fields: "First Name", "M.I.", "Last Name", "Title", "Degree(s)", and "Affiliation". The second section, "Contact information for corresponding authors", contains a large text area for "Address", and smaller text input fields for "E-Mail", "Telephone", and "Fax". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

8. Enter your name and contact information, and then click *OK*. Your name appears in the Authors on File list.
9. Highlight your name, as an author of the current document, and click *OK*.
10. Select the check box next to your name, indicating that you are a corresponding author, and click *Next*.
11. The Sections window lists the document sections required by Nature. (The Section list varies greatly between publishers.) Normally you would simply click *Next* to accept all sections.

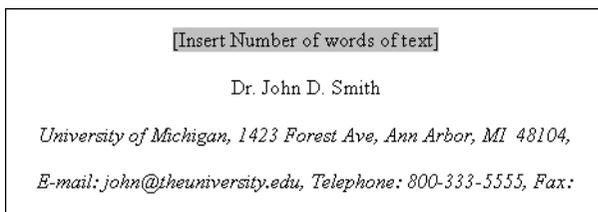
For this tour, you can deselect some of the sections as indicated in the window below, and then click *Next*.



12. Click *Finish* to complete the manuscript wizard and display the new Word document.

As you scroll through the paper, you can see where the template wizard inserted the title and author information you provided, and where you need to insert additional information.

In the example below, the author's name and contact information was inserted by the template wizard in the font and style required by *Nature*. You would need to select each string of text surrounded by brackets and enter the appropriate information required by *Nature*.



## Cite EndNote References

Next 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 insert citations:

1. Scroll down the document to the area that says Insert Text here, and highlight the line.

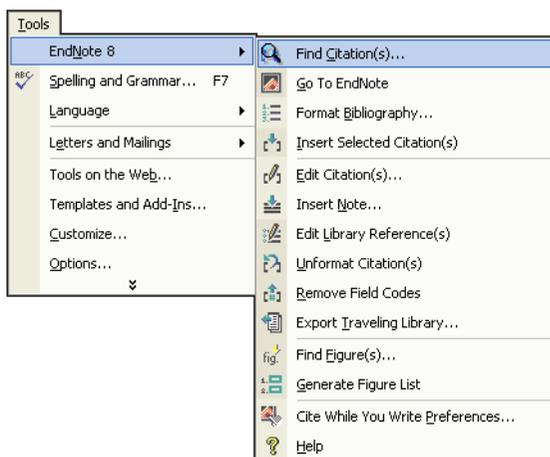
Insert Text here

2. 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, this hypothesis was overturned by the discovery of yet another species.

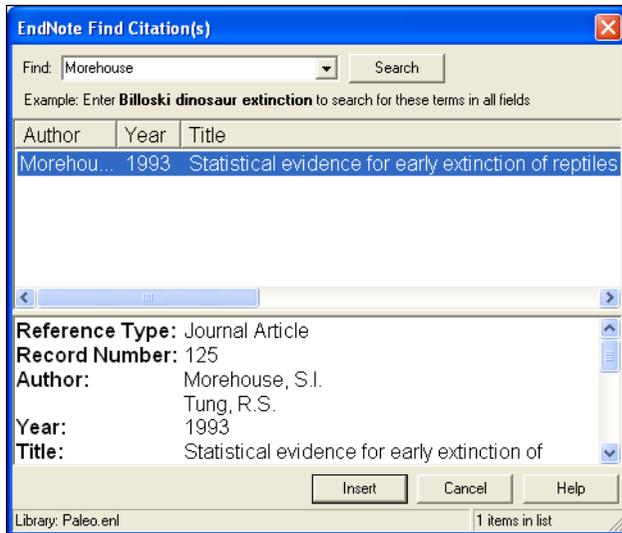
Now you are ready to insert a citation.

3. From the *Tools* menu, go to the *EndNote 8* submenu and then *Find Citation(s)*.



4. 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.



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

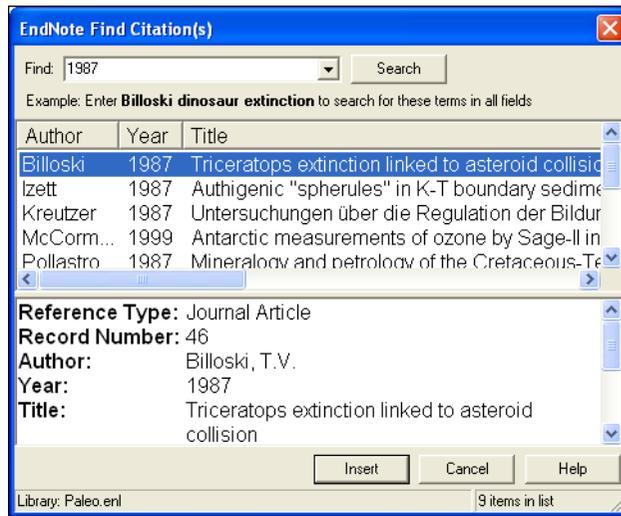
EndNote not only inserts a citation, but Instant Formatting formats it in the numbered Nature style.

6. Add more text to the paper:

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

7. From the *Tools* menu, go to the *EndNote 8* submenu and then *Find Citation(s)*.

8. Type the date "1987" into the find box and click *Search*. EndNote lists the matching references.



9. Scroll down the list of matching references, select the reference by the author Turnhouse, and click *Insert*.

EndNote not only inserts the citation, but 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, this hypothesis was overturned by the discovery of yet another species. <sup>1</sup> It is now the undisputed progeny of the species at hand. <sup>2</sup>

10. Scroll down the document to view the References list formatted with the Nature output style:

**References**

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

---

**NOTE:** In these examples, each of the Cite While You Write citation and bibliography fields is shaded. This is set with Microsoft Word's Field Shading option, which you can turn on if you find it helpful. The shading is for on-screen help only, and does not print.

---

11. Assume that you have finished inserting citations in your paper. From Word's *File* menu, choose *Save* to save your document.

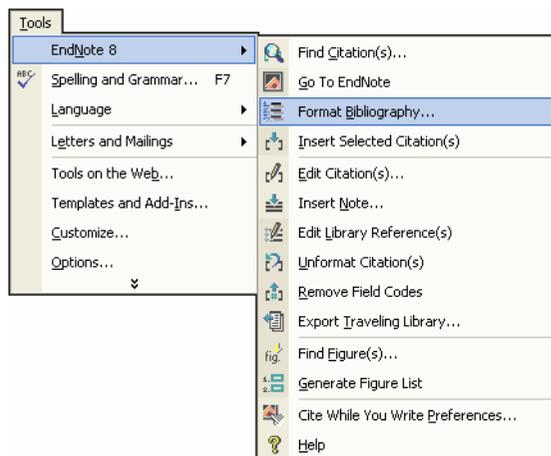
---

## Confirm the Bibliographic Style

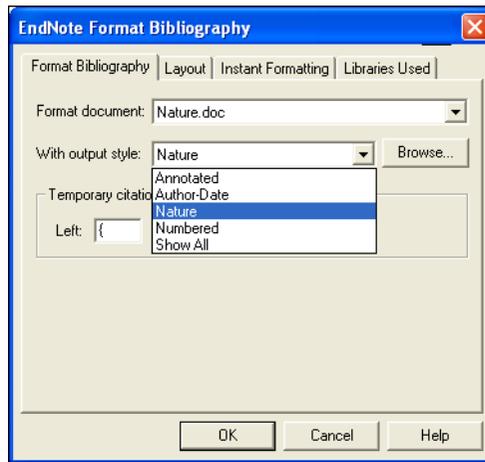
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

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

1. From Word's *Tools* menu, go to the *EndNote 8* submenu and choose *Format Bibliography*.



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



Styles contain instructions for how EndNote should format the citations and bibliography. For this example, the manuscript template automatically selected the *Nature* style, which inserts citation numbers and a bibliography at the end of the paper.

2. For this example, leave “With output style” set to *Nature*.
3. Click *OK* to leave the dialog.

EndNote automatically updates the existing citations and regenerates the bibliography. If you had changed the bibliographic style, those changes would be reflected in the paper.

In the future, if you need to make changes to the paper such as adding or deleting citations or text, just make the necessary edits or additions 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:** If you directly edit citations or the bibliography, the changes will be lost when you *Format Bibliography* again. To make and retain changes, either modify the output style to affect all citations, or use the Edit Citation command from the *Tools>EndNote* menu in Word.

---

---

**NOTE:** More than 1,100 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*.

---

---

## 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 references inserted in Chapter 3.

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:

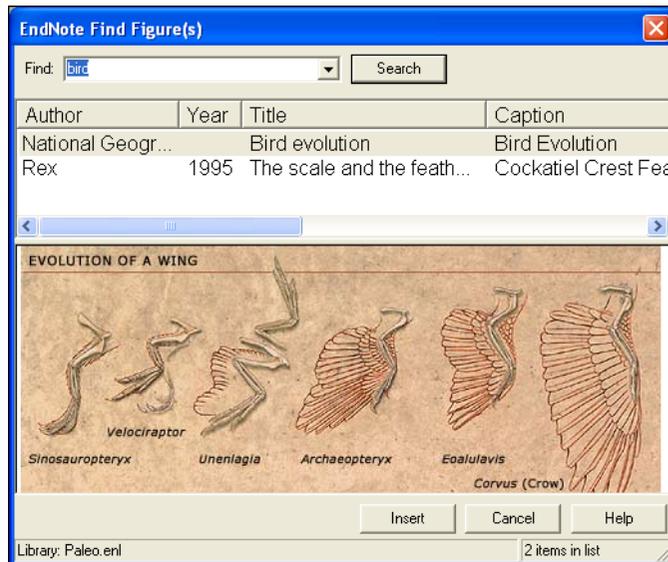
1. First, add more text to your paper:

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. From the *Tools* menu, go to the *EndNote 8* submenu and then *Find Figure(s)*. 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.

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.

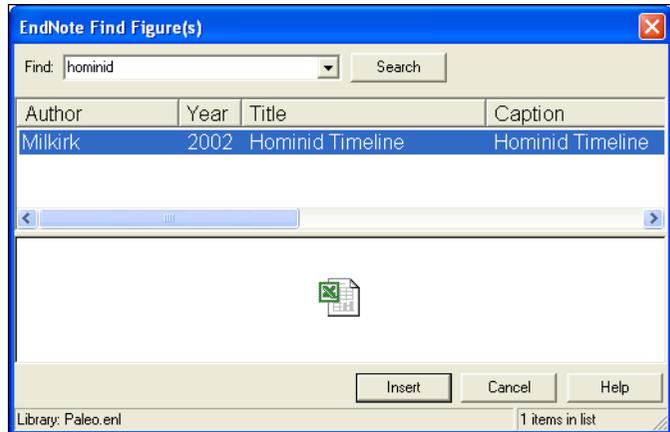
As researchers look at evidence, even the crest on the modern Cockatiel provides insight into the evolution of feathers. (Figure 1)

5. Next, enter the text:

While exploring the evolution of dinosaurs and birds, it becomes clear that *Homo sapiens* have occupied earth for a relatively short period of time.

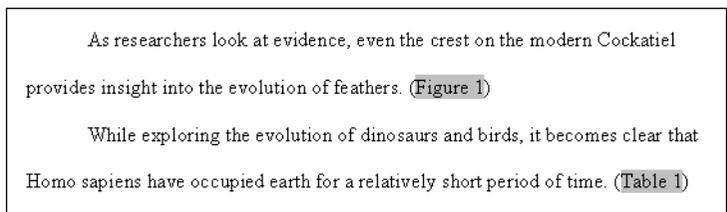
Now you are ready to insert a reference to the Microsoft Excel file we inserted into an EndNote reference earlier in this guided tour.

6. From the *Tools* menu, go to the *EndNote 8* submenu and then *Find Figure(s)*. The EndNote Find Figures dialog appears.
7. Type the text “hominid” 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.



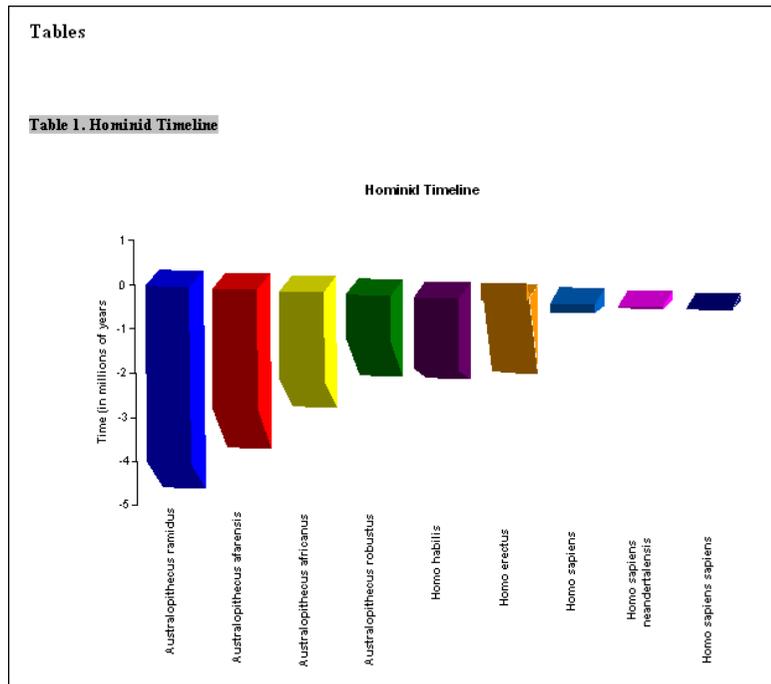
8. Click *Insert* to insert the citation.

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

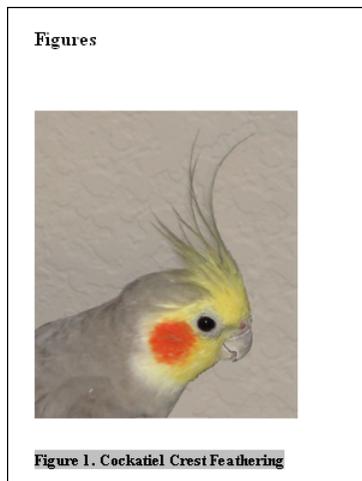


9. Scroll through the document, and you will find that EndNote used Word bookmarks to place the images under labeled Tables and Figures sections as required by *Nature*.
10. You may need to resize the Hominid Timeline to fit on the page. Click on the image, and then hold down the **Shift** key

while you drag a corner of the figure to resize it proportionally.



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 References list, Tables list, and Figures list!

To close Microsoft Word: In Word, go to the *File* menu and choose *Exit*.

If you do not want to continue with the next chapter (Creating a Subject Bibliography), and want to close the EndNote program: In EndNote, go to the *File* menu and choose *Exit*.



# Chapter 5: Creating a Subject Bibliography

This chapter will show you how to:

- ◆ Generate a list of references grouped by subject.
- ◆ Change the layout of a subject bibliography.

You can create a list that groups references under any EndNote field or combination of fields—such as journal title or publisher. However, the most common use is to group references by subject with terms from the Keywords field.

---

## Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library as shown under “Start EndNote” on page 19.

---

## Select the References to Include

The first step in creating a subject bibliography is determining which references you want to include. EndNote compiles the list from those references that are listed in the current library window.

You could limit the list by searching for a subset of references or by showing only selected references. For this example, we will include all references in the library.

### To select all references to include in the subject bibliography:

Make sure all references are displayed in the reference list. From the *References* menu, select *Show All References*. If that command is not available, all references are already included in the list.

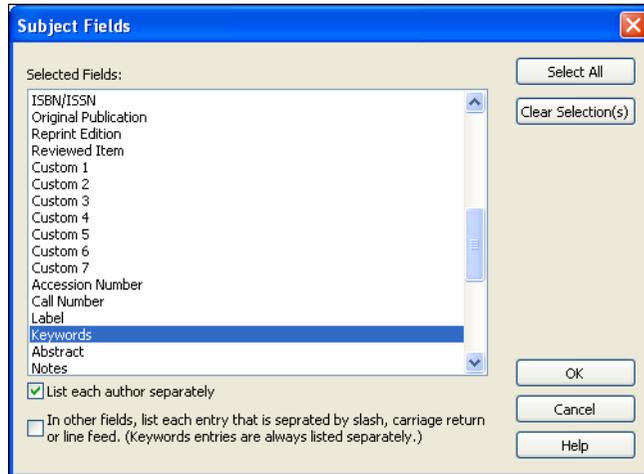
---

## Select the Subject Fields and Terms

Next, you will select a subject field and the terms from that field to use as subject headings.

**To select a subject field and terms from that field:**

1. From the *Tools* menu, select *Subject Bibliography* to display a list of the EndNote fields by default field name.

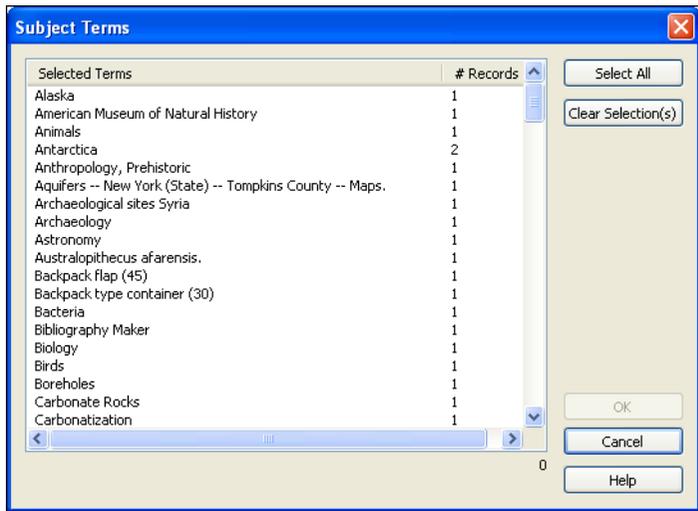


2. Highlight the *Keywords* field.

You can click on individual fields to select any combination and number of fields, but the most common selection is the single *Keywords* field to create a subject bibliography.

Neither of the check boxes at the bottom affect a list by keyword. Terms in the *Keywords* field are always listed as separate headings.

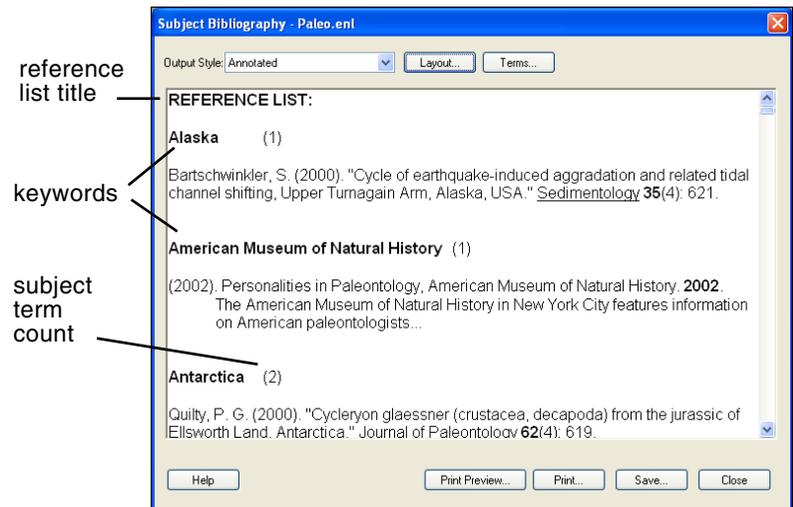
3. Click *OK* to display the terms found in the *Keywords* field of the selected references (in this case, every *Keyword* found in library).



- While you could select specific terms as headings, for this example you will select all keywords. Click the *Select All* button.

It can be helpful to *Select All*, and then click on the few terms that you do not want in order to deselect them.

- Click *OK* to format the subject bibliography on the screen.



A reference list title appears at the top of the bibliography. Formatted references display beneath each keyword heading. Next to each heading, a term count indicates how many references contained the keyword.

---

## Change the Layout of the Bibliography

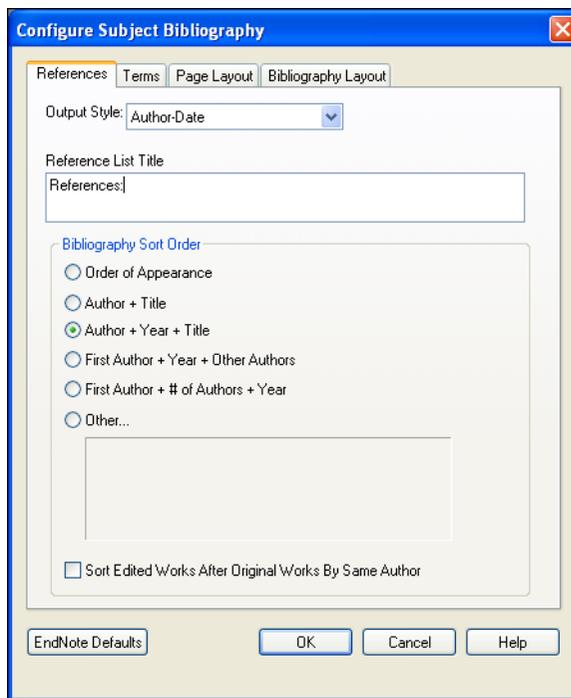
You have a subject bibliography, but is the layout of it quite what you want? For this exercise, you will change the output style, enter a different reference list title, and remove the term counts.

### To change the layout of your subject bibliography:

1. First, use the Output Style list at the top of the window to select a different output style for the formatted references. In this case, select *Author-Date* and EndNote will update all of the references in the bibliography to reflect the new style.

You could choose *Select Another Style* to choose from the 1,100+ output styles provided with EndNote.

2. Click on the *Layout* button to modify the layout and style of your subject bibliography.
3. On the References tab, change the Reference List Title to "References:". This is the title that prints at the top of the bibliography.

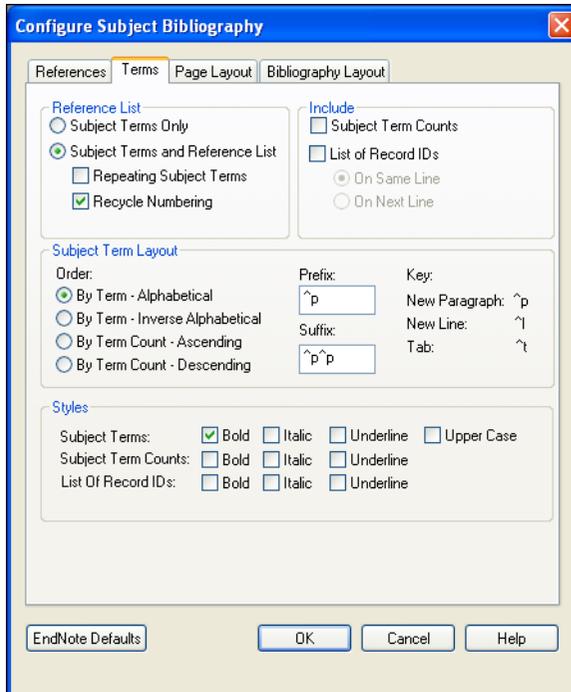


You could also use this tab to change the sort order of the formatted references that appear beneath each subject heading.

4. Click on the Terms tab, and look under the Reference List section.

For a subject bibliography, it is important to select the *Subject Terms and Reference List* button. In this case, *Subject Terms and Reference List* should already be selected.

The *Subject Terms Only* button would print only a list of subject headings, and not the formatted references.

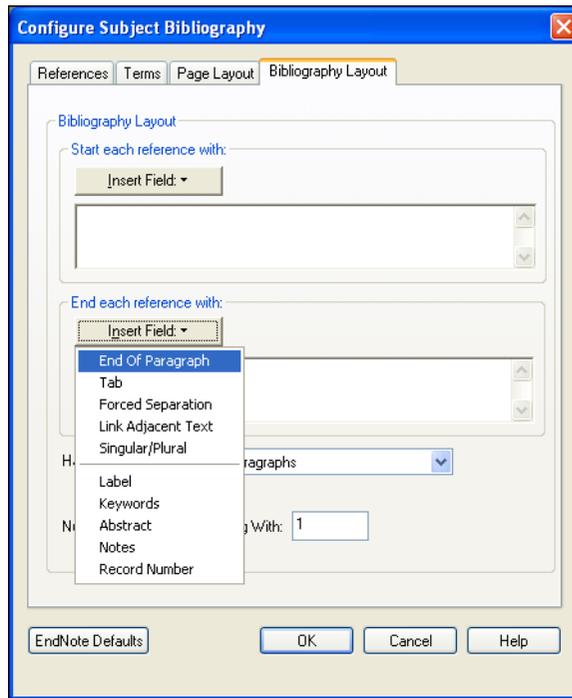


Notice that the Recycle Numbering box is selected. This restarts numbering under each subject heading when you select an output style that numbers references.

5. Under the Include section, click to clear the Subject Term Counts box.

This tab also controls the sort order of the subject terms and the styles applied to subject terms, subject term counts, and the list of record IDs (record numbers) if they are selected to print.

6. Click on the Bibliography Layout tab. The Author-Date output style does not insert a blank line between formatted references. To force a line, use the second drop-down list to insert an "End of Paragraph" marker in the text box labeled "End each reference with."



7. Click *OK* to save changes to all of the Layout tabs and update the subject bibliography.
8. At this point, you can do any of the following:
  - ◆ Click *Print Preview* to display a formatted page view of the subject bibliography. Click *Close* to dismiss the Preview window when you are done viewing it. You could click *Layout* again to fine-tune your settings.
  - ◆ Click *Print* to send a copy of the bibliography to your printer. The Print dialog appears. Verify settings and click *OK* or *Print*.
  - ◆ Click *Save* to save a copy to a file that you can open with your word processor. A file dialog appears for you to name the file and choose the file type (text, RTF, or HTML). Verify settings and click *Save*.
9. Click *Close* to dismiss the Subject Bibliography window and return to the library reference list.

This concludes the subject bibliography section of the tour. The next chapter walks through searching a remote database.

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

# Chapter 6: Searching Remote Databases

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

This chapter will guide you through these basic steps:

- ◆ Connect to a remote database.
- ◆ Search the database.
- ◆ Copy the references that you want to keep into an EndNote library.

---

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

---

## How Does It Work?

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

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

## What EndNote's Searching Offers

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

This search interface is not intended to replace the advanced search options that may be available using the search interface offered by your information provider. There may be times when you want to use the information provider's search interface (for

example, to take advantage of a thesaurus of search terms) and then import those references into EndNote. This is still an option using EndNote's *Import* command (see "Importing Reference Data into EndNote" on page 67). Once you know the terms that you want to use in your searches, being able to retrieve the necessary references directly from EndNote is a very fast and efficient approach.

---

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

---

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

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

---

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

---

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## Open the Paleo Library

---

## Connect to a Remote Database

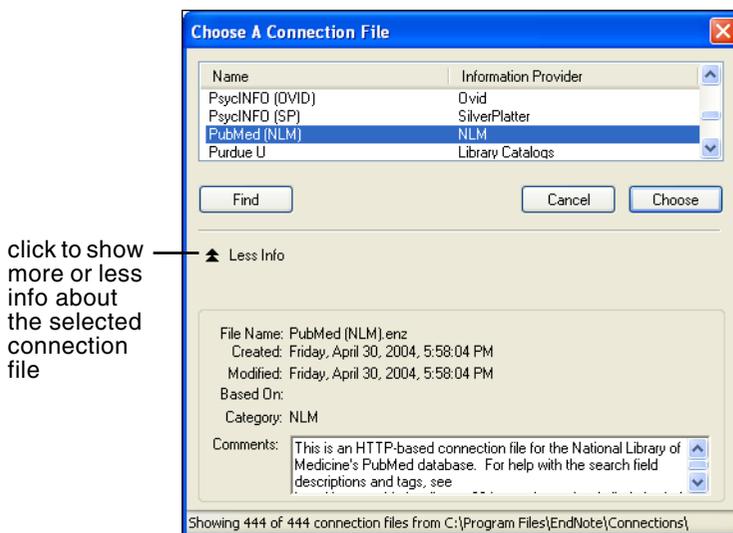
If EndNote is not already running, start it and open the Paleo library as shown under “Start EndNote” on page 19.

The first step in searching a remote database is connecting to it, so that is how you will begin.

### To connect to the PubMed Database:

1. With EndNote running, go to the *Tools* menu, select the *Connect* submenu, and select *Connect*.

(The *Connect* menu will eventually list the databases to which you have connected in the past, and you may customize this list using the Connection Manager.)



---

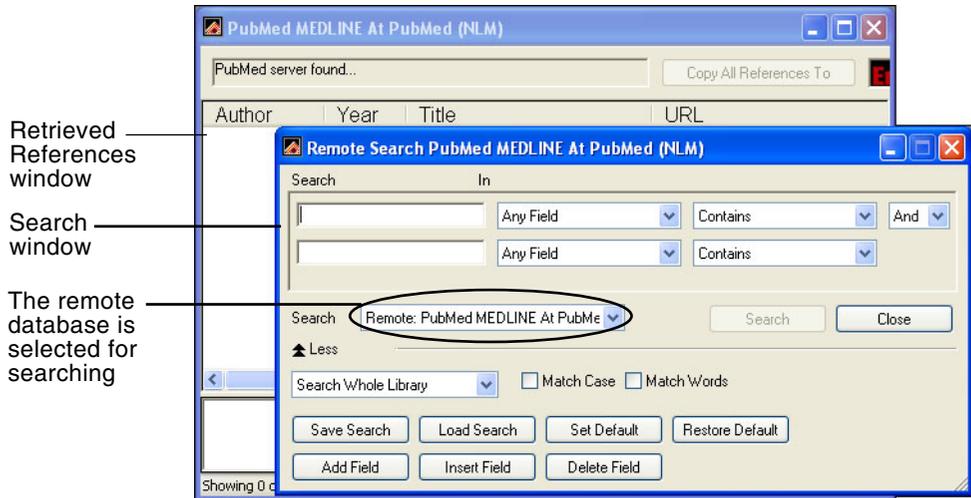
**NOTE:** This window displays all of the connection files available in your Connections folder. Use the *Find* button to quickly view various categories of databases to help you locate the one that you need.

---

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

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 successfully established, EndNote alerts you with an error message and closes the connection.

When the connection has been successfully established, EndNote opens a **Retrieved References window** for the PubMed Database, and displays the Search window. Note that the “Remote: PubMed MEDLINE At PubMed (NLM)” database is selected for searching. EndNote is ready to search the remote database.



---

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

---

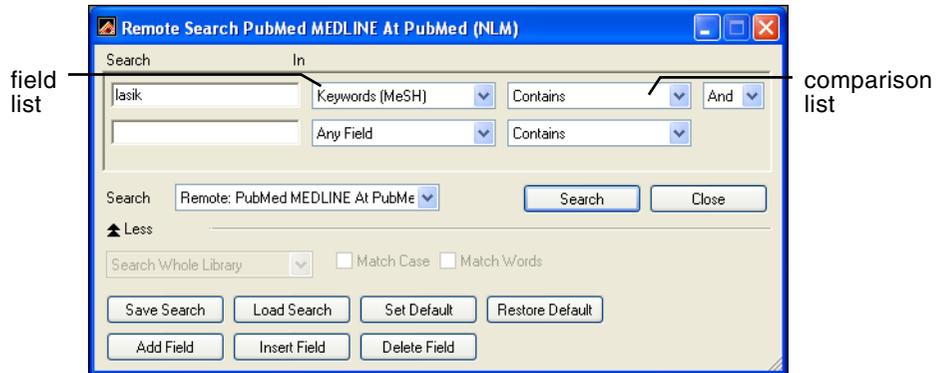
## Search the Database

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

Let’s say you are interested in information about corrective eye surgery, such as LASIK.

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

1. Enter “lasik” into the first search line and verify that the field list in that line is set to *Keywords (MeSH)*. The comparison list for remote searches is always set to *Contains*.



2. Click *Search*.

EndNote sends the search request off to the remote database (PubMed, 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.

---

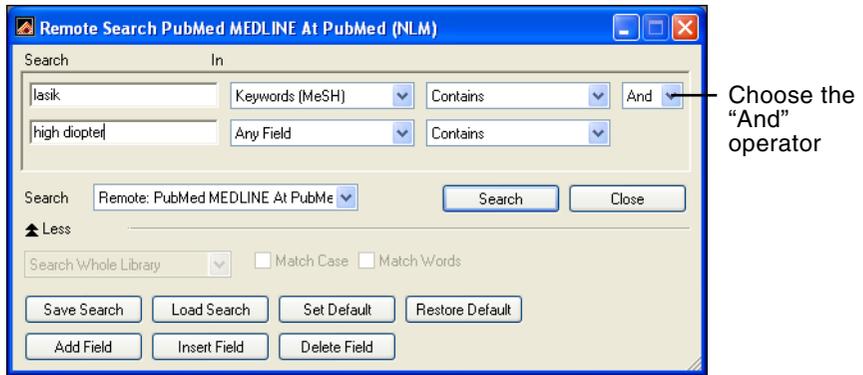
**NOTE:** PubMed is updated regularly, so you may find a different number of references than illustrated here.

---

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 “high diopter.”

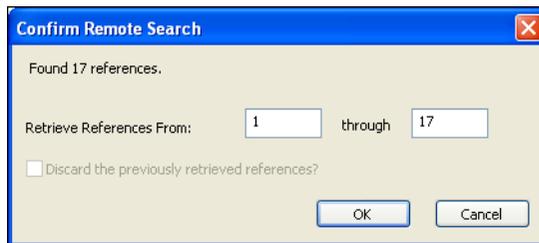
3. Click *Cancel*, and you are returned to the Search window.
4. Click in the second search line and type “high diopter”.

5. Verify that the field list for the second search line is set to *Any Field*.
6. Make sure the operator between the two search lines is set to "And."



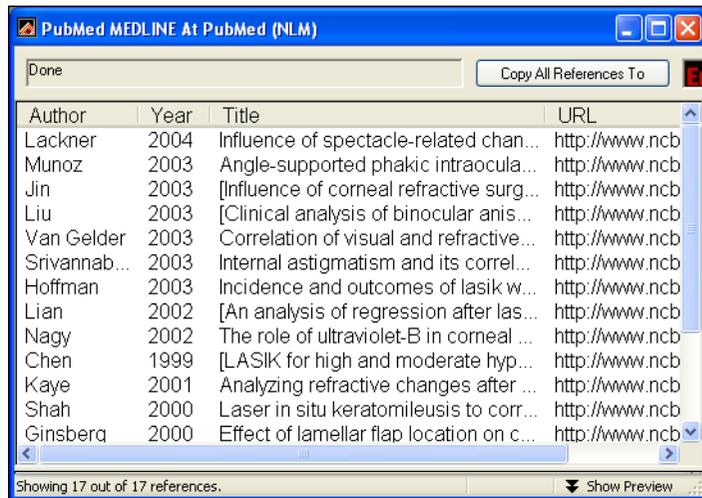
7. Click *Search*.

This time only 17 references were found.



8. Click *OK* to retrieve the matching references.

The references are downloaded and appear in the Retrieved References window for the PubMed Database connection.



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

---

## Save the References

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

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

For this example, we will save two of the retrieved references to EndNote's sample Paleo library.

### To save your retrieved references:

1. Select two of the references displayed by holding down the CTRL key and clicking on the individual references. (SHIFT-click to select a range of references.)
2. Click the *Copy # References To* button (the # indicates the number of selected references), and do one of these:
  - ◆ If the Paleo library is already open and appears in the list, select it.

- ◆ Select *Choose Library*. In the file dialog that appears, open the Examples folder in the EndNote 8 folder, choose PALEO.ENL and click *Open*.

The references retrieved from the PubMed Database are copied to the library.

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

When you are ready to close EndNote, go to the *File* menu and choose *Exit*.

# Chapter 7: Importing Reference Data into EndNote

## Retrieving References Directly from Online Databases

If you have access to a library catalog or bibliographic database that supports the Z39.50 protocol, you can use EndNote as a tool to search and retrieve references directly from that database into EndNote. You do not need to use EndNote's *Import* command at all; you use the *Connect* command instead. This is by far the easiest way to get data into EndNote because it involves no intermediate steps. The direct retrieval of references is not covered in this chapter. See page 59 for information.

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

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

- ◆ How to download the data in the right output format.
- ◆ Which import filter to use to import the data into EndNote.

This section describes these two items. The table on page 72 summarizes a number of common sources of bibliographic data, the instructions for downloading tagged files, and the EndNote import option to use to import the references into EndNote.

---

## Get Data in the Right Format

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

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

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

---

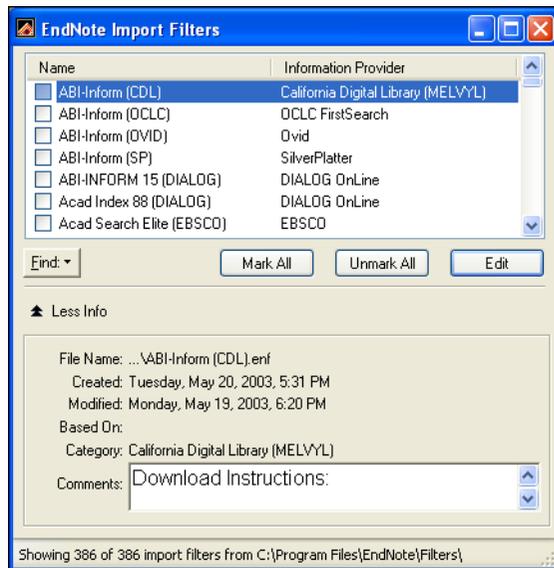
**NOTE:** If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately.

---

## Choose the Correct Import Filter

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

- ◆ To see a complete list of available filters, choose *Import Filters* from the *Edit* menu, and select *Open Filter Manager*.



Use the *Find* button in the Filter Manager window to find all filters for a particular information provider or to search for a filter by name.

When you have located the filters that you want to use, mark them as your favorites by clicking in the check box to the left of the filter name. You can also mark all of the filters currently showing after using the *Find* option by clicking *Mark All*. Once a

filter is marked as a favorite, it will appear in the *Import Options* list in the import dialog.

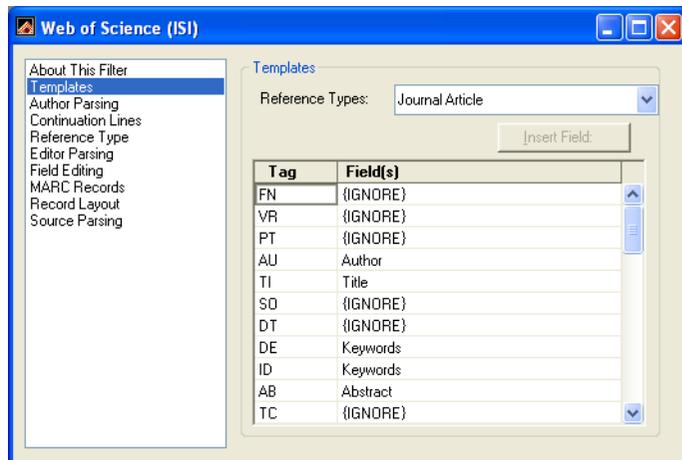
---

**NOTE:** There are many more databases and services that provide data than there are filters included with EndNote, so in some cases you may need to write your own filter or modify one of ours. See the EndNote Help file for information about creating and modifying filters, and check our Web site periodically for new and updated filters (<http://www.endnote.com>).

---

## Comparing a Filter to a Data File

If you are uncertain whether a filter matches a data file that you have downloaded, you can compare the format from your downloaded data file to a filter. To do so, select a filter in the Filter Manager, and click the *Edit* button. When the Filter window opens, select the *Templates* option in the list at the left of the window to display the tags recognized by that filter.



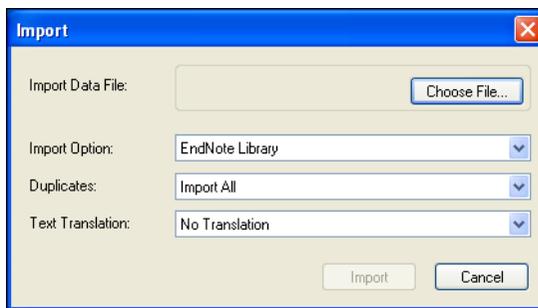
The tags and templates in the filter should match the data in the file you want to import.

---

## General Importing Instructions

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

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



3. Click the *Choose File* button to locate and open the file you want to import. All files, except for EndNote libraries, must be plain text files. Select the file and click *OK*.
4. Select the appropriate import option from the *Import Options* list. Import options are described on page 71.
5. Select an option from the *Duplicates* list:

- ◆ *Import All*  
Imports all references, including duplicates.
- ◆ *Discard Duplicates*  
Imports all references except duplicates.
- ◆ *Import into Duplicates Library*  
Duplicate references are imported into a library called FILE-DUPL.ENL, where “File” is the name of the library into which you are importing.

By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. See the *Duplicates* panel of the EndNote preferences if you would like to change the duplicates criteria.

6. Choose a *Text Translation* option if necessary. This option allows you to specify the text encoding of the file you import.

Choose *No Translation* for all text files except MARC format files, which usually require *ANSEL* translation.

7. Click *Import* to import the file.

When the import is complete, only newly imported references display in the Library window. This is a perfect time to add a keyword to all of the imported references using the *Change Field* command, or to peruse the imported data to make sure it imported as expected.

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

---

## Import Options

EndNote's import options include:

- ◆ **EndNote Library**  
Used to import one EndNote library into another.
- ◆ **EndNote Import**  
Used to import text files that have been downloaded from online databases or exported from EndNote using the EndNote format.
- ◆ **Refer/BibIX**  
Used to import text files exported from the Refer or BibIX programs. The EndNote import format is based on the Refer/BibIX format.
- ◆ **ProCite**  
Used to import text files that have been exported from ProCite (Macintosh or Windows).
- ◆ **Tab-Delimited**  
Used to import text files in which the fields within a single reference is separated by tabs.
- ◆ **Reference Manager (RIS)**  
Used to import text files exported from Reference Manager, Reference Update, Reference Web Poster, or any other source that uses the RIS format.
- ◆ **ISI-CE**  
Used to import text files downloaded from ISI's *Web of Science* and other ISI sources.
- ◆ **EndNote Generated XML**  
Used to export in a proprietary XML format.
- ◆ **Multi-Filter (Special)**  
A special option for importing files that include references from multiple sources.
- ◆ **Various import filters**  
EndNote includes hundreds of import filters configured to import data from a variety of online databases. Most likely, the first time you import a file, you will not see the import

filter that you need in this list. Choose *Other Filters* from the *Import Options* list to find the filter that matches the source of the data you want to import. Import filters that you have recently used or chosen as your favorites will be listed in the *Import Options* list in the Import dialog.

The table on page 73 provides more information about the download formats that work with these filters. See “Choose the Correct Import Filter” on page 68 for information about how to choose the filters to appear in the *Import Option* list.

◆ **Use Connection File**

EndNote provides the option of using a connection file as an import filter. This is useful if you need to import the Connect.log file generated by using EndNote’s *Connect* command to search a remote database. The Connect.log file should include all of the references from your previous session. See page 59 for information about the *Connect* command.

## Summary of Output Formats and Corresponding Import Options

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

### 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	Download Instructions	Import Option
<b>BioMedNet's free Medline service</b>	At the bottom of the results list, click the <i>Download</i> button. Choose <i>EndNote 3.1 or later</i> as the format, and click <i>Get All</i> or <i>Get Selected Refs</i> . The References are sent directly to EndNote and you are prompted to pick the library into which you want the references to be imported.	Direct Export - the <i>EndNote Import</i> option is chosen automatically. (See page 77.)
<b>California Digital Library Web Site</b>  (formerly MELVYL)	<ol style="list-style-type: none"> <li>1. Click <i>Display</i> to display your references.</li> <li>2. Click <i>Download</i>.</li> <li>3. Change the "Citation Format" to "Tags Long".</li> <li>4. Click <i>Download Now</i>.</li> </ol>	Various filters for California Digital Library (Melvyl) databases are provided in EndNote's Filters folder.
<b>California Digital Library via Telnet</b>  (formerly MELVYL)	If you are using your communication software's option to capture text, type "DISPLAY ALL TAGS LONG AB CONT" for searches on the database. To send the search results to your e-mail address, type "MAIL ALL TAGS LONG AB TO JOHN_DOE@BERKELEY.EDU". Save references e-mailed to you as a "Plain Text" or "Text Only" file.	Various filters for California Digital Library (Melvyl) databases are provided in EndNote's Filters folder.
<b>Cambridge Scientific Abstracts</b>	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 or Mac  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 Cambridge Scientific Abstracts databases are provided in EndNote's Filters folder.
<b>CAS SciFinder</b>	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
<b>Current Contents on Disk (CCOD) - Mac</b>	Save references in "EndNote" format.	EndNote Import

## Output Formats and Corresponding Import Options

Information Provider	Download Instructions	Import Option
<b>Current Contents on Disk (CCOD) - Windows</b>	Save references in "EndNote" format.	ProCite
<b>DIALOG OnLine</b>	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 be using the command line mode to obtain Format 5; if in doubt how to do this, contact Dialog's tech support.	Various DIALOG filters are provided in EndNote's Filters folder.
<b>DIMDI</b>	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in EndNote's Filters folder.
<b>EBSCOhost</b>	Save results in "Bibliographic Manager format".	Various EBSCO filters are provided in EndNote's Filters folder.
<b>HealthGate - MEDLINE</b>	At the "HealthGate Search Results" screen, select the desired references to download. At the bottom of the screen, choose "Download references for importing into bibliographic management software," and then click on <i>Retrieve Selected References</i> . You will be prompted by your Web browser to save the file to your computer.	MEDLINE (HealthGate) filter
<b>Information Express Alerting Service</b>	Save references in the "EndNote" format.	EndNote Import
<b>INIST</b>	<ol style="list-style-type: none"> <li>1. Click the <i>Enregistrer</i> button.</li> <li>2. Select the records you wish to download.</li> <li>3. Under "Quels champs?" choose "Tous les champs."</li> <li>4. Under "Include" choose "Numéro de notice et nom de la base de données" and "Libellés abrégés."</li> <li>3. Click the <i>Sauvegarde de notices</i> button</li> </ol>	Various INIST filters are provided in EndNote's Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Download Instructions	Import Option
<b>ISI CD (Citation Indexes)</b>	From the <i>File</i> menu, choose <i>Save Records</i> . In the Save Records dialog, choose the NLM Medline format from the <i>Export Format</i> menu.	ISI Citation Indexes filter
<b>ISI Web of Science</b>	When viewing your marked references, click <i>Export</i> to have the references exported directly to EndNote. (See "Direct Export from Web Pages" on page 77.) You may also choose <i>Save to File</i> to save the references to a text file and import them into EndNote.	ISI-CE
<b>Knowledge Finder</b>	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 EndNote's Filters folder.
<b>Medscape</b>	After selecting the desired records and adding them to your clipboard, click the <i>Save or Email Clipboard</i> link. Save or email your clipboard in PC or Mac MEDLARS format as a plain text (*.txt) file.	MEDLINE (Medscape) filter
<b>NERAC</b>	Save your file as plain text (*.txt).	NERAC
<b>OCLC FirstSearch - Web</b>	Mark those references to be saved and click <i>Export</i> . At the next page, choose EndNote and then click <i>Export</i> . EndNote will prompt you to select a filter.	Various OCLC filters are provided in EndNote's Filters folder.
<b>Ovid Web</b>	After selecting the references you wish to download, click <i>Citation Manager</i> . Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) Click the <i>Email</i> or <i>Save</i> button. Save the file as plain text (*.txt).	The appropriate Ovid filter will be selected automatically when using <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.
<b>Ovid for Windows</b>	Select the <i>Options</i> button from within the "Save Documents" dialog box. From the list of options, choose the Output Format, then click <i>OK</i> . On the next screen, choose <i>Reprint Format</i> .	Various Ovid filters are provided in EndNote's Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Download Instructions	Import Option
<b>ProQuest</b>	Use the <i>E-Mail Article</i> button to send records to your email account. Then save as "Plain Text."	Use the appropriate ProQuest filter.
<b>PsycINFO at www.apa.org</b>	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.
<b>PubMed</b>	Display your search results in "MEDLINE" format by choosing <i>MEDLINE</i> from the popup list between the <i>Display</i> and <i>Save</i> buttons. Click <i>Save</i> to save the references to a text file.	PubMed (NLM) filter
<b>Reference Update v5X</b>	Select <i>Reference Listings</i> from the <i>Output</i> menu, and choose the following options:  Device: ASCII File - No Printer codes (be sure to enter the path and file name for the output file.)  Output Format: Medline  Click <i>Print</i> to create the output file.	ISI Reference Update-Medline filter
<b>SilverPlatter WebSPIRS, Version 5</b>	Once you've obtained your search results, click <i>Save</i> . Select the following "Save Records" options:  Which fields?: All fields  Include: Record number and database name  Field labels: Short labels.  Click the <i>Save Records</i> button. Use your Web browser to save the page as "Text Only" (do not save in HTML format).	Various SilverPlatter filters are provided in EndNote's Filters folder.
<b>STN</b>	Set your communication software's options to capture text to a file. Type the command "Display All".	Various STN filters are provided in EndNote's Filters folder.
<b>UnCover (Ingenta)</b>	Using your e-mail software, save references e-mailed to you as a "Plain Text" or "Text Only" file.	Reveal (Carl UnCover) filter

## Output Formats and Corresponding Import Options

Information Provider	Download Instructions	Import Option
Wilson	Select the following options Destination: Choose "e-mail" or "save". Include: Record numbers and full-text links (optional). Format: Choose "text."	WilsonWeb

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### Direct Export from Web Pages

Certain web sites contain a download button that will send your search results directly to EndNote, pick the correct import option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported. This "direct export" or "direct download" method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter. Many online databases, such as Highwire Press, Ovid, OCLC, ProQuest, Web of Science, and more, provide a direct export of references into EndNote.



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