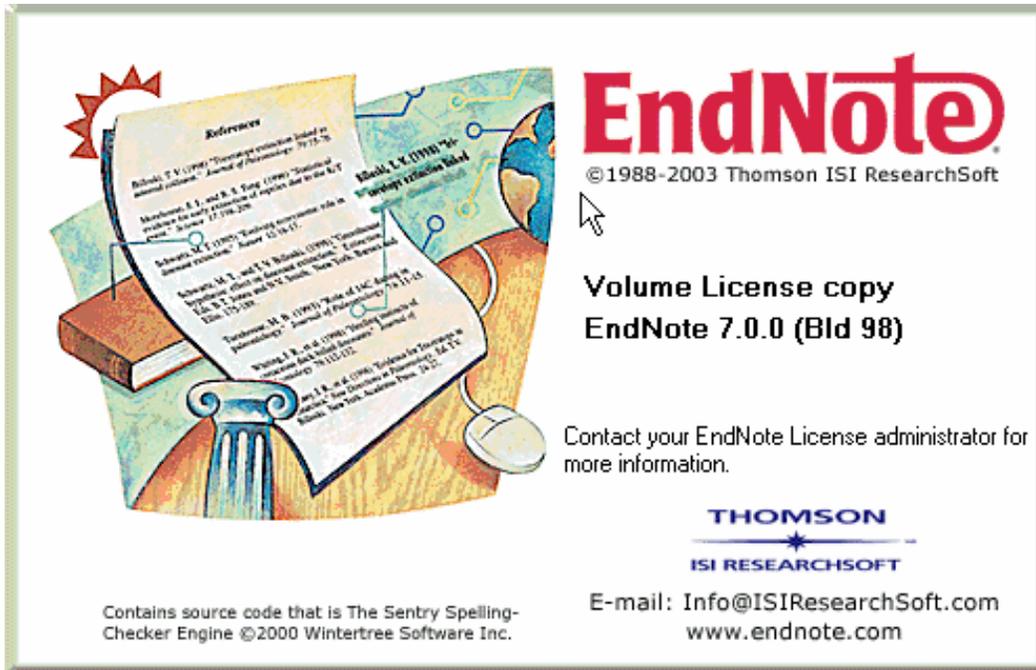


EndNote 7



The image shows the software box art for EndNote 7.0.0. On the left, there is a stylized illustration of a desk with a computer mouse, a book, and a scroll of paper titled 'References' containing several citation entries. The scroll is held by a blue classical column. To the right of the illustration, the 'EndNote' logo is displayed in a large, bold, red font. Below the logo, the copyright notice '©1988-2003 Thomson ISI ResearchSoft' is shown. A mouse cursor icon points to the text 'Volume License copy EndNote 7.0.0 (Bld 98)'. Below this, a line of text reads 'Contact your EndNote License administrator for more information.' The Thomson ISI ResearchSoft logo is centered below that, followed by the email address 'Info@ISIResearchSoft.com' and the website 'www.endnote.com'. At the bottom left of the box art, a small line of text states: 'Contains source code that is The Sentry Spelling-Checker Engine ©2000 Wintertree Software Inc.'

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Edited by: Eric Steele and Matt Rushing
ITSS LMIT Contract
Last Revised: March 2004



**National Institute of
Environmental Health Sciences**
National Institutes of Health
Department of Health and Human Services

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Are you Ready?

At this point, we assume that both EndNote Version 6 or 7 and Microsoft Word or WordPerfect are properly installed on the computer.

Refer to **Method 1** in the **Start EndNote** section below to see check if EndNote is installed and what version.

Start EndNote

EndNote is a regular program so it can be launched in the usual way you launch programs.

Here are two alternative methods for starting EndNote.

Method 1:

Word: click on the **Tools** menu and the first choice should be **EndNote6** or **EndNote 7**.

WordPerfect: click on the **Tools** menu and the choice **EndNote 6** or **EndNote 7** is in the middle of the pull-down menu.

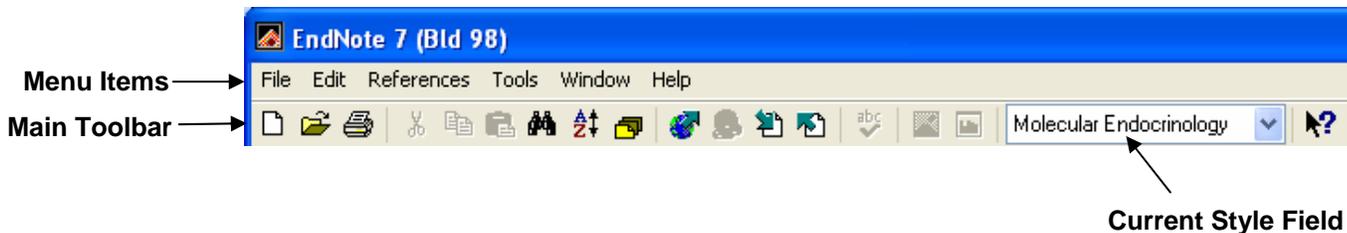
If the choice is not present or it is an older version of EndNote then please contact your Computer Support Person (CSP).

Method 2:

Double click an EndNote Library icon.

What Should I see when I open EndNote 7?

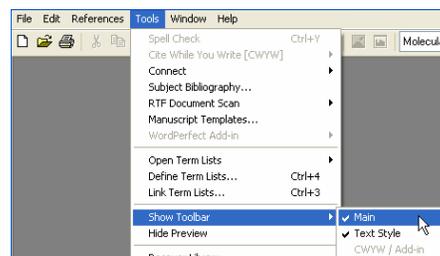
When EndNote opens there will be **Menu Items** and hopefully the **Main toolbar**.



No Main Toolbar

If the main toolbar is not active you can activate it yourself.

1. From the Menu Items choose **Tools**
2. Slide cursor down to **Show Toolbar**
3. This reveals the toolbar list
 - **Main**
 - **Text Style**
 - **CWYW/ Add-in**
4. Slide cursor over and choose **Main**.



A checkmark in front of the toolbar name means it is already active.

Note: To hide a toolbar repeat steps 1-4.

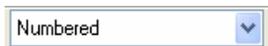
Toolbar descriptions

The Main toolbar:



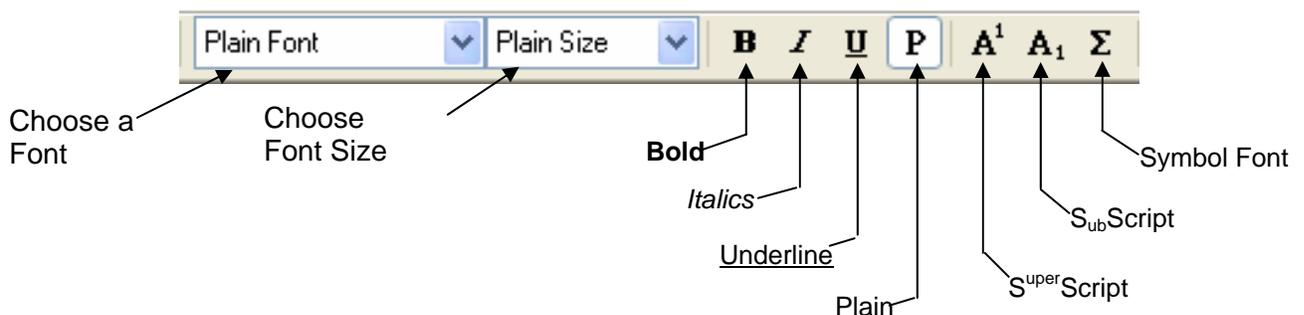
-  **New Library**
-  **Open existing Library**
-  **Print selected Reference(s)**

-  **Cut** Selected text or delete selected Reference(s)
-  **Copy** Selected text or selected Reference(s)
-  **Paste** Copied text or Reference(s)
-  Activates **EndNote's Search Engine** for searching a library. For more details, see page 10.
-  **Sort Library.** For more details, see page 21.
-  **New Reference.** The reference will be placed in the active library when the button is pressed. For more details, see page 5.
-  **Connect** to a database such as PubMed. This button will launch the Connection Manager and needs an Internet connection. For more details, see page 7.
-  **Import.** Brings in the results of a search from another database saved as a txt file following the proper steps. More details.
-  **Export.** Exports your library as a text file for use with other applications.



Current Style Field displays the style name that was last selected. This style will be applied by the **Cite While You Write** function and will be the selected choice when **Format Bibliography** is chosen.

The Text Style Toolbar:



The Text Style toolbar is used when editing a reference in your library. It does not affect the text in your document.

The Text Style toolbar is also used when building a custom journal Style or editing an existing journal style.

Starting from Nothing

EndNote is most effective when used from the beginning of the paper writing process. It can insert and organize the citations as the paper is created, which makes everything more efficient during the formatting phase.

To take advantage of EndNote's efficiency, begin with Microsoft Word open and follow these steps to build your first EndNote reference library.

Creating a New EndNote Library

1. From Word's menu, select **Tools** and **EndNote 7**. Then slide over and choose **Go To EndNote**.

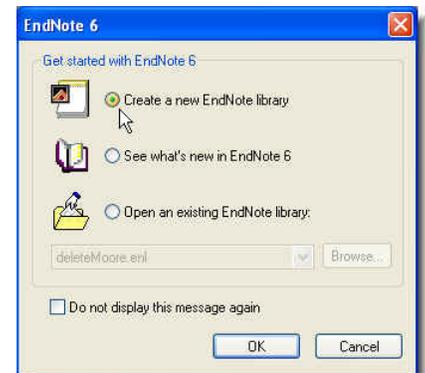
or

1. Click the **Go To EndNote button** on the EndNote **Toolbar**.



2. At this time EndNote will want to open an existing Library.

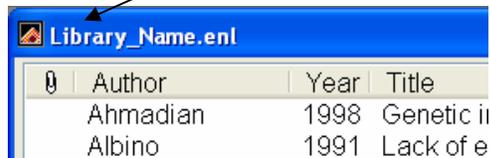
- If one does exist,
 1. Select the **Open** choice
 2. browse on your computer to find the library and open it.
- If one does not exist or as in this exercise a new library is desired then:
 1. click the **Create a New** button



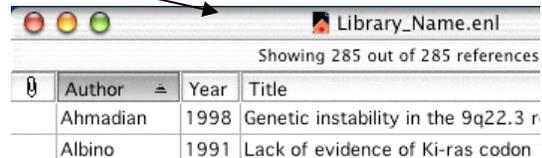
3. This brings up the new library window.
 - a) Select the location on your computer where the library will be stored.
 - b) Type in the name of the new library.
 - PCs will automatically add **.enl** as the extension
 - c) Click on **Save**.

A new, empty EndNote library file is created. It can be identified by the title appearing on the top of the window. This library can be treated like any other file on the computer such as a Word document or an Excel file.

File name displayed on top of Library window



Windows



Macintosh

The EndNote library is a database file.

Two characteristics of the database are:

- a) The file **automatically saves** every change in data you make.
 - So you cannot work/practice/experiment on a library for a while and then decide to close without saving, because the changes will already be recorded.

If you need a practice or experiment library then make a copy of the library and use that.

Adding References to the Library

There are three different ways to add references to the new library:

1. Type them in yourself
2. Connect to the database through the EndNote program
3. Import them from a properly saved text format file from an on-line database query made through either Netscape or Internet Explorer (see Appendix B)

Any question concerning on-line database searching features of the web, please check with Larry Wright of the NIEHS library staff for assistance. Basic information is provided in Appendix B of this manual.

Typing References manually

At times it is necessary to directly type in a reference. An example of this is when the article is old and the archives have not generated that year on the database yet.

1. To add references to the library, pull down the **References** menu item and select **New**.
2. Select the Reference Type from the drop down menu near top
3. Type in the reference information for each field. As with most databases, use the **Tab** key to move down the fields, the **Shift + Tab** keys to go back a field, or click the mouse in the next field. Each field can contain up to eight pages of text.
- 4.

Enter only one author on each line--so press the return key after each author. The method used to enter names in other references in the library does NOT matter. The important issue is to remain consistent within the *individual* reference. When entering an author's name use the following guidelines.

1. Name can be entered as either:

- a. Last name, First Middle **Ex.** Thoughtful, Toby Simon
- b. First Middle Last **Ex.** Toby Simon Thoughtful

2. It is best to enter full names because EndNote can abbreviate when needed, but if only initials are available then they can be entered two ways.

- a. With periods **Ex.** Thoughtful, T. S.
- b. Without periods and a space between Initials

Ex. Thoughtful, T S

Ex. T S Thoughtful

- c. If there is a title with the name it follows the name after a comma

Ex. Thoughtful, T. S., Jr.

Ex. T S Thoughtful, Jr.

Note: Closing the reference window automatically saves it into the library.

Connecting and Importing References within EndNote

Searching through EndNote is the best method for building your first library. Especially when converting all references that have only been hand-typed and never used in a bibliographic data base software program such as EndNote or ProCite.

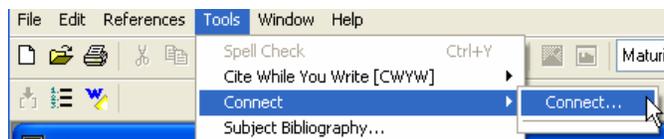
It is quicker to locate these **already known** references using EndNote to connect to PubMed than to manually enter the information and an added bonus is that the information imported from PubMed will be more extensive--including things like the full abstract.

Follow the steps in this section to build the library with your existing typed references or hard copy articles as your starting point. **DO NOT** use EndNote to connect to other databases when performing **new searches** of references on a particular subject, key word, author or publication. When you are not sure of the outcome of the search the lack of accuracy in EndNote's search engine will go unnoticed and important references will be missed!

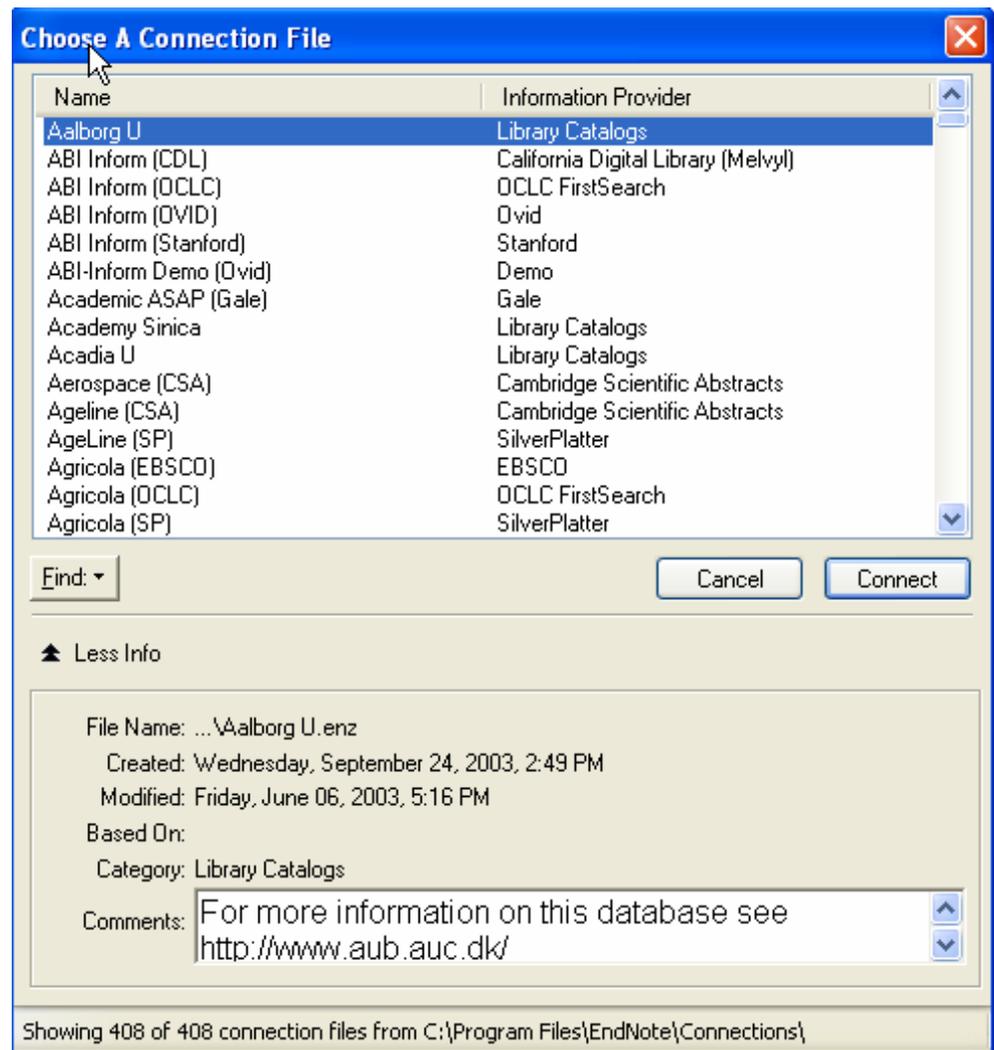
Note: To do a proper first time search or update a search of topics or authors, please refer to the classes offered by Larry Wright of the NIEHS Library:
<http://dir.niehs.nih.gov/cgi-bin/roy/class.pl> or refer to Appendix B of this manual.

The shortest way to get known references from an on-line library is to use the built-in **Connect** feature of EndNote.

1. From the **Tools** menu, choose **Connect**.
2. When the menu opens, If a library has been used before it will appear below the **Connect . . .** choice and can be selected at this time. If the desired library is not listed here choose **Connect. ...**



3. The **Choose a Connection** window opens.

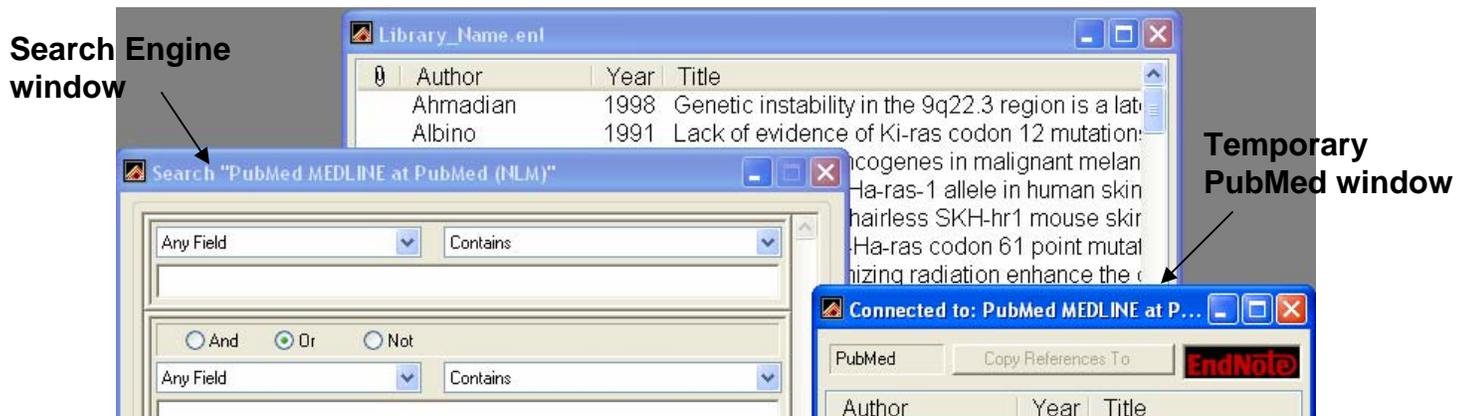


4. For the sake of this exercise choose the **PubMed (NLM)** connection either by double-clicking to activate it or a single click on the name and then click on the **Connect** button.

Two new windows will open on top of your EndNote library.

The first window is the EndNote's Search screen.

The other is the temporary library connected to the database you've just chosen. This window will hold your search results before you transfer them to your library.



Common EndNote Search Engine Error

The EndNote Search engine will search any library that is active. The search window tells you which library it is searching at the window top.

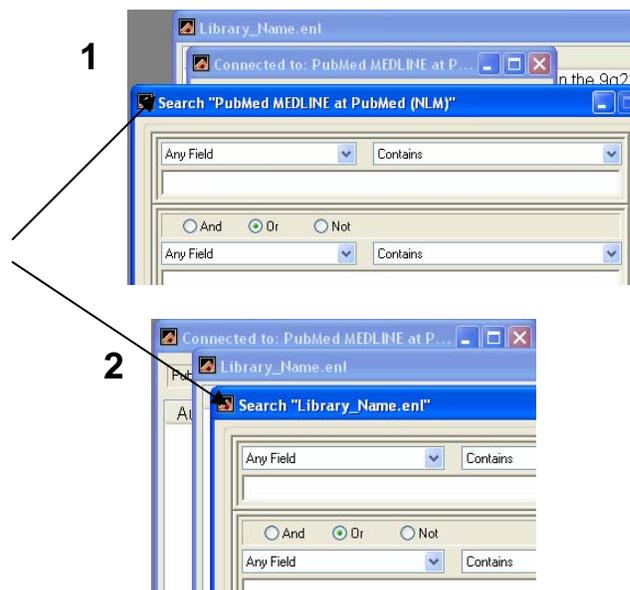
There are two libraries open:

- PubMed MEDLINE
- Library_Name.enl

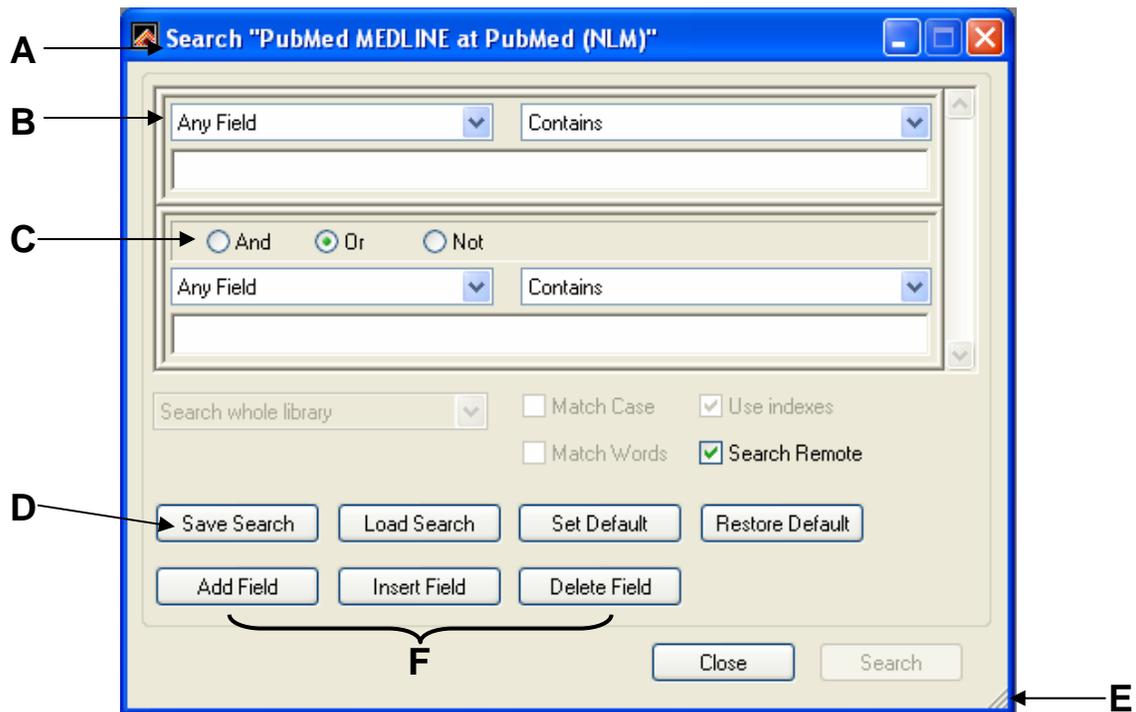
Check the top of the Search window to see which one it is searching.

Example 1: The search engine is searching the PubMed MEDLINE library.

Example 2: The search engine is searching Library_Name.enl



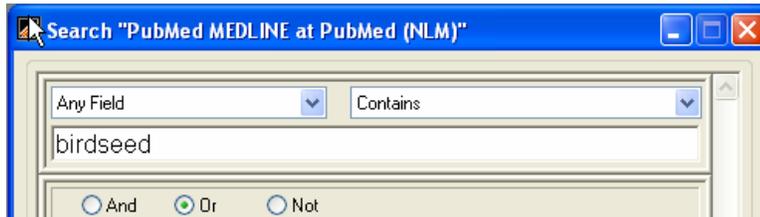
Explaining the Search Engine Window



- A. The title of the library being searched.
- B. Above each field is the search criteria and it defaults to **Any Field**. One click on the double arrows reveals a list of field criteria such as Title, Author, Year, etc.
- C. Next, choose the **And**, **Or**, or **Not** radio button between the search fields.
- D. Save the details of a specific search that will be repeated often. Load a previously saved search for quick searching. For more detail see page 14.
- E. To stretch the window to reveal added search fields put cursor over lower right corner. When cursor changes shape click, hold and drag the window to desired size.
- F. This option is to **Add**, **Insert**, or **Delete** an entire search field. These choices are available across the top right of the window.

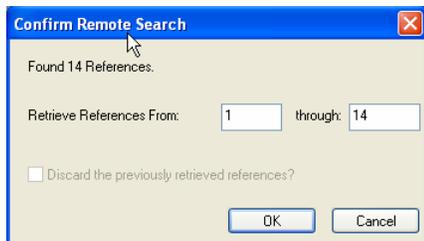
Using the EndNote Search Engine

1. For this exercise, type in **birdseed** in the first search field and leave the search criteria on **any field**.

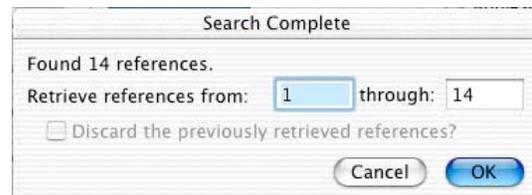


Note: In searching for your real references, try using Author, Year and Title as your first criteria.

2. This query finds nine matches out of all the on-line references in PubMed. The computer indicates the results in the **Confirm Remote Search** or **Search Complete** window.



PC window

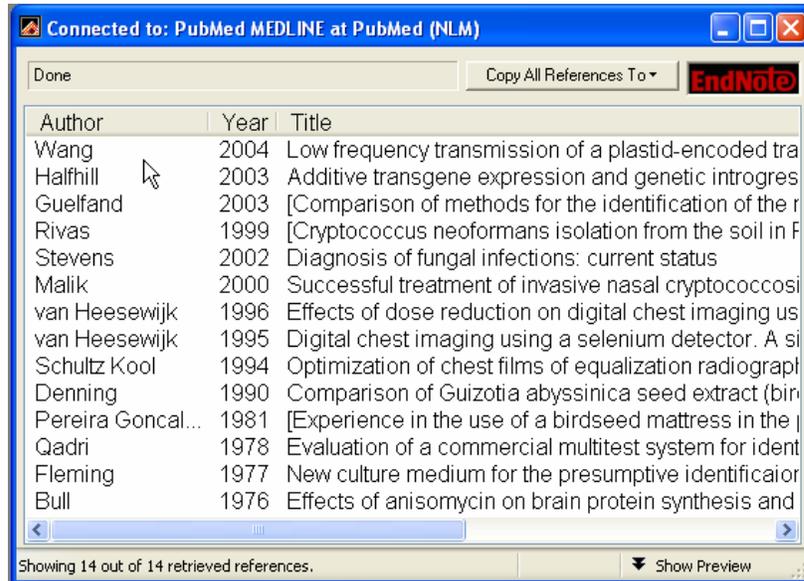


Mac window

Note: If there was a previous list of references in the temporary PubMed window the **Discard** option will be available. If the previous list has been examined and the needed references copied to the permanent library then choose **Discard**. This clears the temporary window and saves time when viewing the new references.

3. Retrieve the found references.
 - If the found set is large choose cancel and narrow the search criteria
 - If the found set is satisfactory, click on **OK**.
4. The temporary PubMed library (the **Connected to:** window)
 - now has all retrieved references showing.

- provides a location to view, examine and choose which references are desired for the new library.
- The references are not yet part of your new library.



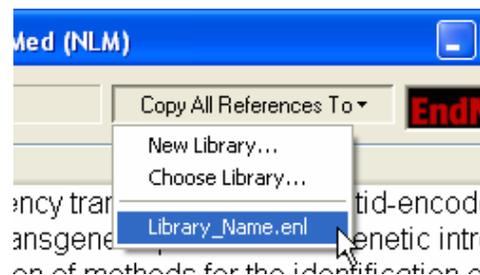
5. Examine the references from the temporary PubMed window.

- Sort a list in any library window click on the column label, such as Author, Year, or Title, and the references will be sorted by that category.
- To examine a reference in more detail, double-click on it and a reference window will open and allow viewing of all fields.
- If all references are highlighted, it will open windows for each.

6. There are three methods to select references to move to the new library:

a) To import them all

- 1) pull down the little arrow next to **Copy All References To** (located in the upper right of the window)
- 2) slide down to the last choice which will be the title of your open library.

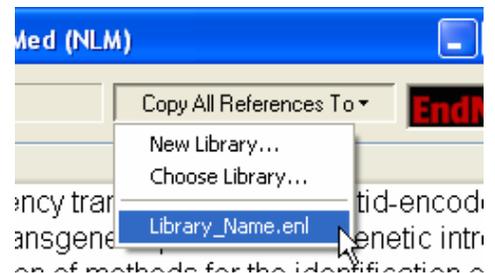


- b) To select a continuous group of references:
 - 1) click on the first reference
 - 2) hold down the Shift key
 - 3) click on the last reference of the group

- c) To select several entries scattered throughout the temporary PubMed window (**Connect to:** window)
 - 1) click on the first reference, hold down the **Control (CTRL)** key on a PC, or the **Apple Command (⌘)** key on the Mac
 - 2) continue to hold down the **Control (CTRL)** key on a PC, or the **Apple Command (⌘)** key on the Mac and click on all the references to be copied to the EndNote library.
 - 3) deselect a reference by clicking it again while holding the **Control (CTRL)** key on a PC, or the **Apple Command (⌘)** key on the Mac

7. Two methods for moving the references to your library

- a)
 - 1) pull down the little arrow next to **Copy n References To** (located in the upper right of the window)
 - 2) slide down to the last choice which will be the title of your open library.



- b)
 - 1) Put cursor over one of the highlighted references.
 - 2) Click, hold and drag the references to your library and release.

Note: A shortcut for copying selected references is to click, hold and drag the highlighted references in your library into your library window and let go.

- 8. When all the references are found and the library is complete, end the connection to PubMed by closing the temporary Connected to: PubMed window and tell it to **Discard** this information. Remember that the PubMed connection is live and using space on that library server. It is professional courtesy to end the connection to make room for someone else when you are finished.

9. Close the Search window, which leaves only the new EndNote library window.

Note: If using an already established EndNote library with references preexisting in it, your library now only shows the newly imported records and none of the old ones. Choose **References** from the menu items and select **Show All** so that you may see your entire list of references.

Save/Load searches

The **Save** and **Load** buttons are at the top left of the search engine window.

- To save the details of a search:
 - a. configure the search window
 - b. then click the **Save** button.
 - c. When the save dialog appears **enter the name**
 - d. click **Save**.

- To load a search
 - a. make sure the library and the search engine window are open
 - b. click the **Load** button
 - c. When the dialog window opens select the search strategy wanted
 - d. click **Open**
 - e. The search window will be automatically be configured to reflect the search
 - f. click **Perform Search**.

Some of my references have disappeared

This will most often occur after a search or import action.

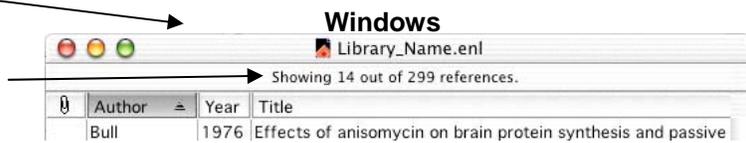
EndNote only shows you the references involved with the action performed.

On the library window EndNote tells you if a subset is being displayed.



- PC this is located in the lower left of the window

- Mac this is located in the upper middle below the title.



Macintosh

To reveal all the references

- 1) From the menu items choose **REFERENCES**
- 2) slide down and choose **SHOW ALL**
- 3) Keyboard shortcut is: PC = **Control (CTRL) + H**
Mac = **Apple Command (⌘) + H**

Importing On-line Queries

Many begin with the research portion of the work completed, such as searches on MEDLINE using Web of Science, or PubMed. This search usually generates a saved file from the query that will be used in a paper. Detailed instructions on how to do searches on PubMed and Web of Science are taught bi-monthly by Larry Wright of the NIEHS Library. Please check the Computer Training schedule for the next available class at the <http://dir.niehs.nih.gov/dirosd/training/home.htm> web page. Basic instructions for searches are Appendix B of this manual.

NOTE: It is highly recommended to go directly to the databases (such as Web of Science or PubMed) when generating a new or exploratory search. Do not use EndNote's Connection when searching these databases. There is a drop-off in searching accuracy that is not readily apparent without a comparison of methods.

PubMed

1. In PubMed, be sure to display the selected search results/ references in **MEDLINE** format (Note: the default format is at the top of the web page is Summary and it will not work with EndNote.)
2. Once the references are displayed in **MEDLINE** format, click on the **Save** button and save as a text (.txt) file.
3. Go to EndNote and open your library file.
4. From **File** menu item, select **Import**.
5. In the Import dialog box, the first step will be to **Import Data File**. Using the **CHOOSE FILE** button, select the text file that you just saved in PubMed.
6. The second step is to select an **Import Option**. For PubMed, select **Other Filters...** Then highlight the **PUBMED (NLM)** filter and click on the **CHOOSE** button.
7. Click on the **Import** button.

Web of Science

1. Mark references and click **SUBMIT** button.
2. Click **MARKED LIST** button (near top of screen)
3. Click **SAVE TO FILE** and save the references as a text (.txt) file
4. Go to EndNote and open the library file.
5. From **File** menu item, select **Import**.
6. In the Import dialog box, the first step will be to **Import Data File**. Using the **CHOOSE FILE** button, select the text file that was saved in Web of Science.
7. The second step is to select an **Import Option**. For Web of Science, select **Other Filters...** Then select the **ISI Web of Science** filter and click on the **CHOOSE** button.
8. Click on the **Import** button.

Opening and Editing a Reference in an EndNote library

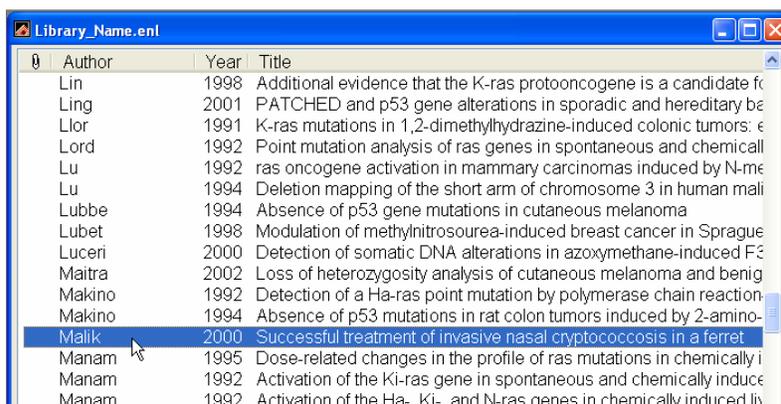
There are different ways to select a reference

- scroll to and click on the reference using the mouse
- typing the first few letters of the author's last name
- using the arrow keys to move the highlight up or down the library.

Locating a reference in a large library

When the library becomes large the method of typing in the first letters of the author's name to locate the reference is most efficient. This method only searches the first column, which defaults to the author category. Directions to change display fields are in the **Changing Preferences** section. (Page 37).

1. Select Malik reference by typing **mal** without pausing between letters. Pausing between the letters takes you to the alphabetic sections of **m**, then **a**, and then **l** separately with each keystroke, pause, keystroke.



0	Author	Year	Title
	Lin	1998	Additional evidence that the K-ras protooncogene is a candidate for
	Ling	2001	PATCHED and p53 gene alterations in sporadic and hereditary be
	Llor	1991	K-ras mutations in 1,2-dimethylhydrazine-induced colonic tumors: e
	Lord	1992	Point mutation analysis of ras genes in spontaneous and chemicall
	Lu	1992	ras oncogene activation in mammary carcinomas induced by N-me
	Lu	1994	Deletion mapping of the short arm of chromosome 3 in human mali
	Lubbe	1994	Absence of p53 gene mutations in cutaneous melanoma
	Lubet	1998	Modulation of methylnitrosourea-induced breast cancer in Sprague
	Luceri	2000	Detection of somatic DNA alterations in azoxymethane-induced F3
	Maitra	2002	Loss of heterozygosity analysis of cutaneous melanoma and benign
	Makino	1992	Detection of a Ha-ras point mutation by polymerase chain reaction
	Makino	1994	Absence of p53 mutations in rat colon tumors induced by 2-amino-
	Malik	2000	Successful treatment of invasive nasal cryptococcosis in a ferret
	Manam	1995	Dose-related changes in the profile of ras mutations in chemically i
	Manam	1992	Activation of the Ki-ras gene in spontaneous and chemically induce
	Manam	1992	Activation of the Ha- Ki- and N-ras genes in chemically induced liv

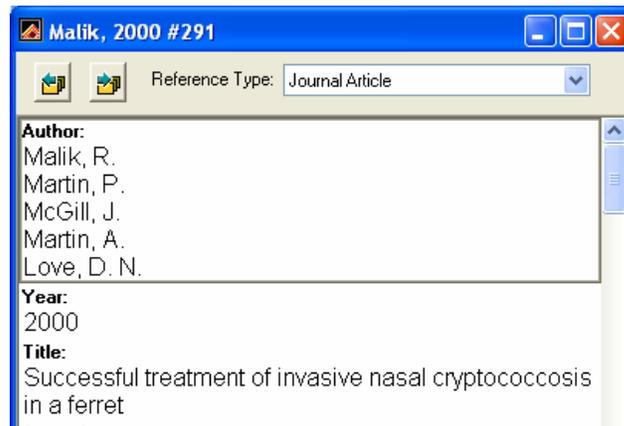
2. The scroll bar to the right of the window is also useful for moving up or down the library
3. The up and down arrows on the keyboard will also move you through the library.

Open a reference

Use any of these methods to open the selected Malik reference:

- a) press **return**
- b) double clicking on it
- c) from the **References** menu select **Edit**

All of the information associated with this single reference is displayed in the Reference window.

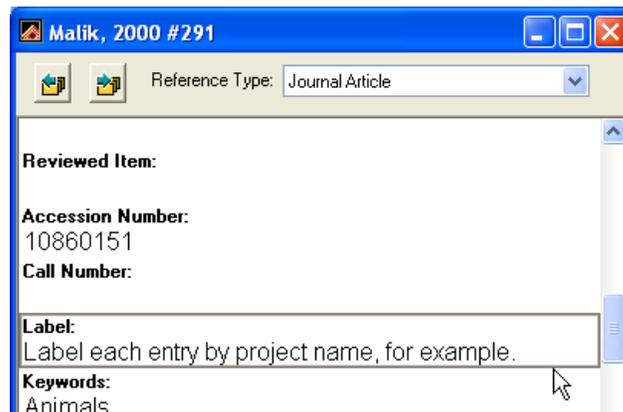


Use the mouse on the scroll bar to view the information or advance by using the **tab** key. **Shift+tab** moves back to a previous field in the record.

Editing a Reference

All of the fields in the reference window can be edited. To edit the fields:

1. Click the mouse at the desired location to insert the text cursor (which is the blinking vertical line).



2. Now most word processing functions are available including pasting a large amount of text (up to 8 pages) into a field.

Leave the text plain without any formatting. This makes the transfer to the specific journal styles easier.

Keywords field

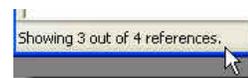
You can add your own keywords to this field.

1. Click in the field to place your cursor
2. Type in the keyword(s) Imitate the same pattern that exists. (usually one per line)

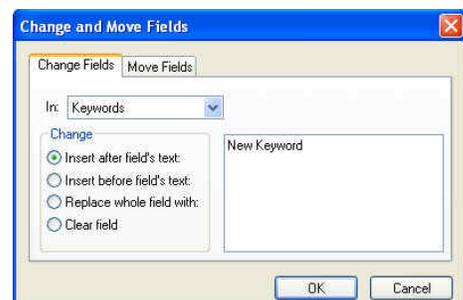
Adding Keywords to multiple references at the same time.

This is useful for future retrieval of these references from a large library. Also useful when importing a specific search or preparing for an upcoming manuscript.

1. Select all the references that you want to edit
2. From the **References** menu choose **Show selected references**
3. Check the Showing numbers in lower left (PC) or upper middle (MAC) to be sure only your subset is active.



4. From the **References** menu choose **Change and Move Fields**
5. Change the **Field** from Author to Keywords
6. Select the insertion choice (usually insert after field's text)
7. Type a **space** and then the **keyword**.
8. Click **OK**
9. A warning dialogue will appear, click **OK**
10. Click **OK** on results dialogue



Notes Field

Use the Notes field to keep any thoughts or reflections about the article. Include any important ideas that will trigger your memory when reviewing the reference at a later date.

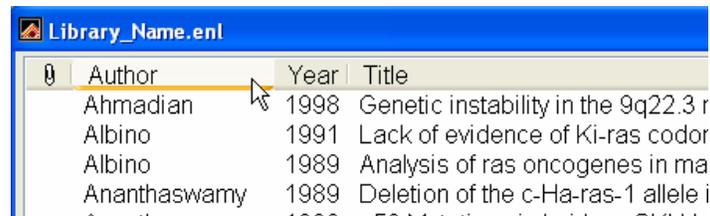
1. Click once in the Notes Field
2. Type and delete as desired

Sorting References in Your Library

Each user has personal preferences on how to view the references. EndNote offers the flexibility to sort any library according to current needs.

Quick sorts

Quick sorts are done by clicking on the category label at the top of a column. This sorts by the field chosen and defaults to ascending order, but can be changed to descending by clicking the same category label a second time.

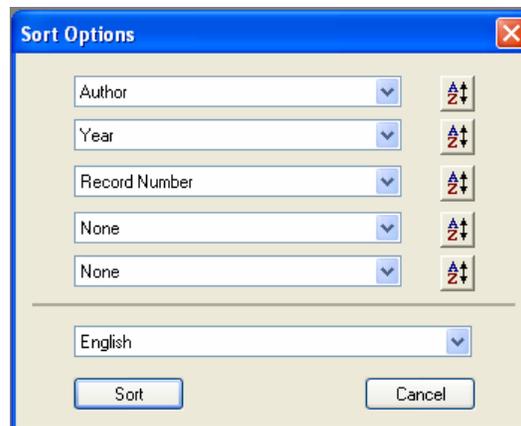


0	Author	Year	Title
	Ahmadian	1998	Genetic instability in the 9q22.3 r
	Albino	1991	Lack of evidence of Ki-ras codor
	Albino	1989	Analysis of ras oncogenes in ma
	Ananthaswamy	1989	Deletion of the c-Ha-ras-1 allele i

Advanced Sorting

A more extensive sort is done by:

1. From the **References** menu item, select **Sort**.
2. The sort window offers a five-level sort.
3. Click the arrow in the **Author** field to select the heading by which you would like to search.



4. Select the most important field. If there is a logical conflict between the sorting the field that comes first takes precedence.
5. The Box to the right of each field decides if the order is ascending or descending

Ascending



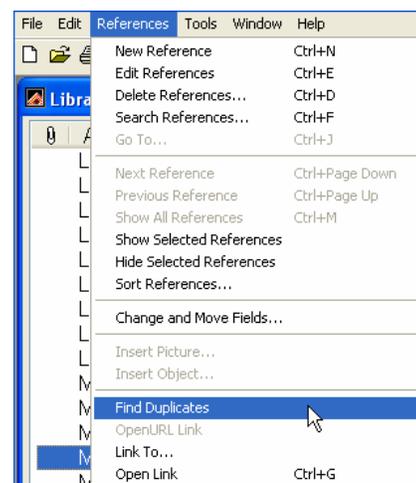
Descending



6. Repeat steps 2-5 for each desired field.
7. Click the **Sort** button and the references in the library will be re-ordered according to the choices.

Finding Duplicates

1. To check for duplicate records, do the following:
from the EndNote menu, choose **References, Find Duplicates**.



The Results of a **Find Duplicates** action:

- EndNote will show only those records it finds as duplicates.
- It automatically highlights the latest copy of the reference.
- It is **very important** to check the references against the Word document to make sure a cited reference is not deleted. Recall the citation example:

0	Author	Year	Title
	Bull	1976	Effects of anisomycin on brain protein synthesis and passive avoid
	Bull	1976	Effects of anisomycin on brain protein synthesis and passive avoid
	Bull	1976	Effects of anisomycin on brain protein synthesis and passive avoid
	Denning	1990	Comparison of Guizotia abyssinica seed extract (birdseed) agar w
	Denning	1990	Comparison of Guizotia abyssinica seed extract (birdseed) agar w
	Denning	1990	Comparison of Guizotia abyssinica seed extract (birdseed) agar w
	Fleming	1977	New culture medium for the presumptive identificaon of Candida a

This is my great new idea and another study that agreed with my findings{Bull, 1976 #9}.

The **#9** inside the braces refers to the reference number. Each reference is given a unique number when created in the library. When a reference is deleted its number is never reassigned.

- If at this time you are positive the highlighted references have not been used then delete them. If unsure proceed to the **Check record numbers of references** section below.
- Methods to delete a selected reference(s)
 - 1) from the menu items choose **References** and then **Delete**
 - 2) from the menu items choose **Edit** and then **Clear**.

- 3) The quick keys **⌘ + X** or **⌘ + D** for Macintosh or **CTRL + X** or **CTRL + D** for PC will also work.

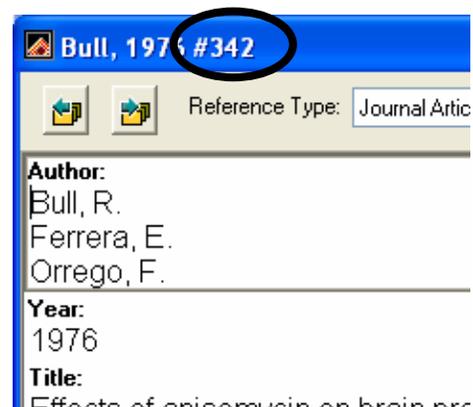
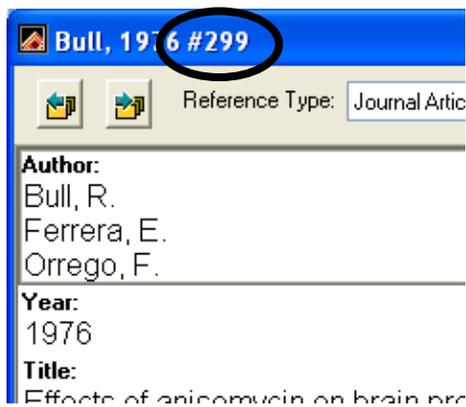
Check record numbers of references.

1. If the **Rec #** category is displayed in your library use it to make the comparison.

Author	Year	Rec #	Title
Bremner	1994	#246	Induction of different genetic changes by different clas
Buchmann	1991	#125	Mutational activation of the c-Ha-ras gene in liver tumo
Bull	1976	#299	Effects of anisomycin on brain protein synthesis and p
Bull	1976	#342	Effects of anisomycin on brain protein synthesis and p
Campbell	1993	#276	The relation between p53 mutation and p53 immunos
Campbell	1993	#147	Codon 12 Harvey-ras mutations are rare events in noi
Castresana	1993	#105	Lack of allelic deletion and point mutation as mechani

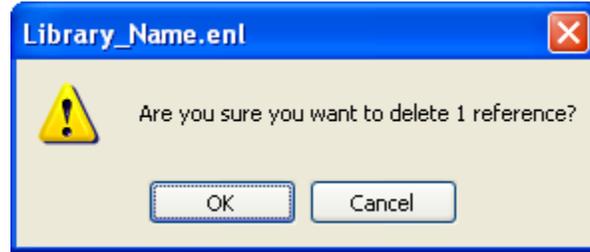
Note: To have the record number displayed in the library window with each reference see the Library Preference section on page 37.

2. If the **Rec #** category is not displayed, open both references and check the record number at the top of the window before deleting any duplicate records



3. Delete the reference whose number is **not used** in any of your unformatted or previously formatted papers.
4. Close the reference windows once the correct references have been identified. Click once to select the unused record, from the menu choose **References, Delete** or **Edit, Clear**. The quick keys **⌘ + X** or **⌘ + D** for Macintosh or **CTRL + X** or **CTRL + D** for PC will also work.

5. A second chance window appears and click **Delete**.



WARNING: Once a reference is deleted THERE IS NO UNDO FUNCTION. Double check the references used in your unformatted papers before deleting.

What if I delete a reference that was used in a paper?

If a reference that had been inserted into a paper as a citation is deleted (inadvertently of course) EndNote will be **unable** to format the citation to the appropriate journal style. For more information see **Checking Mismatched Citations** on page 34.

- To correct this erase the deleted citation reference marker (including the braces)

This·is·my·great·new·idea·and·another·study·that·agreed·with·
my·findings{Bull,·1976·#9}. ¶

- re-insert the citation using the reference that was kept. The reference will look identical except for a different record number.

This·is·my·great·new·idea·and·another·study·that·agreed·with·
my·findings{Bull,·1976·#10}. ¶

Inserting EndNote Citations into a Document

There are three different ways to insert a citation into the Word or WordPerfect document. There is no difference in these citations to EndNote, so use the method you are most comfortable with.

These steps place a **temporary citation marker** in the paper. For example:

{Bull, 1976 #22}

It will not match the style needed for journal submission until the appropriate style is chosen in EndNote and the paper has been formatted to reflect that style. The

final style formatting isn't usually done until you have completed writing your paper and are ready to create your bibliography.

Note: DO NOT type over top or change **any** part of this temporary citation marker. Any editing risks breaking the link to the EndNote library and EndNote cannot find it. Therefore, the citation will NOT be correctly formatted when the final paper is formatted to fit your journal's styles.

Before inserting a citation always ask these two questions:

1. Have you highlighted the reference(s) in your EndNote library?
 - a. Click on a single reference.
 - b. Several consecutive references: click on the first, hold down the Shift key and click on the last reference
 - c. Several non-consecutive references: click on the first, hold down the **⌘** on the Mac or the **CTRL** key on the PC on the remaining references you will need to cite.

2. Is the cursor in the correct place in the document?

If the answer is "yes" to both questions proceed with inserting the citation.

Four methods for inserting a citation

Method 1

1. Open the EndNote Library and highlight the reference(s) to be cited.
2. Open the Word document and place the cursor where the reference(s) citation is to be placed.
3. From the Word menu, select **Tools, Insert Citation(s)**. An example of how It will appear:

This is my great new idea and others have agreed with my findings{Bull, 1976 #9}.

Or

3. From **Word**, Click the **Insert Selected Citations** button on the EndNote toolbar



This marks the spot on the document where the formatted citation will be placed and from which EndNote reference the corresponding bibliographic information is generated.

Method 2

1. Open your document and place the cursor where the reference citation(s) is to be placed.
2. Open the EndNote library and highlight the reference(s) to be cited.
3. From the EndNote menu, select **Add-In, Insert Citation(s)**. The reference citation will appear as:

```
This is my great new idea and others have agreed  
with my findings{Bull, 1976 #9}.
```

Method 3

1. Open the EndNote {Lumbiganon, 1996 #4}library and highlight the reference(s) to be cited.
2. Choose **Edit, Copy** from the menu (or use the quick keys **⌘ + C** for Macintosh or **CTRL + C** for the PC).
3. Open the document and place the cursor where the reference citation(s) should be placed.
4. Choose **Edit, Paste** from the menu (or use the quick keys **⌘ + V** for Macintosh or **CTRL + V** for the PC).

Method 4

1. Open the EndNote library and highlight the reference(s) to be cited.
2. Place cursor over selected reference(s)
3. **Click, hold and drag** to the Word document.
4. place the **vertical dotted line** where you want the citation and release



The markers look and act identically regardless of which of these four methods are used to insert the reference citations. More than one library may be used in the same paper and any of these three different methods can be employed when choosing entries from the different EndNote libraries.

Turning off the CWYW tool

When you insert a citation and it is automatically formatted and the bibliography is created the CWYW tool is active.

1. Go to EndNote
2. From the **Tools** menu choose **Cite While you Write**
3. Slide over and choose **CWYW Preferences**
4. From the CWYW preferences window **deselect** the **Enable Instant Formatting** on new Word Documents. It will gray out the two other check boxes



Remember to have all used libraries open when formatting the paper otherwise EndNote cannot gather the necessary information to build the final citations and bibliography to match the chosen style.

Formatting Citations and Creating a Bibliography

After building the library, writing the paper, and inserting the temporary citation markers, the next step is to generate the bibliography to complete your paper. There are two choices:

1. Format a copy of the original document and save it in the style chosen
2. Format the original document in the style chosen.

As always it is a good habit to keep a copy of the unformatted document.

Choosing a Journal Style

Although there are over 30,000 journals published around the world, EndNote has less than 700 journal formatting styles to choose from. This is because many journals use the exact same bibliographic formatting style.

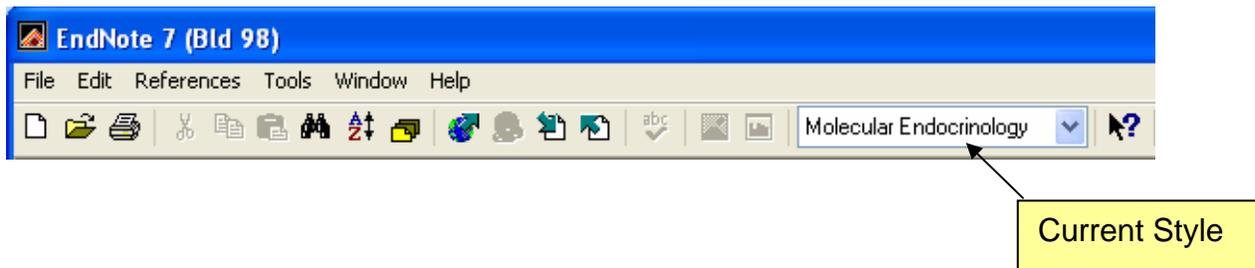
The first step is to check the styles built into EndNote to determine if there is a preformatted style for the particular journal to which you will be submitting. The

window that displays the styles is called **Style Manager**. There are two ways to reach **Style Manager** and both produce the same results.

Selecting Journal Styles:

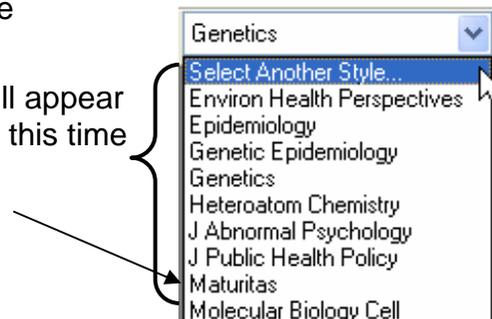
Method 1

1. Use the Main toolbar located below the menu items. The current style is displayed in a field to the right of the toolbar.

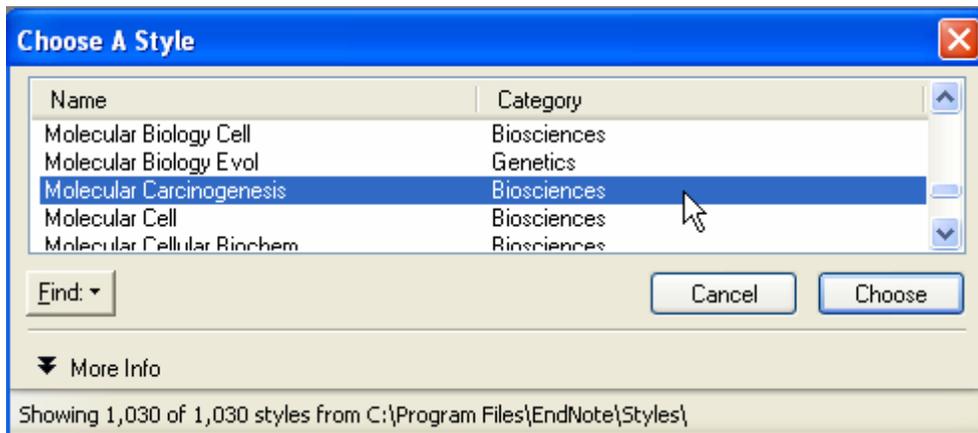


Note: If the toolbar is not visible it can be displayed by, from the menu items, choosing **Edit, Show Toolbar**. This shows three toolbar options. The **MAIN** toolbar is the one needed for styles.

2. Next click on the double arrow or triangle to the right of the current style field. The drop-down menu provides three types of choices
 - A. **Select Another Style** opens the Style Manager.
 - B. If the style has been used before it will appear in the lower list and can be chosen at this time



3. The Style Manager displays all the styles in alphabetic order.
 - Type in the first letter of the journal you are looking for and the Style Manager will go to that section of the alphabet.
 - Click on a style to highlight it and then click the **Choose** button in the lower right.



Now the style is displayed in the current style field and will be the default style when formatting the bibliography.



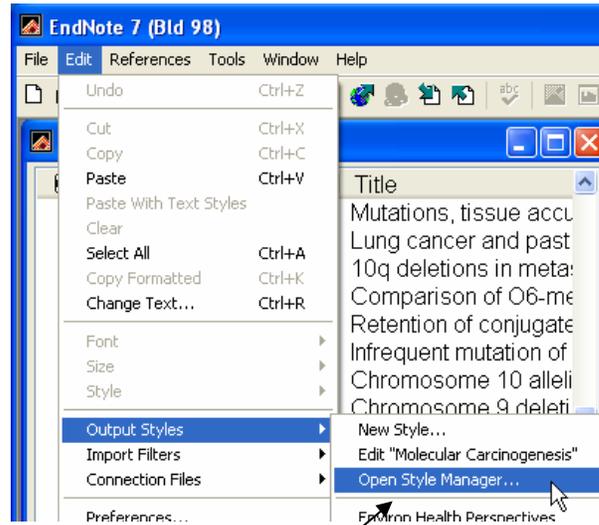
Note: If the required style is not found or the style does not match the examples provided by the publisher then a custom style must be made or an alternate style found.

If a style has been used before, it is NOT necessary to do step one (either Method). The reason for this is that it will already be on the style list.

When the formatting process is started in Word a **Format** prompt appears and asks for confirmation that the style selected is correct. A drop-down menu is available at this time with the same list of styles that are on the **Current Styles** menu on the Main Toolbar in EndNote. As long as the style is on that list it can be selected then.

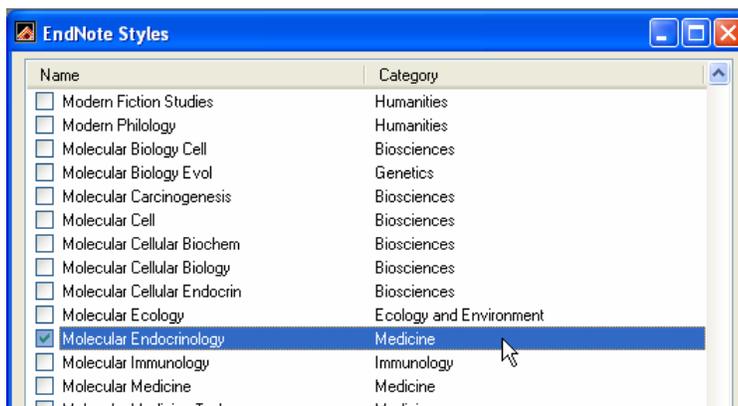
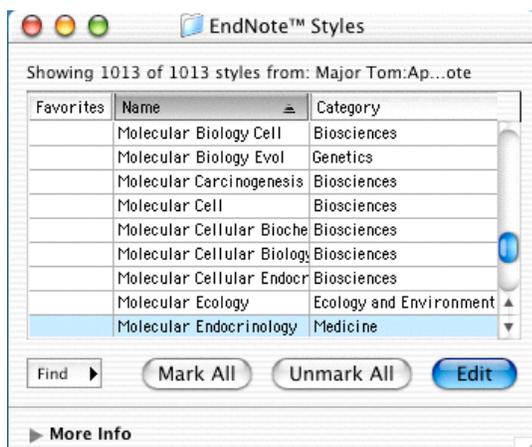
Method 2

1. From the menu items, choose **Edit, Output Styles**.
2. A menu appears and the third choice is **Open Style Manager**.
3. Select **Open Style Manager**



Note: If the style has been used to format previous papers, then it will appear as a choice on the lower half of the menu and can be selected again. Otherwise, select **Open Style Manager**.

4. The Style Manager displays all the styles in alphabetic order.
 - Type in the first letter of the journal you are looking for and the Style Manager will go to that section of the alphabet.
 - To select a style click in the left column so that a **check mark** appears. A style is NOT selected just because it is highlighted.



5. When the correct style is checked, close the window by clicking the little box in upper left (Mac) or the X in upper right (PC). **DO NOT** choose **Edit** or **Cancel**.

Note: Once a style has been chosen from the **Style Manager** it will be available from the **Current Style** menu or the **File, Output Styles** menu.

Viewing a Journal Style before formatting the document

Use the **Show Preview** option to look at a reference formatted by the current style

1. Set the current style to the one you want
2. Open the **Show Preview** window at bottom of Library
 - Mac:** located at lower left
 - PC:** located at lower right
3. Select a reference by clicking on it once
4. View the reference as it will appear in the bibliography



Matching a Style Not Found in Style Manager

If the style name of the journal is not listed in the available EndNote Style Manager, then take advantage of EndNote's Style Finder on their web page. There are only so many ways to list author, title and year so chances are the style demanded by the journal has a match by a different name or is a new style added since the original release of your EndNote version.

<http://www.endnote.com/support/enstylesfinder.asp>

The Style Finder asks the following questions. Answer only the ones necessary. Ignore the first two fields: **Journal/Publication Name** and **Discipline**.

Usually the **In Text Citations**, **First three fields**, and **Bibliography Sort Order** questions are enough to provide a good search.

Style Finder	Sorting Options
Publication Name <input type="text"/>	First 3 Fields (Journal) <input type="text" value="none"/> <input type="text" value="none"/> <input type="text" value="none"/>
Citation Style <input type="text" value="none"/>	Discipline <input type="text" value="none"/>
Bibliography Sort Order <input type="text" value="none"/>	<input type="button" value="Find Style"/>

The search provides a series of styles that fulfill the query. Below is an example search result.

[<- Back to List](#)

American Journal of Tropical Medicine and Hygiene		Download for Windows or MacOS
File Name:	Amer_J_Tropical_Medicine.ens Amer_J_Tropical_Medicine.hqx	
Last File Posting Date:	3/28/2000	
Citation Format:	Superscripted Number	
Bibliographic Sort Order:	Appearance-Order	
Microsoft Word Template (For EndNote 6 and above)	Not Available.	
Publisher:	Allen Press	
URL:	http://www.astmh.org/journal.html	
Discipline:	Public Health	

[<- Back to List](#)

The found styles show examples of a **Journal Article**, **Book** and **Book section**.

- Compare the examples of each style to the specifications of the Journal until a match is found.
- Do not download the style.
- All the styles included in these lists are built into EndNote so once a style is identified select the style in EndNote's Style Manager.

If the found style is not in the Style Manager

- then download it by clicking the appropriate version (Mac or PC) for the computer EndNote is installed on.
- The new style file must be placed in the Styles folder on the hard drive before it appears in the Style Manager and can be used by EndNote.
- You may have to restart EndNote for the choice to appear after moving the downloaded style into the correct folder on your computer.

Below are listed the most common locations for the styles folder. It is a folder that is inside your EndNote program's folder.

- On the PC: C:\Program Files\EndNote\Styles
- On the Mac: Macintosh Hd\Applications\EndNote 7\Styles

Changing the Journal Style

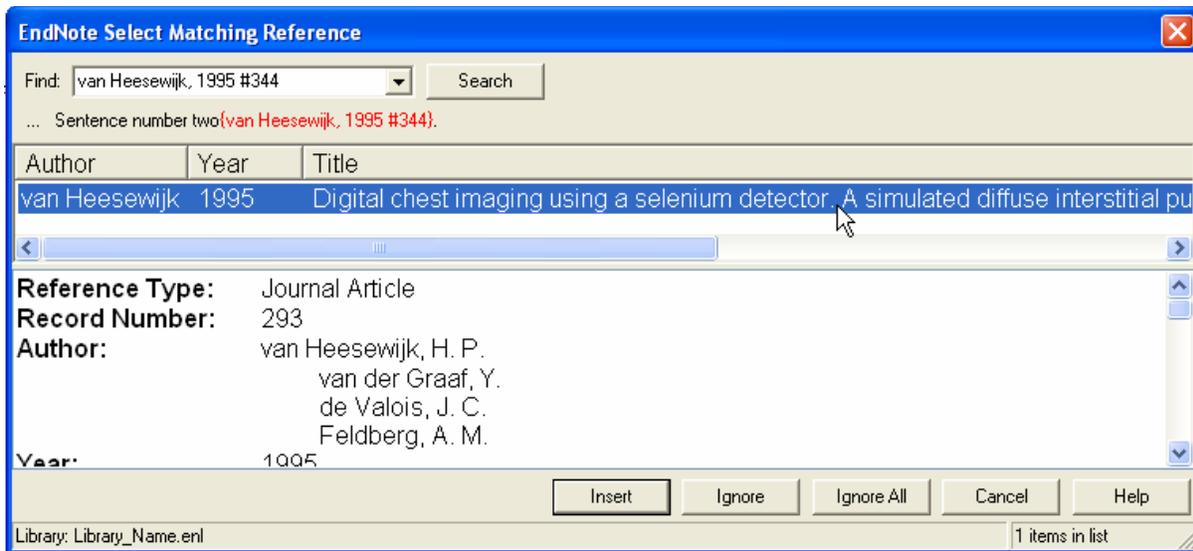
If on the odd chance a manuscript is unappreciated by a publisher (rejected) changing the style to submit to a different (more enlightened) publisher is painless.

1. Follow all the steps necessary to locate, select, and preview the new style as described starting on page 27 of this manual.
2. Remember to have all libraries open that were used for inserting citations into your paper.
3. Switch to your paper in Word or WordPerfect.
4. At this point you may unformat citations to remove the bibliography style by choosing **Tools, Unformat Citations** from the menu items or you may format over the existing formatted style.

Choose **Tools, Format Bibliography** from the menu items. Then proceed with all the steps to check the accuracy of the new style outlined in the Formatting Citation section on pages 33-34.

Checking Citation Matches

Now the paper is formatted and the Bibliography is visible and it must be checked for accuracy. The first window to check is the Add-in Matches window. This is located in the EndNote program so return to the program from Word. This window shows the number of matched citations and unmatched citations found in your paper.



The real value of this window is the lower field where each reference is individually listed. A successful match will have a **1** in the matches column and the temporary citation to the right.

A mismatched reference will have a **0** in the matches column. This window allows for a quick assessment of the mismatched references to see if they were in fact citations.

Note: EndNote sees all text inside of curly braces { } as a citation and will try to match a library reference to it. So any scientific notations within braces will be mistaken as citations and marked as unmatched. Please ignore those particular items.

EndNote does not change the temporary citation marker or scientific notations within braces in your document if it cannot find a match, instead it leaves them alone. So if, by looking at the Add-in Matches window, it is determined that the misses were not citations to begin with, then no further editing is necessary. These mismatches can be ignored since they were never references to begin with.

If the mismatch is indeed a reference to a citation, then proceed to the **Edit, Add or Delete Citations** section after you check the style formatting for your citations and bibliography.

Common EndNote Preferences and Their Locations

You may want to make small changes to the set up and default choices made by EndNote. There are two preference sections in EndNote:

1. EndNotes Main Preferences
2. EndNote Add-In Preferences

This appendix lists some common questions about customizing your version of the program and shows where to make the changes. The list is primarily for reference and does not provide detailed instructions.

EndNote's Main Preferences

To access EndNote Preferences:

1. From the **Edit** menu choose **Preferences** (at the bottom of menu).
2. The Preference window has a list of categories on the left hand side. Your options for setting preferences will be to the right. These options will change to reflect the category you choose.

To Save or Discard your Changes.

While each category will have different choices, all the categories have the same options at the bottom of the window:

EndNote Defaults: Returns the settings for the current window (ONLY) to the original EndNote settings.

Revert Panel: Removes any changes made to the current panel since it was last saved.

OK: Saves all changes to the preferences and loses the Preferences window.

Cancel: Discards all changes to the preferences and closes the Preferences window.

Apply: Saves and applies all changes to the preferences, and keeps the Preferences window open so that you can continue to modify the preferences as necessary.

Library preferences

- Add Field to Reference Type (see Edit Reference Type)
- Add Reference Type (see Edit Reference Type)
- Delete Field from Reference Type (see Edit Reference Type)
- Delete Field from Reference Type (see Edit Reference Type)
- Rename Field in Reference Type (see Edit Reference Type)

Library default to open when EndNote opens:

- a. Open desired library
- b. Choose Library category, Add Open Libraries

Font Default for reference display:

- a. Choose Display Font
- b. set Library display font.

Font Default for typing references:

- a. Choose Display Font
- b. Set General Display Font

Reference Type default. When creating a new reference what type should it open?

- a. Choose Reference types
- b. Set the default type

Edit Reference Type. To add/ delete or modify fields. Also to add or remove complete types.

- a. Choose Reference types
- b. Click the Modify Reference Types

Display fields: To change the order of the display or substitute a different field.

- a. Choose Display Fields
- b. Use pull down menus to modify display

Capital letters used in a word such as DNA: To keep EndNote from changing these words.

- a. Choose Change Case
- b. Enter Word to be ignored and Add.

Sort Author's name: To ignore certain words:

- a. Choose Sorting
- b. Add words to ignore in Author window

Sort Title Name: To ignore certain words.

- a. Choose Sorting
- b. Add words to ignore in Title window

Formatting: Confirm style before formatting. To remove this step

- a. Choose Formatting
- b. Deselect confirm button

Formatting: Merge duplicates in Bibliography. To remove this option.

- a. Choose Formatting
- b. Deselect Merge button.

Duplicates: To set field criteria for duplicate search, such as which fields to compare.

- a. Choose Duplicates
- b. Set search criteria.

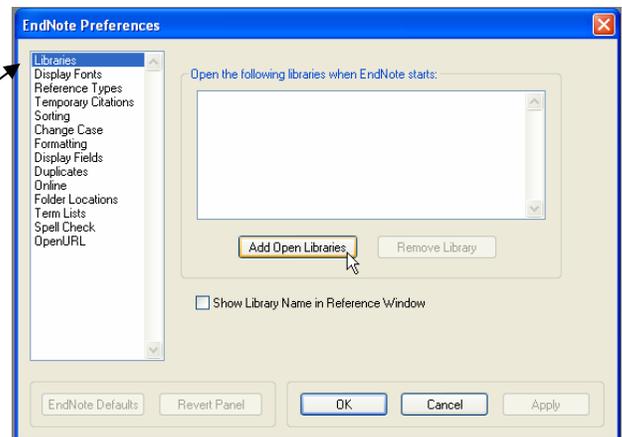
Term Lists: To turn off typing suggestions for author's names so EndNote will not try to guess the name you are typing.

- a. Choose Term lists
- b. deselect suggest term box.

Setting a Default Library

To set a created library (or libraries) to open automatically as a default, there are five simple steps to follow.

1. Open the EndNote library(s) that will be the default.
2. From the **Edit** menu, select **Preferences**.
3. Choose the **Libraries** option from the list on the left. This window allows a library to be open when EndNote opens.
4. Click on **Add Open Libraries** and the name of the library(s) opened in step one will appear in the blank field. A number of libraries can be added to this list.
5. When done click on **Save**.

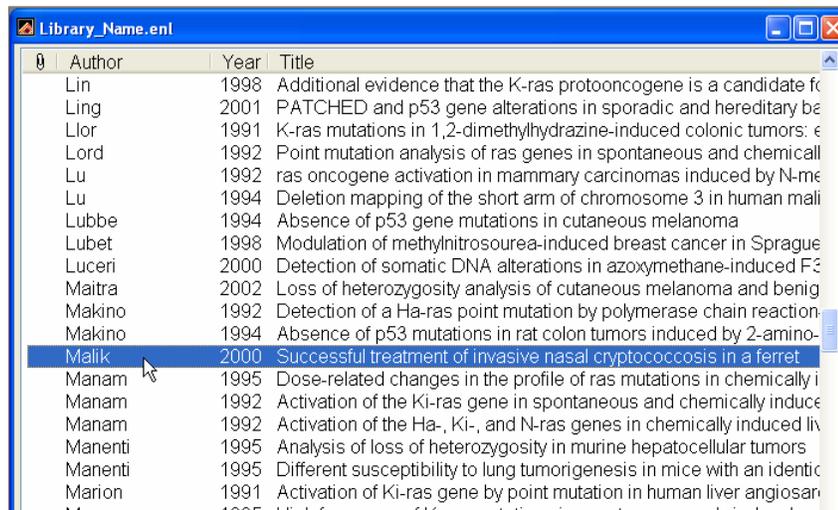


Printing References

When printing one, several, or all of the references they will be printed out alphabetically with no line breaks between each reference. The name of the library and the number of pages appear in the header in bold.

Basic Printing options

1. Begin by selecting the references needed to print.
 - a. For a single reference, single-click on the one wanted.
 - b. For several contiguous references, click on the first record, hold down the **Shift** key for both PC and Mac and click on the last. Select non-contiguous references by holding down the **Control** key for PC and **Command (⌘)** key for Macintosh while selecting the references.



- c. For printing all of the records, select **Edit, Select All**. The keystrokes are **⌘ + A** (Mac) or **CTRL + A** (PC)
2. Check that the current style is the one you want for displaying the reference.
 3. Choose **File, Print** or use the quick keys **⌘ + P** (Mac) **CTRL + P** (PC)
 4. After selecting all it can be turned off by choosing **Edit, Unselect All** from the menu items. **⌘ + A** (Mac) or **CTRL + A** (PC) deselects all.

Note: The reference will be printed as a bibliographic entry in the current style.

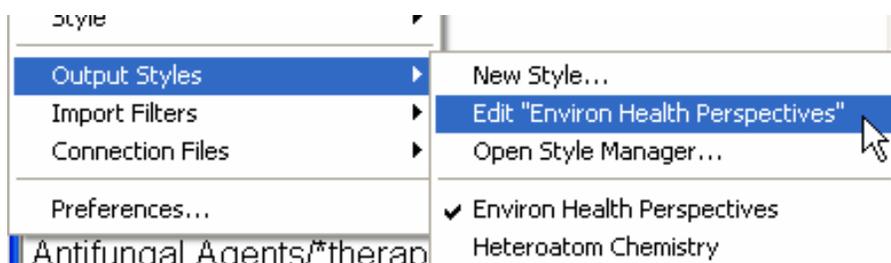
Advanced Printing options

It is possible to have other fields such as **Abstract** or **Keywords** added to the reference when it is printing. These changes must be made to the Style layout. When the printing is finished the changes must be removed or the added fields will appear when the style is used to format a paper.

Note: The easiest way to have the Abstract included is to use the Annotated style. It is already set to include the abstract.

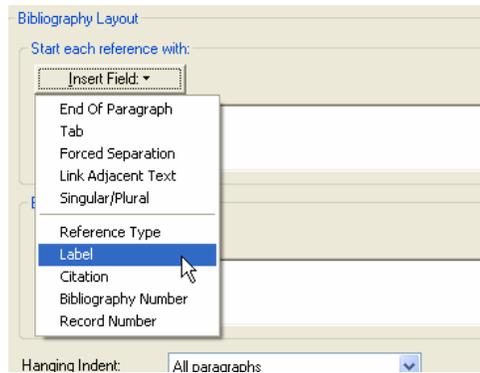
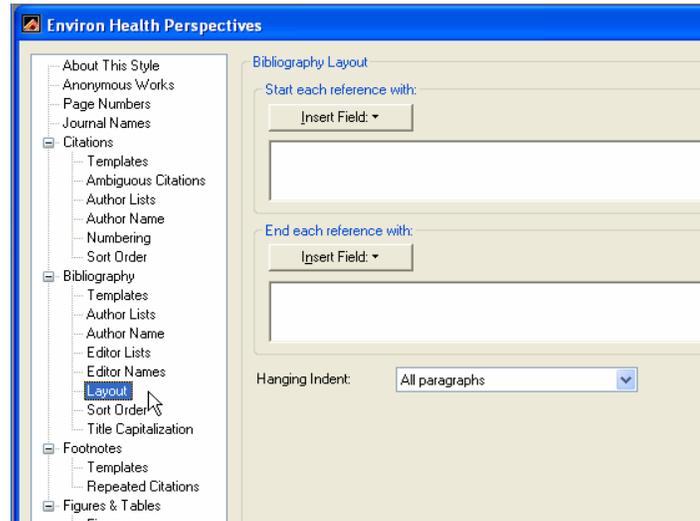
To include other fields:

1. From the menu items choose **File, Output styles**.
2. This opens the available style list along with the choices to make a new style edit a style and open the style manager.



3. Make sure the correct style for your paper is listed with the **Edit** choice.
 - If it is, then choose **Edit "The style title here"**.
 - If it is not the correct style then slide down one choice and select **Open Style Manager**. For more information on the style manager see page 29
 - If it is not the correct style and the journal name is not in the style manager then proceed to the **Matching Styles Online** section on page 33.

4. The editing window opens with the categories in the left field.
5. Open the layout field in the **Bibliography** folder. There is a Start and End reference field, each with a pull down menu of field choices called **Insert Field**.
6. Decide if the added field should appear before or after the reference and choose from the corresponding field.
7. Select the **Insert Field** button



that responsible for where you want to attach the extra field(s).

8. Slide down and select the field you want.
 - Only the visible choices are available and you can insert multiple choices. So both Abstract and Keywords, for example, can appear after the reference.

Note: Remember to remove the added fields after printing or they will remain part of the style and appear next time a paper is formatted with that style.

Copying References

It may be necessary to copy references from one library to another to build specific libraries for specific papers.

1. Select the reference (click to highlight in EndNote) and choose **Edit, Copy** from the menu (or use the quick keys **⌘ + C** for Macintosh or **CTRL + C** for PCs).
 - For several contiguous references, click on the first record, hold down the **Shift** key for both PC and Mac and click on the last.
 - Select non-contiguous references by holding down the **Control** key for PC and **Command (⌘)** key for Macintosh.
2. Open or activate the library that will receive the reference(s) and choose **Edit, Paste** from the menu (or use the quick keys **⌘ + V** for Macintosh or **CTRL + V** for PCs).

EndNote automatically alphabetizes the newly added references and combines them with the old ones.

Another reason to copy a reference from a library is to paste a citation in a Word document directly instead of using the **Tools, Insert Citation(s)** command.

Note: A reference can also be moved from one open library to another by clicking, holding and dragging the reference to the target library.

Temporary Citations

All of the changes listed below can be made in the Temporary Citation section of the Preferences. In each case the default preference will be indicated within parentheses at the end to the sentence.

1. Change the Temporary citation delimiters from braces to another choice to avoid confusion with scientific expressions. ({ })
2. Change how record number markers are indicated (#).
3. Substitute record number marker with a label. Useful if collaborating with someone who does not use EndNote and would not recognize the temporary citation by number.
4. Change Prefix Marker. To separate a prefix from the citation itself. (\).
5. Change Note indicator. (**NOTE:**)

EndNote Add-In Preferences

This preference window is separate because it is concerned with how Word and EndNote interact. EndNote add-in preferences can be reached in two ways:

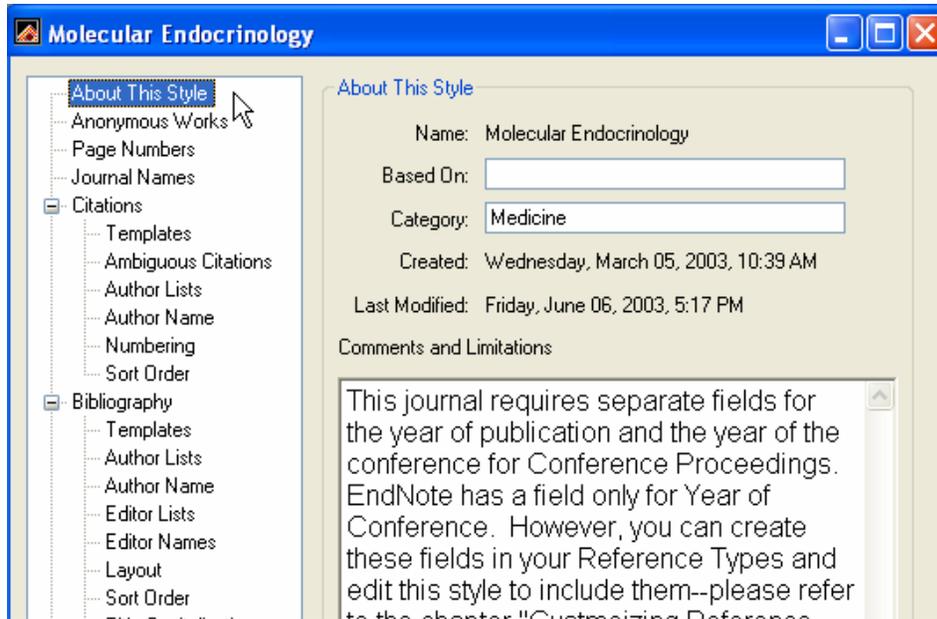
1. From **Tools** menu in Word choose **EndNote Add-in Preferences**.
2. From **Add-in** menu in EndNote choose **EndNote Add-in Preferences**.

This window allows:

1. Open EndNote automatically when Word opens
2. Close EndNote automatically when Word Closes
3. Return to Word after inserting citation.
4. Set keyboard shortcuts for:
 - Return to Word
 - Go to EndNote
 - Insert Citation
 - Format Bibliography
 - Unformat Citation

Editing Styles

The Edit window appears with the name of the style on the title bar.



The choices of which parts of the style to alter are on the left of the window. Here is a brief explanation of the categories most used during editing a style.

Templates: Shows the models EndNote uses to create entries. Click here to adjust a specific reference type such as Journal or Book.

Author lists: Determines how many names to list and how to list them: such as the placement or omission of commas.

Author name: Choose the order for names, such as Jane Doe or Doe, Jane, as well as initials with or without periods.

Editor lists: Determines how to display Editor and multiple editors' names.

Template Syntax Rules

Direct adjusting to the style occurs in the template category for either the in text citations or Bibliography. The concept of style editing is very basic: change the template to match the desired style. The difficulty is in the syntax used by EndNote. Once the syntax is understood then customizing a style goes smoothly.

Rule #1:

By default the Font, size and Style are all Plain forcing EndNote to match the font to the one used in the paper. The Text menu allows these aspects to be altered. For example to change a field entry to always appear in Italics highlight the field and choose **Text, Style** and **Italics**.

Any text or punctuation not separated from a field name by an ordinary space is **dependent** on that field. So the dependent text or punctuation only appears if the field contains data.

Example: Volume (Issue)
A reference with an issue = 28 (6)
A reference without an issue = 28

The parentheses around issue only appear if the entry contains an issue number.

Note: There is also a text toolbar available under the **Edit** menu. Choose **Show Toolbars, Text Style**. This toolbar is more convenient if extensive editing is necessary

Rule #2:

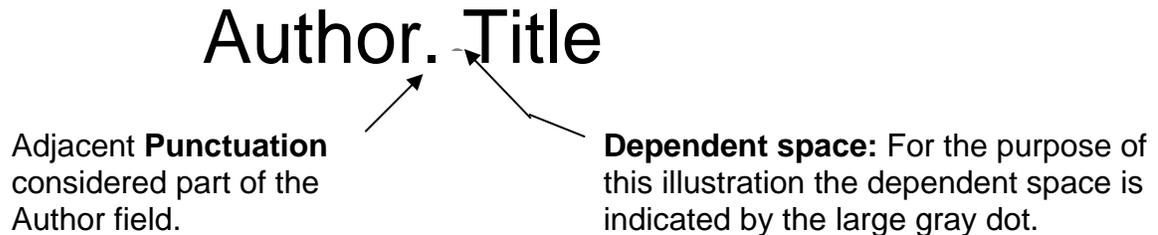
The preceding field takes precedence over the following field. Punctuation that appears between fields with no spaces is dependent on the first field.

Example: Volume:Issue
A reference with a Volume = 28:(6)
A reference without a Volume = (6)

If there is no volume in the reference then no colon will appear.

Rule #3:

The first space after a field is dependent on that field. Additional spaces are independent and will always appear.



In this illustration the space is dependent on the Author field.

Example: Author. Title
A reference with an author = Smith. No Way Out
A reference without an author = No Way Out

Without an extra space the title will be lined up with the left margin.

Here there are two spaces between the period and Title. So the first space will not appear if there is no author, but the 2nd space will appear.

Example: Author. Title
A reference with an author = Smith. No Way Out
A reference without an author = No Way Out

That extra space will cause the reference margin to be uneven in the Reference List. With only one space if there is no author then the title **will not** have a space before it in the reference.

Rule #4:

Independent text always appears in the bibliography or citation. Any text or punctuation not dependent on a field name always appears in the reference.

Example: Edition ed.
A reference with an Editor = Wilson W ed.
A reference without an Editor = ed.

Because only the one space after the Edition field is dependent, the "ed." is independent and will appear in all references regardless if there is a need for it. This is corrected using special characters that allow you to break the rules.

Special Formatting Characters

There are special characters that allow the rules of syntax to be bent and provides some flexibility to constructing templates.

Option-space: Links text or Punctuation to a field. This is created by:
Mac: holding down the **Option** key while pressing the **space bar**
PC: hold down the **CTRL + ALT** and press **space bar**.

Example: Edition ed.
A reference with an Editor = Wilson W ed.
A reference without an Editor = ed.

In the above example the "ed." would print in all references because it is independent. To ensure it will only appear when the Edition field is used it must be connected to it. Replace the regular space with an Option-space and the "ed." will appear only when needed:

Example: Edition◆ed.
A reference with an Editor = Wilson W ed.
A reference without an Editor =

Forced Separation: Separates text or punctuation that is dependent. It is the opposite of the Option-space. The vertical bar is made by holding the **shift** and hitting the **backslash ** key.

Example Volume.Issue (Year)
A reference with an issue = 23.(2) (1998).
A reference without an issue = 23.(1998).

There are two problems with the reference without an issue.

1. As written the period is connected to the Volume field, but if there is no Issue field the period is not needed. The period is connected, however, and will appear unless it is changed.
2. The space following the issue field is dependent on the issue field and will not appear if there is no issue allowing the year to sit on top of the period.

The solution is the same for both problems:

1. A forced separation between the Volume field and the period will force the Period to be dependent on the Issue field.
2. A second forced separation immediately after the Issue field will break the space away and allow it to appear between the volume and year when no issue is present.

Example: Volume|.Issue| (Year)

Field Names in bibliographies: When text is needed in the bibliography but is the same as a field name EndNote will read it as a field name. This text must be tagged with **Back apostrophes** so EndNote will recognize it as text and not a field. You can usually find this key at the top left of the keyboard near the number 1.

Example: If the title "Editor" is to appear after the name of the editor then it must have back apostrophes around it. Also remembering the prior situation, the text must be made dependent on the Editor field to avoid having it appear in every reference.

So the final result is : Editor,◆`Editor`
A reference with an Editor = Boy, Tommy, Editor
A reference without an Editor =

Singular/Plural Term Separator: Labels change if the field data is singular or plural and EndNote recognizes the difference.

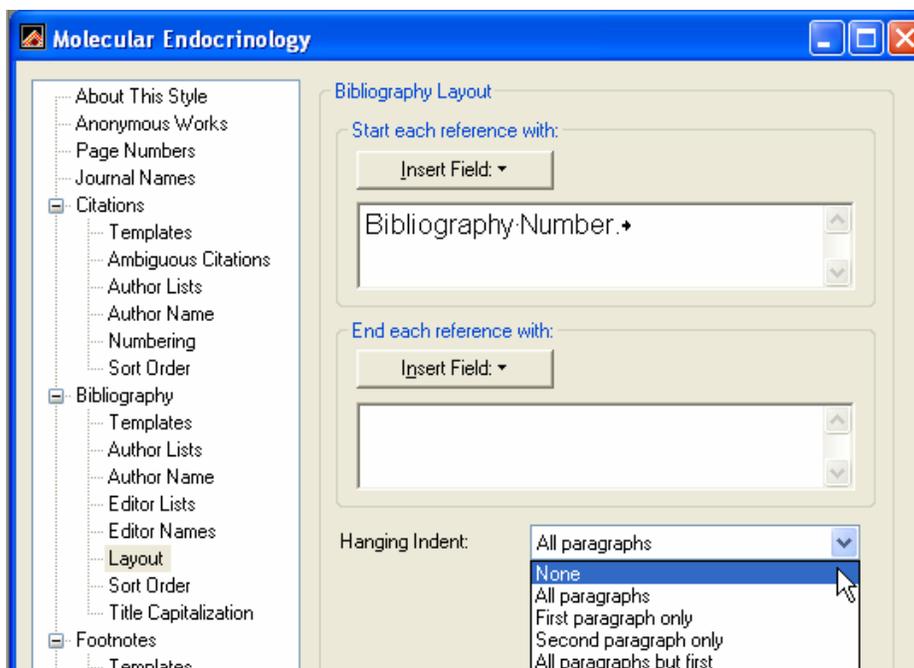
By using the **Caret** which is the symbol (^) typically found above the 6 key. Most of the uses for this involve multiple editors or pages. Enter both the singular and plural forms separated by the Caret (^). Now all text prior to the caret up to the preceding space will appear in singular form, while all text after the caret including the first space will appear in plural form.

Example: Editor, ed.^eds.
A reference with an Editor = Wilson W ed.
A reference with Editors = Wilson W and Boy T, eds.

Tabs: Tabs are entered by **Command + Tab** for Macintosh (**⌘ + Tab**) and **Ctrl + ALT + Tab** for PC

The width of the tab is determined by the word processor tab settings.

Hanging Indents: The setting for Hanging indents is located in the edit style window under the **Bibliography folder**. Choose **Layout** and the hanging indent menu is in the bottom right of the window.



Custom Style Exercise

In this exercise we will be creating a paper to be submitted to Cell, Death and Differentiation magazine. We are only concerned during this exercise with the specifications dealing with citation and bibliography formatting.

Gather Information from the Publisher

The magazine's specifications read as follows: (Emphasis and Organization is added)

1. The References should follow the **Vancouver** format.
2. In the text, citations should appear as numbers starting at 1
3. At the end of the paper the references should be listed (double-spaced) in numerical order corresponding to the order of citation in the text.
4. The first and last page numbers for each reference should be provided.

The following are examples of the reference style from their web page of instructions to authors (<http://www.stockton-press.co.uk/cdd/instruct.html>):

1. Gottschalk AR, Boise LH, Oltvai ZN, Accavitti MA, Korsmeyer SJ, Quintans J and Thompson CB (1996) The ability of Bcl-XL and Bcl-2 to prevent apoptosis can be differentially regulated. *Cell Death Differ.* 3: 113-118
2. Feramisco JR and Welch WJ (1986) Modulation of cellular activities via microinjection into living cells. In *Microinjection and organelle transplantation techniques*, Celis JE, Graessmann A and Coyter A, eds (London: Academic Press) pp. 40-58

Locating Style Provided by Publisher

Note: The style can also be viewed by selecting the **Show Preview** window in the lower left of the Mac library window or in the lower right on a PC.

Finding a Style Using EndNote's Style Finder

It becomes clear that EndNote's version of Vancouver is not the same as Cell so we will have to create a custom style.

1. Create a new style from scratch
2. Modify the version of Vancouver present in EndNote.
3. Use EndNote's Style Finder to locate a style closer to the magazine's specifications.

In this instance, the first option is a considerable amount of extra work. Both options 2 and 3 are good choices. For the sake of the exercise we will first try to find a style closer by using the StyleFinder because in most situations we will not even have a style name to go by. So we go to the web site

Style Finder		Sorting Options			
Publication Name	<input type="text"/>	First 3 Fields (Journal)	none ▾	none ▾	none ▾
Citation Style	none ▾	Discipline	none ▾		
Bibliography Sort Order	none ▾	Find Styles			

<http://www.endnote.com/help/ENstylesfinder.htm>

It presents us with this search engine. So we fill out the important information. Because we know we will be editing the style it is best not to limit the search to a journal name or discipline.

From the journal's author's notes, we know the style requires superscripted numbers for in-text citations and that the first three fields are author, year and then title. Next we select the order of the bibliography is sorted by their appearance in the paper.

We select the necessary information for the citations, reference fields and sort order and then click search.

After a delay as the StyleFinder searches the database it produces the results. In this case 19 matches were found.

[<- Back to List](#)

American Journal of Tropical Medicine and Hygiene		Download for Windows or MacOS
File Name:	Amer_J_Tropical_Medicine.ens Amer_J_Tropical_Medicine.hqx	
Last File Posting Date:	3/28/2000	
Citation Format:	Superscripted Number	
Bibliographic Sort Order:	Appearance-Order	
Microsoft Word Template (For EndNote 6 and above)	Not Available.	
Publisher:	Allen Press	
URL:	http://www.astmh.org/journal.html	
Discipline:	Public Health	

[<- Back to List](#)

We begin matching the examples shown to the magazine's examples until a close match is found. We can check to see if the journal style is already in the Style Manager or we can choose to download a copy by clicking on the appropriate computer type (Mac or PC). In this particular example, the style is already in the Style Manager we will not have to downloading the style.

Downloading a Style

Use EndNote's Style Finder to locate a style closer to the magazine's specifications.

<http://www.endnote.com/help/ENstylesfinder.htm>

It presents us with the search engine where we fill out the important information. From the journal's author's notes, we match the style for in-text citations and that the first three fields. Next we select the order of the bibliography sorted as described by the journal's author's notes.

Once you have chosen a style from the list that results from your search you will need to download the style and place it in the styles folder so it would be available to EndNote. It may be a good idea to rename the style to reflect the name of the journal you are submitting to. Otherwise you may have to make a note on paper somewhere that the Style you chose to download works for your particular journal.

Location of Styles folder:

Mac: Macintosh HD/applications/endnote 4/Styles
PC: My Computer \C:\Program Files\EndNote 4\styles

Choose the style in the Style Manager by either choosing **select another style** from the Current styles menu found on the Main toolbar or from the Menu item **File** choose **Output Styles, Open Style Manager**.

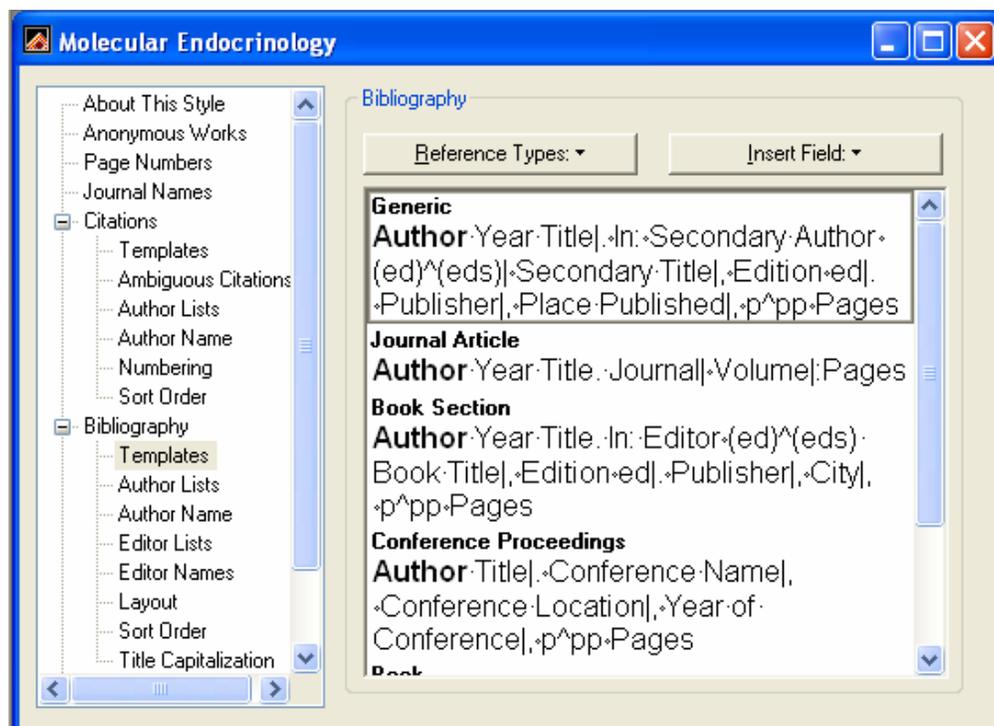
After choosing the correct style, go to **File** on the menu and choose **Output Styles**. Make certain the style we wish to edit is selected and choose **Edit "the name of your style here"**

For this exercise we will choose **Edit "Amery J Tropical Medicine"**.

This opens the edit window. The categories for editing are on the left side of the window and the details of whichever category is on the right. So with each category, expect a change in the window on the right.

The Bibliography Template

Most of the major changes can be made using the **Template** category. Choose the Templates in the Bibliography folder and focus on the **Journal Article** because in most papers here at NIEHS, most of our citations are from journals.



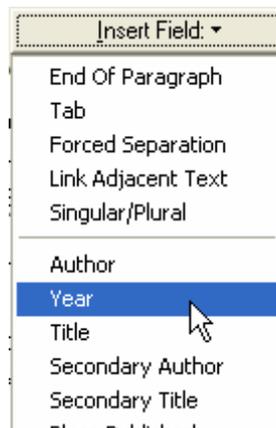
Compare the Journal Article Template to the author's notes sample.

Journal Article
Author·Title·Journal|·Volume|:Pages

1. Gottschalk AR, Boise LH, Oltvai ZN, Accavitti MA, Korsmeyer SJ, Quintans J and Thompson CB (1996) The ability of Bcl-XL and Bcl-2 to prevent apoptosis can be differentially regulated. Cell Death Differ. 3: 113-118

In this example, the year is missing from the Journal Article Template and must be added.

- Insert the year field in between the author and title. Place the cursor where you want the field to be added.
- When the cursor is in place the **Insert Field** menu becomes active. Click on the arrow and choose the desired field.



Journal Article
Author·Year·Title·Journal|·Volume|:Pages

Note: If the field we want is not present then copy and paste the field from another reference type or type it in directly. Do not forget the dependent space after the Year.

The Book reference:

Compare the Book Section Template to the author's notes sample.

```
Book Section
|Author·(Year)·Title|·Editor,·ed^eds|·Book·
|Title|·(City|·Publisher|)·Pages|.
```

2. Feramisco JR and Welch WJ (1986) Modulation of cellular activities via microinjection into living cells. In Microinjection and organelle transplantation techniques, Celis JE, Graessmann A and Coyter A, eds (London: Academic Press) pp. 40-58

Everything is fine except:

1. The Editor field and book title field need to be switched
2. The text labeling the pages needs to be added
3. The period removed from the end.

Edit the formatting for this journal style's Book Section by doing the following:

1. The Editor field can be moved by highlighting from the capitol "E" in Editor to the independent space after the Forced Separation (indicated by the vertical line).

```
Book Section
|
|Author·(Year)·Title|·Book·Title|·Editor,
|·ed^eds|·(City|·Publisher|)·Pages
```

2. Next **Cut** the Editor selection and **Paste** immediately after the independent space following the Title field.

```
Book Section
|
|Author·(Year)·Title|·Editor,·ed^eds|·Book·
|Title|·(City|·Publisher|)·Pages
```

3. The next step is to add the text labeling for the page numbers. Because the page field can produce either a singular or plural value we have to give the field two options to choose from. This is accomplished by using the caret symbol (^). Place the cursor between the independent space after the Publisher field and the Capitol "P" of Pages
4. Now type in the singular option including punctuation.

5. Type in the caret symbol ^.
6. Add the plural option including punctuation.
7. Finish by adding a connecting space so the text label will be attached to the Pages field. On MAC hold down **Option** and hit the **Space** key. On PC hold down the **Ctrl + Alt** keys and hit the **Space bar**. Do not forget to delete the period at the end of the reference and we are finished the Book Section.

Book Section

Author (Year) Title, *Editor, *ed^eds* Book
 Title (City: *Publisher*) *p.^pp.* Pages

The other reference types are fixed in this fashion. Choose **File, Save as** and rename the style so we do not lose the original. Be sure the file is saved to the Styles folder in the EndNote program.

Location of Styles folder:

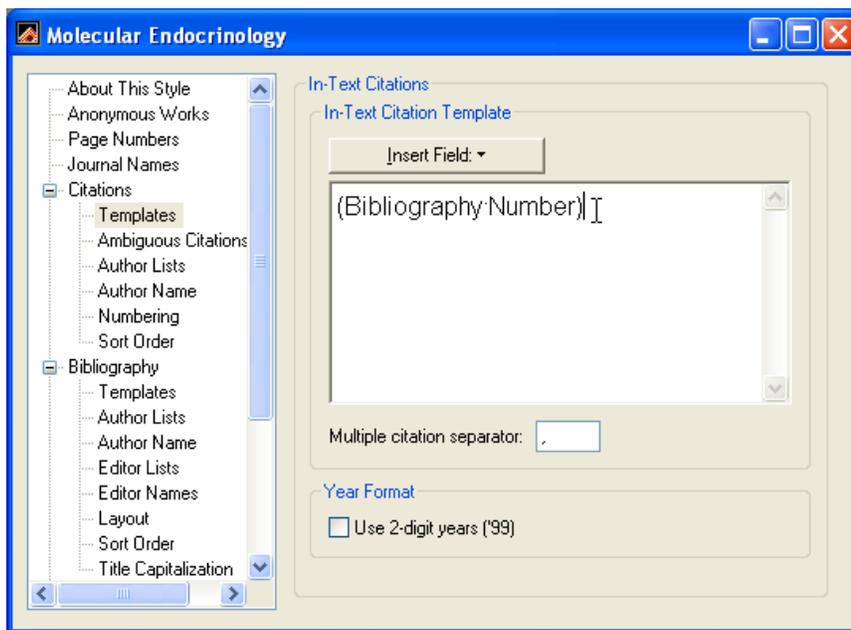
Mac: Macintosh HD/applications/EndNote 4/Styles

PC: My Computer\C:\Program Files\EndNote 4\styles

Once the Bibliography Templates are corrected then check the Citation Template.

The Citations Template

The Citations Template is much simpler and in this case only contains one field. It is the bibliography number and is superscript. Notice that if a field was needed the insert field would be available once the cursor is placed in the test window.

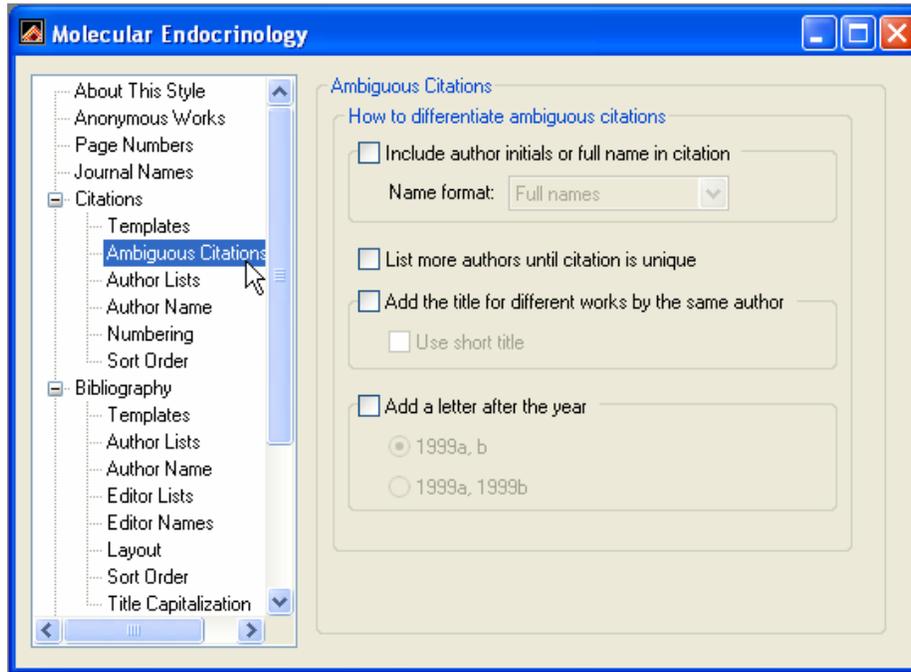


A second choice on this window is deciding the punctuation used to separate multiple citations. Presently the style uses a comma for that and to edit this highlight and type the desired punctuation in the field.

Fine-Tuning Styles

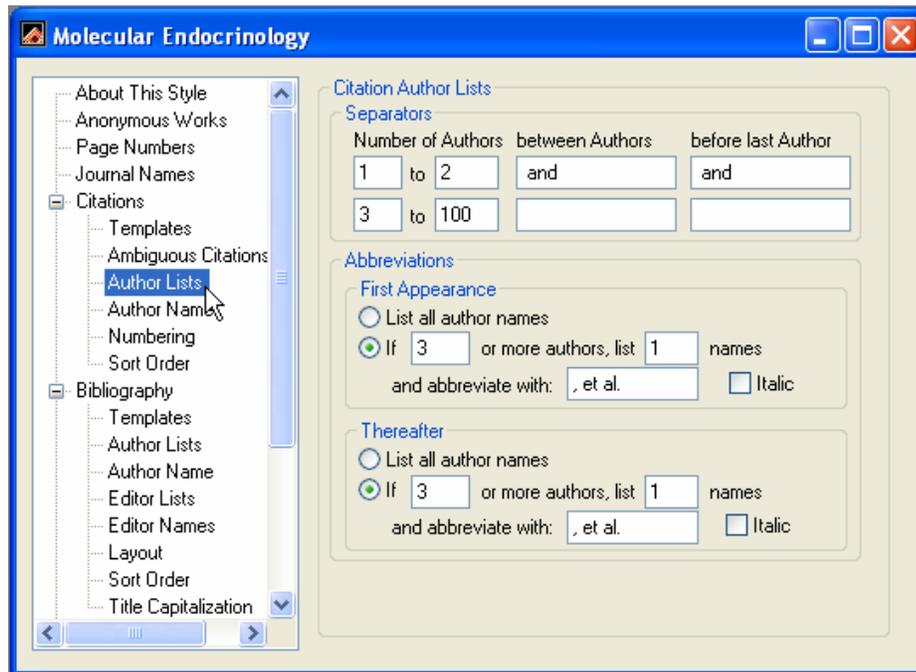
We are finished with the templates for both categories. In both the Citation and Bibliography folders there are more categories for fine tuning the style. We will now take a quick look at each category starting with Citations.

- **Ambiguous Citations:**



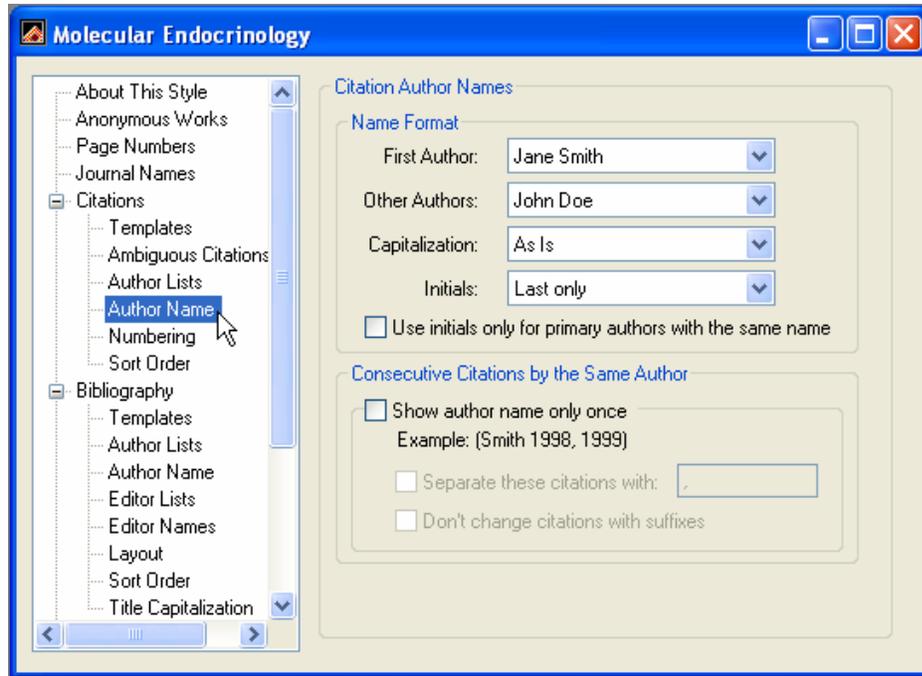
This category helps make a citation unique when not enough information is available for the regular citation or to separate two similar references from each other.

- **Author Lists**



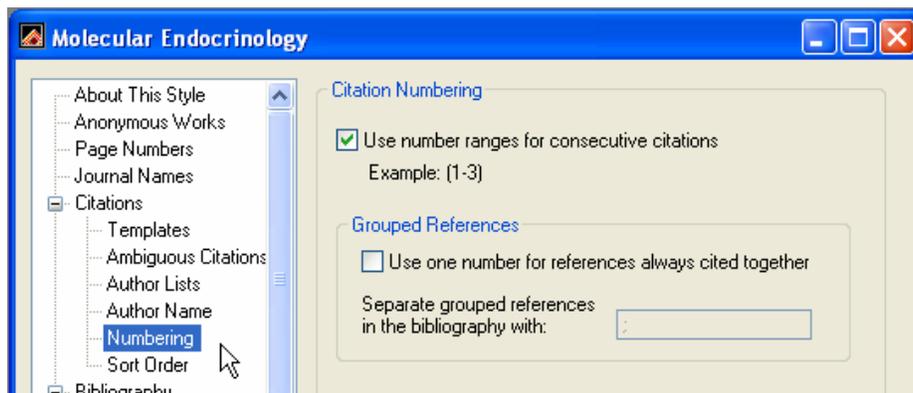
This category allows you to decide how to separate authors, and what to have before the last author. It also allows you to adjust the number of authors listed and how to abbreviate.

- **Author's Name**



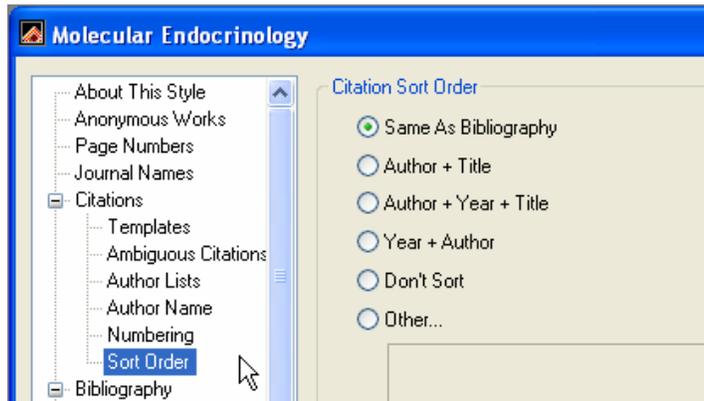
This category allows you to choose how the authors name will be displayed and what punctuation to use with initials. It also provides a way to handle consecutive citations by the same author.

- **Numbering**



For this exercise the Numbering category will be the only one of interest because the citations are only numbers. Here you can decide how consecutive citations will be displayed. We want them to be shown with a dash between the first and last number instead of each one listed. So check the number range box.

- **Sort Order**

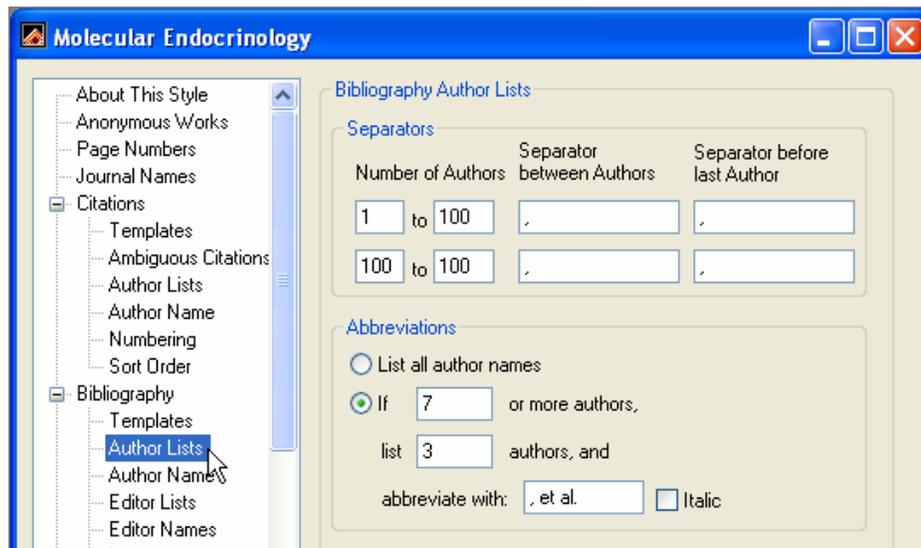


As a rule of thumb the sort order will stay the same as the Bibliography and any specific order can be established in that folder instead of in the Citation folder.

Bibliography:

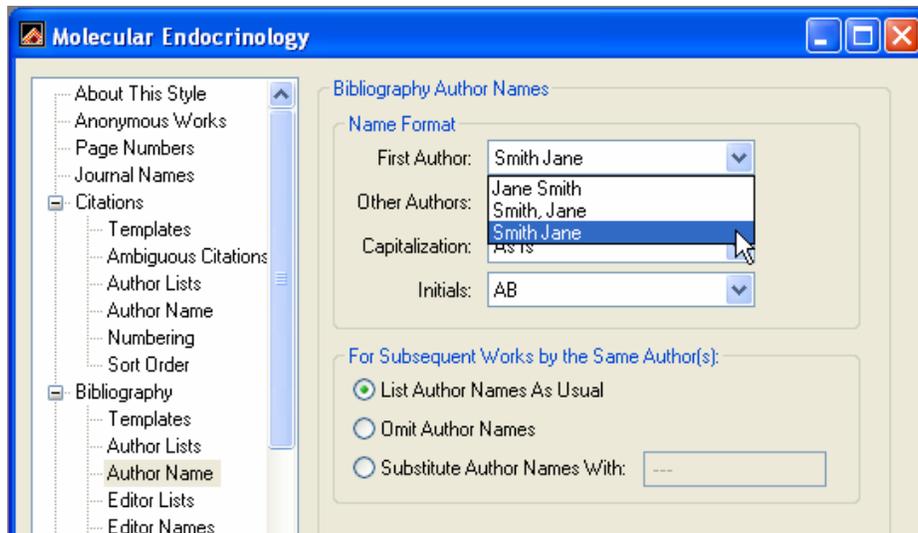
Following the same pattern we will check all the categories for the Bibliography folder.

- **Author lists**



This category allows you to decide how to separate authors, and what to have before the last author. It also allows you to adjust the number of authors listed and how to abbreviate.

- **Author name**



This category allows you to choose how the authors name will be displayed and what punctuation to use with initials. It also provides a way to handle consecutive citations by the same author.

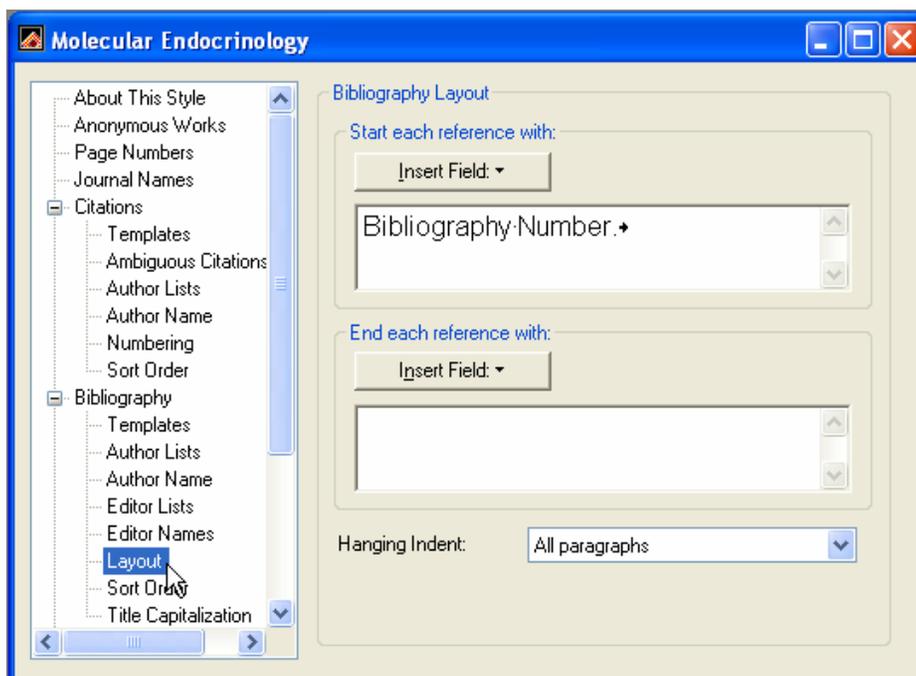
- **Editor lists**

This category has the identical choices as the Author lists window. (see above)

- **Editor name**

This category has the identical choices as the Author name window. (see above)

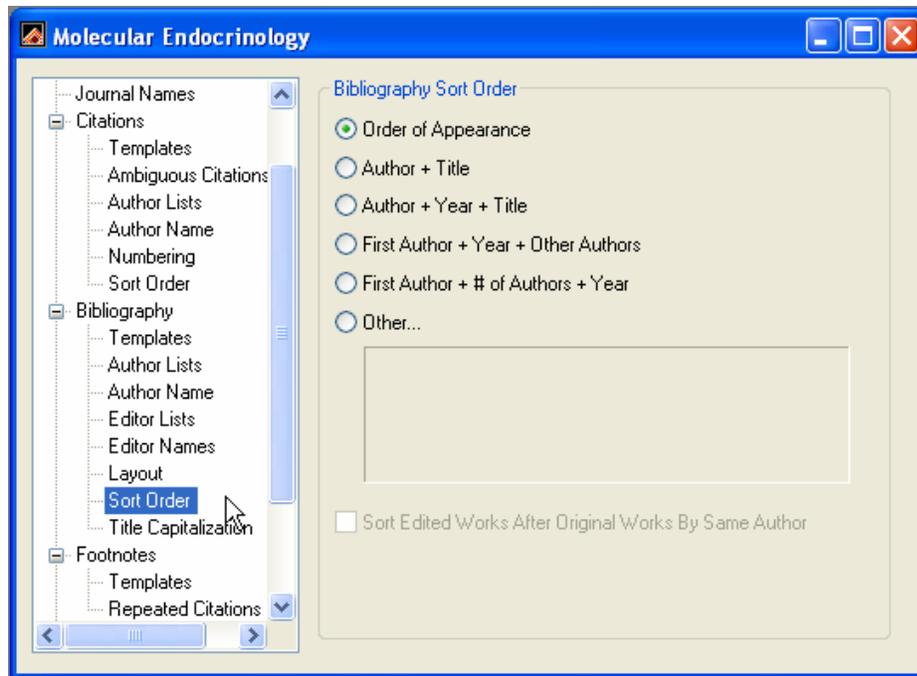
- **Layout**



This category is where you can add or remove numbering from the reference list as well as add a missing field. Layout is where we can affect the first tabs and hanging indents as well.

This category is also used for attaching a field for special printing situations. See Advanced Printing on page

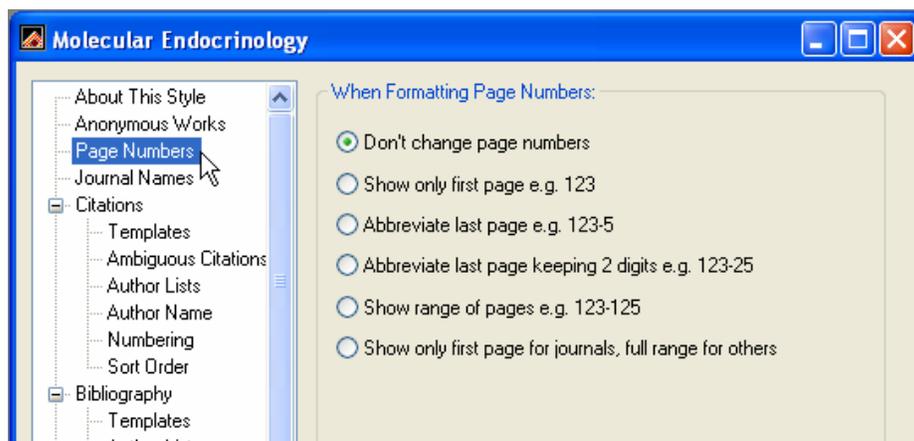
- **Sort Order**



Sort order allows us to decide how to order the Bibliography.

There are two categories not included in the **Citation** or **Bibliography** categories that may be of some use in further editing.

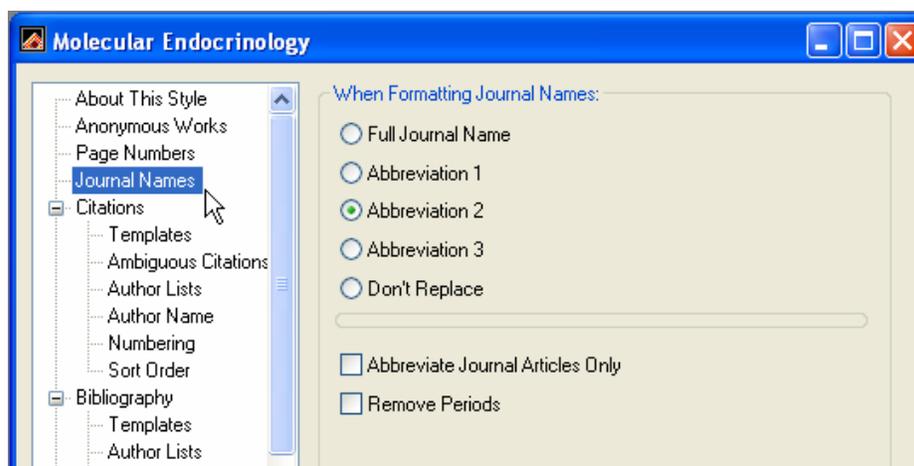
Page Numbers:



When a style is specific about how the numbers should be shown this category allows access to the various options.

Journal Names:

Finally if there is any trouble with journal names and how they are being displayed then check in the Journal Names category near the top of the menu.



That completes our editing of this style and it is ready to go. Close the window and it will prompt you to save changes. Do so and proceed to format the paper in the usual manner.

APPENDIX

Basic Library Searches and EndNote

NIEHS Library Photocopy Request Instructions Part 1:

When using library databases, users have the ability to select bibliographic references and send them to the NIEHS Library. The Library then copies, or arranges to copy, the full text of the requested article and sends the paper copy to the user.

For each database platform, follow the instructions given to mark and download selected records.

Protocols for Exporting References to EndNote

PubMed

1. In PubMed, be sure to display your selected search results/references in “MEDLINE” format. (Note: the default format is “summary.”) Also adjust the “Show” (under “Display) pull-down menu to accommodate the number of “items” in your search results. Next, you will want to “Display” all your records to capture all “items” to file.
2. Once the “items” are displayed in MEDLINE format, click on the “Save” button and save as a text (*.txt) file.
3. Open End Note and then open your library file.
4. From “File” menu item, select Import.
5. In the Import dialog box, the first step will be to “Import Data File.” Using the CHOOSE FILE button, select the text file you saved in PubMed.
6. The second step is to select an “Import Option.” For PubMed select “Other Filters...” Then highlight the PUBMED (NLM) filter and click on the CHOOSE button.

Web of Science

1. First, you should have an EndNote library ready to receive your Web of Science search results.
2. Mark desired records in your (Web of Science) Search Summary and click SUBMIT button.
3. Click MARKED LIST button (near top of screen). Select format/fields (abstract, keywords, address, etc) you want citations to have in EndNote. This is at the bottom of your screen.
4. Click EXPORT. This will load EndNote, select appropriate Library, records will import automatically.

Biological Abstracts OVID Database System

(These instructions apply to other OVID databases such as AGRICOLA, MEDLINE and PsycInfo.)

1. First, you should have an EndNote library ready to receive your search results.
2. Conduct search. Click on the blue DISPLAY button.
3. Click on CITATION MANAGER.
4. Under CITATIONS, select range of items you want to export to EndNote.
5. Under FIELDS, select data elements you want to export to EndNote.
6. Under CITATION FORMAT, select REPRINT/MEDLARS.
7. Under ACTION, select SAVE.
8. Under SAVE CITATIONS, select the "LINEFEED" that matches your situation and click on the green CONTINUE button. This should save your file to disk.
9. Open EndNote and then open your library.
10. Repeat steps 4-6 under PubMed at the top of this page; however, in this case you highlight the Medline (OVID) filter instead of the Medline (NLM) filter.

Porpoise Searches Delivered Weekly by E-mail

1. You should have a library (file) established in EndNote to receive your search results.
2. Open the Porpoise e-mail message with "Matches Found." "Matches Found" is a list of your weekly search results in Porpoise. Look through the list of records. You will want to "Mark" each record to be exported to EndNote. This is done in the following manner.
3. Locate the first record you want to export to EndNote. Click on the URL that starts with <http://porp.cit.nih.gov/isicgi/gateway/Gateway.....>
4. After you click on the URL, Porpoise will take you to the record of this citation in Web of Science.
5. Click on MARK, located in a blue box at the top of the page. You will note this adds this record to MARKED LIST.
6. To add more records from your Porpoise search, go back to "Matches Found." Click on the URL of another record as you did in steps "2" through "4" above. Click on MARK in the blue box and you will add another record to your MARKED LIST. Records will accumulate in MARKED LIST until you have added everything you want to export to EndNote. Now you are ready to export items from Marked List to EndNote.
7. Click on MARKED LIST. Select format/fields (abstract, keywords, address, etc.) you want citations to have in EndNote. This is at the bottom of your screen.
8. Click EXPORT. This will load EndNote, select appropriate Library, records will import automatically.

BasicBIOSIS - OCLC FirstSearch Database System

(These instructions apply to other OCLC FirstSearch databases such as AGRICOLA and WorldCat.)

1. First, you should have an EndNote library ready to receive your search results. You should also make sure that you have the appropriate filter installed in EndNote. To do this, choose *File, Import Filters, Open Filter Manager*. Look at the alphabetical list and check for the filter of the database you plan to search. In this case, be sure that “BasicBIOSIS (OCLC)” filter is installed. If the correct filter is not already installed, visit <http://www.endnote.com/support/enfilters.asp> to download it. Save the filter to C:\Program Files\Endnote\Filters. If you have the “Filter Manager” window open when you do this, close and reopen it to refresh the list of import filters.
2. Conduct the search in the database. On each page, mark the desired records in the search results.
3. After marking records on the last page, click on the blue “Export” button on the top navigation bar.
4. Verify that the radio button for “Marked records” is chosen. Click the gray “Export” button.
5. EndNote will load automatically. A dialog box will open, enabling you to choose the EndNote library that you created to receive your results. Select the appropriate library and click “Open”.
6. Another dialog box will appear, prompting you to choose an import filter. You will need to choose the filter that corresponds to the database in which you conducted your search. Since this search was conducted in the BasicBIOSIS database provided by OCLC, choose the “BasicBIOSIS (OCLC)” filter. If you were to search another database provided by OCLC, such as WorldCat or Agricola, you would choose filters that correspond to those databases.
7. Once you have selected the appropriate filter, click the “Choose” button. Your records will be imported into EndNote.