



Collect. Collaborate. Create. From anywhere.

Clarivate EndNote 20 User Help Guide

macOS

Updated for Clarivate
by Donna Kirking (info@portable-press.com)

Trademarks

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Notice regarding legal use of downloaded reference data

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

Introduction

Welcome to EndNote—the complete reference solution!

Overview of Clarivate EndNote

EndNote is a bibliography maker.

Cite While You Write™ allows you to format references in Apple Pages, Microsoft® Word, OpenOffice.org Writer 3.x–4.x, and LibreOffice 4.x–6.x (32-bit) for Windows. You can also create bibliographies for other word processors using Format Paper (RTF files). There is no better tool than EndNote for handling diverse bibliographic style requirements.

EndNote is an online search tool.

Search online bibliographic resources and retrieve references directly into your EndNote library. You can also export references to EndNote from your favorite online resource. See [Direct Export Providers](#) for more information about this feature.

EndNote is a reference and full-text organizer with a collaborative Web tool.

Your personal reference library will save you countless hours of organizing your research.

- Group references according to your research projects and attach up to 45 files per record for managing related materials.
- Locate full-text PDF files or create a reference when importing a PDF file.
- Synchronize references and file attachments with your EndNote online library.
- Share groups with other EndNote users easily.

EndNote desktop and EndNote online are collaborative tools to simplify working with colleagues.

Help

- See the [What's New in EndNote 20](#) video for information about the most recent features added to EndNote.
- Find useful information about EndNote at [EndNote Learning](#).

EndNote Documentation Updates

- For documentation updates and correction notes, refer to the Readme.txt file installed in the EndNote folder.
- For updates to the EndNote program, select *Check for Updates* from the *Help* menu in EndNote.

New Features in EndNote 20

- Newly redesigned user interface for a better user experience
- Tabbed interface
- Filter groups panel by group name
- Retraction Alerts
- Library sharing limit raised to 400

View Our What's New Video

Clarivate recommends that you view our What's New video on our [YouTube channel](#).

Contacting Clarivate

Customer Care

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

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

Sales Information

Phone: 1-888-418-1937 (toll-free in the U.S. and Canada, country code is 01)

E-mail: <https://endnote.com/buy/contact-our-sales-team>

Customer and Account Support (Orders, Billing, and Shipping)

Phone: 800-336-4474, press 3 (toll-free in the U.S. and Canada, country code is 01)

Web: <https://endnote.com/contact>

Technical Support

Contact Technical Support if you encounter problems while using EndNote. When you contact us, have a clear description of the problem and know the version of your Windows or Macintosh operating system and word processor.

To find the EndNote version and serial number, start EndNote and select About EndNote from the EndNote menu (Macintosh) or the Help menu (Windows).

- Phone: 800-336-4474, press 4 (toll-free in the U.S. and Canada, country code is 01)

- For questions regarding your EndNote software, including questions about orders, billing, shipping, and serial numbers, go to <http://endnote.com/support/contact-support>.
- For web/email or phone contact, including hours and holiday closures, go to <https://clarivate.com/contact-us/support>.
- For technical support tips, go to the EndNote User Forum at <http://community.endnote.com>.

EndNote Training

The [EndNote](#) home page contains a Training menu that offers free training options including online videos, live training, an online user manual, and trainer resources. Access training material at <http://endnote.com/training>.

EndNote Downloads

To download EndNote styles, filters, and connections, go to the [EndNote Downloads](#) page.

EndNote Discussion Forums

If you wish to join an ongoing forum of EndNote users like yourself, go to <http://community.endnote.com>.

You can browse several EndNote message lists, easily search for topics, and join to add messages.

Join the EndNote social network at:

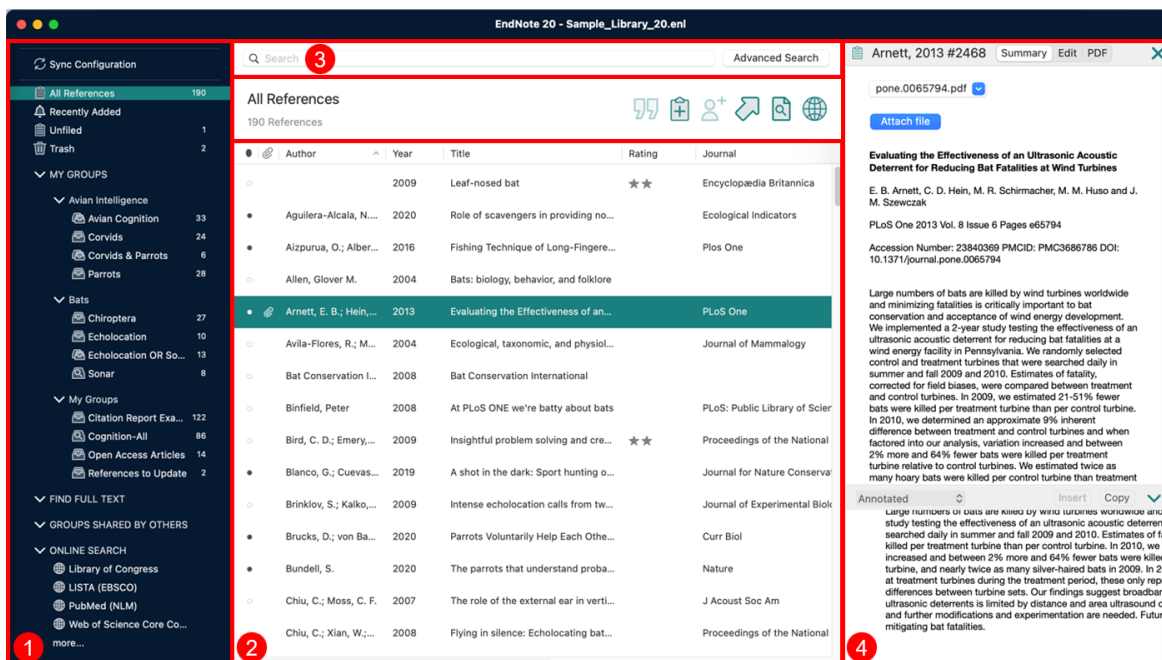
- www.twitter.com/EndNoteNews
- www.youtube.com/endnotetraining

The EndNote Library

Your EndNote Library is a database for tracking all of your references and information about them. It's flexible, searchable, and can be used to create formatted bibliographies. You can store related files, such as PDFs and graphic files. If you work with colleagues, you can share your EndNote libraries with them.

The Library Window

When you first open a Library in EndNote, you see a Library window made up of four different panels.



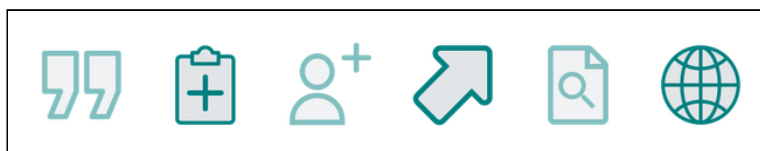
The Library Window

1. [The Groups and Group Sets Panel](#)
2. [The Reference List Panel](#)
3. The Search Panel (see [Searching EndNote References](#))
4. [The Reference Panel](#)

You can click on a panel to make it active.

The Library Toolbar

The Library toolbar provides various commands that allow you to manage your references.



The commands on the Library toolbar include (from left to right):

Insert Citation: This command will insert the selected references into a word-processing document at the location of the cursor in Word.

New Reference: Creates a new reference for data entry.

Share This Group: Allows you to share the selected group through EndNote online.

Export: Exports references in a format that can be imported into another library or application.

Find Full Text: Searches online for the full-text article for the selected references. EndNote downloads the file of the article and displays a paper clip in the Attachments (Paper Clip) column.

Create a Web of Science Citation Report: Creates a citation report providing aggregate citation statistics for the selected reference(s). (This feature requires a Web of Science™ subscription.)

Resizing the Library Window

Resize the Library window by clicking the window border in the lower right window corner of the library and dragging to the desired size or by clicking the maximize/minimize buttons in the upper corner of the Library window.

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

Tabs in the Library

The tabbed interface allows you to work with multiple groups or references in the library. The tab will show the name of the group selected for that tab. Select the *New Tab* button (the + button) above the *Search* panel to open a new tab in the library, then select the group you want to work with.

Changing the Library Display Font Size

EndNote displays the recommended system font specified for your operating system.

Select a different size for the text displayed in the Library by using EndNote's preferences. The Reference List and the Reference panel displays both use the font size selected in the Display Font section of the preferences.

See [Display Font Preferences](#).

Note: Changing the display font size does not affect the font EndNote uses when it creates a bibliography. EndNote uses the Normal style font of your paper for the bibliography.

The Groups Panel

Groups are subsets of references saved for easy retrieval. The left panel of the Library window lists several group sets that include various types of groups: automatic groups (which EndNote creates and the user cannot control), custom groups, smart groups, Groups Shared by Others, Find Full Text, and Online Search groups. See [The Groups and Group Sets Panel](#) in the [Groups and Group Sets](#) section for more information.

The Reference List Panel

The Reference List displays all the references in the currently selected group. Options are available from the References and Library menus, and from the Library Window toolbar. See [The Library Toolbar](#).

Changing the Display Fields

By default, the first column in the Library window displays a Read or Unread indicator followed by:

- File Attachment
- Author
- Year
- Title
- Rating
- Journal
- Last Updated
- Reference Type

Reorder the fields in the Library window heading columns using drag and drop. Select a field heading and move it to the desired location in the column headings. For example, you can move the Last Updated field to be the last field or the first field in the heading column. Your changes are reflected in the Display Fields preference dialog.

Customize which columns/fields display in the Library reference list by control-clicking on the column headings to display a contextual menu. Select or remove fields.

Changing the Order of the Display Fields or Adding/Removing Display Fields

You can change the order of the fields, add fields, remove fields, or change the name of a field in the column headings of the Library window. See [Display Fields Preferences](#) for more information.

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Display Fields* option in the list.
3. Select the desired field from the Field list. You may select up to ten fields to be displayed in the Library window. Select *[Do not display]* instead of a field name if you want to show fewer than ten fields.

4. By default, the column heading in the Library window is the same as the Generic name of the field (the Figure field is indicated by a figure icon and the File Attachments field is indicated by a paper clip icon). To change the field name for the Reference List display, enter a new name in the Heading section next to the chosen field.
5. To display all author names under the Author heading in the Reference List, select the checkbox next to the *Display all authors in the Author field*. Leave this box unchecked if you only want to see the last name of the first author in the column.
6. Click **Save** to save your changes, and then close the Preferences window by clicking the *Close* button in the upper left corner.

Note: These settings apply to all libraries.

See also [Display Fields Preferences](#).

Changing the Reference List Sort Order

By default, the references listed in the Library window are sorted by the first author's last name.

Change the sort order by selecting *Sort Library* from the *Library* menu or by clicking the column headings. When you sort a library, that sort order is retained even after you close and reopen a library. See [Sorting the Library](#) for more information about sorting.

When you sort the library, character sorting is carried out according to the language and local settings of your operating system—unless you specify a different language in the Sort Options dialog. This determines whether a plain "a" is sorted before or after "ä."

EndNote does not remember the sort order for all groups. EndNote displays the results of a search in the order in which they are found. Similarly, after importing references, EndNote displays the newly imported references in the order in which they were imported. This behavior greatly enhances the speed of these two functions. Selecting the Show All References group shows all references in the Library window and lists them according to the last sort order specified.

Note: See [Sort Order: Bibliographies and Multiple Citations](#) about how to set the sort order for a bibliographic style. See [Sorting Preferences](#) for information about having EndNote ignore certain words or names when sorting references.

Navigating in the Reference List

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

- Scroll through the list of references in the Reference List by clicking in the vertical scroll bar with the mouse.
- Use the Up and Down arrow keys to move up or down the reference list.
- Sort references in the list by clicking on a column heading. For example, click the Year heading to sort the references by descending or ascending year.
- Type a letter to select the first matching reference. Matching depends on the order in which the library is sorted. If the library is sorted by the Author field, typing a letter selects the first reference in which the first author's last name begins with that letter.

For example, typing the letter "Z" selects the Zorina reference in the sample library since Zorina is the first author's name to begin with a "Z." Type several letters and the selection jumps to the first name that begins with those typed letters. Letter matching starts over after a half-second pause.

- On extended keyboards, the Home and End keys go to the first or last reference, respectively. The Page Up and Page Down keys allow you to move up or down the reference list.

The Search Panel

The Search panel allows you to search your EndNote library, and is also used for searching online databases from EndNote.

The Simple Search option displays a single line where you can enter a search term and search all fields.

Click on *Advanced search* to display multiple search lines. With this option you can create advanced searches by selecting each field you want to search and entering the terms you want to search for in that field.

To begin a search of your EndNote library, select the search option, then select the group of references you want to search. To search your whole library, select the *All References* group. Enter your search term(s) and press the *Return* key on your keyboard to see the list of found references.

To begin a search of an online database, click on the database name in the Groups panel under Online Search or go to the *Tools* menu and select *Online Search*. See [Searching Online Databases](#) for more information.

The Reference Panel (Formerly The Tabs Panel)


The Reference panel includes three options, formerly called "tabs," which open up the following panels: Summary, Edit, and PDF.

The Summary Panel

The Summary panel contains a Summary subpanel, showing a summary of the reference at top, and a Preview subpanel at bottom, showing how the selected reference would appear in the style of your choice. The size of the subpanels can be changed by dragging the line separating them.

The Preview Subpanel

Select the *Preview* subpanel to view the formatted style of the selected reference.

Note: The Preview subpanel may originally show only the top toolbar, where you can select the style for the preview. Drag it up to see more of the preview, or click the chevron button (.

The preview displays the selected reference in your current style. If multiple references are selected, it displays just the last one in the selection. Fields within the Preview feature are not editable. To edit the reference, select the *Edit* panel.

Choosing the Current Style

The Preview panel uses the current style. To select another style:

- On the Preview toolbar, shown between the Summary and Preview subpanels, use the drop-down Output Styles menu to select a new style.
- From the *Tools* menu, select *Output Styles*, and select a style in the list. The check mark next to a style name indicates that it is the current style

EndNote provides over 7,000 styles. Although not all styles are installed with a default installation, you can add more later. Styles installed on your computer are available from the Style Manager. Go to the *Tools* menu, select *Output Styles*, and then select *Open Style Manager*. Mark the style or styles that you would like to see in the Output Styles menu. You should now be able to select the style that you need from the Output Styles menu. For more information, see [The Style Manager](#).

Previewing Multiple References

The Preview panel displays a preview for only one reference at a time, formatted according to the current style. To preview multiple references:

1. Select (highlight) the references in the Reference List.
2. From the *References* menu, select *Copy Formatted Reference* to copy the formatted references to the Clipboard.
3. Paste the formatted references into a word processor document.

Using the Preview Feature to Display Notes or Abstracts

You may find it useful to configure the Library window so that the reference list displays bibliographic data (such as author, year, title, and journal) and the Preview subpanel displays notes or abstracts. That would allow you to browse through the references in the Reference List without having to move through the Edit panel of individual references to see more about them.

To get the preview to display notes or the abstract, you will need to create a custom style to include just those fields.

You can use the Show All Fields style to display all reference fields in the Preview subpanel.

The Edit Panel

Select *Edit* from the *Reference* panel to edit the contents of the selected reference.

Enter text in a field by clicking on the field. All edit commands are available via the menus including context-sensitive menus. *Control+click* in the reference to display common options such as Cut, Copy, and Paste.

Open the context-sensitive menu to view the following options.

- Revert Reference
- Cut
- Copy
- Paste

- Paste with Text Styles
- Select All
- Open Term Lists
- Show Spelling and Grammar
- OpenURL Link
- URL

Navigation Keys

- The Tab key allows you to move to the next field in the Edit panel in order to edit the contents of a field.
- The Shift+Tab keys allow you to move to the previous field within the Edit panel.

The PDF Panel

Select *PDF* to view and annotate attached PDF files.


EndNote allows you to open, preview, and annotate PDF files within the PDF panel. Select a reference from the reference library, and then select the PDF panel to view a PDF file.

If no PDF files are attached to the reference, EndNote displays a "No PDFs attached to this reference" message in the PDF panel. In this instance, you can begin attaching PDFs to the reference by clicking the *Attach PDF* button, and then selecting the file to attach from the dialog.

Note: Although the button to attach files is called Attach PDF, many file types can be attached to an EndNote record. If attaching another type of file, the file can be opened in its default application from the Edit panel.

The PDF Panel

EndNote allows you to view and annotate PDF files within the PDF panel. Select a reference with attached PDFs, then select *PDF* in the *Reference* panel to view a PDF file. If there are multiple PDFs attached to a reference, you can select a PDF from the drop-down list of attached PDFs.

If you want to open the PDF in a larger window, in the PDF panel click *Open this PDF in a separate window* () to open the PDF in the PDF Viewer, a window you can resize..

Note: The PDF panel is within the Reference panel, the PDF Viewer is a separate window that can be resized or shown full screen.

To open a PDF file attached to a reference in an application other than EndNote, select *Edit* in the *Reference* panel, navigate to the *File Attachments* field, and select the option to *Open with...* from the drop-down list.

If there are no PDFs attached to a reference, you will see an Attach PDF button in the PDF panel.

Note: Although the button to attach files is called Attach PDF, many file types can be attached to an EndNote record. If attaching another type of file, the file can be opened in its default application from the Reference Edit panel.

Attaching PDF Files

You can attach PDF files and view them in the PDF panel in various ways.

- Click the *Attach File* button near the *File Attachments* field in the *Edit* panel.
- Click the *Attach File* button at the top of the Summary panel.
- If the reference has no attached PDFs, click the *Attach PDF* button in the *PDF* panel to open a Select File dialog.
- If the reference has attached PDFs, select *Attach PDF...* from the drop-down list in the *PDF* panel.



- Select a reference in the References List, select *References > File Attachments > Attach File* to open a select file dialog.

Click the *Save PDF* icon in the *Edit* panel to save your work. You can also navigate to another reference and EndNote will prompt you to save your work.

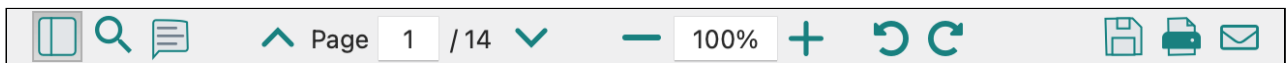
Using the PDF Toolbar(s)

A toolbar appears within the PDF panel that displays the following options.



Move your cursor over an icon on the toolbar to see Alt text to explain its function.

If you open a PDF document in the PDF Viewer, you will see the following toolbar. You can move to the next or previous page, zoom and select text, and use various tools such as Search to work within the PDF document.



Click the *Markup/annotation* button (🗨) to open the Markup/annotation toolbar, with commands for editing the PDF. Use this toolbar to add annotations, highlight text, underline text, or strikeout text.



Using the Search Feature

Select the *magnifying glass icon* to open the Search feature. This feature allows you to search for words and phrases within a PDF document. Enter your terms in the text box and press *Return*. Use the *Next* and *Previous* buttons to find the next/previous instance of a search term.

The Search feature only searches within the currently open PDF. You cannot use this feature to search the reference fields in the Reference Edit panel or to search other PDF files that are attached to the current reference.

The Search feature highlights and returns matches that contain the search query followed by any other characters. For example, searching for "reduc" will find "reduce," "reduced," or "reducing."

Using the Markup/Annotation Toolbar

Using the Markup/annotation toolbar, you can add annotations (sticky notes), highlight selected text, underline selected text, or strikeout selected text within a PDF. Hover over the buttons to identify the commands available.

Add a Comment (a sticky note): Select the *Add a sticky note* button, click in the location in the PDF where you want to add a comment. A small comment icon will appear in the PDF. *Double-click* on the icon to open the Comment window, type in your text, then click the *Close* button to close the comment. It will again appear as a small icon until you double-click it to see the comment.

Notes: You cannot move sticky notes in a PDF. Sticky note comments are searchable using the "Any Field + PDF with Notes" or "PDF Notes" options in the Advanced Search panel, or when using the Simple Search panel.

To Highlight, Underline, or Strikeout Text: Select the text you want to annotate in the document, then select the appropriate command on the Markup/annotation toolbar.

To Use Colors: Use the drop-down colors list to select the color used for annotations.

To Delete an Annotation: *Control+click* on the annotation to open a contextual menu, and then select the *Delete Annotation* option.

To Hide the Annotations: *Control+click* within the PDF to display a contextual menu. Select the *Hide Notes/Markup* option from the menu. To show the annotations again, *Control+click* within the PDF and select the *Show Notes/Markup* option.

Other PDF Toolbar(s) Commands

Rotate PDF: This command will rotate the PDF counter-clockwise or clockwise.

Save changes to this PDF: This will save any annotations you have made to the PDF in a format that can be read by most PDF applications. This means you can send a copy of the annotated PDF to others and they should be able to read your annotations.

Print this PDF or pages from this PDF: This command allows to print all of your PDF or just the pages you choose.

Attach a copy of this PDF to an email: This command will open up your desktop email application and create a new email with a copy of the PDF attached.

Note: The Attach a copy of this PDF to an email feature will not work with online email systems, only desktop applications.

Important Points About Libraries

Listed below are some important points about the EndNote library.

- You can create up to 999,995 references in an EndNote library. However, it is recommended that the number not exceed 50,000 to maintain efficient database performance.
- There is no limit to the number of libraries you can create, assuming that you have the disk space to store them. We recommend that you keep all the references you cite in your papers in one primary library.
- You can select default libraries to open automatically when EndNote is started.
- You can open more than one library at a time.
- Libraries created with the Windows version of EndNote can be used by the macOS version of EndNote and vice versa (see [Transferring Libraries between Computers or Platforms](#)).
- Each library can be independently moved, copied, or deleted using the macOS Finder. Always move, copy, or delete both the main .enl file and the .Data folder; otherwise, you can lose reference data.
- Figures, Groups, and other significant files are stored in a [library name].Data folder which is in the same folder as your main library file. This folder is an extension of the library, so remember to move, copy, or delete the associated .Data folder along with the main library file.
- Library filenames include the extension .enl. If your library filename does not include the .enl, your macOS Finder may not be displaying file extensions. You can display or suppress file extensions with the Finder.
- If you wish to rename a library, it is best to save a copy of the library with the new name, then use the copy you created instead of the original library. When you are sure the new library is working correctly, you can delete the original library.
- The Library window can be resized and the display font size can be changed.
- The Reference List displays a multi-column reference list. This list can be customized to meet your needs.
- The record number displayed in an EndNote record is not a permanent number. It will change if the record is copied between libraries, cut and pasted within the same library, or synchronized using EndNote online.

Note: Changes made to the library you are syncing with EndNote online can have consequences for your online library and any other EndNote libraries that are syncing to that online library. Do not move or rename libraries used with Sync. When syncing a library on a new computer, it is best to use an empty library to avoid creating duplicates of your references.

You can change the order of the fields, add fields, remove fields, or change the name of a field in the column headings of the Reference List display. See [Display Fields Preferences](#) for more information.

The Sync Feature

Your purchase of EndNote desktop entitles you to a two-year free subscription to EndNote online—our Web-based version of EndNote.

The Sync feature allows you to synchronize the references (including file and figure attachments) in one EndNote desktop library with the references in your EndNote online library. You must register and have an active EndNote account to initiate the Sync process.

The Sync feature provides an online backup of all your references and attachments for your current library, as well as providing access to your references from anywhere through EndNote online.

I Already Have an EndNote Online Account

1. Click *Sync Configuration* in the *Groups* panel to go to a Sync Configuration dialog. Click the *Sync Now* button to go to an EndNote Login dialog.
2. Enter your EndNote account email address.
3. Enter your EndNote account password.
4. Click *OK*.
5. Read the terms and conditions, then click *Agree* to accept the terms and conditions, and to link your account to your new copy of EndNote.
6. Click *Sync* to begin synchronizing your EndNote online library with your EndNote library.

Since you already have an EndNote account, EndNote populates the fields on the Sync Preferences page with the e-mail address and password that you entered on the EndNote online login dialog. You can change the data in these fields if you ever change your email address or password.

Note: The Sync library that you defined in Sync Preferences must be open and currently active to perform the Sync process.

I Do Not Have an EndNote Online Account

Since you do not have an EndNote account, you must create one. Registration is fast and easy and activates your two-year EndNote account enhancement when completed.

1. Click *Sync Configuration* in the *Groups* panel to go to a Sync Configuration dialog.
2. Click the *Sync Now* button to go to an EndNote Login dialog.
3. Click the *Sign Up* button to go to an EndNote Registration dialog.
4. Enter your email address in the EndNote Registration dialog. Retype your email address, and then click the *Submit* button.
5. Enter your name and a secure password, read the EndNote End User License Agreement, then click the *Agree* button if you wish to create your account.

6. Click the *Sync* button to begin synchronizing your EndNote online library with your EndNote library.
7. Before synchronizing for the first time, you will be prompted to create a compressed library backup. Click the *Yes* button to create the backup.
8. Choose the location for your backup, then click the *Save* button.

EndNote will save the backup and begin synchronizing your library references.

Once you create your EndNote account, EndNote populates the fields on the Sync Preferences page with the email address and password that you entered during registration. Later you can change the data in these fields if you ever change your email address or password.

Note: Although it is possible to synchronize your library without creating a compressed library backup during your first synchronization, we suggest creating the backup. You can also create a compressed backup of your library at any time. See [Saving a Compressed Copy of a Library](#) for more information.

Library Management

Back Up Your Libraries

Your EndNote library becomes increasingly valuable to you as you add references to it. Consequently, it is imperative that you back up your libraries, along with any other important documents. Each library is made up of a file with the extension .enl plus a corresponding .Data folder. Always back up both the .enl file and the .Data folder.

Use the *Save a Copy* command or one of the *Compressed Library* commands to save a copy of your library to a removable disk (or elsewhere) for safekeeping. See [Backing Up Your EndNote Files](#) for more information about making backup copies of your files. See [Saving a Compressed Copy of a Library](#) and [Saving a Copy of a Library](#) for ways to back up your library.

Saving a Copy of a Library

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

To create a copy of your library:

1. With a library open, select *Save a Copy* from the *File* menu.
2. Name the new library and choose where to save it.
3. (Optional) You may want to save your library files to a single folder package. See [Saving a Packaged Library](#) for more information.
4. Click *Save* and EndNote creates a copy of the library.

The new library does not open, it is saved to disk, where you can then open it with EndNote. EndNote leaves your original library open as it was before the command was chosen.

Note: The Save a Copy command creates a [library name].enl file as well as a [library name].Data folder for the new library, and copies all necessary files and figures to it.

Saving a Compressed Copy of a Library

The [Sync Feature](#) provides a backup of your current library, but if you have deleted references from your library and emptied the trash, they will also be deleted from the online copy of the library; if you have deleted references from the online library and emptied the trash, they will be deleted from the EndNote library at the next sync. Making a backup of your library at regular intervals ensures you have access to older material, if you ever need it.

You can save an EndNote library, including the filename.enl file, its associated .Data folder, and all of its contents, to a single compressed file in order to back up your library or to send a copy to a colleague. Later, you can restore the compressed library with EndNote.

Note: EndNote libraries larger than 4 gigabytes or 65,535 files cannot be compressed with EndNote's Compressed Library command. See [Saving a Copy of a Library](#) for information on making backup copies of larger libraries.

Creating a Compressed Library File

1. Open the library in EndNote.
2. From the *File* menu, select *Compress Library (.enlx)* to display a Compress Library dialog.
3. Use the radio buttons to determine these options:
 - Specify whether you want to Create a compressed library or to Create & Email the library.
 - Specify whether you want to save file attachments with the library or not.
 - Specify whether you want to save all references to the compressed library, only selected references, or only the references in a specific group or group set.
4. Click *OK* to display a file dialog.
5. Save the compressed library to a folder on your hard drive. You can change the file name but you cannot use the following characters.

Invalid Characters for Naming a Compressed Library	
\	back slash
/	forward slash
:	colon
*	asterisk
?	question mark
"	quotation mark
<	less than
>	greater than
	vertical bar

5. If you selected the Create & Email option, EndNote will launch your default email application, create a new email, and attach the compressed library file to the email. Enter additional information to the email, such as a recipient, subject, and message. Click the *Send* button.

Note: The Create & Email option will only work with desktop email applications. It will not work with online email sites. Emails attachment sizes may also be restricted by your email provider.

Restoring a Compressed Library File

Use EndNote to open the filename.enlx file, which will extract the .enl file and the .Data folder to the same folder where the .enlx file is located.

After restoring the compressed library, use EndNote to open the filename.enl file as you normally would to use the library.

Note: Be careful not to open the compressed library in the same location as an original library of the same name. This would overwrite the original library's .enl file and .Data folder when the compressed library is uncompressed.

Saving a Packaged Library

Each EndNote library is made up of a filename.enl file and an associated .Data folder. If you want to back up, move, or share a library, you must remember both files. To make this easy, the macOS allows packaging the files in a folder that looks like a single file. You can open the package as you would any EndNote library, and you never have to worry about forgetting the .Data folder when you move the library to another location.

If you share a packaged EndNote library with an EndNote for Windows user, the Windows user sees the package as an ordinary folder that contains the filename.enl file and filename.Data folder.

To create an EndNote Library Package:

1. From the *File* menu, select either *New* to create a new library or *Save a Copy* to create a copy of the currently open library.
2. Name the file and choose where to save it.
3. Select the *Save as Package* option.
4. Click *Save* and EndNote creates a packaged version of the library.

The package appears on disk as a single file with the extension .enlp, and is really a special folder that contains your EndNote library plus its associated .Data folder.

Note: Please do not copy, move, or rename your EndNote library files after they are synchronized, as this will break the link to the Sync target library.

The Library Summary

To see a summary of statistics about the currently open library, go to the *Library* menu and select *Library Summary*.

If you wish to save and print this information, use the *Copy text to clipboard* button and then paste the text into a word processor document.

For a list of statistics about a specific reference, see [Reference Summary](#).

Setting a Favorite Library

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

You do not need to select a favorite library. By default, EndNote will open the last used library.

To assign or change the favorite library:

1. Open the library (or libraries) that you would like to set as your favorite(s). You must have a library open in order to set it as your favorite library.
2. From the *EndNote* menu, select *Preferences*, and then select *Libraries*.
3. In the drop-down list at the top of the window, select *Open the specified libraries*.
4. Click *Add Open Libraries* and all of the currently open libraries will be added to the list of favorite libraries that should open every time EndNote starts.
5. Click *Save* to save your changes, and then close the Preferences window by clicking in *Close* button in the top left corner.

To remove a library from the list of favorite libraries:

1. From the *EndNote* menu, select *Preferences* and select *Libraries* from the list of options.
2. Select the library that you would like to remove from the list of favorite libraries and click *Remove Library*. (This will only remove the library from your favorites list, it will not delete the library.)
3. Click *Save* to save your changes, and then close the Preferences window by clicking in *Close* button in the top left corner.

Opening a Library

To open a library when the EndNote program is already running, select *Open* from the *File* menu and select *Open Library*. If you have previously opened a library, you can use the Open Recent list to open a recently opened library and skip the dialog below.

When you select the Open Library command, EndNote displays a file dialog.

By default, this dialog displays all files with an extension .enl, .enlx, .enlp, or .lib. (.lib was the extension for very early versions of EndNote.) If your library name has a different extension, you should change the Files of Type option to All files (*.*). If your library is listed in the dialog, select it and click *Open*. If your library is not listed there, then it is probably saved in a different place on your hard drive or removable disk.

To locate a library not on the list, use your operating system's search feature to look for files ending in .enl, .enlp, or .enlx. Note the location of the file, then use the *File > Open Library* command in EndNote to locate and open the file.

When you open a compressed library (with the extension .enlx), EndNote uncompresses the files and opens the uncompressed version (with the extension .enl). After uncompressing a library, you should open the .enl file, not the .enlx file.

Closing a Library

To close a library, do one of the following:

- From the *File* menu, select *Close Library*.
- Type $\text{⌘}+W$ when the Library window is active.
- Click the *Close* button in the top left corner of the Library window.
- Hold down the *Option* key when clicking the red close button of a library to close all open Library windows..

EndNote saves changes to references in your library as you work. As a result, closing the library does not invoke the familiar "Save changes?" question unless changes to a reference you were working in have not been saved. EndNote will ask if you want to save changes to the open reference, but not changes to the library as a whole.

Closing a library does not quit the EndNote program. If you want to quit from EndNote, select *Quit EndNote* from the *EndNote* menu or type $\text{⌘}+Q$. Quit from the EndNote menu and any open libraries are saved and closed automatically.

Deleting a Library

You can delete an EndNote library in one of two ways.

One option is to exit EndNote and delete the library file and its associated .Data folder by dragging the icons to the Trash.

The other option is to delete a library from within EndNote.

1. Close the library, but keep EndNote open.
2. From the *File* menu, select *Open* and then *Open Library*.
3. In the file dialog, select the libraryname.enl file, *Control+click* and select *Move to Trash* from the menu.
4. Next, highlight the libraryname.Data folder, *Control+click* and select *Move to Trash* from the menu.
5. Click *Cancel* to close the file dialog.

Moving a Library

Each EndNote library can be independently moved using the Finder. When moving a library, we recommend that you move both the main .enl file and the .Data folder.

If you move an .enl file without moving the corresponding .Data folder, EndNote will try to recreate the .Data folder to accompany the .enl file the next time you try to open the .enl file. However, you may lose data, including PDF file attachments, term lists, and even reference information.

EndNote will display an Alert when you try to open the .enl file without the corresponding .Data folder that includes the text below:

You are attempting to open an EndNote Library without its associated .Data Folder. This is not recommended because it may result in the loss of data including, but not limited to: reference information, file attachments, and term lists.

In order to prevent the loss of data you should locate the original .Data folder and copy it to the same location as the EndNote library you are attempting to open. The .Data folder was created in the same directory in which the EndNote library was originally created.

We recommend that you click *Cancel* and go find and move your original .Data folder before attempting to open a moved library.

Note: Please do not move or rename your EndNote library files after they are synchronized, as this will break the link to the Sync target library.

See also [Important Points About Libraries](#)

Recovering a Damaged Library

If an EndNote library gets damaged, you may get an error message when trying to open it or work with the references. The best way to protect yourself from damaged files is to make regular backup copies of your important files and documents (see [Backing Up Your EndNote Files](#)). If you do not have a backup copy of a damaged EndNote library, you can use the Recover Library command to repair the damaged file.

Note: If you have synced the damaged library, we suggest contacting [EndNote support](#) for information on recovering a synced library safely.

To repair a damaged EndNote library:

1. Close the library if it is currently open.
2. From the *Library* menu, select *Recover Library*. Read the information about the Recover Library command, and click *OK*.
3. In the dialog that appears, locate and select the library that needs to be repaired, and click *Open*.

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

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

Differences Between Saved Libraries and the Original

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

Term lists are not recovered with the library. Consequently, you will need to rebuild each term list by selecting *Define Term Lists* from the *Library* menu, highlighting the list, and then clicking *Update List* to fill the term list with the terms used in your library. For the Journals term list, you may find it a better option to import one of the predefined term lists instead of using the Update List feature.

Find Broken Attachments Links

Broken file attachment links occur when EndNote cannot locate the file in the path specified in the File Attachment field. In these instances, EndNote cannot display or index the attached file or include the file when compressing a library.

To find broken file attachments in the currently open library, go to the *Library* menu and select *Find Broken Attachment Links*.

EndNote finds all references with broken file attachment links and displays them in the Library window. In the Groups panel, EndNote creates a new group called Broken Attachments.

This situation may occur when you:

- Open a library that has one or more broken file and figure links.
- Import a library that has one or more broken file and figure links.
- Open a library without the accompanying .Data folder that contains the PDF files.
- Transfer PDFs and figure files using the Sync function and EndNote finds one or more broken file and figure links.

Fix or Remove Broken Attachment Links

To fix broken links, delete the link for the broken attachment and reattach the original file.

To remove broken attachment links, select *Remove Broken Attachment Links* from the *Library* menu. Removing broken links using this command cannot be undone, so you may want to create a backup of your library first. See [Saving a Compressed Copy of a Library](#) and [Saving a Copy of a Library](#) for methods of backing up your library.

Sorting the Library

The Sort Library command provides a way to arrange all references showing in the Reference List for browsing, exporting, printing, or copying.

By default, the references in the list are automatically sorted by the first author's last name.

You can change the sort order by selecting *Sort Library...* from the *Library* menu or by clicking the column headings. When you sort a library, the sort order is retained even after you close and reopen a library.

To change the sort order:

1. From the *Library* menu, select *Sort Library...*
2. Select one or more field names from the menus. Enter the field names in the order you want the references sorted. You do not have to use all five options.
3. Click the button to the right of each field to indicate ascending or descending order.
4. Click *OK*.

The Sort Options dialog is initially set to sort the library by author names, in alphabetical order, and then references published by the same author are sorted by year (from oldest to newest).

Note: EndNote reads the default language setting from your operating system and uses it as the default language for character sorting. However, you can override the default language from this dialog.

Special Cases in Sorting

Except for title fields, quotation marks, parentheses, and other punctuation marks are considered during a sort. In an alphabetic sort, punctuation comes first, then numbers, then letters A-Z.

If the field you selected to sort by is empty in a particular reference, or not included in the selected reference type, that reference will sort before the other references in ascending order.

Author Names

When you select the Author field for sorting, author names from the first Author field are sorted by last name first, then first initial. Next, author names from the Secondary Author field are compared for sorting. Then, author names from the Tertiary Author field are compared for sorting.

If a reference has more than one author in a single field, EndNote includes the additional authors in the sort (up to 255 characters) before moving on to other fields.

If you select the specific First Author field to sort, only the surname is used for sorting.

If your EndNote library includes author names with connectives such as de, di, van, and von, you may want EndNote to skip these parts of the name in order to sort the references by the principal element of the surname. See [Sorting Preferences](#).

Titles

When sorting by title fields, EndNote ignores the words A, An, and The as well as punctuation at the start of the titles. You may enter additional words that should be ignored for sorting purposes when they appear at the beginning of a title. To do so, see [Sorting Preferences](#).

Sorting Diacritical Characters

Characters with diacritics are sorted differently in English, Spanish, Swedish, and other languages. EndNote reads the default language (or locale) setting from your operating system and uses it as the default language for sorting. EndNote typically sorts diacritical characters according to the rules of the language selected for your operating system; however, you can override the default language setting on the Sort Options dialog.

Creating a New Library

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

To create a library:

1. From the *File* menu, select *New*.
2. EndNote presents a dialog prompting you to name and save the new library.
3. By default, EndNote will call the new library "My EndNote Library," but you can change the name. Enter a name for your new library. Using a unique name for your library will make it easier to identify if you ever have to work with multiple libraries, or with libraries others have given to you. Do not include an extension, EndNote will add the ".enl" extension for the main library file and the ".Data" extension for the linked Data folder automatically.
4. Select the location where you would like to save the library. For simplicity, we suggest that you save your EndNote libraries in your Documents folder.
5. (Optional) You may want to save your library files to a single folder package. See [Saving a Packaged Library](#) for more information.
6. Click *Save* and the new library appears as an empty EndNote library.

Note: Do not save EndNote libraries in any cloud-syncing folders or drives. Cloud-syncing programs can corrupt EndNote libraries over time. The only suggested method for syncing EndNote libraries is through EndNote online.

Now that you have created a new library, you can begin entering references into it. The following topics illustrate the different ways to add references to an EndNote library:

- [Creating a New Reference](#) discusses how to enter individual references manually.
- [How to Search an Online Database](#) describes how to connect directly to online databases and retrieve references from them.
- [Importing Reference Data into EndNote](#) shows you how to import references that you have previously downloaded from online bibliographic databases.

If you have just created the library that will be the main library you use, you can set it to open automatically every time you start EndNote by setting it to be your "favorite library" (see [Setting a Favorite Library](#)).

Merging Libraries

There are two ways to merge complete libraries: [Merging Libraries through Sync](#) or [Importing EndNote Libraries](#) to import one library into another. (For information on copying selected references from one library to another, see [Copying and Pasting Complete References](#).)

Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library. This means that a reference that was #23 in a smaller library could become #600 in a larger library.

Note: Before merging libraries, we strongly suggest making a backup copy of the library into which you are transferring references. See [Saving a Compressed Copy of a Library](#) for information on creating a backup.

Merging Libraries through Sync

If you sync a new EndNote library to an EndNote online account that contains references in it, the references will be merged together into a single library, and the last library you synced to your EndNote account will become the library you use for syncing from that time on. The advantage of this method of merging libraries is that all the references, group sets, and groups from both libraries will be included in the merged library. The disadvantage is that references that exist in both original libraries will be duplicated.

Steps to merge two libraries together using Sync:

1. If you have previously synced a library, close that library in EndNote, then proceed to step 3.
2. If you have not previously synced a library, open the library you do *not* want to use for your final synced library in EndNote and follow the instructions in [The Sync Feature](#) to sync the library to your EndNote account. After syncing, close that library.
3. (Optional) To identify which references were in each original library, before syncing you might find it helpful to create a custom group containing all the references in each library and labeling it with something like "All from [original library name]." The groups would need to be created before syncing any libraries, with all the references in a given library added to that group.
4. Open the library you want to merge with the previously synced library. ***Please note this will be the library that you will sync in the future.***
5. Select *Sync Status* in the *Groups* panel. A message will be displayed saying, "You already have a synced library. If you choose to sync this library, it will be merged with your existing synced library..."
6. Click the *Sync Now* button. A warning will appear saying, "Warning: You are about to sync or share a library that is different than the last library you synced. This will merge the libraries. Do you wish to proceed?" If you wish to merge the libraries, click the *Yes* button.
7. You will be asked if you want to create a backup of the library. We suggest clicking *Yes* to create a backup before syncing. If you chose *Yes* to make a backup, save the backup and the sync process will begin; if you chose *No*, the sync process will begin immediately.

When the sync has finished, you will see all the references, group sets, and groups that appeared in both original EndNote libraries. Be sure to use this library in the future for syncing.

Note: If you had previously set another library as a favorite to open when starting EndNote, you may wish to make your merged library the favorite instead. You can find instructions for this in [Choosing a Library to Open](#).

Importing EndNote Libraries

The advantage of using the Import command to combine libraries is its ability to filter out duplicate references during the import operation.

Note: Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references. See [Saving a Compressed Copy of a Library](#) for information on making a backup.

To import an EndNote library into an EndNote Library:

1. Open the library into which you want to import the references.
2. From the *File* menu, select *Import*.
3. Click the *Options* button.
4. Select *EndNote Library* from the *Import Options* list (see [Import Options](#) for more information).
5. Select an option from the *Duplicates* list.
 - **Import All:** Imports the references, including duplicates.
 - **Discard Duplicates:** Imports the references, except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called File-Dupl.enl where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title and Reference Type match a reference already in the library. See [Duplicates Preferences](#) if you would like to change the duplicates criteria.
6. Set the *Text Translation* option to *No Translation*. Extended characters, saved as Unicode in EndNote, will transfer correctly.
7. Click *Import* to import the file.

Note: The time required to import an EndNote library is proportionate to the size of the library.

When the import is complete, the library displays the contents of the Imported References temporary group. This is the time to add a keyword to each imported reference with the [Change Fields](#) command or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

About Shared Libraries

EndNote 20 offers users the option to share your entire sync library with up to 399 other users.

Library sharing provides entire teams with immediate and real-time access to an entire EndNote library, meaning the same set of references, attachments, notes, and annotations. Changes are sent and received via sync, so all members of the shared library need to have the desktop activated with sync preferences completed, and be connected to the internet in order to send and receive changes. Library sharing is recommended as an alternative to saving a library on a shared drive, or emailing a compressed copy around to a group of collaborators.

Notes: The EndNote database engine was upgraded in EndNote X9.3. This means EndNote X9.2 or earlier cannot open libraries created in EndNote X9.3 or later. However, libraries from EndNote X9.3 or later can be shared through EndNote Sync with users of EndNote X9.2 or earlier without problems.

Libraries are synced approximately every 15 minutes, so members may not all see changes immediately after they are made.

To begin sharing:

Select *Share...* from the *File* menu.

You will be presented with the Share Dialog, where invitations can be sent.

The Share Dialog allows you to do the following:

- Invite people to have access to your Shared Library.
- Check the status of your invitations.
- Resend (remind) prior recipients of invitations.
- Add or change access level for colleagues invited to share your library.
- Remove colleagues from your Shared Library.

Inviting People to your shared library:

1. Open your synced library.
2. Select *Share...* from the *File* menu.
3. If you are not logged into EndNote online, you will be prompted to log in.
4. The Share dialog will pop up.
5. Enter the email address (or addresses, separated by commas) of the people that you would like to invite in the box under *Invite more people*.
6. For each invitee, use the *Permission* drop-down to select the desired access level: Read & Write or Read Only.

7. If desired, enter an optional message in the *Add a message* box.
8. Click the *Invite* button.

Once users have accepted the Shared Library invitation, their activity in that library will be reflected in [The Shared Library Activity Feed](#).

You can remove or change a person's access to your library by clicking the *Settings* button (the gear) next to their name.

Being Invited to a Shared Library

When you are invited to a Shared Library, you will receive an email.

Click on the *Accept* button, and a browser window should appear.

If you have an EndNote Online account:

Log in using your existing user name and password.

If you do not have an EndNote Online account:

Create your account, using the on-screen instructions.

How to open a library that was shared with you:

1. From the *File* menu, select *Open Shared Library...*
2. Click on the desired shared library, based on the sharer's email address.
3. Click the *Open* button.

Note: Libraries shared with you will always show the email address for the owner's EndNote account as the name of the library. This library name cannot be changed.

The Shared Library Activity Feed

The Shared Library Activity Feed provides Shared Library members with insight into who is doing what to the shared library, as well as when new members join.

Each Shared Library comes with an Activity Feed, both the library you are sharing with others, and those libraries that others have shared with you. This feature has been available since EndNote X8.

The Feed is attached to the associated Shared Library window. You can click on the Activity Feed drop-down button, to the right of the bell icon in the Sync Status, to display it, scroll through the updates listed and click outside the feed to dismiss it.

How is the activity displayed?

Activity is presented in reverse chronological order, and the Feed will update to display all the new activity that has happened since you last synced changes to the Shared Library. Next to each sync span, you will see the sync icon with a sync timestamp and below it all the latest activity that was retrieved. The activity is displayed in this way to update you with all the latest activity since you were last working on the library.

What activity is reflected in the feed?

All Shared Library member activity including:

- Activities: Adding, modifying, moving to or restoring from Trash, deleting (emptying Trash)
- Library objects: references, attachments and figures, Groups and Groups Sets.
- New member joining the library by accepting the invitation
- When a user has performed an action more than 1 time, that activity is consolidated into one line. Example: adding 145 new references
- Exceptions are Groups (Smart, Combined, Custom) or Group Sets being created. These are listed out individually so a user can select that activity line and be taken to the Group or Group Set to display contents.
- The deletion of one or more Groups or Group Sets is consolidated to one line. The user can select that activity line and see the deleted Group or Group Set names listed out on individual lines.
- What is considered a "modification" of a Smart or Combined Group: 1) New search criteria or group being added or taken away 2) Group is renamed 3) moved to new Group Set

Which activity lines are active versus inactive?

Items listed in the feed are distinguished as active vs. inactive by the font color. Inactive lines, such as a member joining the Shared Library, are a light shade of gray, indicating to the user that they are unable to select that line.

Activity lines not in light gray are meant to signify that they will show more information. For example, selecting a line that says "Bob Smith added 145 references" will display those 145 references that Bob Smith added in a temporary Activity Feed group. Selecting a line that says "Bob Smith created a new Smart Group" will cause that Smart Group to be highlighted in the Groups pane and its reference contents to display in the library view.

What activity is not in the Shared Library Activity Feed?

Members being invited or revoked will not be reflected in the feed, it is only when a user has joined by accepting the invitation. Also excluded is activity done by the library owner in the EndNote online environment, though activity done by the owner on an iPad/iPhone will be reflected.

What happens when I select a line of activity and some content has since been deleted?

If you select a line of activity to which changes have since been made (e.g. "Bob Smith added 200 references" but more recently, another member of the library, Mike Hammer, deleted 75 of those) you will be presented with the remaining references. You will be viewing the most up-to-date set of references and attachments.

Can I undo a line of activity?

No. The Feed is meant to inform and does not offer the ability for users to roll back changes or access an earlier version of the Shared Library.

Multiple People Opening One Library

It is possible to share a read-only copy of a library on a local area network (LAN) drive. However, keeping a read-write library on a network drive is strongly discouraged and can lead to library corruption. To avoid library corruption, keep the master library on the computer of the library administrator and put a read-only **copy** of the library on the network drive. If there is more than one administrator, the administrators should share access to the library through EndNote's Sync's Library Sharing, not by trying to update the library on a network drive, then the "main" administrator should put the copy on the network drive, to keep the record numbers consistent (record numbers change with sync). See [The EndNote Library is Corrupted](#), [Record Numbers](#), and [About Shared Libraries](#).

EndNote does not perform record-locking functions that would allow multiple users to edit one library at the same time. However, multiple users can access one EndNote library simultaneously as long as the library is restricted to read-only or locked status. This will allow users to perform searches, copy information to their documents, and format their papers. Use Finder to change the Properties of your EndNote library; select the Locked attribute for the .enl file and the .Data folder.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. Except for the person who posts the database, grant all users read-only access.

One person should be assigned the responsibility for maintaining and updating the library on their computer, not on the network. This user should be granted full access to the file and should periodically post an updated copy of the library on the network for all other users, with read-only access.

Opening and Converting Old EndNote Libraries

When opening a library from a version of EndNote prior to EndNote X9.3, EndNote will convert the library to the current format and leave the original library unchanged. EndNote libraries consist of an .enl file and a .Data folder that must be kept together when sharing libraries.

To open or convert an older EndNote library:

1. Start EndNote.
2. From the *File* menu, select *Open* and then *Open Library*.

3. On the file dialog, locate and highlight the old library, and then click *Open*. EndNote will warn you that the selected library was created with an older version and ask you for permission to convert it.
4. Click *Yes* to convert the library.
5. EndNote will give the new library a default name of [oldlibraryname]-Converted.enl, but you can change it. Name the new library and click *Save*.

The conversion makes a copy of the original library in the latest file format, and leaves the original library intact.

Transferring Libraries between Computers or Platforms

Any library created or updated with EndNote X9.3 can be used by EndNote X9.3 or later on Windows or macOS. No conversion is necessary. Therefore the methods described below can be used for transferring libraries between computers, no matter the platform.

With EndNote X9.3 the database engine changed. This means EndNote X9.3 or later are able to open and use libraries from EndNote 20, but EndNote 20 libraries cannot be opened in EndNote X9.2 or earlier.

Transferring a Library through Sync

The easiest way to transfer the contents of a library from one computer to another, whether Windows or macOS operating system, is to use EndNote Sync. This method will work even if not all of the libraries being synced are from the same version of EndNote.

1. If you have not yet done so, sync the library on your original computer to EndNote online. You can find instructions in the section [The Sync Feature](#).
2. On the computer you are transferring your library to, create an empty library and sync it to the same EndNote account. The empty library will be populated with all the references, group sets, and groups from the original library (if you use a library with references in it, they will be merged and you may end up with duplicate references). Attachments that are in the .Data folder of the original library will also be transferred. These will be attachments created as relative links. See [Selecting a Relative Path or an Absolute Path for File Attachments](#) for more information on relative links.
3. If automatic sync is turned off, be sure to manually sync the library before closing EndNote to update the online library.

Note: EndNote record numbers are not permanent and may change during sync.

The two copies of the library will continue to synchronize changes made to to the library on either computer.

Transferring a Compressed Library

If you want to copy a library to another computer, or give a copy of it to a colleague, but do not want to synchronize your references, the safest way to do so is by creating a compressed copy of the library. A

compressed copy can be transferred through a network, through syncing services such as OneDrive, iCloud, or Dropbox, or attached to an email (if small enough),

To transfer a compressed library:

1. Create a compressed copy of the library. See [Saving a Compressed Copy of a Library](#) for detailed instructions. The compressed library will have a .enlx extension.
2. Copy the compressed library file to the new computer via a thumbdrive, a syncing folder, a network drive, or email.
3. On the new computer, place the compressed library in the location you want to permanently store it.
4. Open the compressed library from EndNote, uncompressing it. See [Restoring a Compressed Library File](#) for instructions. In the future, open the .enl file to open the library. This will be an uncompressed file.

Note: If using a cloud-syncing service such as OneDrive, iCloud, or Dropbox to transfer the compressed library, move it out of the syncing folder before opening the library. Uncompressed libraries should not be used in cloud-syncing folders to avoid data corruption.

Note: EndNote libraries larger than 4 gigabytes or 65,535 files cannot be compressed with EndNote's Compressed Library command.

Transferring a Copy Made through the Save a Copy Command

If your library is too large to compress, you could save an uncompressed copy of the library and transfer it via a network or thumb drive. See [Saving a Copy of a Library](#) for more information.

To transfer an uncompressed copy of a library:

1. Select *Save a Copy* from the *File* menu in EndNote.
2. Name the file and select the location you want to save the copy, such as an external hard drive or thumb drive. By default, EndNote will use the original file name and add "Copy" at the end, but you can change the name.
3. The recipient of the library can use Finder to copy the library files to their own computer.

Sharing a Library

If you wish to give a colleague access to your EndNote library, with automatic updates, consider sharing your library with them through EndNote Sync. This would enable both of you to make changes to the library and have them automatically synchronized between computers, and would eliminate any problems with incompatibility from using different versions of EndNote. You can find information on this in [About Shared Libraries](#).

Working with References

The heart of your EndNote library is your references. EndNote provides many tools for working with references and their related files.

The Reference Panel

The Reference panel displays the contents of a reference, allows editing of the reference, and viewing and annotation of PDFs. Each part of the reference is stored in its own field; field names and data can be seen in the Edit panel. The Reference Type field displays the type of reference that you are viewing, such as journal article, book, or conference proceeding. Changing the Reference Type field will change the names of the fields displayed.

The first author's last name, the year, and the EndNote record number appear at the top of the Reference panel in the title bar.

Note: Record numbers should not be considered permanent identifiers. The same record may have a different number if it is copied to another library or synced to another computer.

Reference Panel Options

When you select a reference in the library, by default EndNote displays the Summary panel, showing a summary of the reference and a preview of the reference. The preview subpanel may only be displayed as a toolbar at the bottom of the panel, but you can drag it up to see both the summary and preview in the panel.

To edit the reference, select *Edit* in the *Reference* panel.

To see PDFs for the reference, select *PDF* in the *Reference* panel.

If you change the Reference panel option, your choice will be remembered when you next start EndNote. So if you select the Edit option in the Reference panel, then close EndNote, the Edit panel will be displayed the next time you open EndNote.

Reference Panel Controls

- To open a context-sensitive menu, *Control+click* anywhere in the Reference panel.
- Press *Control+Option+A* to attach a file to the current reference.
- To open a PDF in the default PDF application on your computer, in the *Edit* panel click the *drop-down arrow for the PDF*, then select the option to *Open with...* (the name of the application to open the PDF with will depend on the default PDF application for your computer).
- Click the *Attach File* button in the *Summary* panel to attach a file such as a PDF, document, or text file.

Reference Commands

Commands affecting an entire reference, or set of references, are available under the References menu. Most of these commands are also available by Control+clicking on a reference, then selecting the command from the list.

New Reference

Select *References > New Reference* to create a new reference. Enter your data, then click the *Close* button to save and close the reference. You will be asked if you want to save the changes.

Edit Reference

Select *References > Edit Reference* to move to the Edit panel for the selected reference.

Copy References To

Select *References > Copy References To* to copy a set of selected reference(s) to a new library or another EndNote library on your computer.

Copy Formatted Reference

Select *References > Copy Formatted Reference* to copy selected reference(s) as they would be formatted according to the currently selected style. The reference(s) can then be pasted into emails or documents.

Note: The Copy Formatted Reference command pastes the reference(s) as formatted text, not as a Cite While You Write (CWYW) code, so the pasted references cannot be updated.

E-mail Reference

Select *References > E-mail Reference* to have EndNote open your default desktop email application and create a new email with a formatted version of the reference inserted as text, and a subject line based on the reference. The format used will be the one selected in the Reference Preview subpanel. If there is a PDF attached to the reference, it will be included as an attachment of the email.

Note: This feature will not work with online email websites or within browsers; it requires a dedicated desktop application, such as Outlook.

Move References to Trash

Select *References > Move References to Trash* to have all selected references sent to the EndNote Trash. They will remain in the Trash until the Trash is emptied. If the library is synced, the contents of the Trash will be synced along with the rest of the library's contents.

File Attachments

Select *References > File Attachments* to attach files to a reference, open an attachment in the default program for its file type, save a copy of an attachment outside of the EndNote library, convert attachments with absolute links to relative links, or rename attached PDFs.

Note: Although PDFs tend to be the most common attachments, almost any file type can be attached to an EndNote record. Attachments with relative links will be stored in the .Data folder and will sync; attachments with absolute links are not stored in the .Data folder and will not sync. See [Selecting a Relative Path or an Absolute Path for File Attachments](#) for more information.

PDF Viewer

If a PDF is open in a separate PDF Viewer window, the *References > PDF Viewer* command mirrors some of the commands available on the PDF Viewer toolbar.

Find Full Text

Select *References > Find Full Text* to have EndNote attempt to find and download available PDFs matching the reference(s).

Find Reference Updates

Select a reference, or set of references, in the Reference List, then select *References > Find Reference Updates* to look for updated information for the reference(s). EndNote searches for and retrieves available field updates for the selected reference(s). If a reliable match is found, EndNote displays a Review Available Updates dialog that shows you the updates that were found. See [Find Reference Updates](#) for more information.

URL

The *References > URL* command contains two options:

1. It can use OpenURL to find local copies of the reference. If Find Full Text does not find the PDF you need, try selecting *References > URL > OpenURL Link* to connect to your library services and find the PDF.
2. It can open the website of the URL in the URL field or the record.

Figure

Select *References > Figure* to attach a graphic file to the reference using the Figure field, or to open a graphic in the Figure field. The Figure field can contain only one file and can be used to insert graphic files into Word documents using Cite While You Write. If you have previously attached a file to the reference using the Figure field that you would prefer to move to the File Attachments field, there is also an option to convert the file to an attachment.

Web of Science

Select *References > Web of Science* to quickly access the Web of Science™ source record for the reference, related records for the reference, or to create a citation report for selected reference(s).

Note: You must have access to the Web of Science to use this feature.

Reference Summary

Select a single reference, then select *References > Reference Summary* to view a summary of information about the selected reference. An example of the information included is shown below.

Web of Science Times Cited: 18
Date Added: Thursday, September 17, 2020, 10:08 AM
Last Updated: Thursday, September 17, 2020, 10:08 AM
Fields Used: 17
Custom and Smart Groups: Citation Report Example

Important Points About References

There are various ways to add references to an EndNote library. This topic, and the following topics, discuss how to type information into EndNote, edit EndNote references, and insert graphics and files.

See [How to Search an Online Database](#) for information about connecting to online bibliographic databases and retrieving references directly into EndNote. [Importing Reference Data into EndNote](#) describes how to import references from a variety of sources using EndNote's Import command.

Here is an overview of important aspects of EndNote references:

- Each EndNote reference stores the information required to cite it in a bibliography. Keywords, notes, abstracts, URLs, and other information can be stored in a reference as well.
- Each reference added to a library is automatically assigned a unique record number for that library. If a reference is copied to another library, synced to a library on another computer, or even cut-and-pasted within the same library, the record number will change, so these numbers should not be considered permanent identifiers. EndNote uses these record numbers to format papers. You cannot change these record numbers.
- You can create up to 999,995 references in an EndNote library. However, we suggest limiting libraries to about 50,000 references for best performance.
- Fifty-eight reference types are already defined (such as Journal Article, Book, Conference Proceedings, and so on). Three additional Unused reference types are available so you can define your own. See the [List of Reference Types](#).
- The fields (Author, Title, Year, and so on) displayed for each reference type can be modified or deleted. New fields can also be added, up to a total of 52 fields per reference, including the reference type name.
- The text of the references should remain as [Plain Text](#) unless a special font, size, or style of text is required for a specific term or character.

- The font size used to display the text in references can be changed using the Display Font Preferences.
- You can insert one graphic or file into the Figure field of a record, and the figure can be cited in Microsoft Word. See [Figures](#). However, you can insert up to 45 files into the File Attachments field. See [Linking a File to an EndNote Reference](#).
- New references are automatically saved when they are closed; however, you may save a reference while editing the reference using the Save command from the File menu.

Special Fields

There are two special tagging fields which appear in the library display, not in the Reference panel: Mark as Read/Mark as Unread and Rating. If you choose not to display these fields in the Reference List, you can still edit them by Control+clicking on a reference, then select them from the list.

Mark as Read/Mark as Unread Button: Use these toggle buttons to apply a Read or Unread status tag to the current reference. EndNote automatically saves your selection. You can set options for this field in the preferences.

Rating: Apply a rating to the reference selected in the library list to signify the importance of the current reference to your research. Apply up to five stars (or none) by clicking a dot in the Rating field in the library list.

Selecting References

To work with individual references (for example to copy, export, or edit them), first select them in the Reference List. The simplest way is to click on a reference in the Reference List. That reference is then highlighted to indicate it is selected.

You can also select a reference by typing the first few letters found in the field by which the library is currently sorted. For example, if the library is sorted by the author field, type the first few letters of an author's last name to select the first reference by that author. If the library is sorted based on title, type the first few letters of the title of the reference that you want to select. (When typing the letters to match a title, articles such as "a," "an," and "the" are skipped.)

To select multiple references:

- Hold down the *Command*(⌘) key while clicking on individual references. Press the *Command*(⌘) key and click on a selected reference to deselect that reference and retain the rest of the selection.
- Select a range of references by clicking on the first reference, then press the *Shift* key and click on the last reference of the range.
- Choose *Select All* from the *Edit* menu to select all of the references showing in the current Reference List. When all the references are selected, the Select All command changes to Unselect All.

The Reference Summary

To see a list of statistics about a reference, select the reference, then go to the *References* menu and select *Reference Summary*.

If you wish to save and print this information, use the *Copy text to clipboard* button and then paste the text into a word processor document.

For a list of statistics about the library, see [The Library Summary](#).

Saving References

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

- Click the *Save* button.
- Select a different reference. You will be asked if you want to save the changes to the reference you were working with.
- From the *File* menu, select *Save*.
- Use the keyboard shortcut of $\text{⌘}+\text{S}$.

If you Quit from EndNote while editing a reference, a confirmation window will appear asking if you want to save the changes to the reference.

Deleting References

To delete references:

1. Select (highlight) those references you want to delete.
2. Do one of these, which moves the selected references to the Trash group:
 - Drag the selected references and drop them on the Trash group.
 - From the *References* menu, select *Move References to Trash*.
 - Press the *Delete* key on your keyboard.

When you are absolutely certain that you want to delete the references in the Trash, *Control+click* on the *Trash* group and select *Empty Trash*.

You must confirm that you want to remove the references from the library.

If you want to permanently delete only some of the references in the Trash, select those references in the Trash, then select *Delete Trash References* from the *References* menu.

Note: You cannot undo the Empty Trash or Delete Trash References commands, so be sure you want to delete the reference(s) in the Trash before dismissing the EndNote warning.

About the Trash Group

The Trash group contains references you have removed from the library by using any of the methods mentioned above. While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be searched or cited), they are not completely deleted until you empty them from Trash.

Until you select Empty Trash, you can still drag references from the Trash group back to the All References group of your active library. You can also highlight a reference in the Trash group, *Control+click* the reference, and select *Restore to Library*. However, references restored to the Library will not be restored to any custom groups they belonged to, you will need to restore the custom group associations manually.

Note: When you delete a reference, you delete its record number in that library forever. Even if you paste the reference back into the same library, it is assigned a new, unique record number. This may cause incompatibilities with older papers that have unformatted citations that use old record numbers. We strongly recommend that you do not delete references that have been used in papers that you might want to reformat later, and keep backups of your libraries!

Find Reference Updates

Select and update individual or multiple references using the Find Reference Updates feature by retrieving information from source databases outside EndNote such as Web of Science™ Core Collection and PubMed.

The Find Reference Updates feature is available from the References menu.

When you select this feature, EndNote searches for and retrieves available field updates for the selected reference.

EndNote uses the following process when searching for field updates.

1. EndNote first looks for the DOI (Digital Object Identifier) that matches the DOI of the selected record. If a reliable match is found, EndNote displays the Review Reference Updates dialog and displays the field updates.
2. If EndNote cannot find a matching DOI number, it looks for the author name, year of publication, and journal title that matches the selected record. If a reliable match is found, EndNote displays the Review Reference Updates dialog and displays the field updates.
3. If no match is found, then a message that all references are up to date is displayed.

Note: The Find Reference Updates feature is designed for journal articles. It will probably not work for other reference types, even if they are available in PubMed or Web of Science™.

To update a reference:

1. Select one or more references from the Reference List.
2. From the *References* menu, select *Find Reference Updates*.

3. All updates are highlighted in blue in both the Available Updates and the My Reference panels. An update exists for a field in the My Reference panel when the field is empty or differs from the information in the same field in the Available Updates panel. For each update that EndNote finds for a record, you can:
 - Click the *Update All Fields* button to update all the fields in the My References panel with updated information from the Available Updates panel. EndNote will ask if you want to apply this choice to all references to be updated. If you click Yes, you will not be given a choice of how to update the rest of the references to be updated.
 - Click the *Update Empty Fields* button to update every empty field in the My Reference panel with the new information from the Available Updates panel. EndNote will ask if you want to apply this choice to all references to be updated. If you click Yes, you will not be given a choice of how to update the rest of the references to be updated.
 - Edit the reference manually by selecting the *Edit Reference* option, making your changes, then clicking the *Save and Continue* button to save your changes and continue to the next record.

Note: If you have selected more than one reference, click the *Skip* button to skip a particular reference that you do not wish to update.

All fields in the My Reference panel will display, even if they are empty.

Editing a Reference in Find Reference Updates

After selecting the Edit Reference option, you can copy any of the information from a retrieved field and paste the information into the same field in the My Reference panel. You can also edit any of the fields in the My Reference panel. The following edit options are available: Cut, Copy, Paste, Paste with Text Styles, and Select All.

You cannot edit any of the retrieved fields from the Available Updates panel.

Creating a New Reference

To add a new reference to an open library:

From the *References* menu, select *New Reference* (⌘+N). This opens an empty Reference window:

Select a reference type from the *Reference Type* field at the top of the window.

Enter bibliographic data into each of the fields in the reference. For guidance, see [Entering References](#). When you are finished, *Close* the reference to save it and add it to the library.

After a new reference has been saved, you can edit it in the Reference Edit panel.

Entering References

Bibliographic information (as well as keywords, notes, and other relevant information) is entered into separate fields in each EndNote reference. By storing the pieces of bibliographic data in different fields,

EndNote can later rearrange the elements to conform to various bibliographic formats (such as APA or MLA).

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

Note: There are a few exceptions to this punctuation rule, notably in the Author, Editor, and Edition fields. See the detailed topics on those fields for more information.

Keyboard commands are available for many functions, reducing the need to use the mouse. See [Keyboard Commands](#).

The Reference Type selected for a reference determines which fields will be available. The Generic Reference Type is the one all others are based on, so it is the only Reference Type where all fields will be available. It is possible to customize Reference Types if you need a field that is not available in the default set. See [Customizing Reference Types](#) for more information.

Note: Selecting a font from the Edit > Font menu should not be used for changing the display. Overriding the plain font will affect your bibliographies.

For details about entering data into specific fields, see these topics:

- [Field Size Restrictions](#)
- [Changing the Default Reference Type](#)
- [Using Term Lists with Data Entry](#)
- [Author and Editor Names](#)
- [The Year Field](#)
- [Title Fields](#)
- [Journal Name Fields](#)
- [The Pages Field](#)
- [The Edition Field](#)
- [The Date Field](#)
- [Auto Date Stamps](#)
- [The Short Title Field](#)
- [The Original Publication Field](#)
- [The Reprint Edition Field](#)
- [The Reviewed Item Field](#)
- [The ISBN/ISSN Field](#)
- [The DOI Field](#)
- [The Call Number Field](#)
- [The Accession Number Field](#)
- [The Label Field](#)

- [The Keywords Field](#)
- [The Abstract, Notes, and Research Notes Fields](#)
- [The URL Field](#)
- [The File Attachments Field](#)
- [The Figure and Caption Fields](#)

Field Size Restrictions

The Figure field can contain a single graphic.

All other fields can contain up to 64 KB or approximately 16 pages of plain text. The exact number of pages will depend on the font size.

Choosing a Reference Type

When you create a new reference, that reference is assigned the default reference type. If you want to add a different type of reference, click the List of Reference Types at the top of the Edit panel, and select the reference type that you need.

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

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

Customizing Fields and Reference Types

Fields can be removed, added, or renamed. You can also rename reference types. See [Customizing Reference Types](#) for more information.

Tips for Choosing the Right Reference Type

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

Use *Book Section* for references to parts of edited or nonedited books (a chapter, for example).

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

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

Use the *Chart or Table* reference type if you want to include an image and later insert that image as a table in Microsoft Word. Images in all other reference types will insert into Word as figures, which are listed and numbered separately from tables.

Changing the Default Reference Type

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

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

See [Reference Types Preferences](#) for more information.

Using Term Lists with Data Entry

EndNote uses term lists for the Author and Editor names, Journals, and Keywords. Term lists can also be created for other fields. These lists are updated automatically as you enter or import new terms into these fields. The benefit of this is that the term lists also help with data entry. If you begin to enter a name, journal or keyword that you have used before in that library, EndNote will complete the term for you to speed up data entry.

To accept a term that EndNote has suggested, press *Return*, *Tab*, or click in the next field. Terms that are new (that is, those that do not already appear in the corresponding Author, Journals, or Keyword term list) appear in red text.

A more complete discussion of EndNote's term lists is provided in [Introduction to Term Lists](#).

Note: Both the "Auto-Update" and "Auto-Complete" term list features described here may be turned off using the [Term Lists Preferences](#) settings in the EndNote preferences.

Author and Editor Names

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

Always enter author and editor names with one name per line. If an author's name is too long to fit on a single line, let it wrap to the next line as you type it.

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

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

"JO Fisher" or "Fisher, JO" would result in "JO" being perceived as the single name "Jo" and formatted as "J." in the APA style instead of "J. O." However, using any of the data entry formats below would result in the name being formatted according to the APA requirements.

- James Oscar Fisher
- James O. Fisher
- Fisher, James Oscar
- Fisher, James O.
- Fisher, J. O.
- Fisher, J.O.
- Fisher, J O
- J. O. Fisher
- J.O. Fisher
- J O Fisher

Note: EndNote will not perceive an author's name entered as a full name to be the same author as a name entered with initials. EndNote's author term list is not designed to work with full and abbreviated versions of a name. This means that to meet requirements for styles which require special formatting when there are multiple works by the same author, such as a solid line instead of repeating the author's name in the reference list, it is important to enter the author's name the same way in all records.

See [Additional Style Formatting Options](#) for information about how EndNote can use style settings to format author names in bibliographies. For more information about term lists, see [Introduction to Term Lists](#).

Using "et al." or Similar Abbreviations

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

Anonymous Works

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

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

Corporate Authors

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

U.S. Department of Agriculture,

Apple Computer Inc.,

This ensures that the entire name is treated as a last name, so no name manipulation will be applied.

If a corporate author name includes a comma in the name itself, use two commas in place of the first comma:

Apple Computer,, Inc.

EndNote treats this as a last name, followed by a blank first name, and then a suffix. As a result, everything after the (blank) first name is appended, with the second comma treated as text instead of the identifier between the first and last name. The formatted result of the corporate name above would be "Apple Computer, Inc."

Complex Author Names

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

de Gaulle, Charles

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

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

Smith, Alfred, Jr.

The text after the second comma will print exactly as entered and the second comma will always be included as part of the suffix. For the example above, the name would show as "Alfred Smith, Jr." but could not be formatted as "Alfred Smith Jr."

Note: See the [Sorting Preferences](#) section of the EndNote preferences if you do not want EndNote to include prepositions (such as de, van, von, and so on) when it alphabetizes references in a bibliography.

The Year Field

Normally, you should enter the four numbers of the year of publication, as in 2013. When appropriate, you may enter "in press," or "in preparation," or some other notation.

Note: When you transfer references from an outside source into EndNote, only valid dates are parsed and transferred. Text such as "submitted" or "in print" is ignored, and year ranges such as 2010-11 may not import as expected. However, you can manually type this information into the reference. Also, only one item can be imported into the year field, so if year information appears more than once in import data, only the first item will be imported into the Year field.

Title Fields

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

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

Journal Name Fields

The Journal field is automatically set up to work with the Journals term list. This means that the Journals list is updated as you add new journal names to your references, and EndNote will use this list to facilitate data entry by suggesting journal names as you enter them into the Journal field.

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

EndNote includes several predefined journal lists in the Terms folder. If you would like to use these lists, you should import them into your Journals list as described in [Loading Supplied Journal Abbreviations](#).

The Journal Field

When using a Journals term list, new contents in the Journal field will be interpreted as a full journal name and added to the list as such. If an entry shows up in red, the name has not been used in the Journals term list before.

The Alternate Journal Field

When using a Journals term list, new contents in the Alternate Journal field will be interpreted as the journal abbreviation and added to the list as such.

The Journals Terms List

If EndNote has a predefined journals term list for your area of study, importing it when you create your library will eliminate many problems.

Some databases export the full journal name, some export the abbreviation, and some export both. If the term list is automatically updated from references where the names are not consistent in the Journal and Alternate Journal fields, EndNote will be unable to create a bibliography where the journal name formats are consistent. EndNote will not add a new name if that name already exists anywhere in the term list, so having an abbreviation in the Journal field or the full name in the Alternate Journal field is not a problem when an "official" version of the name already exists in the term list—because you imported the list before adding references!

The Pages Field

Page ranges can be entered as complete (1442-1449) or abbreviated (1442-9) ranges. The style used to create the bibliography will change the page numbers to match the style requirements, either full number ranges, abbreviated page ranges, just the first page (see [Page Numbers](#)).

Do not use commas in the Pages field for page numbers in the thousands. EndNote will add them, if needed.

This field is one of three that can be used in EndNote temporary citations in place of the EndNote record number. The other two fields are Accession Number and Label. You can find more information on this in [Temporary Citations Preferences](#).

The Edition Field

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

The Date Field

In the Date field of your references, enter dates as you would like them to appear in your formatted list or bibliography; EndNote does not reformat dates. The output style determines which date field prints in your bibliographic references.

Note: When you transfer references from an outside source into EndNote, only valid dates are parsed and transferred. Text such as "submitted" or "in print" is ignored. However, you can manually type this information into the reference.

Auto Date Stamps

Two Auto Date Stamp fields are tracked in EndNote and can be added to the Reference List panel display.

The Added to Library and Last Updated date fields are inserted when you save a new reference. The Last Updated date is reset each time you save changes to a reference. The date format of the Auto Date Stamp fields matches your default operating system settings (for example, 4/16/2020).

To add the two Auto Date Stamp fields to the Reference List panel, select *EndNote > Preferences > Display Fields*. From the Field column, select the Added to Library and/or Last Updated fields. EndNote populates the Heading column with your selection.

You cannot edit, print, or export either of the Auto Date Stamp fields. You can, however, display and sort these fields from the Reference List panel just as you can any other EndNote field.

Note: For references entered with EndNote version X1 or earlier, the Added to Library field is left blank and the Last Updated field displays the date of conversion to EndNote.

The Short Title Field

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

(Perin 141)

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

(Perin, Burning the Midnight Oil 141)

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

The Original Publication Field

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

The Reprint Edition Field

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

Note: This field is not intended to be used to indicate whether or not you have a reprint of the article on file.

The Reviewed Item Field

Use the Reviewed Item field for articles or chapters that are critical reviews of books, cinema, art, or other works. The contents of the Reviewed Item field varies depending on the type of review that you are citing, but typically you should enter the title of the reviewed work and the primary person responsible for it (author, artist, performer, and so on). Additional information about a production or performance may also be included. Enter the information exactly as you want it to appear in the formatted references (including punctuation and text formatting).

The ISBN/ISSN Field

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

These numbers help to identify a specific publication if you need to order it or locate it. This field is also used for Report Number and Patent Number in the Report and Patent reference types.

The DOI Field

A DOI (Digital Object Identifier) is a unique ID for locating a digital version of a document, PDF, or image. It is most useful if you are importing reference data or retrieving references directly from an online source. In early versions of EndNote, this field was titled "Electronic Resource Number."

The Accession Number Field

This field is used to identify the internal tracking number for references imported from online databases. For example, if you import a reference from Clarivate Web of Science, the Web of Science Unique Identifier number will be imported into this field; if you import a reference from PubMed, the PMID will be imported into this field.

This field is one of three that can be used in EndNote temporary citations in place of the EndNote record number. The other two fields are Label and Pages. You can find more information on this in [Temporary Citations Preferences](#).

Note: Only one item can be imported into this field. This means if a record from an online database contains both a Web of Science Unique Identifier and a PMID, only one of them can be imported into the Accession Number field. The other identifier will likely be imported into the Notes field.

The Call Number Field

The Call Number field is used to store library call numbers. These are the codes that help you to locate a particular publication on the shelves in your library. When available, the EndNote connection files import the call number information into this field.

The Label Field

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

When converting references from other reference management systems, the record number from the previous system is imported into the Label field, for example, when converting a Reference Manager database to EndNote.

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

This field is one of three that can be used in EndNote temporary citations in place of the EndNote record number. The other two fields are Accession Number and Pages. You can find more information on this in [Temporary Citations Preferences](#).

If you do not need the Label field for citation purposes, it can be used as an additional field for categorizing references or storing reprint numbers. (Do not use EndNote's record numbers to number reprints because these numbers change when references are moved to different libraries. EndNote's record numbers cannot be assigned or changed by the user, but the Label field can be edited.)

The Keywords Field

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

By default, EndNote will also import keywords from online databases into the Keywords field.

The Keywords term list (which maintains a list of terms used in the Keywords field) can be set up to recognize semicolons (;), slashes (/), backslashes (\), and returns as delimiters that separate individual keywords. If you would prefer to use other punctuation to separate your keywords, you may change these settings using the Define Term Lists command under the Library menu.

The Abstract, Notes, and Research Notes Fields

The Abstract, Notes, and Research Notes fields can each hold up to 64,000 characters, which is equivalent to about 16 pages of text. Use the Notes field to store personal reminders, such as the location of a quotation in a book or the quotation itself. Use the Abstract field for a brief description of the contents of the work. Use the Research Notes field to create personal annotated bibliographies.

The URL Field

URL (Uniform Resource Locator) is the term for the address used to locate a specific page of information with your Web browser.

To link a URL to a reference in your EndNote library:

1. Select a reference in the Reference List and select the *Edit* panel. Put your cursor in the URL field.
2. Type or paste a valid URL into the field. For example:

`https://endnote.com/`

or

`https://clarivate.com/`

3. The URL becomes a hyperlink (blue and underlined).

If you need to enter multiple links into the URL field, enter them one per line. Adding any other information along with the URL or path and filename may keep the Open URL command from successfully finding the desired site.

When a correctly formatted URL is entered into the URL field, the *URL > Open URL* command on the *References* menu can be used to launch a Web browser and take you to that site or file.

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

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

The File Attachments Field

Use the File Attachments field to store the path to PDF files (and other file types) on your hard drive.

Note: Use the Figure field to attach a graphic or file that you want to insert into a Word document with Cite While You Write.

To link a file to a reference in your EndNote library:

1. Select a reference in the Reference List.
2. From the *References* menu, select *File Attachments > Attach File*.
3. On the file dialog, select the file to attach to your reference.
4. Note the checkbox along the bottom titled, "Copy this file to the default file attachments folder and create a relative link." This gives you the option to:
 - Select the checkbox to copy the original file and place the copy in the .Data/PDF folder that is part of your EndNote library. In this location, it will sync through EndNote online.
 - Deselect the checkbox to always have EndNote look in the original folder for the inserted file. If kept in the original location, the attachment will not sync through EndNote online.

For more information about this option, see [Selecting a Relative Path or an Absolute Path for File Attachments](#).

5. Click *Open*.

EndNote will display an icon indicating the type of file inserted. You can insert up to 45 files into the same File Attachments field.

Note: Another way to link a file to the File Attachments field is to drag and drop the file onto the reference in either the Library window or the Reference Edit panel. Whether the file is saved with the database or is linked with an absolute path is determined by the default file attachment setting. See [URLs & Links Preferences](#).

Note: In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the .Data/PDF folder with a relative path.

These characters are replaced with an underscore	
\	back slash
/	forward slash
:	colon
*	asterisk
?	question mark
"	quotation mark
<	less than
>	greater than
	vertical bar

For more information, see [Linking a File to an EndNote Reference](#) and [Opening a Linked File or URL](#).

To automatically search online to locate and attach the full text of a referenced document, see [Finding Full Text for a Reference](#).

Note: Never rename attached files within the DATA folder. EndNote assigns each file a unique name that helps link it to a specific reference.

The Figure and Caption Fields

The Figure field can contain a graphic or file attachment. See [Figures](#).

The Figure field is included by default for all reference types, but you can remove it from any reference type or rename it in any reference type.

Note: Each reference can contain only one item in the Figure field.

The figure itself is copied to the [library name].Data folder found in the same folder as the library file.

A related Caption field appears directly under the Figure field in a reference. Use this field for a short description of the image or file.

Cite While You Write allows you to insert the figure and its caption into a Microsoft Word document. See [Finding and Inserting Figures and Tables](#). Figures in most reference types will insert into Word as figures. The only exception is the Chart or Table reference type; use the Chart or Table reference type if you want to include an image and later insert that image as a table in Microsoft Word. Tables are listed and numbered separately from figures in Word.

The PMCID and NIHMSID Fields

Unlike most of the fields described in this section, the PMCID and NIHMSID fields are not generic fields. They occur only in the Journal Article and Electronic Article reference types. As you can see below, the generic names for these fields are Custom 2 and Custom 6.

Modify Reference Types

Reference Type: Journal Article

To hide an unwanted reference type, add a period before the name (e.g., ".Map") in the column heading below.

Generic	Journal Article
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item
Custom 1	Legal Note
Custom 2	PMCID
Custom 3	
Custom 4	
Custom 5	
Custom 6	NIHMSID
Custom 7	Article Number
Custom 8	
Accession Number	Accession Number
Call Number	Call Number

EndNote Defaults

Apply to All Ref Types

OK

Cancel

The U.S. National Institutes of Health (NIH) requires that the PMCID be reported by some authors, so it is important to track this information and be able to use it if you are working with the NIH. You can find information on requirements for using these numbers at <https://publicaccess.nih.gov/include-pmcid-citations.htm>.

What is the difference between these two? The PMCID is the unique permanent identifier assigned when an article is approved for publication at PubMed Central (PMC). The NIHMSID is a temporary identifier assigned when an article is submitted for publication at PubMed Central. The NIHMSID is only to be used for the first 90 days after it is assigned or until an article has been granted a PMCID. You can find more information on this at <https://www.ncbi.nlm.nih.gov/pmc/about/public-access-info/>.

Note: The PMID is not equivalent to either of these numbers. The PMID is the unique identifier for an article in the PubMed database and would be imported into the Accession Number field when importing references from PubMed, or into the Notes field when importing references from the Web of Science™.

Font and Style

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

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

To apply font or text styles, select the text to be changed and then select the desired font options from the *Edit* menu or the *Font* toolbar.

EndNote supports Unicode UTF-8, allowing you to enter Unicode characters into references as well as the characters available through the font options.

Note: If the Font and Style (bold, etc.) options are dim, it is either because you are not in an editing window (such as a Reference or Style window), or you have not selected (highlighted) any text to change.

Plain Text

The Plain Font command on the Edit > Font menu removes overriding formatting from the selected text.

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

Text entered into EndNote without any special font or style applied is considered plain text, which is formatted in the font of your paper. Once you specifically apply a font or style to text, that formatting overrides the plain text setting.

The default font used to display EndNote's "Plain Text" is the default font of your operating system. The General font setting does not affect the font of a bibliography created for a word processing document.

Keyboard Commands

A full set of key commands is available so that you can enter references without using the mouse. For example, to create and enter a new reference without touching the mouse, select $\text{⌘}+N$ to add a new reference, type the bibliographic information using Tab or Shift+Tab to move forward or backward between the fields, and then press $\text{⌘}+W$ to save and close the reference.

Action When Entering Text	Key Command
Create a new reference	⌘+N
Go to Reference Edit panel	⌘+E
Select the next field	Tab
Select the previous field	Shift+Tab
When the cursor is in a field linked to a term list, such as Author, Journal, or Keywords, display the appropriate term list for term selection	⌘+1
Undo the previous command	⌘+Z
Cut selected text and put it on the clipboard	⌘+X
Copy selected text and put it on the clipboard	⌘+C
Paste text from the clipboard at the insertion point	⌘+V
Select all text in a field	⌘+A
Check spelling	⌘+Y
Set the text style to Plain	⌘+L
Turn bold on or off	⌘+B
Turn italic on or off	⌘+I
Turn underline on or off	⌘+U

Note: Use the Arrow keys to navigate within a field.

Special Characters

EndNote references can include special characters, including characters with diacritics, Greek, mathematical, and typographical symbols.

EndNote uses Unicode to encode special characters, so that data can be easily translated between platforms, programs, and languages.

EndNote uses the default language setting of your operating system. If the characters you wish to use require installing a different language, see [Working with Multiple Languages](#).

Special characters can be entered into EndNote using any of these text-entry methods:

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

- For diacritical characters, type the character the diacritic would be applied to and hold it. A dialog box will appear showing the letter with different diacritical characters. Select the one you want from the dialog.
- Copy the character from another program, and paste it into your EndNote library.
- Use [The Character Viewer](#) by selecting *Emoji & Symbols* from the *Edit* menu.

Characters with diacritics can be entered into EndNote references and into EndNote term lists. If you frequently use certain diacritical characters, or words that include diacritical characters, you can store them in a term list and then select them from the list when entering references. See [Introduction to Term Lists](#). However, only one term list can be associated with an EndNote field, so you will not be able to insert a special character from a term list into a field that already has a term list associated with it. You would need to enter it in another field, then cut-and-paste it into the field where you need it.

Note: If characters from other languages do not appear as they should in EndNote, see [Working with Multiple Languages](#).

The Character Viewer

You can enter Greek characters, mathematical characters, symbols, and more into your EndNote references by using the Character Viewer. How you access the Character Viewer may differ depending on which macOS you are using.

To access the Character Viewer, go to the *Edit* menu, and then select *Emoji & Symbols*.

To use the Character Viewer:

1. If you see only buttons, click the *Expand* button at the upper-right of the window. This will allow you to see a list of categories by name at the left.
2. Use the *Search* field if you know the name of the character you need. *Double-click* on the character to insert it where your cursor was located in EndNote, or drag it to the location you want it.
3. If you cannot find the character using the Search field, you can try to find it by checking likely categories in the list. Select a category to see the available characters in that category. When you find the one you need, *double-click* on the character to insert it, or drag it to the location you want it.
4. If there are characters you use frequently, select a character and click *Add to Favorites*. Character Viewer will create a Favorites category where you can easily find your most-used characters in the future.

Working with Multiple Languages

The default font used in EndNote will support Unicode characters, including symbols and standard Greek and mathematical characters. However, if you want to work in more than one language, you may need to install those additional languages to be able to work with them easily in EndNote.

Adding Languages

For macOS 11 (Big Sur)

1. Open *System Preferences*.
2. Click *Language & Region*.
3. Click the *Add (+)* button under *Preferred languages*.
4. Select the language you want to add and click the *Add* button.
5. Select which language you want to use as your primary language.
6. You may be given a choice of multiple keyboard options for your language. If so, you will need to select the one you want. Click the *Add Input Source* button.
7. The new language will be added to your list of preferred languages.
8. Click the *Keyboard Preferences* button to set options for accessing the new keyboard layout.
9. Choose your keyboard options. One useful option, on the Input Sources tab, is to Show input menu in menu bar, making it easy to switch between languages at any time.
10. Close and save your changes.

Note: Steps may vary with different versions of the macOS.

Entering Several Articles from the Same Source

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

To create a reference template:

1. From the *References* menu, select *New Reference*.
2. Enter all of the bibliographic information that the references have in common (such as the year, book title, publisher, and city for different sections from one book).
3. Close the reference when you are finished.
4. Select the reference you just created in the Reference List.
5. Select *Copy* (⌘+C) from the *Edit* menu to copy it.
6. Use the *Paste* (⌘+V) command to paste the reference several times, to create as many partially filled references as you need. You should paste directly to the Reference List—do not open a new reference and select Paste.

7. Select the first of the partially filled references that you just created and add the information unique to it. Save the reference, then go to the next partially filled reference and edit it. Continue until you have completed all the references.

Figures

EndNote extends the organization of reference information by including the ability to embed files in an EndNote library using the Figure field and insert them in Microsoft Word documents. This feature is most useful for graphic files or tables. You can insert a graphic, figure, or file into the Figure field of any EndNote reference. See [Inserting Graphics and Files](#).

Note: While the Figure and Caption fields are included by default for all reference types, you can remove them at any time if you do not intend to use them. See [Adding, Changing, and Hiding Reference Types](#).

Note: While it is possible to insert almost any file in the Figure field, it is better to reserve this field for graphics you want to insert into Microsoft Word. The Figure field can only hold one file attachment while the File Attachments field can hold up to 45 file attachments, of almost any kind.

Once you have a figure in your EndNote reference, Cite While You Write allows you to insert the figure and its caption into a Microsoft Word document. See [Finding and Inserting Figures and Tables](#) for more information about using images with Cite While You Write.

Selecting the Appropriate Reference Type

You can insert a graphic or file into the Figure field of an EndNote reference. Depending on the reference type, the field may be labeled "Figure" or have a custom label assigned by you.

By default, the Figure and Caption fields are included in all reference types. So, while a reference to a journal may contain primarily bibliographic information, you can also include an illustration that appeared with the journal article.

The Figure, Chart or Table, and Equation reference types should be used specifically to catalog image files, and may contain minimal reference information.

Note: Figures in the "Chart or Table" reference type are inserted into Word as tables, and are labeled and numbered separately from the figures found in all other reference types.

To add or remove the Figure and Caption fields from a reference type, go to the *Edit* menu, select *Preferences*, and then select *Reference Types*. For more information about modifying reference types, see [Customizing Reference Types](#).

Inserting Graphics and Files

Notes on Figures:

- Always use the *Figure > Attach Figure* command to insert graphics and other files into the Figure field. If you use Copy and Paste, System settings are used and colors and other attributes from the original file could be lost.

- Each EndNote reference can contain only one graphic or file attachment in the Figure field. A second graphic or file inserted into a reference will replace the first one. The previous graphic or file will be deleted from the DATA folder. See [Storing and Sharing Figure Files](#) for more information about the DATA folder.
- After inserting a graphic, you should always type Caption text into the Caption field, particularly if you intend to later insert the figure into a Word document. The Caption will label the graphic in the figure list at the end of the Word document. The Caption also helps you search for the figure.
- You can insert a figure only into a reference that contains the Figure field. If you need to add the Figure field to a reference type, see [Customizing Reference Types](#).
- In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the .Data folder.

These characters are replaced with an underscore	
\	back slash
/	forward slash
:	colon
*	asterisk
?	question mark
"	quotation mark
<	less than
>	greater than
	vertical bar

Inserting Figures into EndNote References

1. To insert a graphic (picture) or other file into the Figure field:
2. Select the reference from the Reference List.
3. Select *Figure > Attach Figure* from the *References* menu.
4. Click *Choose File* to open a dialog where you can select the file to attach.
5. Locate and select the graphic file, then click *Open*.
6. If returned to the Attach Figure dialog, click *OK* to copy the file to your EndNote reference. A graphic appears as a thumbnail within the reference.

EndNote recognizes at least these graphic file types:

- Windows Bitmap — BMP
- Graphics Interchange Format — GIF
- JPEG File Interchange Format — JPEG
- Portable Network Graphics — PNG
- Portable Document Format — PDF

- Tag Image File Format — TIFF

Valid picture files are those that Microsoft Word recognizes as pictures.

Other types of files will appear as an attachment, with the program icon and filename. (If the application used to create the document is not available on your system, the icon gives generic Windows file information.)

Double-clicking on the thumbnail or file icon will launch an associated application to open the file, with the same effect as if you had double-clicked the file on your computer desktop.

EndNote also recognizes at least these other file formats:

- Audio files (WAV, MP3)
- Microsoft Access files
- Microsoft Excel files
- Microsoft Power Point files
- Microsoft Project files
- Microsoft Visio files
- Microsoft Word files
- Multimedia files (MOV, QuickTime)
- Technical drawing files
- Text files (TXT, RTF, HTML)

Note: Unless you want to later insert the file into Microsoft Word, it is better to use the File Attachments field to attach files to records. The Figure field can hold only one file, the File Attachments field can hold up to 45 files.

The Figure Caption

A related Caption field appears directly under the Figure field in a reference. Use this field for a short description of the image or file. The Caption field allows you to easily search for figures.

If you insert an EndNote figure into a Word document with Cite While You Write, the corresponding caption appears either above or below the figure in your paper (the placement is determined by the current output style).

Editing Figure Files

To edit a figure stored in an EndNote reference:

1. Select the reference containing the figure in the Reference List.
2. Select *Figure > Open Figure* from the *References* menu.

This launches an associated application to open the file for editing.

Editing changes are made to the file stored in the library's .Data folder for the reference, not to the original figure file that was inserted.

Note: Never rename figure files within the .Data folder. EndNote assigns each figure a unique name that helps link it to a specific reference.

Deleting or Replacing Figure Files

To delete a figure from an EndNote reference:

1. Select the reference in the Reference List
2. Scroll down and click in the Figure field.
3. Press the backspace key on your keyboard.
4. Click the Save button to save your changes.

Deleting a figure from the reference also deletes it from the .Data folder.

Note: If you insert the same figure in two different references, EndNote stores two copies of the figure in the .Data folder. Deleting the figure from one of the references will not affect the other reference.

To replace a figure in an EndNote reference, you can do one of these:

1. Select the reference from the Reference List and attach the new figure. The existing figure is deleted from the .Data folder and is replaced with the new figure.
2. Delete the old figure from the reference, and then attach the new figure.

Converting from Figures to File Attachments

You can move a linked file from the Figures field to the File Attachments field in a reference. Keep in mind that only figures stored in the Figure field can be inserted as graphics in Microsoft Word with Cite While You Write.

Early versions of EndNote did not include a File Attachments field. You may have linked a file to the Figure field in the past, and now would prefer to have the file linked to the File Attachments field.

To convert file links from the Figures field to the File Attachments field:

1. In Reference List, highlight the reference(s) you wish to change.
2. Select *Figure > Convert Figures to File Attachments* from the *References* menu.

Storing and Sharing Figure Files

When you insert a figure, EndNote copies the figure file and places the copy in the .Data folder for your library, which is found in the same folder as the main library file. The copied figure file is specifically linked to a single EndNote reference.

Note: Simply putting a figure file into the .Data folder does not link it to a reference. You must use the *References > Figure > Attach Figure* command.

If you move your library to a different computer or if you want to share your library with someone, remember to always copy the .Data folder along with the library.

Linking References to Files and Web Sites

EndNote includes a URL field and a File Attachments field that you can use to link URLs and local files to EndNote references.

See the related topics below for details.

- [Linking a URL to an EndNote Reference](#)
- [Linking a File to an EndNote Reference](#)
- [Selecting a Relative Path or an Absolute Path for File Attachments](#)
- [Removing a Linked File from File Attachments](#)
- [Opening a Linked File or URL](#)
- [Finding Full Text for a Reference](#)

Linking a URL to an EndNote Reference

The term "URL" stands for "Uniform Resource Locator" and is a common term for the "address" used to identify the location of an item online. Most often, URLs refer to Web pages, such as this example of the Clarivate Web page:

<https://clarivate.com/>

To link a URL to a reference in your EndNote library:

1. Select a reference in the Reference List.
2. Put your cursor in the URL field.
3. Type or paste a valid URL into the field. EndNote will recognize URLs beginning with [http://](#), [https://](#), or [ftp://](#) as valid URLs.
4. The URL becomes a hyperlink (blue and underlined).

For more information about linking to a URL, see [The URL Field](#).

Linking a File to an EndNote Reference

You can link a file on your computer—such as a PDF, a word processing document, or a spreadsheet file—to an EndNote reference.

The File Attachments options are available only when a single reference is selected in the Library window or when you are editing a reference.

To link a file to the File Attachments field in a reference:

1. Select a reference in the Reference List.
2. From the *References* menu, select *File Attachments > Attach File*.
3. On the file dialog, select a file to link to the selected reference.
4. Click the *Options* button.

Note the checkbox along the bottom titled, "Copy this file to the default file attachments folder and create a relative link." This gives you the option to:

- Select the checkbox to copy the original file and place the copy in the .Data/PDF folder that is part of your EndNote library. Files in the .Data folder will sync and can be shared.
- Deselect the checkbox to always have EndNote look in the original folder for the inserted file. Files that are in their original locations, not in the .Data folder, will not be synced and cannot be shared. If the original file is moved, the link will break and you will not be able to open it from EndNote.

For more information about this option, see [Selecting a Relative Path or an Absolute Path for File Attachments](#).

5. Click *Open*.

EndNote will display an icon indicating the type of file inserted. You can insert up to 45 files into the File Attachments field.

Note: Another way to link a file to the File Attachments field is to drag and drop the file onto the reference in the Reference List. Whether the file is saved with the database or is linked with an absolute path is determined by the default file attachment setting. See [URLs & Links Preferences](#).

Note: In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the DATA/PDF folder with a relative path.

Note: Never rename attached files within the DATA folder. EndNote assigns each file a unique name that helps link it to a specific reference.

These characters are replaced with an underscore	
\	back slash
/	forward slash
:	colon
*	asterisk
?	question mark
"	quotation mark
<	less than
>	greater than
	vertical bar

Selecting a Relative Path or an Absolute Path for File Attachments

When you link a file to the File Attachments field in a reference, you have the option of saving a relative path to the file or an absolute path to the file.

What is a Relative Path Versus an Absolute Path?

When you insert a link to a file with the *File Attachments > Attach File* command from the *References* menu, the file dialog includes a checkbox titled, "Copy this file to the default file attachments folder and create a relative link."

Relative Path (checkbox selected)

When the checkbox is selected, EndNote makes a copy of the original file and places it in the .Data/PDF folder that is part of your EndNote library. This saves the file as a "portable link" that can move as part of the library. EndNote will always be able to access the file, even when you share your library with a colleague through Library Sharing or by giving them a copy of your library files (always include the complete .Data folder along with the .enl file).

File attachments stored in the .Data folder will sync and be included in libraries shared through the Library Sharing feature.

If you edit the original file on your computer, those changes will not be reflected in EndNote. You would need to make the changes to the copy in your library or clear the file from your EndNote reference and reinsert the file. To make changes to the copy in your library, open the file in the default application for that file type by selecting *File Attachments > Open File* from the *References* menu.

Absolute Path (checkbox blank)

When the checkbox is blank, EndNote will use the complete path and filename to look in the original folder for the inserted file. This can be helpful if you plan to edit the original file and you want those changes reflected when you access the file from within EndNote. However, if you ever move the file from the original folder, EndNote will not be able to access it unless you clear the file from your EndNote reference and reinsert it from the new folder location. If you send your library to a colleague, the file will not be available.

File attachments outside the .Data folder will not sync and will not be shared through the Library Sharing feature.

How Can I Tell Which Type of Path Was Used?

In the Summary Panel

At the top of the Summary panel you will see a list of attached files. Files showing only a file name are stored in the .Data/PDF folder and have relative links. Files showing path information are not stored in the .Data/PDF folder and have absolute links.

In the Edit Panel

Go to the Edit panel for the reference, then scroll to the *File Attachments* field. Hold your mouse pointer over the file icon.

- If the file was linked with an absolute link, the file name will **not** include the .Data/PDF folder for your library.
- If the file was linked with a relative path, the file name will include the .Data/PDF folder for your library.

You can also determine the type of path by previewing the File Attachments field. Use an output style such as Show All Fields, which includes the File Attachments field, or make your own custom style. See [Introduction to Output Styles](#) for information on creating custom styles. In the preview, file attachments appear as:

'File' Attachments: <file://localhost/Applications/EndNote%2020/EndNote.pdf>
internal-pdf://2044897763/EndNote.pdf

'File' Attachments: internal-pdf://0605142259/Bird-2009-Insightful problem solving and creat.pdf
[file://C:\Program Files \(x86\)\EndNote 20\EndNote.pdf](file://C:\Program Files (x86)\EndNote 20\EndNote.pdf)

Files with relative links in the .Data folder begin with "internal-pdf" while files with absolute links show a full path name.

Selecting a Default Setting for the Path

Since you likely will want most of your linked files treated the same way, you can select a default setting for the "Copy this file to the default file attachments folder and create a relative link" checkbox. You can change the default setting from the Preferences panel. See [URLs & Links Preferences](#).

You still have the option to override the default setting each time you insert a file into the File Attachments field.

Converting Absolute Paths to Relative Paths

If you are working with a library that was created with a version of EndNote prior to version X, all of your existing linked files are saved with absolute paths. You can easily change your absolute paths to relative paths, which will allow you to easily share your library, along with linked files, with colleagues.

To convert absolute paths to relative paths:

1. Before you begin, back up your EndNote library. This change cannot be reversed. You can find information on creating a compressed library as a backup at [Saving a Compressed Copy of a Library](#).
2. In the Reference List, select the references you wish to modify.
3. From the *References* menu, select *File Attachments > Convert to Relative Links*.

For each selected reference, EndNote locates each file linked in the File Attachments field and copies those files into the .Data/PDF folder for the library.

Inserting the Same File Again

If you try to insert a link to the same filename again in the same reference, your results are different depending on whether you are inserting files with a relative path or an absolute path.

Relative Path: The relative path always points to the library's .Data/PDF folder. EndNote will attach the file again, giving it a new name.

Absolute Path: Because you could have several absolute paths pointing to the same filename in different folders, it is possible to link to the same filename numerous times.

Removing a Linked File from File Attachments

Before you remove a linked file, make sure you have a backup of the original file. This process cannot be undone. You can find information on creating a compressed library as a backup at [Saving a Compressed Copy of a Library](#).

To remove a linked file from the File Attachments field:

1. Select the reference in the Reference List.
2. In the *Summary* panel for the reference, select the drop-down list for the attachment you wish to remove, then select *Delete* from the list.

OR

3. In the *Edit* panel for the reference, scroll to the *File Attachments* field, select the drop-down list for the attachment you wish to remove, then select *Delete* from the list.

If the file was linked with an absolute path, the File Attachments field no longer points to the file. The original file remains intact.

If the file was linked with a relative path, that file is deleted from the library's .Data/PDF folder, and the File Attachments field no longer points to it. You will not be able to reinsert the link unless you have the original file stored elsewhere on your computer.

Note: See [How Can I Tell Which Type of Path Was Used?](#) for information on identifying relative or absolute links for files.

Saving a Copy of an Attached File

Whether an attached file is saved with a relative path in a library's .Data/PDF folder or with an absolute path to a specific location, you can save a copy of the attached file to any location.

To save a copy of an attached file from the Reference panel:

1. Select the reference in the Reference List.
2. Select the *Summary* panel.
3. Select the file attachment you want to copy.
4. Select *Save As...* from the drop-down list.
5. Use the file dialog to select a folder, enter a file name, then click *Save* to save the file.

To save a copy of an attached file from the References menu:

1. Select the reference in the Reference List.
2. Select *File Attachments > Save As...* from the *References* menu.
3. Use the file dialog to select a folder, enter a file name, then click *Save* to save the file.

Note: From the References menu, if more than one file is attached to the reference, only the first one is saved to disk.

Opening a Linked File or URL

Once a valid URL or file attachment appears in EndNote, you can use them to quickly access the linked web site or file.

- To open a URL in a selected reference, select *URL > Open URL* from the *References* menu. If there is more than one URL listed in the URL field, the first one listed will open.
- To open a file attachment in a selected reference, select *File Attachments > Open* from the *References* menu. If there is more than one file attachment, the first one listed will be opened.
- If you have more than one file attachment in a selected reference and don't want to open the first one, go to the *Summary* panel, select the attachment you want to open, then select *Open* from the drop-down list.

You must have the necessary program installed on your computer in order for EndNote to open a file created by another program. For example, to open a Word document file, you must have Microsoft Word or another program that can read Word files installed on your computer.

Using Keyboard Command Shortcuts

Keyboard command shortcuts can also be used to open URLs and file attachments. The command shortcut for *References > URL > Open URL* is (⌘+G). The command shortcut for *References > File Attachments > Open File* is (⌘ +Alt+P). Below are the expected actions for these commands.

- The Open URL command (⌘+G) opens the first URL listed in the selected reference's URL field.
- The Open File command (⌘ +Alt+P) opens the first linked file listed in the selected reference's File Attachments field.

If you need to enter multiple links into the URL field of one reference, enter them one per line. EndNote will open the first link in the field when you select Open URL. If you have multiple links, you can click on any one of them to activate the link.

Renaming Attachments and PDF Files

EndNote includes two options to rename your attached files from within EndNote:

- You can rename individual files, including PDFs, with custom names.
- You can have EndNote rename PDFs with new names based on EndNote fields, either one EndNote reference at a time or an entire group of references at once.

Renaming Individual Attachments with Custom Names

This method allows renaming any file type, not just PDFs, but must be applied to one attachment at a time. To rename a selected attachment with a name of your choice:

1. In the Reference *Summary* or *Edit* panel, open the drop-down menu for the attached file you want to rename, and then select *Rename Attachment...* from the menu.
2. In the *Rename* field, give the file a new name of less than 50 characters (remember to keep the extension part of the name intact), and then click the *OK* button to rename the file.

The new file name for the attachment will appear in the EndNote record.

Renaming PDFs Based on EndNote Field Contents

Along with being able to rename PDFs as you do other attachments using the method above, you can also have EndNote rename PDF file attachments based on data in the EndNote records they are attached to. This method can be applied to a single EndNote reference or the PDFs attached to multiple references.

Note: This method will change the name for all PDF files attached to a record. If you have more than one PDF attached to a record, they will have the same name except for a number at the end of the name. The new name is **not** based on the contents of the PDF; it is based on the data in the EndNote record holding the PDF.

Renaming PDF Documents

1. In the Reference *Summary* or *Edit* panel, open the drop-down menu for an attached PDF file you want to rename, and then select *Rename PDFs...* from the menu.
2. Select up to three fields to use in renaming the PDF. EndNote will remember your field choices for future renaming of PDF files. (See below for a list of fields that cannot be used in renaming PDFs.) The format of the PDF filename is First Field, Second Field, Third Field.

- a. **Choose First:** EndNote uses the selected field as the first field in PDF filename. For example, by Author.
 - b. **Then:** EndNote uses the selected field as the second field in the PDF filename. For example, by Year.
 - c. **Then:** EndNote uses the selected field as the third field in the PDF filename. For example: by Title.
3. Click the *OK* button to rename the PDF attachments for the reference.

Note: Data must exist in a selected field in order for renaming to occur. If no data is available, then EndNote inserts a hyphen between selected fields that have data.

Renaming Multiple PDF Documents

You can also rename multiple PDF documents attached to multiple references.

1. Select one or more references that have attached PDF files.
2. From the *References* menu, select *File Attachments*, and then select *Rename PDFs...*
3. You will receive a warning message that this change cannot be undone, with a suggestion to backup the library first. Click *OK* to continue renaming the PDFs or *Cancel* to stop the process. See [Saving a Compressed Copy of a Library](#) and [Saving a Copy of a Library](#) for information on backing up EndNote Libraries.
4. If you chose *OK* to continue renaming PDFs, select your field choices for renaming.
5. Click the *OK* button to rename the files.

The Rename Options

The Rename Options dialog allows you to select the fields used to rename your PDF attachments. You can select any field from the menu when renaming your PDF documents except the following fields.

- Figure
- File Attachments
- Last Updated
- Rating
- Read Status

You may use up to 50 characters to rename your PDF documents. This includes the period (.) and the filename extension. If a PDF that you are renaming exceeds the 50 character limit, then EndNote truncates the name of the PDF to meet the 50 character limit.

See also [PDF Handling Preferences](#).

Changing Text in References

Global editing commands make it easy to keep your reference data consistent.

- The Find and Replace command is available from the Library menu
- The Change/Move/Copy Fields command is available from the Library menu.

The [Find and Replace](#) command searches for text in your library and either deletes that text or replaces it with other text that you specify. The [Change Fields](#) command modifies any field in your library by either inserting text at the beginning or end of the field, replacing all contents of the field with different text or deleting the contents of the field. The [Move/Copy Fields](#) command moves the entire contents of a field to a different field.

Note: Be sure that you have a current backup of your library; these operations cannot be undone with the Undo command.

Find and Replace, Change Field, and Move Field

The Find and Replace, Change Field, and Move Field commands can be used to make changes to a large number of references at once. Here are some of the common uses for these commands.

- Correcting consistently misspelled words or names.

Use the Find and Replace command from the Edit menu to search for the misspelled term and replace it with the correct spelling.

- Updating author's names.

There may be variations of an author's name in your data. For example, "Joe Cool," "Joe A. Cool," "J. A. Cool.," and so on. Since some styles prefer whole names and others abbreviated first and middle names, it is best to update names to full names and leave the work of abbreviating to the EndNote styles.

- Cleaning up your keywords.

You can add a keyword to a group of references using Change Fields. Use Find and Replace to replace a term with a new one. If there is a keyword that you no longer want in your references, use Find and Replace to search for that text and replace it with nothing, thereby deleting it (you might also want to open your term list and delete it from there so that you do not use that term again).

- Dating or labeling a set of imported references.

It can be useful to add the date or source of data to a batch of newly imported references. Only the imported references are "showing" in the Reference List after importing. At this point, use Change Fields to add a word or phrase to any field in just those references.

- Moving fields of information in a set of imported references.

Maybe your import filter or connection file consistently sent Note information to the Abstract field. Use the Move Fields option to cut all information from the Abstract field and move it into the Notes

field. Don't forget to update your filter or connection file so it directs information to the correct field next time!

Find and Replace

Use the Find and Replace command to find text in your references and replace it with other text. Changes can be restricted to a particular field in your references. You can also apply:

- Match Case and Match Words restrictions
- Style changes that include bold, italics, underline, plain text, superscript, subscript, or symbol font

Caution: The Undo command from the Edit menu cannot undo the results of the Find and Replace command. Make sure you have a backup before making changes. See [Saving a Compressed Copy of a Library](#) for information on making a backup of your library.

The Find and Replace command will only be applied to the references showing in the current Reference List. Use the following options to control which references are showing:

- Selecting the *All References* group will show all the references in the library and the change will be applied to any that match the Find and Replace criteria.
- Selecting a group will limit Find and Replace to only the references in that group.
- Performing a search in advance of Find and Replace will bring up a set of search results in the Reference List, allowing you to limit Find and Replace to the showing results. You can find detailed information on searching EndNote libraries in [Searching EndNote References](#).
- If you wish to confine Find and Replace to a specific set of references that none of the methods above will provide, create a custom group and put all the references you want to use with Find and Replace in that group, then select that group to show only those references. You can find information on creating custom groups in [Creating a Custom Group](#).

To use Find and Replace to replace text in your references:

1. After using one of the options above to limit the references in the Reference List to show only those you want to change, select *Find and Replace* from the *Library* menu.
2. From the *Select a Field* list, select the field to be searched.
3. In the *Find* text box, type the text you wish to change. To enter a Carriage Return or Tab in the text box, use the *Insert Special* button.
4. Change the *Match Case* or *Match Words* settings, if necessary.

By default, the Match Words option is always selected. If you change this setting, pay close attention to whether or not the term you are changing could appear as part of another word or in a different context depending on the capitalization.

5. In the *Replace with* text box, type the text that should replace the original text. To enter a Carriage Return or Tab in the text box, use the *Insert Special* button.

Select the Retain Capitalization option to maintain the same capitalization as the text being replaced.

Retain Capitalization should be selected if replacing a term that might appear with different capitalization. For example, any word may have its first letter capitalized if it is the first word in a title, but may also appear in all lowercase in other places. Do not select Retain Capitalization if you are replacing an acronym with its unabbreviated version.

Click the *Change* button to search the selected references for the specified text and replace it with the new text. Before replacing any text, EndNote has you verify the changes.

Click *OK* if all of those items in the dialog are correct. EndNote replaces the text and displays the number of references that were changed.

Change Fields

The Change Fields command allows you to change the contents of a field for the references that are showing in the Reference List.

Caution: You cannot undo the Change Fields operation. Once you perform this operation, EndNote changes the data in the selected field in all the references in the showing Reference List. We recommend that you make a backup copy of your library before making changes. See [Saving a Compressed Copy of a Library](#) for information on making a backup of your library.

The Change Fields command will only be applied to the references showing in the current Reference List. Use the following options to control which references are showing:

- Selecting the *All References* group will show all the references in the library and the change will be applied to any that match the Change Fields criteria.
- Selecting a group will limit Change Fields to only the references in that group.
- Performing a search in advance of Change Fields will bring up a set of search results in the Reference List, allowing you to limit Change Fields to the showing results. You can find detailed information on searching EndNote libraries in [Searching EndNote References](#).
- If you wish to confine Change Fields to a specific set of references that none of the methods above will provide, create a custom group and put all the references you want to use with Move/Copy in that group, then select that group to show only those references. You can find information on creating custom groups in [Creating a Custom Group](#).

To change the contents of a field:

After using one of the options above to limit the references in the Reference List to show only those you want to change, select *Change/Move/Copy Fields* from the *Library* menu.

From the *Select a Field* list, select the field that you want to modify.

1. Select one of the following options:

- *Insert after field's text* appends text at the end of the chosen field. It does not modify the text already in the field.

By default, when you select this option, the "Include a space before the new text" checkbox is selected at the bottom of the dialog, to insert a space between the existing text and the new text.

You could also use the *Insert Special* button to insert a carriage return before the new text. If you do this, unmark *Include a space before the new text* to avoid having both a space and a carriage return.

- *Insert before field's text* inserts the text at the beginning of the chosen field. It does not modify text that is already in the field.

By default, when you select this option, the "Include a space after the new text" checkbox is selected at the bottom of the dialog, to insert a space between the new text and the existing text.

You could also use the *Insert Special* button to insert a carriage return after the new text. If you do this, unmark *Include a space after the new text* to avoid having both a space and a carriage return.

- *Replace whole field with* replaces the entire contents of the field with the text entered in the text box.
 - *Clear field* deletes the entire contents of the chosen field. You cannot enter text in the text box.
 - *Change Case* applies new case formatting to the entire contents of a field. Options include: Sentence case, lowercase, UPPERCASE, Every Word, and TOGGLE cASE. You cannot enter text in the text box.
2. In the text box, type the text that you want to add to the field. To enter a Carriage Return or Tab in the text box, use the *Insert Special* button.
 3. Select (highlight) the text that you entered in the text box, and then select a font style: Bold, Italics, Underline, Plain, Superscript, or Subscript, or Symbol Font. This is optional.
 4. Click the **OK** button. EndNote will ask you to confirm the changes. The dialog EndNote presents provides this information:
 - How many references will be changed
 - The library in which the changes will be made
 - The type of change that will be made
 5. Click **OK** to continue with the changes or click **Cancel** to cancel the operation.

Move/Copy Fields

The Move/Copy Fields command allows you to move and copy field data. Both commands apply to all of the references that are showing in the Reference List.

The Move Fields option allows you to move the entire contents of one field to another field within a reference. All data, including any formatting that you applied to the source field, is moved to the destination field.

Caution: You cannot undo the Move operation. Once you perform this operation, EndNote removes the source field from all the references in the Reference List. We recommend that you make a backup copy of your library before making changes. See [Saving a Compressed Copy of a Library](#) for information on making a backup of your library.

The Copy option allows you to copy the entire contents of one field to another field within a reference. Both the source field and the destination field will contain the same data. All data retains any formatting that you applied to the source field and to the destination field.

The Move/Copy Fields command will only be applied to the references showing in the current Reference List. Use the following options to control which references are showing:

- Selecting the *All References* group will show all the references in the library and the change will be applied to any that match the Move/Copy criteria.
- Selecting a group will limit Move/Copy to only the references in that group.
- Performing a search in advance of Move/Copy will bring up a set of search results in the Reference List, allowing you to limit Move/Copy to the showing results. You can find detailed information on searching EndNote libraries in [Searching EndNote References](#).
- If you wish to confine Move/Copy to a specific set of references that none of the methods above will provide, create a custom group and put all the references you want to use with Move/Copy in that group, then select that group to show only those references. You can find information on creating custom groups in [Creating a Custom Group](#).

To move/copy the contents of one field to another:

1. After using one of the options above to limit the references in the Reference List to show only those you want to change, select *Change/Move/Copy Fields* from the *Library* menu.
2. Select the *Move/Copy Fields* tab.
3. In the dialog that appears:
 - Select the *Move Field* radio button to move information to another field.
 - Select the *Copy Field* radio button to copy information to another field.
4. Use the *From* list to select the source field from which you want to move or copy the data.
5. Use the *To* list to select the destination field to which you want to move or copy the data.
6. Select one of the following options:
 - Insert after field's text (the default option).
 - Insert before field's text.
 - Replace entire field.
7. Click *OK* to move or copy the data from one field to another field within each reference in the showing Reference List. Click *Cancel* to stop the operation.

Caution: When using the Move option, you have the choice of inserting the moved text before or after the data in the destination field or replacing the entire contents of the destination field. If replacing the entire field, you have the additional option of whether or not to move empty fields. If you clear the "Don't move empty fields" checkbox, then any reference with an empty originating field deletes the contents of the corresponding destination field (thereby making it empty as well). If this option is marked (turned on), the contents of the destination field will not be deleted if the originating field is empty.

Reverting References

The Revert Reference command undoes (reverts) all changes made to a reference since it was last opened or saved. Revert Reference is not available after you close the reference.

To revert changes, *Control+click* in the *Edit* panel, then select *Revert Reference* from the list.

To remove the very last change made to a reference, use the *Undo Typing* (⌘+Z) command in the *Edit* menu before closing or saving a reference.

Cut, Copy, and Paste Text in References

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

Using Drag-and-Drop Within a Reference

Text may be moved within a reference by selecting the text in the Edit panel, and then dragging and dropping it in a new location.

Note: When text is moved this way within a reference, it is moved from one location to another. When it is dragged from a reference in one library to a reference in another library, or to another program (such as your word processor), the text is moved to the target reference and removed from the original location.

To drag-and-drop text:

1. Select the text to be moved.
2. Click on the selection, and keep the mouse button pressed while you drag the text to another location. When the cursor is positioned in the right place, release the mouse button to drop the text in the selected location.

See also [Copying and Pasting Complete References](#).

Copying and Pasting Complete References

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

Copying References Using the Copy and Paste Commands

1. Select one or more references in the Reference List (hold down the *Command* (⌘) key to select multiple references or the *Shift* key to select a range of references).
2. Select *Copy* from the *Edit* menu and those references are copied to the Clipboard.
3. Open another EndNote library and select *Paste* from the *Edit* menu. The references you copied are pasted into the library and sorted correctly with the existing references.

Copying References Using Drag-and-Drop

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

If you need to copy all of the references in one library to another library, you can also use the Import command to import one library into the other.

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

Copy References To

The Copy Reference To command allows copying a set of references to an EndNote library of your choice.

From the *References* menu, select *Copy References To*. You will have these options:

- **New Library:** This will create a new library and copy the selected references into it.
- **Choose Library:** This will allow you to choose an EndNote library on your computer and copy the references into it. The library does not need to be open in EndNote. When the references are copied into it, the library you chose will be opened and display the copied references in a Copied References group.
- **[YourCurrentLibraryName].enl:** The third option will only appear when you have selected references from online search results. It will show the name of the library you are currently working in and will allow you to copy the references from your online search results into your current library.

Searching EndNote References

EndNote provides Search features that enable you to locate specific references or groups of references. For example, you can select a very general search, one that scans the entire library; or you can limit your searches to specific fields (such as the Author or Keywords fields). You can also create more complex searches using a variety of operators such as And, Or, Not, Greater than, Less than, and others.

You can use the Search panel to search EndNote libraries as well as remote databases that are available online. See [Searching Online Databases](#) for information about online database searches.

The Simple Search Panel

The default Simple Search panel allows you to quickly search your entire library (and PDFs and PDF Notes) by typing a word or phrase into the single text box. EndNote executes a general search of all fields.

EndNote uses an implied AND Boolean operator when you enter two or more adjacent terms in Simple Search. For example, entering **rainbow trout fish farm** is equivalent to entering **rainbow AND trout AND fish AND farm**.

Use double quotation marks (" ") to search for exact phrases and to override the implied AND Boolean operator.

If you need to perform a more specific or complicated search, click the *Advanced Search* button to access [The Advanced Search Panel](#).

The Advanced Search Panel

The Advanced Search panel offers far more control over your EndNote search, using Boolean operators and comparison options, as well as abilities to save search strategies and reload saved search strategies.

Search Line

A search line includes a Logical operator, the field to be searched from the Field list, the Comparison operator, and a blank field in which you enter your search terms. Use the plus or minus buttons to the right of each search line to insert or delete a line. You can have up to ten lines in your search.

The diagram illustrates the structure of the Advanced Search Panel. It shows three horizontal search lines. Each line consists of four main components: a Logical Operator (e.g., 'And'), a Field List (e.g., 'Author', 'Year', 'Title'), a Comparison List (e.g., 'Contains'), and a Search Field (a text box). To the right of each Search Field are two buttons: a plus sign (+) and a minus sign (-). Below the first three components of each line, there are four vertical arrows pointing upwards to the corresponding components. These arrows are labeled: 'Logical Operator List' (pointing to the 'And' operator), 'Field List' (pointing to the 'Author' field), 'Comparison List' (pointing to the 'Contains' operator), and 'Search Fields' (pointing to the text box).

Logical Operator List	Field List	Comparison List	Search Fields
And	Author	Contains	<input type="text"/>
And	Year	Contains	<input type="text"/>
And	Title	Contains	<input type="text"/>

Boolean Operators List

The AND, OR, and NOT operators between the search lines indicate how the search lines are to be combined. See [Combining Search Lines with AND, OR, and NOT Operators](#).

Field List

The Field list allows you to restrict your search to a particular field—such as Author, Year, or Keywords—or expand it to Any Field. By default, the Field lists are set to search Author, then Year, then Title. You can change the default search strategy by setting the operators, fields, and comparison terms you want to use for your new default strategy, then selecting *Set Default* from the *Search Options* drop-down menu.

You can also restrict your search to PDF files attached to references by selecting the PDF option from the field list. The Any Field + PDF with Notes option allows you to search any field within a reference and all PDF files in the selected group that you are searching.

See [Restricting Searches to Specific Fields](#) for more information.

Comparison List

Select an item from the Comparison list to indicate how the search term should relate to the field(s) being searched. For example, you can find references in which:

- The Journal field begins with the term "science."
- The Journal field contains "science" anywhere in the field.
- The full Journal name is "science."

See [Using Comparison Operators](#) for more information.

Search Fields

The search term is the word or phrase that you want to locate in a reference. Enter your search terms in one or more search fields. Search terms can be typed or pasted into the fields. For special search items, such as tab or paragraph break characters, try copying and pasting them from TextEdit. Copying from TextEdit assures special characters will be copied without extra formatting.

Asterisk (*) Wildcard

Expand your library retrieval results by adding wildcards before and after search terms. The asterisk represents any group of characters.

- Fields and PDF files can be searched using the asterisk wildcard.
- No minimum character length is required.

Note: EndNote automatically applies left- and right-hand truncation to your search terms. So, by default, searching for "look" would find "look," "looking," or "outlook." However, you can still use the asterisk (*) wildcard before and after a search term, if you prefer.

Save Search and Load Search

If you frequently use the same search strategies on the Search panel, you can use the Search Options menu to save these searches and later load them when you need them. See [Saving Search Strategies](#).

Set Default and Restore Default

Use the Search Options drop-down menu and select Set Default to save the configuration of all of the items on the Search panel except for the search terms. Use the Search Options drop-down menu and select Restore Default at any time to return the original configuration. See [Saving Search Strategies](#).

Searching a Group or Group Set

You can limit your search to a specific group or group set of references.

To search a group or group set:

1. Select the group or group set. The Reference List will change to display only the references in that group or group set.
2. Select either the *Simple Search* or *Advanced Search* panel.
3. Enter your search strategy and click *Search*.

Restricting Searches to Specific Fields

Use the Field list on the Advanced Search panel to narrow your search to a specific field. You can select Any Field to look for your search terms in any of the fields in your references.

For example, to find references published in 2013, restrict the search to the Year field to avoid finding entries that include 2013 in the abstract, title, or elsewhere.

The field names in the Field list are EndNote's "generic" field names. For example, Author represents Reporter, Editor, Artist, or any other variations of the Author field used in the different reference types. See [The Generic Reference Type](#) for a complete list of generic field names. To find the generic name that matches a field for a specific reference type, select that reference type from the [List of Reference Types](#) or by selecting it from the Modify Reference Types dialog.

To access the Modify Reference Types dialog:

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Click the *Modify Reference Types* button and the Modify Reference Types dialog will open.

EndNote can import references from hundreds of sources, each of which uses its own set of field names. Once you have transferred references into EndNote, you will search for information by using the destination EndNote generic field names, and not the original field names from the information provider. For example, the PMID number, when importing data from PubMed, typically transfers into the Accession Number field in EndNote. To search for a specific PMID in EndNote, search the Accession Number field.

Searching Fields and PDF Files

You can search all fields, the attached PDF files, and added PDF notes in your selected Reference List.

1. Select the *Any Field + PDF with Notes* option from the *Field* list.
2. Select an item from the *Comparison* list to indicate how the search term(s) should relate to the search.
3. Enter the search term(s) that you want to locate.
4. Click the *Search* button.

The following rules apply when you select the PDF option or the Any Field + PDF with Notes from the Field list.

- By default, EndNote ignores capitalization when searching for text. For example, a search for the term **hospital** also finds Hospital.
- If you enter a phrase, EndNote retrieves references that contain the words you entered in any field or in a PDF file. The words appear together if they are in any EndNote field or any PDF file. For example the query, **hospital care** retrieves references containing the term "hospital care" in either a field or a PDF file.
- When using the Advanced Search panel, EndNote searches quotation marks (" ") as characters when you select a specific field, the PDF option, or the Any Field + PDF with Notes option. For example, the query "**poured cold water**" only retrieves references that contain the phrase showing within a set of quotation marks somewhere in the reference, a linked PDF file, or within a Sticky Note. The phrase without quotation marks would be ignored in Advanced Search.

Rules for Single Word Searching

When searching for a single word in any field using the Contains comparison operator, EndNote applies both left- and right-hand truncation. For example, the term **plant** finds:

Plant
plant
plant classification
planter
"plant"
transplant

Combining Search Lines with AND, OR, and NOT Operators

You can combine search lines on the Search panel with the Boolean operators AND, OR, and NOT to produce the following effects:

- **AND** finds references that match the preceding search line(s) and the following search line. AND narrows search results.

Example: A search for **parrot AND corvid** finds only those references that mention both terms.

- **OR** finds references that match either the preceding search line(s) or following search term. OR broadens the search.

Example: A search for **parrot OR corvid** finds all references that include either term.

- **NOT** finds all references containing the preceding term(s) and then omits references that contain the subsequent term. NOT narrows search results.

Example: A search for **parrot Not corvid** finds all references including **parrot**, excluding any **parrot** references that mentioned **corvid**.

You can use the Boolean operators (AND, OR and NOT) in sequence with as many as ten search lines to build your search strategy.

A Strategy Tip for the AND, OR, and NOT Operators

Items in combination searches are executed from the top field to the bottom field of the Search panel. If you will be mixing the AND, OR, and NOT operators in your search, you will generally get the best results by following this strategy:

1. Use the **OR** operator first, to broaden the search.
2. Use the **AND** operator next, to narrow the search.
3. Use the **NOT** operator last, to exclude items from the search.

	Any Field	Contains	parrot	+	×
Or	Any Field	Contains	corvid	+	×
And	Year	Contains	2008	+	×
Not	Any Field	Contains	bat	+	×

For example, in the search strategy shown above, EndNote will try to find any reference in the Reference List that contains either parrot or corvid in any field, but those references must also contain 2008 in the year field, and cannot have the term bat in any field. In this search of the sample library, five references were found.

However, with the search below twenty-three references were found. This was because instead of broadening the search first with the **OR** operator, then narrowing (refining) it with the **AND** operator, this search first narrowed the search with the **AND** operator and then broadened it with the **OR** operator, producing poor results.

	Year	Contains	2008	+	x
And	Any Field	Contains	parrot	+	x
Or	Any Field	Contains	corvid	+	x
Not	Any Field	Contains	bat	+	x

Using Comparison Operators

Comparison Operators

The "comparison operators" are used to indicate how the search term relates to the chosen field in that search line. For example, if you have a search line that looks like this:

Field	Comparison Operator	Search Term
Title	Contains	parrot

You will be searching for references where the Title (the search field) contains (the comparison operator) parrot (the search term).

The comparison operators function as follows:

- **Contains:** Finds all references where the search field includes the search term. The search term includes both left and right truncation, so a search for "house" would find "house," "greenhouse," and "household" anywhere in the field.

Note: Only the "Contains" comparison operator is available when searching online databases. The following operators are available only for searching the EndNote library. Please note that some operators may not work together with some options selected from the Field list.

- **Is:** finds all references in which the entire content of the search field is exactly the same as the search term.

Note: This operator does not work in searches where you select the Any Field + PDF with Notes option from the Field list.

- **Is Less Than:** finds all references in which the search term is less than the contents of the search field.
- **Is Less Than or Equal To:** finds all references in which the search term is less than or identical to the contents of the search field.
- **Is Greater Than:** finds all references in which the search term is greater than the contents of the search field.

- **Is Greater Than or Equal To:** finds all references in which the search term is greater than or identical to the contents of the search field.

Note: For all of the Greater Than and Less Than comparisons, the comparison is either numerical or alphabetical based on the nature of the term. When the fields have both numbers and letters, numbers are considered less than letters, and empty fields are ignored.

- **Field Begins With:** finds all references in which the search term is found at the beginning of the selected field (also referred to as right field truncation). The search term can be a partial word, a full word, or several words, and will be compared to the initial text in the field. If you enter more than a single word, remember that punctuation and spaces are significant, so you must enter exactly what is found in the reference.

Note: This operator does not work in searches where you select the Any Field + PDF with Notes option from the Field list.

- **Field Ends With:** finds all references in which the search term is found at the end of the field (also referred to as left field truncation). The search term can be a partial word, a full word, or several words, and will be compared to the ending text in the field. If you enter more than a single word, remember that punctuation and spaces are significant, so you must enter exactly what is found at the end of the field.

Note: This operator does not work in searches where you select the Any Field + PDF with Notes option from the Field list.

- **Word Begins With:** finds all references in which the search term is found at the beginning of a word anywhere in the field (also referred to as right word truncation). Punctuation and spaces are ignored. This can help you find words that start with the same root. For example, searching for a word that begins with "land," would also find "landing" and "landfill," but not "Iceland" or "island."

Note: The Field begins with, Field ends with, and Word begins with comparisons all treat Author fields like any other field. There is no manipulation of surnames and first names; EndNote looks at the literal string of text in the field.

Examples of Comparison Operators in Searches

Field	Comparison Operator	Search Term	EndNote Finds
Year	Is greater than	2020	all references published after 2020
Year	Is less than	2020	all references published before 2020
Year	Is greater than or equal to	2015	references published during or after 2015
Title	Is less than	A	all references where titles start with a number
Author	Is less than or equal to	C	all references with authors whose last names begin with A, B, or a number; this would not match a name such as "Carter," as "Ca is greater than C
Author	Is greater than or equal to	S	all references with authors whose last names begin with S-Z
Title	Contains	bird	all references with "bird" in the title
Title	Is	bird	all references with "bird" as the exact title, "birding" or "birdlike" would not be found
Abstract	Is		all references with no abstract (empty field)
Title	Field begins with	bird	all references where titles start with "bird" including "birding," and "birdlike behavior," but not "Once a bird"
Abstract	Field ends with	bird	all references where abstracts end with "bird," which would include "a single bird," but not "two birds" or "birding"
Any field	Word begins with	house	all references where any field includes a word that begins with "house," which would include text such as "U.S. House of Representatives" and "household," but not "greenhouse"

Search Command Tips

Canceling Searches

Pressing Esc cancels a search in progress.

Finding Tabs and Carriage Returns

For special search items, such as tab or paragraph break characters, try copying and pasting them from TextEdit. Copying from TextEdit assures special characters will be copied without extra formatting.

Searching for Numbers

When you search for a number, EndNote looks for that exact text string in your reference text. For example, a search on "Any Field" which "Contains" the search text "0025" will match the numbers 00025 and 0025, but it will not match 25.

There is an exception for record numbers. Record numbers, which are assigned by EndNote, cannot include leading zeros. When you search Any Field for a number, EndNote looks for an exact match in all text fields; however, leading zeros are stripped from your search text before comparing it to record numbers. Only an exact match of a record number will be returned. So, a search of the Record Number field for "0025" will match record number 25. It will not match record number 250.

Author Fields

The field names in the Field list are EndNote's "Generic" field names, which means that Author represents Reporter, Editor, Artist, or any other variations of the Author field used in the different reference types.

If you wish to search for author initials, make sure to include a space between the first and second initial. For example:

Smith, J P

If you do not include a space between initials, EndNote will assume that JP is a complete first name.

The Year Field

When searching in the Year field, a search for "1994" retrieves only references published in 1994, where as a search for "94" retrieves references from the 1940s and 1994.

Finding Empty Fields

EndNote can search for empty fields. Select the desired field from the Field list, select "Is" as the comparison operator, and leave the search term blank. Click *Search* and EndNote finds references in which the chosen field is blank.

Finding File Attachments

You can easily search for a specific file attachment by name. Search for:

	File Attachments	Contains	[name of the file]
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To search for all references that include file attachments, enter these two search lines:

	Record Number	Is greater than or equal to	1
NOT	File Attachments	Is	[blank]

The first line ensures that all references are searched and gives EndNote something to apply the NOT command against, and the second line looks for references in which the File Attachments field is not blank.

Note: Another easy way to see references with file attachments is to click on the paper clip header in the Library window to sort those references at the top of the list of references.

Setting and Restoring Defaults for the Advanced Search Panel

Use the *Search Options* drop-down and select *Set Default* to save the current configuration of the Search panel as your default. The default configuration will appear whenever you first display the Advanced Search panel.

The layout of the window (such as the number of search lines) is saved, as are all of the operators and field names. The search terms are not saved.

Use the *Search Options* drop-down and select *Restore Default* to clear out all of the search terms currently entered in the Search panel, and reset all of the settings back to the default configuration.

Saving Search Strategies

The Save Search and Load Search commands on the Search Options drop-down menu allow you to save the settings currently on the Search panel and recall them for later use. Most of the options on the Search panel are saved, including the search terms; however, the target of the search (the EndNote library or online database) is not saved.

To save a search:

1. Configure the Search panel.
2. From the *Search Options* drop-down select *Save Search*.
3. A dialog appears, prompting you to name the search strategy. Enter the name and click *Save*. The search files are saved by default in the //Application Support/EndNote/Searches folder. You may save them elsewhere if you prefer, but EndNote will open to this Searches folder when you choose to Load a saved search. EndNote adds .enq as the file name extension for saved searches.

To load a saved search:

1. On the Search panel, from the *Search Options* drop-down select *Load Search*.
2. In the dialog that appears, select the search strategy that you would like to use, and click *Open*.
3. The contents and settings of the Search window change to reflect the saved search. Click *Search* to initiate the search.

Saved searches are especially useful if you use EndNote's connection files to search online databases. When saving search strategies for online databases, it is helpful to include an abbreviation of the online database name the search is intended for in the file name. See [How to Search an Online Database](#) for information on using connection files.

You can save the search results (the set of matching references) as a group. You can use saved search strategies to set up [Smart Groups](#). Smart groups are updated as you add references to your library. Or, you

can save specific results to [Custom Groups](#). Custom groups are not updated as you add references to your library.

Finding Text in a Single Reference

When you have a reference that contains a significant amount of text, such as long abstracts or notes, it can get hard to find things.

To jump to specific text within a reference, use the Find Text command in the Edit panel.

1. Select the reference to search in the Reference List.
2. Select the *Edit* panel.
3. Click the *Find Text* button (the magnifying glass) to open the Find Text dialog.
4. Enter the search term and press the Return key.

EndNote will jump to the first occurrence of the text and highlight all occurrences of the text within the reference.

Finding Duplicate References

In order to help locate duplicate references, EndNote offers a Find Duplicates command. This command searches the references that are currently showing in the Library window to identify duplicates. Duplicates are determined based on the duplicate criteria specified in preferences. See [Duplicates Preferences](#).

To find all of the duplicate references in a library:

1. With the library open, click on the *All References* group to show all references.
2. From the *Library* menu, select *Find Duplicates*.

EndNote will display a Find Duplicates dialog where you can compare duplicates and decide which version to keep and which to delete.

Differences between reference fields are shown with blue highlighting. In addition, EndNote takes you to the first reference field in which there is dissimilar content between the two duplicate references. Scroll through the list to see which fields contain duplicate content and which contain dissimilar content.

3. For each set of duplicates, you have the option to:
 - Click *Keep This Record* to save that particular reference and throw the other one in the Trash.
 - Click *Skip* to leave both references in the library, intact. They will appear in a temporary Duplicate References group, so you can review them later.
 - Click *Cancel* bypasses the side-by-side comparison process. All duplicates will appear in a temporary Duplicate References group if you wish to review them.

The older (first entered) reference will always appear in the left column in the Find Duplicates dialog.

Warning: Before selecting Keep This Record, which will delete the duplicate, check the record numbers to be sure that you are not deleting a reference already cited in a paper.

By default, references are considered duplicates if they have the same reference type (such as Journal Article or Book), and the Author, Year, and Title fields are identical. The criteria for detecting duplicates can be changed using the [Duplicates Preferences](#) settings in EndNote's Preferences dialog.

References that appear identical may not show up as duplicates if the information in the fields EndNote checks is slightly different or if the reference types are different. When trying to determine how references differ, it is helpful to know exactly how EndNote compares them.

Author: Compares last name and first initials (even if the first or middle name are written in full). Capitalization is not important.

Year: Compared exactly as entered.

Title: Leading articles A, An, or The are ignored, but punctuation is included. Capitalization is not important.

Reference Type: Compared exactly as entered.

When there are no more sets of duplicates to compare, the Find Duplicates dialog closes. The Duplicate References group is refreshed, the Trash group contains the unwanted duplicate references, and all other groups are updated appropriately. The Duplicate References group is empty unless at least one set of duplicates was skipped or the Duplicate References operation was cancelled.

Groups and Group Sets

Groups make it easy to break a large library into subsets for later viewing. A group points to a subset of references that already exist in the library.

You can further organize your references by storing multiple groups in group sets.

You can have up to 5,000 groups and 5,000 group sets in a library.

The Groups and Group Sets Panel

The left panel of the Library window displays the groups and group sets available in your library.

To display a group of references in the Reference List panel, click the group name.

The Types of Groups in EndNote

There are several types of groups to organize your references in EndNote. The first section of groups are automatically generated, and include both permanent groups and temporary groups.

Automatically Generated Groups

Permanent Groups include the All References, Sync Status, Unfiled, and Trash groups. These are groups that will always appear in your library, which you cannot remove or rename.

- **All References** displays every reference in the library.
- **Sync Status** is not really a group. The Sync Status button allows you to open the Sync Status dialog to review information about the EndNote library that you selected to synchronize with your EndNote account.
- **Unfiled** displays those references that are not part of a custom group (and, optionally, of a smart group).
- **Trash** is a holding place for references you have removed from the library but have not yet permanently discarded.

Temporary Groups include the Retractions, Sync Conflicts, Copied References, Duplicate References, Imported References, and Recently Added groups. These are groups that will sometimes appear in your library, which you cannot remove or rename. These temporary groups may be replaced as you use commands in EndNote, and are always deleted when you close a library. (Only the groups are deleted; the references remain in the library.)

- **Retractions** displays articles in the library which have been retracted. It works with Retraction Watch to check for new retractions and provide information on the reason for the retraction.
- **Sync Conflicts** contains all of the references for which EndNote has identified a conflict between an EndNote reference and an EndNote online reference.

- **Copied References** contains the references last copied to your library using the References > Copy References To command.
- **Imported References** contains the references last imported using the File > Import command.
- **Recently Added** is built into each library (shared, unshared, syncing and unsyncing). This group allows users to see the latest references added. The group is handled on a library-by-library basis and is not built into global preferences so that it can be set to display the last 24 hours in one library and last 30 days in another.

Manually Created Groups

Custom groups, smart groups, and combination groups are user defined. You can create up to 5,000 user-defined groups and organize them in group sets.

- **Custom Groups** are manually created by the user to help organize the library; you can drag-and-drop to copy individual references into a custom group. Custom groups are updated only when you specifically add or remove references. Custom Groups are listed alphabetically.
- **Smart Groups** use search criteria to dynamically update groups as existing references are edited or new references are added to the library.
- **Combination Groups** allow you to better organize your EndNote references. Combine groups and use AND, OR, and NOT to create new, useful smart groups based on other groups. Save references in groups and then save sets of groups in group sets. You can collect both custom groups and smart groups within the same combination group set.
- **Online Search** groups allow you to easily initiate a search of a favorite online database and quickly view the latest download.
- **Find Full Text** groups are temporary, and appear only when you use the Find Full Text command.

Group Sets

Group sets are indicated by group set headings in the Groups panel. Some group sets are automatic and cannot be removed or renamed. These include Find Full Text, Groups Shared by Others, Online Search, and more. A new library begins with one group set you can rename: My Groups. Group sets can contain any combination of custom groups and smart groups, as described below.



Expand a group set by clicking the expand arrow.



Collapse a group set by clicking the collapse arrow.

Click and drag a group set heading to move the group set to a new location.

For more information about group sets, see [Group Sets](#).

Find Full Text

The Find Full Text group set lists temporary groups that appear when you select Find Full Text from the References menu. The groups remain for the current session, but disappear when you close the library.

- **Searching...**: This group displays the current set of references for which EndNote is attempting to find the full text file of each referenced work. When the full text search is completed, this group is deleted. Those references for which the full text was found are displayed in a Found PDF group.
- **Found PDF**: This group displays the set of references for which EndNote inserted the PDF file of the referenced work as an attachment. These references display a paper clip icon in the File Attachments column of the reference list. If a URL is also found, it is added to the reference, but the reference is not included in the Found URL group.
- **Found URL**: This group displays references that EndNote was unable to download the full text for, but for which it found a link that appears to allow access to a copy of the PDF. That link is added to the URL field of the reference.
- **Not Found**: This group displays the set of references for which EndNote could not identify a full text PDF file. These are only from the set of references searched with the Find Full Text command during this session of working in the EndNote library.

For more information about Find Full Text, see [Finding Full Text for a Reference](#) and [How to Find and Retrieve Full Text](#).

Groups Shared by Others

Groups that others have shared with you through EndNote online will appear here. See [About Shared Libraries](#) for information on sharing libraries.

Online Search

The Online Search group set in the Groups panel lists your "favorite" connection files for online searching. When you click on one of these connection file names, [The Advanced Search Panel](#) becomes active and you are connected to the selected online service in order to begin searching. You can add or remove connection files from this group using [The Connection Manager](#). For more information about online searching, see [How to Search an Online Database](#).

Custom Groups

Custom groups are perfect for when you want to build a group of references that are not easily found by index term or other common text. You can browse through your reference list and drag individual references to a custom group.

Create group sets in order to organize your custom groups and smart groups. See [Group Sets](#).

Custom groups and smart groups are listed alphabetically within each group set.

Creating a Custom Group

You have options for creating a custom group. You can select references and then add them to a new group or you can create an empty group and then add references to it.

A group name can be up to 255 characters in length, but shorter names will show better in the Groups panel. There are no restrictions on the characters you can use in a group name. Although it is possible to give two different groups the same name, this may cause some confusion if you work in EndNote online because no group sets appear online to organize custom groups under.

You are limited to 5,000 total custom, smart, and combination groups per library. Once you reach that limit, you must delete a group before you can add a new one.

Create an Empty Custom Group from the Groups Menu

1. Select the group set you want to create the new group under. If you do not select a group set, the new group will be created under the top level My Groups heading.
2. Select *Create Group* from the *Groups* menu.
3. Give the new group a name and press *Return*.
4. Add references to the new group. See [Adding References to a Custom Group](#).

Create an Empty Custom Group under a Group Set

1. *Control+click* on a group set.
2. Select *Create Group* from the list.
3. Give the new group a name and press *Return*.
4. Add references to the new group. See [Adding References to a Custom Group](#).

Create a Custom Group from a Selected Set of References

1. Select references in the Reference List. If the references are selected from a group set, the new group will be added to that group set, if they are selected from All References, the new group will be added to the first group set in the library.
2. From the *Groups* menu select *Add References To > Create Custom Group*.
3. A new custom group with the name New Group will appear.
4. *Control+click* on the new group and select *Rename Group* from the list.
5. Enter the new name and press *Return*.
6. Drag the new group to the group set you want it in.

Adding References to a Custom Group

You can add references to a new or existing custom group at any time. You do not have to worry about copying the same reference to a group more than once; EndNote will not allow duplicates (based on EndNote record numbers, which are unique to each library).

To add references to a group:

1. First, select the references you want to add to the group. You can do this in many ways, for example:
 - Click on an individual reference to select it.
 - Display a list of references (such as search results), click in the list of references, and then go to the *Edit* menu and choose *Select All*.
 - Hold down the *Shift* key and click on two references to select a range of contiguous references.
 - Hold down the *Command* (⌘) key and click on individual references to select them.
2. Add the selected references to a group. Several methods are available:
 - Drag and drop the selected references onto an existing custom group name in the left panel of the Library window.
 - From the *Groups* menu, select *Add References To* and then select either the name of an existing custom group (or select *Create Group* to create a new custom group).
 - *Control+click* on the selected reference or selected list of references to display a menu, select *Add References To*, and then select either the name of an existing custom group, or select *Create Group* to create a new custom group.

How to Know Which References Are not Included in Any Custom Groups

The automatic Unfiled group includes references that do not appear in any custom groups.

The Unfiled group may or may not include references that are part of a smart group. *Control+click* on Unfiled to display a context sensitive menu and toggle the setting to *Exclude Smart Groups in Unfiled* or *Include Smart Groups in Unfiled*.

Removing References from a Custom Group

You can remove references from any of your custom groups. The references will still be in your library and appear under All References—they just will not appear in that particular custom group.

To remove references from a custom group:

1. In the left *Groups* panel of the Library window, click on the name of the group.
2. In the reference list, select the reference(s) you want to remove. You can select multiple references:
 - Hold down the *Shift* key and click on two references to select a range of contiguous references.
 - Hold down the *Command* (⌘) key and click on individual references to select them.
3. Select the Remove References from Group command in one of these ways:
 - Press the *Delete* key on your keyboard.
 - From the *Groups* menu, select *Remove References from Group*.

Remember that the selected references are only removed from this group. They still exist in All References and possibly in other groups.

If you really want to delete the references from your library, see [Deleting References from a Group](#).

Notes: When you delete a record from a smart group, EndNote also deletes the record from All References without warning. To restore the reference, go to *Trash* and select the reference, then *Control+click* to bring up a menu. Select *Restore to Library* and EndNote returns the reference to the smart group.

If you delete a reference that is in a custom group, then restore it to the library, the reference's association with the custom group will not be restored. You will need to add it to the custom group again.

Smart Groups

Smart groups are built with search strategies. Smart groups are dynamically updated as you add references to and edit references in the library.

You can create group sets in order to further organize your smart groups and custom groups. See [Group Sets](#).

Creating a Smart Group

Smart groups are built with search strategies and are dynamically updated as you add references to and edit references in the library.

Note: You cannot create a smart group when an Online Search group is displayed.

To create a smart group:

1. Display the set of references that you would like to search. This would typically be All References.
2. From the *Groups* menu, select *Create Smart Group...* An advanced search dialog appears.
3. Enter a name for the group, then your search strategy, and then click *Create*.

The Smart Group search dialog works the same as the Advanced Search panel. If you need more information about how to use the Search dialog, see [Searching EndNote References](#).

The new smart group will be added to the current group set. If you are searching all references, it will be in the top-most group set. You can drag-and-drop the new smart group to any group set.

Creating a Smart Group from an Existing Search Strategy

You may have already created, and possibly saved, a search strategy to find a subset of references. Rather than run the search again each time you enter and edit references, you can use the existing search strategy to create a smart group.

To create a smart group from a search strategy:

1. Select a group, or select *All References* to display all references in the library.
2. Navigate to [The Advanced Search Panel](#).

3. Create your search strategy or, if you have saved a search strategy, select *Load Search* from the *Search Options* drop-down.
4. If loading a saved search, locate, select, and open the search strategy to load it into the Advanced Search panel.
5. From the *Search Options* drop-down, select *Convert to Smart Group*.

A smart group named *Converted Search* is created and stored in the current group set. If you searched all references, the *Converted Search* group will appear in the first group set. You can drag-and-drop the smart group to any group set.

To rename the *Converted Group*, see [Renaming a Group](#).

The smart group will be updated with matching references each time you save a reference.

Editing a Smart Group

You may have created a smart group only to find that you need to tweak the search strategy for the group.

To edit a smart group:

1. Select the smart group name in the *Groups* panel.
2. From the *Groups* menu, select *Edit Group* to display the smart group search dialog, or *Control+click* on the smart group and select *Edit Group* from the list. The current search strategy is displayed.
3. Modify the search strategy as needed, and click *Save*. (If you need more information about how to use the Search dialog, see [Searching EndNote References](#).)
4. The smart group updates based on the new search strategy.

Combination Groups

Combine custom and smart groups under a single group to better organize your EndNote references. Use AND, OR, and NOT logic to create new, useful combination groups.

Creating a Combination Group

To create a combination group:

1. From the *Groups* panel, select *Create from Groups...* to display the *Create from Groups* dialog.
2. Enter a name for the combination group.
3. In the fields under the *Include References In* heading, select up to 10 custom and/or smart groups to use as your search criteria.
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combination group. (See [A Strategy Tip for the AND, OR, and NOT Operators](#).)

5. You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combination group set.

You are limited to 5,000 custom, smart, and combination groups per library. Once you reach that limit, you must delete a group before you can add a new one.

Note: You cannot include group sets in a combination group.

Editing a Combination Group

To edit a combination group:

1. Select the group that you want to edit.
2. From the *Groups* menu, select *Edit Group* to display the Create from Groups dialog, or *Control+click* on the combination group and select *Edit Group*.
3. Enter a new name for the group (optional).
4. Use AND, OR, and NOT to include or exclude custom and/or smart groups in your combined group set (optional). (See [A Strategy Tip for the AND, OR, and NOT Operators](#).)
5. You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combined group set.
6. Click *Save* to save your changes.

Deleting a Combination Group

To delete a combination group:

1. Select the group that you want to delete.
2. From the *Groups* menu, select *Delete Group* to display a dialog, or *Control+click* on the combination group and select *Delete Group*.
3. In the confirmation dialog, select *Delete* to delete the group or *Cancel* to cancel and keep the group.

Group Sets

To help organize your groups, you can create up to 5,000 group sets. Group sets can contain any combination of custom groups, smart groups, and combination groups.

Use the Expand or Collapse icons next to a group set header to expand or collapse the list of groups found in that group set.



Expand a group set by clicking the expand arrow.



Collapse a group set by clicking the collapse arrow.

When the list is collapsed, the number next to the group set header reflects the total number of references found in each group set. This number could include duplicates (references that are included in more than one group).

Some group sets are automatic and cannot be removed or renamed. These include Online Search and Find Full Text.

Creating a Group Set

A new library begins with a single editable group set titled My Groups. However, you can create up to 5,000 group sets in your EndNote library.

To create a group set:

1. From the *Groups* menu, select *Create Group Set*.
2. Enter a name for the new group set and press *Return*.

When you first create a group set, there are no groups listed below the heading. You can drag groups to move them from other group sets to the new group set or you can create new custom groups, smart groups, and combination groups under the new group set.

Selecting a group set shows all the references from the various custom groups, smart groups, and combination groups under the set.

Moving a Group Set

To move a group set in the Groups panel, click on the group set heading, hold down the mouse button, and drag and drop the group heading to its new position in the Groups panel. The new position will be remembered each time you start EndNote.

You can change the position of any group set, including Online Search and Find Full Text.

Deleting a Group Set

Are you sure you want to delete that group set? When you delete a group set, all of the groups within that set are also deleted! The references are not deleted; they still reside in your library.

To delete a group set:

1. From the *Groups* menu, select *Delete Group Set*, or *Control+click* on a group set, then select *Delete Group Set* from the list.
2. A confirmation dialog will appear. Select *Delete* if you want to delete the group set and all groups within it, or select *Cancel* if you do not want to delete the group set and the groups within it.

You cannot delete any of the permanent group sets, such as Online Search or Find Full Text.

You also cannot delete the last group set left in a library. Each library must have at least one group set as a place to store new custom groups, smart groups, or combination groups.

Managing Groups

Renaming a Group

To rename a group:

1. Select the group in the Groups panel.
2. Select the Rename Group command in one of these ways:
 - From the *Groups* menu, select *Rename Group*.
 - *Control+click* on the group name to display a menu, and select *Rename Group*.

You cannot rename the automatically created groups: All References, Duplicate References, Imported References, Search Results, Unfiled, Trash, Find Full Text, etc..

Renaming a Group Set

To rename a group set:

1. Select the group set in the Groups panel.
2. Select the Rename Group Set command in one of these ways:
 - From the *Groups* menu, select *Rename Group Set*.
 - *Control+click* on the group set name to display a menu, and select *Rename Group Set*.

Renaming does not affect the groups found in the set. Your groups will remain intact.

You cannot rename the permanent group sets: Online Search, Groups Shared by Others, or Find Full Text.

Deleting a Group

When you delete a group, the group is deleted but the references themselves are still part of the library.

Temporary groups are always removed when you close the library.

When you delete an Online Search group, it does not mean that you can no longer search that online database. You have not deleted the connection file, but you have removed it as a favorite. You can go to *Tools > Connection Files > Open Connection Manager* to add it as a favorite again. To use a connection file without making it a favorite, select *Tools > Online Search* and select the connection file you want from the list. (If you do not see the connection file you want in the list, see [Installing Additional Connection Files](#).)

To delete a group:

1. Select the group you want to delete.
2. Select the Delete Group command in one of these ways:

- From the *Groups* menu, select *Delete Group*.
- *Control+click* on the group name to display a context-sensitive menu, and select *Delete Group*.

In the confirmation dialog, select *Delete* to delete the group or *Cancel* to cancel and keep the group.

Note: If the group you are trying to delete is used in a combination group, you will receive a warning to that effect, asking if you still want to delete the group.

The group is deleted from the library, but the references that were in the group are still part of the library.

Deleting References from a Group

When you delete a reference from a group, it is moved to the Trash and is deleted from all groups in your library.

If you want to remove the reference from a custom group without deleting it from your library, see [Removing References from a Custom Group](#).

To delete a reference from your library:

1. Select the reference(s) to delete in the Reference List.
2. Select *Move References to Trash* from the *References* menu, or drag the selected references to the Trash group.

The references are now moved to the Trash group. The Trash group is a temporary holding place. The references are no longer in your library and cannot be cited or searched, but they have not yet been irrevocably discarded. If you change your mind, you can still drag a reference from the Trash back to the All References group to bring it back into the library, but any associations to custom groups it belonged to will be lost. It will need to be added to any custom groups manually.

3. When you are absolutely certain that you no longer want the reference(s) you have moved to the Trash, select the *Trash* group and then go to the *References* menu and select *Delete Trash References*.

Recently Added Groups

The Recently Added Group is built into each library (shared, unshared, syncing, and unsyncing) to allow users to see the latest references added.

The Recently Added Group displays above the Unfiled Group.

Control+click on the *Recently Added Group* to select the time frame for the references shown.

The time frame choices are:

- In the last 24 hours
- In the last 7 days
- In the last 14 days

- In the last 30 days

The Added to Library time/date stamp is used to determine when the reference was added to the library.

The group is handled on a library-by-library basis and is not built into global preferences, so it can be set to display the last 24 hours in one library and last 30 days in another.

The Lost & Found Group Set

The Lost & Found group set has special properties. Chances are that you will never see this group set. It appears only when some combination of events has caused a group to be separated from the group set it belongs to. This is incredibly rare.

The Lost & Found group set is a temporary holding place. You cannot add any groups to this set, rename them, or search them. The only thing that you can do is drag a group from this set to another group set. Once you do that, all functionality returns to the group. Once you have moved all groups from the Lost & Found group set, the Lost & Found group set is removed.

Sharing Groups

EndNote allows you to share an entire EndNote Library with colleagues, but sometimes you might not want to share your whole library. Sometimes you just want to share a set of references within your library. For this, use the EndNote Shared Groups feature.

EndNote allows you to share custom groups within your library with up to 1,000 other EndNote desktop or EndNote online users per group, and to have others share their custom groups with you. Smart groups and combination groups are not available in EndNote online, so they cannot be shared.

Before you can share groups, you will first need to sync your library to your EndNote account. Only groups from your synced library can be shared. See [The Sync Feature](#) for more information.

Sharing a Custom Group

To share a group with a colleague:

1. Select the custom group in EndNote.
2. Select *Share Group* from the *Groups* menu.
3. Enter the email address (or addresses, separated by commas) of the people that you would like to invite in the email box. You must use the email address they are using for their EndNote account.
4. For each invitee, use the drop-down box to select the desired access level: *Read & Write* or *Read Only*. These can be edited later in the *Sharing with* list, if needed. If access rights are changed later, they will receive a notice.
5. Enter an optional message to be sent to the above email address(es).
6. Click the *Invite* button.
7. The icon by your custom group will change to show that it is now being shared. (This may not show until the next time you open EndNote.)

Your colleague will receive an email telling them a group has been shared with them. When they next open their synced EndNote library, they will see your group listed under the *Groups Shared by Others* group set. Clicking on this group will send them to their EndNote online library, where they can find the group listed under their online *Groups Shared by Others* heading. They can access the references online and use them in their word-processing documents using Cite While You Write's EndNote Online option.

Colleagues do not need to be using EndNote on the desktop to share a group with them. Groups can also be shared with colleagues using the free version of EndNote online.

Note: Attachments are not shared when sharing a group.

Removing Someone from a Shared Group or Changing Their Permissions

To remove someone from a shared group or change their permissions:

1. Select the custom group in EndNote.
2. Select *Share Group* from the *Groups* menu.
3. Click the *Settings* (the Gear icon) button to the right of a person's name.
4. Select from the following options:
 - **Remove:** This will remove them from your shared group. They will no longer have access to your references.
 - **Remind:** This will allow you to remind people they have access to your shared group.
 - **Read Only:** If their current permission level is Read & Write, this will change it to Read Only.
 - **Read & Write:** If their current permission level is Read Only, this will change it to Read & Write.
5. Make your changes and click the *Close* button.

Important Points about Groups

Keep these points in mind as you work with groups:

- You can create up to 5,000 custom groups, smart groups, and combination groups (5,000 combined) in a single library.
- You can create a maximum of 5,000 group sets in a single library.
- You can add a reference to a particular group only once (based on the unique record number). A single reference will never appear more than once in a particular group. However, you can add that reference to any number of groups.
- When you are viewing a group of references with selected references, and then switch to viewing All References, the references are selected in the All References group until you deselect them.
- You can drag references from one library directly into a custom group in another open library. The references are copied to the second library and into the target custom group.

- Deleting a reference from any group deletes it from the library. If you want to remove a reference from a custom group, but not delete it from the library, see [Removing References from a Custom Group](#). (You cannot remove a reference from a smart group because the contents of the group are based on search results.)
- Once you move a reference to the Trash group, it is no longer officially in your library (it will not appear in any other group or reference list, it is not included in your reference count, and it cannot be searched or cited). However, until you select Delete Trash References from the References menu, you can still drag the reference from the Trash group back to your active library.

Term Lists

Term lists help you automate data entry for the Author, Journals, and Keywords fields. They can maintain lists of all the authors and keywords that have been used in your library. The Journals term list can improve the consistency of how journal names are formatted in your bibliographies.

You can also create your own term lists to automate other fields. For example, if you enter book references manually a lot, you could add a term list for the Publisher field.

Introduction to Term Lists

EndNote's term lists are used to store terms such as keywords, author names, or journal names. You can use these stored terms when entering references to improve consistency and accuracy of information in your library. You can also use the Journals term list to store abbreviated journal names that EndNote can substitute for the full journal name in a bibliography, or to substitute the full name for an abbreviation.

To get a general sense of how the term lists work, here's a brief overview of how term lists can be built and used for someone with a new EndNote library. With the default term list settings in the preferences, updating of terms and auto-completion happen automatically. If you do not like this behavior, you may turn off these settings (see [Term Lists Preferences](#)).

Term Lists are Automatically Maintained

When you create a new EndNote library, there are three empty term lists already set up and ready for you to use: Authors, Journals, and Keywords. As you enter new references into your library (whether by typing, importing, or pasting them) EndNote updates the term lists automatically so that the Authors, Journals, and Keywords lists include all of the author names, journal names, and keywords entered into your references.

Term Lists Help with Data Entry

When you use the New Reference command in the References menu to create new references, you will notice two other features associated with the term lists. As you begin entering an author name, EndNote attempts to complete the name for you by suggesting the closest matching name in the Authors term list. If you enter a new name that is not already in your Author list, the name appears in red text to indicate that it is a new addition to the term list. When you save the reference, that new term is added to the list.

When you are searching for references, you can also open a term list to pick the exact term or name for which to search.

Term Lists: Associating Additional Fields

- **Journals Term List:** By default, the installed Journal term list is linked to the Journal Article reference type. This list allows EndNote to substitute abbreviations for full journal names, or full names for abbreviations, in bibliographies. See [The Journals Term List](#) for more information.
- **Authors Term List:** There are several fields associated with the Authors term list. They include the Primary Author, Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author fields. You can associate additional fields to the Author term list if you require them.

- **Keywords Term List:** This term list is associated with the Keywords field in an EndNote reference. You can associate additional fields with the Keyword term list if you require them.

Important Points About Term Lists

The following list includes useful information about term lists.

- Term lists are stored with the library and therefore are specific to only that library.
- A library must be open before you can edit its term lists.
- If you enter many references manually, you may find it helpful to create new term lists for things like publisher and city names. Up to 31 term lists can be created for any library.
- There is no limit to the number of terms in a term list.
- Each term can be up to 253 characters long.
- Terms can be copied from one list and pasted into another.
- Entire term lists can be exported and imported.
- By default, term lists are automatically updated from the terms entered in your references. New terms appear in red text in the Reference window. This functionality may be turned off using EndNote's Preferences.
- Term lists can be "linked" to specific fields so that EndNote associates the correct term list with the field you are editing.
- Term lists can be used with the "Auto-entry" feature on or off. By default, this option is turned on so that EndNote will suggest the closest matching term as you type in a reference.
- The Journals term list stores various forms of journal names that can be used when creating bibliographies. EndNote provides fourteen Journals lists (including Humanities, Medical, and Chemistry) that can be imported for use with your EndNote libraries. Look in the //EndNote 20/Terms folder.
- By default, the installed Journal term list is linked to the Journal Article reference type.
- There are several fields associated with the Authors term list. They include the Primary Author, Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author fields. You can associate additional fields to the Author term list if you require them.
- The Keywords term list is associated with the Keywords field in an EndNote reference. You can associate additional fields with the Keyword term list if you require them.

Adding Terms to a Term List

Automatic Updating of Term Lists

By default, EndNote automatically updates the term lists in a library so they stay current with the data that has been entered into the references. If you enter a term into a reference, and that term is not in the associated term list already, the term appears in red text to alert you that you have entered a new term. This can help you to maintain a controlled vocabulary for keywords and other terms.

You can turn off automatic updating of term lists if you do not want to use the term lists at all. You can also turn this option off and manually enter terms into your lists as described in the following sections. For example, you can manually enter all of the terms you plan to use into a term list before entering references into the library. This can be extremely helpful when you have someone else entering data for you and you want a specific vocabulary used for keywords or other terms. As references are entered into the EndNote library, the term lists can speed data entry, and if a red term appears, the person doing data entry knows that they have entered something that was not intended to be a valid term for that field.

Turning Off the Automatic Updating of Term Lists

1. From the *EndNote* menu, select *Preferences*.
2. Select the *Term Lists* panel.
3. Click the checkboxes for *Update lists when importing or pasting references* and *Update lists during data entry* to remove the check mark. The feature will be turned off.

Delimiters

EndNote has predefined term lists for authors, keywords, and journals. When you enter multiple terms into those fields and EndNote updates the term list, it needs to know when one term ends and the next term begins. We call the punctuation that separates the terms "delimiters."

The following information applies when entering data into EndNote manually. For the Author fields, author names must always be entered one name per line. Carriage returns (end of line marks) are the only valid delimiter for this field. Journals normally have just one journal name per reference in this field, so delimiters are not needed here. Keywords are the most complex of the three. By default, EndNote uses carriage returns (end of line marks), semicolons, and backslashes (\) as delimiters for the Keywords field. If you would like to use other delimiters, see [Delimiters Used for Separating Terms](#).

Using the New Term Command

To manually add terms to a term list:

1. From the *Library* menu, select *Open Term Lists* and select the term list that you want to modify.
2. On the *Terms* tab, click *New Term*.
3. Enter the term and click *Save Term* to add it to the list. You can then replace the text in the dialog with a new term and again click *Save Term* to save the new term to the list.

4. When you have entered your last new term, click *OK* to add it to the list and close the New Term dialog.
5. Click *Close* to dismiss the Terms List dialog.

If you are entering terms into the Journals term list, you will have options to enter different forms of the journal name. See [Important Points About Entering Journal Names](#) for more information about using the Journal lists.

Note: The Save Term (or Save Journal) button is unavailable (dim) if the new term already exists in the term list.

Manually Updating Term Lists

To create a term list automatically from words already in your library, use the *Update List* button on the *Term Lists* dialog. This is useful if you have turned off the preference to automatically update your term lists, or if you have received a library from a colleague without a term list, or if you have deleted a term list and wish to recreate it.

The Update List command can apply to just a group or set of search results, or use the All References group to apply it to the whole library.

Important Points about the Update List Command

- Update List does not change the terms in your references; it only adds new terms from your references into the term list.
- Update List does not add duplicate terms to a list.
- Update List removes leading and trailing spaces, but does not change punctuation.
- For Update List to update the Journals term list with both a full name and abbreviation, the full name must be entered in the Journal field and a consistent abbreviation must be entered in the Alternate Journal field. See [Journal Names](#) and [Updating a Journal List](#) for more information on the special needs of the Journals term list.
- Update List does not automatically link fields to a term list. For easy data entry, you can link a single term list to any number of fields. See [Linking Term Lists to Fields](#).

To update a term list:

(If you are updating the Journals list, see [Updating a Journal List](#).)

1. Select a group to update the terms list from, do a search to create the set of references to update from, or manually select a set of references to update from.
2. From the *Library* menu, select *Define Term Lists...* and then select the term list that you would like to update.
3. Click *Update List*.

4. The currently linked fields are listed in the dialog as the fields from which EndNote gathers new terms. If necessary, remove a field from this list by selecting it and clicking *Remove Field*; or add a new field by selecting it from the *Add Field* list. Adding or removing field names from this list does not affect the links between fields and term lists.

The Generic field names are used in this dialog. See the [List of Reference Types](#) to find the corresponding field names for the fields of various reference types.

5. To update a term list from only the currently selected references in your library, select the *Update Terms From Selected References* option.
6. Click *Update* to begin the updating process. When finished, EndNote displays the number of terms added to the list. Click *OK* and the process is complete.

Note: Pressing Esc stops the update process, but all terms added up to that point are kept in the term list.

Delimiters Used for Separating Terms

The text used to separate the terms in a particular field is determined by the "Delimiter" settings on the Lists tab of the Term Lists dialog (select *Define Term Lists* from the *Library* menu).

If your keywords are separated by a slash, such as:

Antarctica/ozone/stratosphere

you should select a slash (/) as the field's term delimiter. A carriage return is always interpreted as a delimiter, so it is not necessary to enter a delimiter for the Author fields or any other field that has terms entered one-per-line. If different delimiters are used for the same field in your references, you will need to do more than one update process, updating from the references with different delimiters separately.

Cleaning Up After Updating

Click on the *Terms* tab, and scroll through the term list to make sure that the Update List command had the desired result. If it did not, you can highlight specific terms and remove them by clicking *Delete Term*.

After using the Update List command, you might find that due to errors or variations in spelling, you have multiple entries for the same term. Scan through the list and delete the unwanted terms.

If necessary, use the *Find and Replace* command from the *Library* menu to change all occurrences of a term in your library. For example, if both "geochronology" and "geo-chronology" are entered as keywords, you can delete the unwanted term "geo-chronology" from the term list, then click on the Reference List, and select *Find and Replace* (⌘+R) from the *Library* menu to change "geo-chronology" to "geochronology" throughout the library.

Importing Terms Into Term Lists

EndNote provides fourteen lists of journal names and abbreviations, including lists for Chemistry, Medicine, and the Humanities; all of which are stored in the //EndNote 20/Terms folder. If you are interested in using these abbreviated forms of the journal names in your bibliographies, you can import them into your term lists and adjust your styles to use the abbreviations.

Note: See [List of All Journals Cited in PubMed®](#) for a current list of medical journal names and abbreviations, in case you need to add journal names in the medical sciences to the provided list. Sometimes you may be told to use the "Index Medicus" journal names. Index Medicus ceased publication in 2004 (see the May-June 2004 NLM Technical Bulletin article [Index Medicus to Cease as Print Publication](#)), so the PubMed list is the current resources for finding official medical abbreviations.

If you would like to look at the lists before importing them, you may open them in your word processor—but do not edit or save them. They must remain tab-delimited text files in order for EndNote to correctly import the terms.

Terms can be imported from any text file that lists the terms one per line. Make sure a carriage return is also inserted after the last term in the list. If you create a list of terms in a word processing document, be sure to save the list as plain text using the Save As command in your word processor. Then, if your terms include extended characters, select the Unicode (UTF-8) encoding option.

To import a text file that contains terms other than journal names (see [Loading Supplied Journal Abbreviations](#) for journal names):

1. From the *Library* menu, select *Define Term Lists* and highlight the term list to which you want to add terms. Use *Create List* if you want to create a new list.
2. Click *Import List*.
3. Select the text file to be imported and click *Choose*.

The new terms are imported and sorted alphabetically into the existing term list. This import must be done for each library in which you want to use these terms.

Inserting Terms into References

Suggesting Terms As You Type (Auto-completion)

If you are entering text into a field that is linked to a term list, EndNote finds the first matching term in the list and suggests that as the term you want to enter.

The suggested text appears highlighted after the cursor. Continue typing until EndNote suggests the correct term, and then press *Return* or *Tab* to accept it. (Return creates another line in the field so that you can enter more author names; Tab moves the cursor to the next field in the reference.)

When you enter a term that is not already in the term list, it appears in red to indicate that it is a new term. When you save the reference, that term is added to the term list and will no longer display in red.

These auto-completion term list features may be turned off. To turn off the display of red text, turn off the preference to Suggest Terms as You Type. See [Term Lists Preferences](#).

Inserting Terms Without Using the Auto-Completion Feature

If you have turned off the option to suggest terms as you type (auto-completion), you can still insert terms into your references manually.

To insert a term from a Term List window:

1. Open a reference and position the cursor where you want to add the term.
2. From the *Library* menu, select *Open Term Lists* and select the desired list.

Or, in an Author, Journal, or Keywords field, press ⌘+1 to display the appropriate list. (If you create a custom term list, the ⌘+1 command will also work with any field you link to your custom term list.)

3. Double-click a term to insert it directly into the reference, or select the term(s) and click the *Insert Term* button.

Terms can also be selected by typing the first few letters of the term, by using the Arrow keys, or by clicking on the term with the mouse. Hold down the *Command*(⌘) key to select multiple terms. Press Return to insert the selected term or click *Insert Term*. If multiple terms are selected and inserted, they are listed in the reference one per line in alphabetical order.

Using Terms For Searches

To ensure that you are searching for the correct terms, you can use the term lists with EndNote's Search command. Terms can be entered in the fields on the Advanced Search panel just as they are entered into references.

1. Navigate to the *Advanced Search* panel, select the field you want to search, and click in the field as though to enter data in it.
2. From the *Library* menu, select *Open Term Lists*, and then select a list. Or, in an Author, Journal, or Keywords field, press ⌘+1 to display the appropriate list. (If you create a custom term list, the ⌘+1 command will also work with any field you link to your custom term list.)
3. Select a term and click *Insert Term* to insert it into the Search field.
4. Click *Search* to search for your references.

Modifying Terms

Any term in a term list may be modified or deleted without affecting any of the references in the library or any links between term lists and fields.

To edit a term in a term list:

1. From the *Library* menu, select *Open Term Lists* and select the list that contains the term to be modified.
2. Select a term, and then click *Edit Term*. If multiple terms are selected, only the first one opens.
3. Change the term as necessary and click *OK* when finished. The modified term replaces the original term in the term list. (If the term as it is modified already exists, the OK button will be dim.)

Notes: Editing a term in a term list does not change all occurrences of that term in your library. Use the *Find and Replace* command from the *Library* menu to find the old term in your references and replace it with the new one.

You cannot edit a term to change the capitalization. You will need to delete it from the list and add it again with the new capitalization.

Deleting Terms

A term can be deleted by highlighting it in the list and clicking *Delete Term*. Deleting a term from a term list does not remove it from the references in the library. If you later use the Update List command, the term will be added to the term list again.

Exporting and Printing Term Lists

Term lists can be exported and then imported into other term lists as a way to move complete lists from one library to another (see [Importing Terms Into Term Lists](#)).

You can also open exported term lists in a word processor to print them.

To export a term list:

1. From the *Library* menu, select *Define Term Lists*.
2. Highlight the term list that you want to export.
3. Click *Export List*.
4. Name and select a location for the text file that will be created during the export.
5. Click *Save*. The terms are exported to the text file and listed alphabetically, one term per line.

This file can now be imported into another EndNote term list or opened in a word processor to be printed. Term lists cannot be printed directly from EndNote.

Predefined Term Lists

Three empty term lists are available by default with every library: Authors, Journals, and Keywords. These lists are already linked to their corresponding fields: the Authors term list is linked to the Author, Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author fields; the Journals term list is linked to the Secondary Title and Alternate Title fields; and the Keywords term list is linked to the Keywords field.

Defining Term Lists

Use the *Define Term Lists* command in the *Library* menu to create, rename, or delete a term list. This command is also used to specify the punctuation that separates individual terms in a reference (delimiters).

Creating a New Term List

To create a new term list:

1. From the *Library* menu, select *Define Term Lists*.
2. Click *Create List*, and then enter the name for the new list. You cannot create a term list with the same name as an existing term list.
3. Click *OK*.
4. Check the "Journal List" box only if you want to create a term list for storing journal names and abbreviations. These different forms of the journal name can be used interchangeably when creating bibliographies. See [Creating Bibliographies with Journal Abbreviations](#).

The predefined Journals term list is already set up as a multi-column list. If you delete this list, you can create another one as described here, but there can only be one Journals term list in a library. Do not create a 4-column journal list for nonjournal fields.

To add terms to the list, you can import an existing list of terms, update the list from existing EndNote field data, or manually enter terms into the list.

Note: New term lists must be linked to fields for the "Suggest terms as you type" and automatic updating features to work. See [Linking Term Lists to Fields](#).

Linking Term Lists to Fields

Term lists are associated with fields using the Link Term Lists command from the Library menu. When a term list is linked to a field, the list can be used to facilitate data entry. EndNote can also keep the term lists current by automatically adding new terms from linked fields. By linking term lists to particular fields, you can use the auto-completion (Suggest terms as you type) feature whenever you are entering data into the linked field. Each field can be linked to only one term list. However, you can link the same term list to multiple fields.

The three predefined term lists (Authors, Journals, and Keywords) are already linked to their corresponding fields. Any new term list that you create is not linked to a field until you set up the links. The links between term lists and fields are specific to each library.

To change these settings or to link a new term list to one or more fields:

1. Open a library.
2. From the *Library* menu, select *Link Term Lists*.
3. If you have more than one library open, select a library from the drop-down list at the top of the dialog.
4. The names of the available term lists appear next to the field names with which they are linked. You may change the links here as necessary by selecting a different term list from the drop-down lists. A field can only be linked to one term list.
5. Click *OK* to save your changes and close the dialog.

These changes will not alter any data that is currently entered in either your references or your term lists. Term lists may be linked to multiple fields.

Note: After linking a term list to one or more fields, you should make sure the list is updated with the data from those fields. Go to the *Library* menu, select *Define Term Lists*, select the list, and click *Update List*.

To unlink a term list from a field:

1. With the library open, select *Link Term Lists* from the *Library* menu.
2. Scroll through the list of fields to find the field that you would like to be unlinked from a list. Select *None* from the drop-down list next to the field name.
3. Save your changes by clicking *OK*.

Deleting and Renaming Term Lists

Term lists can be renamed without disturbing their links to reference fields or the terms within them. Deleting or renaming term lists does not change the data entered into your references.

To delete or rename a term list:

1. From the *Library* menu, select *Define Term Lists*.
 - **To Rename a Term List:** Highlight a term list, and then click *Rename List*. In the *Rename List* dialog, enter the new name for the list, and click *OK*.
 - **To Delete a Term List:** Select a term list, and then click *Delete List*.
2. Click *OK* to save your changes.

Configuring Term Separators (Delimiters)

EndNote uses the delimiters in the Define Lists dialog to determine what punctuation separates the individual terms in the same field in a reference.

For example, if you import data from a source that uses semicolons (;) to separate keywords:

Adult, Age Factors; Astigmatism; Follow-Up Studies; Hospitals, University;
Keratotomy, Radial; Myopia; Refraction, Ocular

you would want to be sure that the semicolon was selected as a separator for your Keywords term list. You would also want to be sure that the comma was not chosen because the commas in this example are used within some of the terms.

By default, EndNote uses the semicolon (;), backslash (\), and end-of-line markers as separators. Words or phrases entered on different lines in a field (by pressing Return) are always interpreted as separate terms, but the other separators can be changed depending on your needs.

Note: Line breaks are the only allowable separators for Author and Journal lists, so the delimiter options cannot be changed for lists linked to the following fields: Author, Secondary Author, Tertiary Author, Subsidiary Author, Translated Author, Journal/Secondary Title, and Alternate Title.

To customize the delimiters for a term list:

1. Open a library.
2. If you have more than one library open, select a library from the drop-down list at the top of the dialog.
3. From the *Library* menu, select *Define Term Lists*. (Each library has its own set of term lists.)
4. Click on the name of the term list that you intend to modify.
5. Click the checkbox to the left of the desired separator to select it (or to unselect it if it is already checked). The last checkbox provides a place to enter a custom term delimiter, if necessary.
6. Close the Term Lists dialog to save your changes.

The Journals Term List

The Journals term list allows EndNote to format bibliographies with the version of journal names required by a publisher's style requirements. For example, most humanities styles require the full journal name, while scientific and medical journals generally require journal abbreviations, sometimes with periods on abbreviated words and sometimes without. Because the Journals term list can track up to four versions of a journal name, EndNote styles can use the version of the journal name required by the publisher—but only if a Journals term list has been set up with the different variations of the journal names.

There should be only one multi-column term list per library: the Journals term list. If you somehow accidentally delete the Journals term list, it is possible to recreate it, but trying to create multi-column lists for other fields, such as publisher or author names, will not work properly in formatting bibliographies.

Important Points About Entering Journal Names

If you will never need to submit documents that require journal names formatted in different ways, you do not have to use the abbreviation sections in a Journals term list. However, if you do need to submit documents with different formats for the journal names, keep these points in mind:

- Enter variations of the same journal name together in one term.
- Enter a consistent abbreviation format in each column. For example, all abbreviations with periods could be entered under the Abbreviation 1, all abbreviations without periods in Abbreviation 2, and so on.
- Only the first term for each journal (the one in the Full Journal slot) is transferred when you insert a term into a reference. However, what will show up in the bibliography will depend on the style and the consistency of your Journal term list.
- Use the Journal Abbreviation option in the styles to pick which form of the journal names should be used in the bibliography (see [Creating Bibliographies with Journal Abbreviations](#)).
- EndNote can remove periods from abbreviations during formatting. EndNote cannot add periods to an abbreviated journal name.

Loading Supplied Journal Abbreviations

You can load one of the supplied journal name lists to use for data entry. These lists also contain journal abbreviations for alternate output, and are used by certain output styles. The lists are supplied as plain text files in the //EndNote 20/Terms Lists folder. You can open and view one of these files with any word processor, but make sure to leave it a plain text file so that EndNote can import it.

To replace the existing Journals list with one of the supplied journal abbreviation lists:

1. From the *Library* menu, select *Open Term Lists*, and then select *Journals Term List*.
2. Delete all existing terms from the list (you can click and drag to highlight all terms, or use the *Command(⌘)+A* shortcut, and then click *Delete Term*. This will give you a "clean slate" to import the journal lists, with each version of the name in the correct column of the list.
3. Click on the *Lists* tab and select the *Journals* list.
4. Click *Import List*.
5. In the File dialog, navigate to the //EndNote 20/Terms Lists folder, select the list you want to use, and click *Open* to import the journal names and abbreviations from the file into the Journals term list.
6. *Close* the Terms Lists dialog.

Updating a Journal List

For EndNote to accurately use the abbreviated journal names in your bibliographies, it is important to be consistent when entering different formats of a journal name. The first column should always list the full journal name, and subsequent columns should store consistent formats of abbreviated names. See [Important Points About Entering Journal Names](#).

Journal lists are updated automatically, from the Journal Article and Electronic Article reference types, unless you have turned off the preferences to update lists (see [Term Lists Preferences](#)). When journal lists are updated, the entry in the main Journal field goes into the first column of the list (Full Journal) and the journal entered into the Alternate Journal field goes into the second column (Abbreviation 1). Be consistent when entering data into these fields so that the Journals term list will be updated correctly. Note that if the name entered into the Journal field exists in any of the columns of the Journals term list, it is not added again. EndNote tries to avoid duplicate entries in the Journals list.

If you have turned off the preference to automatically update the term lists, you may manually update the lists as described here. When you are manually updating Journal lists, you can choose which columns in the list are used for which fields of data.

Note: It is best to import a terms list, if there is one available in EndNote, before updating from your library. This will ensure that a large number of the journal name versions will be in the correct location before the update, minimizing cleanup. See [Loading Supplied Journal Abbreviations](#).

To update a journal term list:

1. Select a group to update the terms list from, do a search to create the set of references to update from, or manually select a set of references to update from.
2. From the *Library* menu, select *Define Term Lists...* and then select *Journals*.

3. Click *Update List*.
4. The fields to update the list from should already be selected: the Journal/Secondary Title and Alternate Title fields. If you wish to change these fields, select the fields from which EndNote should extract the journal names. If importing from selected references, check the *Update from Selected References* option.
5. Click *Update* to begin the updating process. When finished, EndNote displays the number of terms added to the list. Click *OK* and the process is complete.

When the update is complete, you will see a column of journal names listed in alphabetical order.

Creating Bibliographies with Journal Abbreviations

When you insert a journal name from the Journals term list into a reference, only the first entry for the journal name is entered. However, you can create a bibliography that uses any abbreviation in the term list by editing the style used to format the paper.

To edit a style to use journal abbreviations:

1. From the *Tools* menu, select *Output Styles*, then select *Open Style Manager*.
2. Select the style that you would like to edit, and click *Edit*.
3. From the list of options at the left of the Style Editor window, click [Journal Names](#).
4. Select one of the available options.
5. Close and save the style. Now when you format a paper or look at the Preview panel, all of the journal names should be replaced with the appropriate abbreviation.

If a journal name in one of your references does not have the selected abbreviation entered in the Journals term list, the journal name appears in the bibliography exactly as it is entered in the Reference window. Editing the Journal term list to include all the versions of the name will fix it in the current bibliography and any time that journal name is used in the future. See [Modifying Terms](#).

Searching Online Databases

EndNote's search interface provides a simple way to do basic searches of EndNote libraries and online databases. The same Advanced Search panel is used for both purposes.

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

How Does It Work?

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

EndNote stores the information necessary to connect to and search these online databases in individual Connection Files. Preconfigured connection files are provided for a number of these sources. If necessary, you can also customize or configure your own connections to Z39.50-compliant databases (see [Editing a Connection File](#) and [Creating Connection Files](#)).

Note: If the online database that you access is not available on a Z39.50 server, EndNote will not be able to connect directly to it. You can still import references downloaded from non-Z39.50 databases. See [Importing Reference Data into EndNote](#).

How to Search an Online Database

The process of searching an online database is very similar to searching an EndNote library. Here are the basic steps involved; more detailed descriptions of these steps are provided in additional help topics.

To search and retrieve references from a online database:

1. Initiate the online search in one of these two ways:
 - From the *Tools* menu, select *Online Search* to display the collection of connection files installed on your computer.

or

Click *more* under the *Online Search* group set. Select the online database that you would like to search, and then click *Choose*. See [Selecting a Connection File](#).

When the connection has been established, the Search panel appears ready for you to enter a search.

- Once you have searched an online database, or marked the database as a favorite with the Connection Manager, it appears in the Online Search group set in the Groups panel.
- 2. Enter your search request in the search fields on the Advanced Search panel, and then click *Search*. EndNote searches the database and displays the number of references that were found to match your search criteria.
- 3. Click *OK* to retrieve the references.

If you would like to pause during record retrieval, click *Pause*. When you are ready to continue, click *Resume*.

Note: The connection to the online database is maintained only until the search is completed and the matching references are retrieved; when the references are downloaded, you are automatically disconnected. Each time you initiate another search, EndNote reconnects.

Next, Determine Which References to Keep

The retrieved references are stored in the Online Search group set for the library, but they are not yet in your EndNote library.

1. Select the references you want to add to your library.
2. Now you have choices on how to add the references to your library.
 - Go to the *References* menu and select *Copy References To* in order to select a new or existing library and copy the selected references to that selected library.
 - *Control+click* on the selected references and select *Copy References To* from the list in order to select a new or existing library and copy the selected references to that selected library.
 - Drag and drop the references into the group you want to add them to in the library.
 - Mark the references using the checkmark boxes to the left of them, and then click the *Add the selected records to your local library* button to add them to your library.



If you used the *Copy References To* command, the references are copied to the selected library and are displayed in a Copied References group. Each time you copy references into an EndNote library, the Copied References group is replaced with the new set of references. Previously copied references remain in the library; they are just no longer part of the latest Copied References group.

Searching an Online Database

Establishing the Connection

The first step to searching an online database is to connect to it. Once the connection has been made, you're able to use EndNote's Advanced Search panel to search the online database.

If you have connected to a particular database before or if you have selected a database as one of your favorites (see [Adding Favorite Connection Files](#)), it will appear in the Groups panel under Online Search. This saves you a few steps in the process of using the Online Search command.

To connect to an online database, do one of these:

- On the Groups panel, under Online Search, select the online database you want to search. That initiates the online connection.
- If the database you want to search is not listed under Online Search in the Groups panel, select *Tools > Online Search*, select the desired database, and click *Choose* to initiate the connection.

or

Click the *more...* button in the Online Search group set, select the desired database, and click *Choose* to initiate the connection.

This Connection dialog is very similar to the Connection Manager described in [The Connection Manager](#), but it does not provide the options to edit connection files or mark them as favorites. However, it does contain a Quick Search field that the Connection Manager does not. Here you can enter the name, or a portion of the name, of the file you are looking for, then press *Return* to find files matching the text entered.

When a successful connection has been made, the Search panel opens with the online database selected for searching. You are now ready to begin searching the database.

The connection to the online database is maintained only until the search is completed and the matching references are retrieved; when the references are downloaded, you are automatically disconnected. Each time you initiate another search, EndNote reconnects.

Note: If you have difficulty establishing a connection, see [Troubleshooting Connections](#).

Online Database Searching (Overview)

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

1. Enter your search term(s) in the fields on the Advanced Search panel.
2. Select the appropriate search options.
3. Click *Search* to send the search request to the online database.

A few significant differences between searching an online database and an EndNote library are described in [Searching EndNote Fields vs. Online Database Indexes](#). See [The Advanced Search Panel](#) for general information about using the Advanced Search panel interface.

Available Search Options

Once you are connected to an online database and that database is selected for searching, certain elements on the Search panel change from the settings that are available for EndNote library searches.

- The search set list changes when searching an online source. You can search either the remote database or the list of references already retrieved and saved from the remote source.

- The options available in the search menus (such as Author, Title, or Keywords) vary with each database, and they are not the same as searching the fields in an EndNote library (see [Searching EndNote Fields vs. Online Database Indexes](#)).
- The following fields are not available in the search menu for searching an online source: PDF, Any Field + PDF with Notes, and PDF Notes.
- The comparison list for each search line is always set to Contains.

Boolean Searches

Multiple search terms can be combined using the Boolean operators AND, OR, and NOT. EndNote constructs a search from the top to the bottom of the Search panel, finding the search results of the first two items, then combining that result set with the third search line, and so on.

Field	Comparison Operator	Search Term	Boolean Operator
Keywords	Contains	parrot	AND
Keywords	Contains	corvid	NOT
Keywords	Contains	avian	OR
Keywords	Contains	Emery	
Boolean Operators Table			

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

((parrot AND corvid) NOT avian) OR Emery)

First EndNote looks for references about parrots and corvids, then any references to avian would be omitted from that set, and finally all references by Emery would be added.

Keep in mind that:

- OR broadens your search by adding together two result sets
- AND narrows the focus of the search by looking for the intersection of references found
- NOT narrows the search by omitting the results for one term from the current result set.

See [A Strategy Tip for the AND, OR, and NOT Operators](#) for an example search strategy to help with using these three operators.

Searching EndNote Fields vs. Online Database Indexes

When searching an online database, you are not searching the specific fields in each record, but rather the available search indexes for that database. The search menus on the Search panel list only available indexes for the online database, so you will not see all of the generic field names listed as you do when searching an EndNote library.

If the current search strategy is set up to search an EndNote field that does not exist as an online database search index, that field name will appear in italics. If you try to execute a search, EndNote will advise you that the field is not valid. Change the search field selection to a valid index for the selected online database.

The connection file for a particular database stores the names and settings for the search options listed in the search menus. See [Search Attributes in Connection Files](#) if you are interested in changing the preconfigured options.

Note: Comparison operators other than "Contains" cannot be used when searching online databases.

Understanding Search Results

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

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

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

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

Online Database Search Limitations

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

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

Documentation from the information provider may help to clarify which search options are available.

Changing the Focus of the Search

The target of the search is the online database (represented by the database name on the Search panel) or the current EndNote library group that is displayed when the Search command is chosen. (If you haven't yet connected to the online database or opened a library, you will need to do so before you can search it.) To change the focus of a search, click on a different library group or online database in the Groups panel.

The available search options differ among the various online databases, as well as between online databases and EndNote libraries. When you change the target of a search, the field options on the Search panel change automatically. You could set up a Keywords search for a particular online database, but when you select a different online database, the field selection changes because Keywords is not an option for the new database selection.

When switching the focus of your search from one group to another and back again, the original search setup is retained as long as you have not changed any settings on the Search panel and the field selections are available in both databases.

Selecting a Connection File

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

Access-Restricted Databases

EndNote comes with preconfigured connection files to free reference databases and library catalogs as well as databases that require payment and/or authentication for access. Most of the databases offered by the commercial information providers (Ovid, OCLC, etc.) require an account for access. There are, however, numerous databases that are available at no cost to you, and no account is required (see [Free Databases](#)).

When you attempt to connect to a restricted database, by default EndNote prompts you to enter your user ID and/or password. If you have a user ID and/or password supplied by the data provider that hosts the restricted database, enter the necessary information, and click *OK* to log on. (Depending on the database you are accessing, the passwords and IDs may be case-sensitive.)

Note: The User ID and password must be the one provided by the database provider. Student, Faculty, or employee logons for your system are unlikely to work because they are provided by your institution, not the database provider. You may be able to access the database through IP address recognition instead. If you find you are unable to access the database through Online Search, you can still search the database through a Web browser and then import your references into EndNote. See [Importing Reference Data into EndNote](#) for more information. Clarivate does not control access to databases from other database providers.

If you do not have a user ID and/or password, but instead have authenticated access to a database either by IP address recognition (for example, your computer is on your university campus or company network and has an IP address that is recognized as authenticated by the data provider's server) or through a proxy server, it may be possible to configure the connection file and your Network Preferences so that you do not need to enter a user ID and password.

If you have access to a restricted database by IP address recognition, you may need to edit the connection file so that it does not prompt you for a user ID and/or password. In EndNote, select *Tools > Connection Files > Open Connection Manager*. Locate the connection file for the database you wish to access, select it, and click *Edit*. Click *Connection Settings* and clear the *User ID* and *Password* boxes under *Login Information Required*. Close the connection file, choosing *Yes* when asked if you want to save your changes.

Note: To access databases using IP authentication, you must be on the authenticated network. If you are off-site, this is usually managed through an institutional VPN. Contact your institution's library or technical support group for information on institutional VPN setup.

If you have access to a restricted database via a proxy server, you must make sure that your Network Preferences are properly configured, because EndNote uses these settings. Note that these are operating system settings, not browser settings. See [Problems Connecting](#) for information about proxy servers. You will need the address and port number of your proxy server.

Free Databases

Two major databases that do not require passwords are the PubMed database from the U.S. National Library of Medicine, and the Library of Congress. Many of the general library catalogs are also unrestricted. Additional connections may be available at the EndNote online site. See [Download EndNote Connection Files](#).

Databases Not Requiring an Account

Description	Information Provider/Category
PubMed (MEDLINE and pre-MEDLINE) references from the U.S. National Library of Medicine	U.S. National Library of Medicine (NLM)
Most university library catalogs	Library Catalogs
Books at the U.S. Library of Congress	Library of Congress
Crossref	Publishers International Linking Association, Inc.

Adding Favorite Connection Files

EndNote provides thousands of connection files for a variety of sources. Whenever you use a connection file you have not used in the past, it is automatically added to your list of favorite connection files and will show in the Online Search group set.

You can also add multiple connection files to favorites using the Connection Manager.

1. To peruse the list of installed connection files, choose *Tools > Connection Files > Open Connection Manager*. The list includes the original connection files installed in the EndNote program folder (// EndNote /Connections), as well as any user created or edited files stored in your personal Connections folder (see [Folder Locations Preferences](#)).
2. When you have found a connection file that you will want to use in the future, click the checkbox to the left of it to mark it as a favorite. Marked files (up to 500) appear under the Online Search group set in the Groups panel, giving you easy access to those files you use most often.

Note: By default, EndNote only installs a list of popular connection files, but you can customize the installation to install more connection files. See [Installing/Uninstalling Components of The Customizer](#) section for more information.

If you have installed a large number of connection files, use the following features in the Connection Manager window to locate the connection file(s) that you want to use:

- Click in the list and start typing the name of a connection file. Use the letter "u" as an abbreviation for "university." Other words might also be abbreviated. For example, the University of California at San Francisco would be searched for as "U Calif-San Francisco." EndNote will jump to the first letter that matches very quickly, so you may only be able to type a few letters, to help you get near the file you want.
- Click *Find by* and EndNote displays the list of information providers (categories) used for all of the connection files. Choose one to restrict the list to show just that set of files.
- Click the column headings to sort the connection files by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

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

Note: For information about editing connection files or creating new ones, see [Introduction to Connection Files](#).

What if Your Database Is Not Listed?

By default, EndNote installs only the most popular connection files. For information about locating and installing additional files, see [Installing Additional Connection Files](#).

If a connection file has not been provided for the database that you want to search, contact your librarian or information provider to see if their database is available on a Z39.50 server. If it is, you should request the information required to set up a Z39.50 client for that database. See [Creating Connection Files](#).

Adding Connection Files

The Connection Manager displays all of the connection files in the EndNote program folder as well as in your personal Connections folder. If you have received a connection file from a colleague or librarian or downloaded one from the Web, copy it into your personal Connections folder and it will appear in the Connection Manager. Keeping the file in your personal Connections folder ensures that it will not be deleted or overwritten with future updates to the EndNote program.

To locate your personal Connections folder or to designate a different Connections folder:

1. Select *Preferences* from the *EndNote* menu.
2. Select the *Folder Locations* option.
3. Select the *Connections Folder* option.
4. Click *Select Folder* if you want to select a different folder to use for your personal Connections folder. The default folder should be in your Documents folder.
5. Use your personal Connections folder to store and access connection files you have created or modified. They will show up in Connection Manager or when you click the *more* button in the Online Search group set.

Note: New and updated connection files are posted on the EndNote Web site as they become available ([Download EndNote Connection Files](#)).

Retrieving and Saving References

After a successful search, EndNote alerts you to the number of references that were found in [The Connection Status Panel](#). You have the option of retrieving all of the references or a specific range of references. The order of the retrieved references reflects the way they were returned from the server—this is not necessarily alphabetical, chronological, or in order of relevance.)

Retrieved references are downloaded into the group selected in the Online Search group set, but are not automatically saved to a library. To save references, select them, and then:

- Go to the *References* menu and select *Copy References To* in order to select a new or existing library and copy the selected references to that library.
- Click the *Add the selected online records to your local library (+)* button at the right side of [The Connection Status Panel](#).
- Drag and drop the selected references to a group in the current library.
- Use the *Copy* and *Paste* commands from the *Edit* menu to copy individual references from the Online Search group and then paste them into a library group.

Discarding Duplicate References

If you use the same search strategy to search multiple online sources, you may introduce duplicate references into your EndNote library. See [Finding Duplicate References](#) for information on removing duplicates from the library.

The Connection Status Panel

The Connection Status panel provides abbreviated information on the results of an online search. You can select the number of results to download, or quickly add references to your library using the *Add the selected online records to your local library (+)* button (+) at the right.



Connection Status Panel

For more detailed information on the status of connections during your current EndNote session, see [The Connection Status Window](#) and [The Connection Log File](#). This log file can be helpful for troubleshooting connection files.

The Connection Status Window

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

View the connection status information by selecting *Show Connection Status* from the *Tools* menu to display the Status window.

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

Note: The Connection Status window displays the last 32K of text written to the [Connection Log](#). If you need to see more than that, you can open the Connection.log file in a word processor after closing the EndNote connection.

The Connection Log File

All messages and retrieved references for a given EndNote session are recorded in a log file. By default, the log file is called "Connection.log" and is saved in the folder:

[Your Folder]/Library/Application Support/EndNote

An existing log file is overwritten the first time EndNote establishes a connection after being started.

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

You may also choose not to create a log file by clearing the *Use Log File* option. This will slightly speed up the retrieval process. However, a log file can be useful for troubleshooting connection problems or when building or editing a custom connection file.

Importing a Log File

The log file is a regular text file. It can be viewed using a word processor and imported, if necessary, using the connection file. In this sense, the log file is a back up for the references retrieved in a particular EndNote session. You can verify that EndNote retrieved the reference data correctly by browsing through the log file in your word processor and comparing the unmodified data to what appears in your EndNote references. If necessary, you can change the settings in your connection file and import the references again (without reconnecting to the online database).

Note: You cannot import from a Connection.log file saved for an online search from the Web of Science™ Core Collection. You must do a regular online search or a direct export.

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

1. Open a library into which you want to import the log file.

2. From the *File* menu, select *Import > File*.
3. Open *Options*.
4. Navigate to the folder for the Connection.log file and select it. Substitute the name of your log file if you have changed the default name.
5. Select *Use Connection File* from the *Import Options* list.
6. Select the desired connection file, and then click *Choose*. Now you should be back in the Import File dialog with both the file and the import option set.
7. Next to *Text Translation*, select *No Translation*.
8. Click *Import*.

Note: The connection file and filter file for a database are likely configured to import very different reference formats. Normally, a connection file is set up for MARC (Machine Readable Cataloging) data, whereas a filter is set up for tagged data. Because the output formats are so different, you should not use a filter file.

Searching the Web of Science™ Platform

Web of Science™ is a comprehensive research platform that brings together many different types of content for searching. Journal articles, patents, Web sites, conference proceedings, Open Access material—all can be accessed through one interface, using a variety of powerful search and analysis tools.

Search the Web of Science™ Core Collection just as you would search any other online database. Your search results can be copied directly to the EndNote library of your choice.

Once the records are in EndNote, you can click on an EndNote record's URL to jump back to the original Web of Science Core Collection online record. Various options are available to you online, such as viewing a list of related references.

Note: IP authentication is required to search the Web of Science platform from EndNote.

Available Web of Science™ Databases

As of this release, the following Web of Science product databases are available for direct online searching with EndNote. A subscription is required to access a particular product database.

- Biological Abstracts
- BIOSIS Previews
- CAB Abstracts
- Current Contents Connect
- FSTA

- MEDLINE
- Zoological Record

Web of Science Core Collection: Citation Indexes

- Core Collection Index
- Science Citation Index
- Social Sciences Citation Index
- Arts & Humanities Citation Index

Full Record Charges

The Web of Science platform requires a paid subscription. You may have an online subscription with a username and password, or you may have access to a local Web of Science platform server.

Users of Previous Versions of EndNote

If you used a previous version of EndNote, many of your preferences were saved when you upgraded to EndNote . However, if you want the ability to link back to Web of Science Core Collection records and product databases, you may need to update the Base URL.

1. From the *EndNote* menu, select *Preferences*.
2. Click the *EndNote Defaults* button to update to the latest Base URL.

Searching Author Names in Web of Science Databases that Contain Particles and Spaces

When searching a Web of Science product database (for example, the CABI or MEDLINE), you may need to add a connector to names that contains particles and spaces. For example, to search for **de Bruyn A**, enter the name in the Search field as **de+Bruyn+A** to ensure that the product returns all relevant results.

To search for **de la Rosa**, enter the name in the Search field as **la+Rosa**. You can also add a first name to restrict your search, but do not add a connector between the first name and the last name. For example, to search for **Mario de la Rosa**, enter in the Search field **Mario de+la+Rosa**.

Finding Full Text for a Reference

EndNote can attempt to locate full text files on the Web by using data stored in your references. If found, EndNote downloads and attaches the files to the references.

EndNote uses these resources when searching for full text publications:

- PubMed

- Clarivate Links
- DOI
- OpenURL

EndNote will try to use all of these methods to optimize the likelihood of finding full text files associated with your bibliographic records.

The Web of Science™ Core Collection free journal set is checked for all users; subscribers may have increased IP-based access to all resources. In cases where full text PDF files require a subscription, and you or your institution have the appropriate access, EndNote will attempt to authenticate and automatically download the appropriate files. If EndNote cannot find the full text file, it will often be able to attach the URL of the provider's Web page for the article for easier future access.

How to Find and Retrieve Full Text

When you retrieve the full text file of a referenced work, it is saved to the File Attachments field as a relative link (the file itself is stored in the current library's .Data folder). The file is saved in its native format, which in most cases is a PDF file.

When a file is downloaded and attached to a reference, a file attachment icon appears in the File Attachment field for the reference. In the Reference List, a paper clip icon appears in the File Attachments column for that reference.

The Find Full Text command can attempt to find full text documents for up to 250 records at a time; this total includes all full text searches run concurrently in open databases. If you want to find the full text for more than 250 EndNote records, you must run the Find Full Text operation more than once. Select up to 250 references each time.

Note: References must be in an EndNote library to use Find Full Text. You cannot find the full text for references in Online Search groups. Copy your references to your library, then run Find Full Text.

To find and retrieve full text:

1. Select the reference(s) to which you want to add full text.
 - In the Library window, highlight up to 250 references.

For example, you can select a single reference, or hold down the *Command*(⌘) key to select individual references, or use *Edit > Select All* to select an entire set of displayed references.

2. From the *References* menu, select *Find Full Text > Find Full Text*. You can also *Control+click* a reference in the Reference List and select *Find Full Text* from the contextual menu or use the *Search the Web for full text documents for the select references* button on the toolbar.



3. (Optional) If you have entered an OpenURL address and authentication URL in the [Find Full Text Preferences](#), you may be directed to a login web page for your institution's library. Follow the

instructions to log in, such as entering the appropriate User ID and password. Once you are logged in, click *Continue*.

EndNote begins searching for and downloading full text for the selected references. Full text downloading happens in the background, which may affect the performance of other operations.

References appear in groups under a Find Full Text group set. See [Find Full Text Groups](#) for a description of the resulting groups.

Note: Your institution may sever your OpenURL connection after a certain amount of time. Unfortunately, there is no indication when that happens. You will need to go to the *References* menu, select *Find Full Text*, and then *Authenticate* to restore access to the site. Just selecting Find Full Text again during this EndNote session will not restore authentication.

To add access to a library, see [Adding Access to Your Institution's Library](#).

To improve the likelihood of finding full text articles for references, see [Improving the Search for Full Text](#).

If you want to pause or cancel a Find Full Text operation, see [Pausing or Canceling Find Full Text](#).

Note: Some institutions or data providers may have restrictions on downloading large numbers of PDFs using methods such as Find Full Text. If you are unsure of the restrictions for your institution, check with your library.

Find Full Text Groups

During the Find Full Text searching and downloading process, results are constantly updated under a Find Full Text group set.

The results of a Find Full Text search remain for the current session until you close the library. The categories include:

- Searching...
- Found PDF
- Found URL
- Not found

If you run the Find Full Text operation more than once during a single library session, the additional references are added to the references already found in the Find Full Text groups.

Searching...

This group displays the current set of references for which EndNote is attempting to find either the full text file of each referenced work or at least a URL to the referenced work. When the full text search is completed, this group is deleted. Those references to which full text or a URL was added are displayed in a Found PDF group or a Found URL group.

You can cancel the Find Full Text operation at any time by *Control+clicking* on the Searching group, to display a context-sensitive menu, and selecting *Cancel finding full text*. Full text that has been retrieved until that point is already saved in the library.

You can pause the Find Full Text operation at any time by *Control+clicking* on the Searching group, to display a context-sensitive menu, and selecting *Pause finding full text*. Full text that has been retrieved until that point is already saved in the library.

Found PDF

This group displays the set of references for which EndNote inserted the PDF file of the referenced work as an attachment. These references display a paper clip icon in the File Attachments column of the Reference List. If a URL is also found, it is added to the reference, but the reference is not included in the Found URL group.

If the Find Full Text operation recognizes an already attached file as being the same as that found for a selected reference, EndNote will not attach the new file. This means the original PDF, with any personal annotations, will not be replaced by the newly found PDF. If it finds a different file, it will add the new file to the record. For example, if you manually added a PDF of related material, but not the article itself, when the PDF for the article is found, it will be attached to the PDF by Find Full Text.

Found URL

This group displays the set of references for which EndNote inserted a URL to the referenced work, but did not find a full text document to attach.

Not Found

This group displays the set of references for which EndNote could not identify a full text file or a URL. These are only from the set of references searched with the Find Full Text command during this session of the EndNote library.

Pausing or Canceling Find Full Text

- To pause a Find Full Text operation, *Control+click* on the *Searching...* group to display a context-sensitive menu, and select *Pause finding full text*. Full text that has been retrieved until that point is already saved in the library.
- To resume a paused Find Full Text operation, *Control+click* on the *Searching* group and select *Resume finding full text*.
- To stop a Find Full Text operation, *Control+click* on the *Searching* group and select *Cancel finding full text*.

Improving the Search for Full Text

These are suggestions for improving the accuracy of the Find Full Text feature:

- Make sure you are IP authenticated to access any premium full text resources to which you would like EndNote to attempt connecting.

- Ask your librarian whether your institution is set up with Web of Science™™ Core Collection journal links. If so, create a free personalized Web of Science™ Core Collection account and log in. If your institution does not have custom journal links set up for Web of Science Core Collection, ask your librarian to set it up (it is easy and free).
- Create a free EndNote account and log in. Enhanced EndNote online is included for two years with EndNote. Make sure your EndNote account information is complete under EndNote Preferences (*EndNote > Preferences > Sync*).
- Review your EndNote references to confirm that the DOI information is in the DOI field. If it is not, data for multiple records can be moved between fields with the *Change/Move/Copy Fields...* command from the *Library* menu. (See [Move/Copy Fields](#).)
- Enable Web browser cookies.

If you would like Find Full Text to search a specific institutional library, see [Adding Access to Your Institution's Library](#).

Finding Related Online References

If Find Full Text is unable to find and download the PDF you need, you may still be able to access it using the OpenURL Link command. OpenURL Link connects to an OpenURL standard syntax server and uses EndNote's OpenURL preferences along with data in your EndNote record to find related online references.

Highlight a reference in EndNote and use the *URL > OpenURL Link* command on the *References* menu to start your default web browser and display the full text article (if available) plus a list of links to similar articles.

Note: This command has no relation to the URL field found in EndNote references or to the URL > Open Link command on the References menu (which opens the specific URL found in the URL field).

To enable this feature, and find out what preferences are available, see [URLs & Links Preferences](#).

Adding Access to Your Institution's Library

Many libraries are accessible with an OpenURL Path. Subscription libraries also require valid authentication, which usually means a user ID and password. First, you must determine the appropriate OpenURL path. If the library requires authentication, you must also determine the authentication URL. Next, enter these URLs as Find Full Text preferences. Then, you may need to authenticate access by entering your personal user ID and password. These definitions may be helpful to you:

OpenURL Path: This is the OpenURL web address to the online library. It is where EndNote will be directed to search for matching references.

Authentication URL: This is the web address to the page where you enter subscription details to access the online library. It is typically the page where you enter a user name and password. Once you enter the Authentication URL (if required), EndNote can access the full text of the matching references from the online library's OpenURL path.

Proxy Server: Your institution may use a proxy server to control access. For EndNote to automatically handle the proxy server when accessing http-based connections, you will need to configure your proxy settings. You can do this for macOS by opening *Preferences > Network > [your connection method] >*

Advanced > Proxies. Check your institutional library's website, or ask your librarian or network administrator, for information on what the settings should be for your institution's proxy server.

Determining the OpenURL Path

The easiest way to determine your institution's OpenURL address is to ask your librarian, or check the library's website.

SFX link resolvers work best, so look for a URL that begins with `http://sfx.library` or a similar URL that contains `sfx` in the path.

Determining the Authentication URL

In order to use the OpenURL path to find full text articles, your institution likely requires that you log in to access full text. EndNote uses an authentication URL to automatically direct you to your institution's log-in web page.

Again, the easiest way to determine the authentication URL is to work with your librarian or check your library's website. To act as your own detective, though, you can try the suggestion below.

To determine the authentication URL:

1. Enter the OpenURL path as an EndNote preference.
 - a. From the *EndNote* menu, select *Preferences*.
 - b. Select the *Find Full Text* panel.
 - c. Select the *OpenURL* box, and enter the *OpenURL Path* information.
 - d. Click *OK* to save the setting.
2. Then try one of these:
 - a. Follow the URL Path:
 - (1) Highlight a reference—one where you believe the full text article is available from your institution.
 - (2) *Control+click* on the reference and select *References > URL > OpenURL Link*. If you are not automatically directed to the full text article, use your browser to continue to try to get to the full text PDF file.
 - b. Browse to the URL:
 - (1) Use a browser to go to your library's Web site and try to access a subscription resource.
 - (2) Once you reach a page where you are prompted to enter credentials, copy the root of that URL. It may start with `https://login.ezproxy`. Copy everything through `/login?url=%@`.
 - (3) Enter the path as an authentication preference as described next under Setting Full Text Preferences.
 - (4) Test the URL by logging in to your institution's site as described below.

Setting Full Text Preferences

Once you have determined the appropriate OpenURL path and authentication URL for your institution, you must enter them as preferences in EndNote.

To enter Find Full Text preferences:

1. From the *EndNote* menu, select *Preferences*.
2. Select the *Find Full Text* panel.

This panel determines which methods are used when searching for full text articles. By default, PubMed, the Web of Science™ Core Collection Full Text Links, DOI, and OpenURL are selected.

3. To search your institution's library, make sure OpenURL is selected, and enter your institution's OpenURL Path. If authentication is required, enter an Authentication URL (the address of the site's login page).

For more information, see [Find Full Text Preferences](#).

Logging in to Your Library

Once you have entered the appropriate URLs as Find Full Text preferences, you can log into your institution's library. Do this in one of two ways:

Authenticate Only

1. From the *References* menu, select *Find Full Text* and then *Authenticate*.
2. This method allows you to try connecting without starting a Find Full Text search. You should be directed to your institution's login web page. Log in as indicated on the web page. You may be directed to a home page or a list of resources, which means you are logged in. Click *Done*. You are authenticated for this session of EndNote or until your institution times out the connection.
3. You still need to specifically select the *References > Find Full Text > Find Full Text* command to begin searching for full text articles.

Authenticate and Search

1. From the *References* menu, select *Find Full Text*, and then *Find Full Text*.
2. If you have an OpenURL path and authentication URL entered under Find Full Text preferences, EndNote will direct you to your institution's login web page. Log in as indicated on the web page, and then click *Continue* to begin the search for full text articles for the selected references.

You are authenticated for this session of EndNote or until your institution times out the connection.

Note: Your institution may sever your OpenURL connection after a certain amount of idle time. Unfortunately, there is no indication when that happens. You will need to go to the *References* menu, select *Find Full Text* and then *Authenticate* to restore access to the site. Just selecting Find Full Text again during this EndNote session will not restore authentication.

Importing Reference Data into EndNote

Retrieving References Directly from Online Databases

If you have access to a library catalog or bibliographic database that supports the Z39.50 protocol, you can use EndNote as a tool to search and retrieve references directly from that database into EndNote. You do not need to use EndNote's Import command. You can use the Online Search command instead. This is the easiest way to get data into EndNote because it involves no intermediate steps. For more information about the direct retrieval of references, see [Searching Online Databases](#).

Importing Bibliographic Data to EndNote

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

- Import PDF files.
- Import references saved or downloaded from online data services (for example, PubMed or Clarivate).
- Import text files that conform to a particular format (such as the Tab-Delimited or EndNote Import format). These files can be created by you or generated from other databases.
- Import text files exported from other bibliographic software programs.

For all of these options except importing PDF files, you need to get your data files in the right format (see [Getting Data in the Right Format](#)), and then determine the correct [Import Options](#).

Once you have a file in the proper format and you know which import option or filter to use, the import instructions are the same for all of these types of data. See [Importing Text Files](#).

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

Note: When importing records, we recommend that you import into a temporary new library, determine which ones you want to keep, and then move those records into your permanent library.

Before you download references from an online source, consider copyright issues.

Copyright Issues and Fair Use of Downloaded Data

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

Importing PDF Files

If you already have PDF files you have downloaded, or even need a little assistance with finding PDF files for references you have discovered online, EndNote can help.

EndNote can import PDF files, either a single PDF or an entire folder of PDF files. It can even import a folder of PDF files with subfolders and create a group set for the main folder and custom groups for the subfolders.

EndNote Click (formerly Kopernio) can help you find PDF files for articles your institution has access to, quickly and easily.

EndNote Click

EndNote Click is a free browser plugin that finds the best available PDF of an academic article while you browse. Behind the scenes, EndNote Click will search open databases and (where possible) your university's subscriptions to find the best version of the paper for you.

Download and Install the EndNote Click Plugin

The EndNote Click plugin is available for Firefox, Chrome, Microsoft Edge, and Opera (for Opera you must first install the [Chrome Extensions for Opera](#), then download the plugin for Chrome). Download and install the plugin according to the requirements for your browser.

- Download [EndNote Click for Firefox](#).
- Download [EndNote Click for Chrome](#).
- Download [EndNote Click for Microsoft Edge](#).

Create Your EndNote Click Account

The first time you click on the EndNote Click button in your browser, you will be directed to log in or create an account. You must create an account to use EndNote Click.

After creating your account, you will be shown a set of customization options. Select *EndNote* as your citation management software to enable quick integration for downloading PDF files to EndNote or pushing them to EndNote online.

On-Campus Access

EndNote Click automatically detects your library subscriptions when you are on campus based on your IP address. You don't need to do anything.

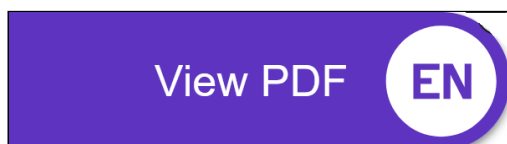
Off-Campus Access

If your library supports off-campus access to subscriptions via EZproxy, OpenAthens, or Shibboleth, EndNote Click can connect through these. You will need to log in to your library the first time you use EndNote Click off-campus.

Note: Neither Clarivate nor EndNote Click receive or store a user's institutional credentials. Credentials are stored in the Web browser, just like any other set of stored credentials, and EndNote Click simply uses them when attempting to retrieve fee-paid journal articles when the user is off-site.

Using EndNote Click to Import PDF Files into EndNote

As you are browsing the web, EndNote Click will be searching for available PDF files matching the articles you are looking at. When it finds one, it will show a button similar to the one below in the lower left corner of the window.



To download the PDF to EndNote:

1. Click the *View PDF* button. The PDF will appear in an online viewer and a panel with options will appear at the left.
2. Select *Export to EndNote Desktop* to send the PDF and its related bibliographic data to your desktop library. (Depending on your browser settings, you may be asked what to do with the downloaded file, to open it or to save it. If asked, open the file with EndNote.) An EndNote reference will appear in the temporary Imported References group, and the PDF will be attached.

Note: The EndNote reference will have the basic information, but there may be additional information available. Try using the *References > Find Reference Updates* command to find missing information and add it to the reference.

Importing PDF Files to Create New References

This feature allows you to convert existing collections of PDF files into EndNote references with minimal typing or copying by extracting the Digital Object Identifier (DOI) from the PDF file. The system matches DOI information with data available from CrossRef (<https://www.crossref.org/>), capturing bibliographic content and creating new EndNote references.

To import a PDF file:

1. Open the library into which you want to import the references.
2. From the *File* menu, select *Import*.
3. Locate and select the PDF file, or folder of PDF files, you want to import.
4. Click the *Options* button to show the Import Options, Duplicates, and Text Translation options.

5. Select *PDF File or Folder* from the *Import Option* list. (If you are importing a folder of PDF files, you could also select the *PDF Folder as a Group Set* option. This would automatically create a new group set based on the contents of the PDF folder you are importing, with groups for any subfolders.)
6. Select an option from the *Duplicates* list:
 - **Import All:** Imports all references, including duplicates.
 - **Discard Duplicates:** Imports all references except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See [Duplicates Preferences](#) if you would like to change the duplicates criteria.

7. Select *No Translation* for the *Text Translation* option.
8. Click *Import* to import the file.

Note: When performing the import function, if there are two DOIs found in the first two pages of a PDF document, EndNote will put at least one DOI in the DOI field for data extraction. The PDF is then attached and the file name is put in the Title field.

When the import is complete, the new record is stored in the temporary Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file metadata, such as title, author, volume, issue, page, year, and DOI. You may be able to find more information for the record using the [Find Reference Updates](#) command.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), click the *All References* group.

Importing References Downloaded from Online Databases

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

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

1. How to download the data in the right output format. See [Getting Data in the Right Format](#).
2. Which import filter to use to import the data into EndNote. See [Choosing the Correct Import Filter](#).

Importing Text Files

EndNote can import structured text files to create new references in your library. This method of importing is extremely flexible. You can create your own structured files for importing, and your own import filters, as well as importing data from hundreds of online databases. This method also has the advantage of letting you remove duplicates of references already in your library during the import process.

Note: See [Importing EndNote Libraries](#) for specific instructions about merging two EndNote libraries by importing one library into another. For another method of merging EndNote libraries, see [Merging Libraries through Sync](#).

To import a text file into an EndNote library:

1. Open the library into which you want to import the references.
2. From the *File* menu, select *Import*.
3. Locate the file you want to import. All files, except for EndNote libraries and PDFs, must be plain text files. (The exception to this "plain text" rule is EndNote-generated XML files. See [Exporting to EndNote XML](#) for information on creating EndNote XML files.) Select the file and click *Open*.
4. Click the Options button to show the Import Options, Duplicates, and Text Translation options.
5. Select the appropriate filter from the *Import Options* list. Filters are the customizable files EndNote uses to import text files. See [Import Options](#) for more information on available filters. See [Creating a New Filter](#) for information on creating your own custom filters.
6. Select an option from the *Duplicates* list:
 - **Import All:** Imports all references, including duplicates.
 - **Discard Duplicates:** Imports all references except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See [Duplicates Preferences](#) if you would like to change the duplicates criteria.

7. Select a *Text Translation* option.

This option allows you to specify the text character encoding of the file you import, so that extended characters transfer correctly. You should verify the setting with your database provider. Some U.S. databases that contain extended characters require ANSI-Latin1 or UTF8. MARC format files may require ANSEL translation. You might be able to use No Translation for text files that do not contain any extended characters.

8. Click *Import* to import the file.

Note: The time required to import a file is proportionate to the size of the library and the number of references being imported. Refer to the progress indicator to determine when EndNote has completed the task.

When the import is complete, the newly imported references are displayed in a temporary Imported References group. This is a perfect time to add a keyword to each imported reference with the Change Field command or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), click on the All References group.

Import Options

EndNote's import options include:

- **PDF File or Folder:** Use to import references from a PDF file that has been downloaded to your hard drive. This option allows you to convert existing collections of PDF files into EndNote records with minimal typing or copying by extracting Digital Object identifiers (DOI) from PDF files. The system matches the content against the existing API services by capturing bibliographic content and creating new EndNote records. See [Importing PDF Files to Create New References](#) for specific instructions.
- **EndNote Library:** Used to import references from one EndNote library into another. If the library you are importing from is closed or locked, all references are imported. If the library you are importing from is open, with read/write access, the showing references are imported. See [Importing EndNote Libraries](#).
- **EndNote Import:** Used to import text files that have been downloaded from online databases or exported from EndNote using the EndNote format. See [Creating a Tagged EndNote Import File](#) for more information.
- **Refer/BibIX:** Used to import text files exported from the Refer or BibIX programs. The EndNote import format is based on the Refer/BibIX format.
- **Tab-Delimited:** Used to import text files in which the fields within a single reference are separated by tabs. For details see [Creating a Tab-Delimited Format](#).
- **Reference Manager (RIS):** Used to import text files exported from Reference Manager or any other source that uses the RIS format.
- **ISI-CE:** Used to import text files downloaded from Web of Science™ Core Collection and other Clarivate sources.

Note: See [Searching the Web of Science™ Platform](#) for information about directly retrieving Web of Science™ Core Collection records.

- **Multi-Filter (Special):** A special option for importing files that include references from multiple sources (see [Identifiers](#)).
- **EndNote Generated XML:** Used to import EndNote's proprietary XML format.
- **Other Filters:** EndNote includes hundreds of import filters configured to import data from a variety of online databases. Most likely, the first time you import a file, you will not see the import filter that you need in this list. Select *Other Filters* from the *Import Options* list to find the filter that matches the

source of the data you want to import. Import filters that you have recently used or chosen as your favorites will be listed in the Import Options list in the Import dialog.

See [Choosing the Correct Import Filter](#) for information about how to choose the filters to appear in the Import Options list.

- **Use Connection File:** EndNote provides the option of using a connection file as an import filter. This is useful if you need to import the Connection.log file generated by using EndNote's Online Search command to search an online database. The Connection.log file should include all of the references from your previous session. See [The Connection Log File](#) for more information.

Note: See [Introduction to Filters](#) for information about creating and modifying import filters. All of the import filters (except Tab Delimited and EndNote Generated XML) can be modified.

Choosing the Correct Import Filter

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

To see a complete list of filters installed for your copy of EndNote, select *Import Filters* from the *Tools* menu, and select *Open Filter Manager*. You may see many filters with the same name, but from different data providers. Be sure to select the filter that matches both the database and the data provider you are working with or your data will not import correctly.

Use the *Find by Category* list in the Filter Manager to find all filters for a particular information provider. To search by name, use the *Quick Search* on the Filter Manager toolbar. You can click the *More Info* button to display additional information about a selected filter. The Comments section may provide information about how to appropriately download information from the source database.

When you have located the filters you want to use, mark them as your favorites by clicking the checkbox in the Favorites column to the left of the filter name. You can also mark all of the filters currently showing after using the Find option by clicking Mark All. Once a filter is marked as a favorite, it will appear in the Import Options list in the import dialog.

Note: There are many more databases and services that provide data than there are filters included with EndNote, so in some cases you may need to write your own filter or modify one of ours. See [Introduction to Filters](#) for information about creating and modifying filters. You can also check our Web site periodically for new and updated filters ([Download EndNote Import Filters](#)).

Comparing a Filter to a Data File

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

The tags and templates in the filter should match the data in the file you want to import. See [The Basic Components of a Filter](#) for information about editing filters.

Changing the Filter Folder

By default, all filters provided with EndNote are stored in the Filters folder found in the EndNote program folder. These are the filters displayed when you open the Filter Manager. EndNote also displays filters found in your personal Filters folder.

When you create a new filter, it is saved to your personal Filters folder. When you attempt to save changes to an existing filter, you must use *Save As* to save a copy to your personal Filters folder. For more information about your personal folders, and information about how to change the location of your personal folders, see [Folder Locations Preferences](#).

Importing References from PubMed

To Save References to a Text File and Import Them

Follow the steps below to download your search results from PubMed as a text file and to import them into your EndNote library.

1. Go to the PubMed Web site in your Web browser at <https://pubmed.ncbi.nlm.nih.gov/>.
2. In the Search field, enter your search criteria. (To create an advanced search, click the *Advanced* button.) To execute your search, click the *Search* button.
3. Select the needed results and then click the *Save* button.
4. Select *PubMed* from the *Format* menu.
5. Click the *Create File* button. This will bring up a dialog box allowing you to save your selected references as a text file.
6. Save the file to your computer. Check your browser's options for where files are saved. You may have choices that will allow you to customize the location.
7. Open the library into which you want to import the references.
8. From the *File* menu, select *Import*.
9. Locate the downloaded PubMed file you want to import. Select the file.
10. Click the *Options* button to show the Import Options, Duplicates, and Text Translation options.
11. Select *Other Filters...* from the *Import Options* list, then select the *PubMed (NLM)* filter from the list. (After using the PubMed filter once, it will automatically be added to your favorites list.)
12. Select an option from the *Duplicates* list:
 - **Import All:** Imports all references, including duplicates.
 - **Discard Duplicates:** Imports all references except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See [Duplicates Preferences](#) if you would like to change the duplicates criteria.

13. Select *No Translation* for the *Text Translation* option.
14. Click *Import* to import the file. The references will appear in the Imported References temporary group.

To Import References with Direct Export

1. Open the library into which you want to import the references.
2. Go to the PubMed Web site in your Web browser at <https://pubmed.ncbi.nlm.nih.gov/>.
3. In the Search field, enter your search criteria. (To create an advanced search, click the *Advanced* button.) To execute your search, click the *Search* button.
4. Select the needed results and then click the *Send To* button.
5. Select *Citation Manager* from the list.
6. Click the *Create File* button. This will save the references in a format that works with EndNote's Direct Export feature.
7. The references should appear in the temporary Imported References group of your library. If the references do not appear in your library, go to your browser's download location and double-click the file ending with the .nbib extension. The .nbib extension indicates the PubMed file format compatible with Direct Export.

Note: On the macOS, Direct Export works best with Firefox. See [Enabling Direct Export](#) if PubMed files are not automatically added to your library with these Direct Export instructions.

Creating Structured Text Files that EndNote Can Import

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

- Try searching for the references in another online database that might provide an importable format.
- Rearrange the reference data using your word processor so that it is in a format that EndNote can import (one of the two options listed at the end of this topic).
- Copy and paste each piece of data from its source into the proper fields in EndNote, as described in [Copying and Pasting References from a Document into EndNote](#).
- Enter the data manually by typing it into EndNote as described in [Entering References](#).

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

However, if you have many references to import, it might save time to first manipulate the data in a word processor as best you can, and then import the references into EndNote and clean up the references there. Even if the imported data does not come through perfectly, it can be rearranged with EndNote's various commands, drag-and-drop, and copy and paste, or it might be possible to update the data using [Find Reference Updates](#) if it is fairly accurate.

These are two different formats that you can put your data into that will allow it to be imported into EndNote:

- A tab-delimited format. This is best if your data is in a database or spreadsheet that can export to a tab-delimited file. See [Creating a Tab-Delimited Format](#).
- A tagged format. This is best for when your data is in a word processor document and looks like a bibliography. See [Creating a Tagged EndNote Import File](#).

Note: To allow for the appropriate import of Unicode characters, save TextEdit files as Western (Mac OS Roman).

Getting Data in the Right Format

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

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

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

Note: If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately. See [A Comment About Difficult Data Files](#).

If references are sent to you in the body of an email as tagged text, save the email to a plain text file.

Creating a Tagged EndNote Import File

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


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

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

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

Author Names in the EndNote Import Format

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

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

- Author names can appear either as:

```
Geoffrey Chaucer
or
Chaucer, Geoffrey
```

- Either initials or full names are accepted.

Defining Reference Types

Set the reference type for each of the imported references by using %0 (zero) and the reference type name.

The default reference types are listed below. If you have modified a reference type, your EndNote data files should use the new name instead.

%0 Aggregated Database	%0 Hearing
%0 Ancient Text	%0 Interview
%0 Artwork	%0 Journal Article
%0 Audiovisual Material	%0 Legal Rule or Regulation
%0 Bill	%0 Magazine Article
%0 Blog	%0 Manuscript
%0 Book	%0 Map
%0 Book Section	%0 Multimedia Application
%0 Case	%0 Music
%0 Catalog	%0 Newspaper Article
%0 Chart or Table	%0 Online Database
%0 Classical Work	%0 Online Multimedia
%0 Computer Program	%0 Pamphlet
%0 Conference Paper	%0 Patent
%0 Conference Proceeding	%0 Personal Communication
%0 Dataset	%0 Podcast
%0 Dictionary	%0 Press Release
%0 Discussion Forum	%0 Report
%0 Edited Book	%0 Serial
%0 Electronic Article	%0 Social Media
%0 Electronic Book	%0 Standard
%0 Electronic Book Section	%0 Statute
%0 Encyclopedia	%0 Television Episode
%0 Equation	%0 Thesis
%0 Figure	%0 Unpublished Work
%0 Film or Broadcast	%0 Unused 1
%0 Generic	%0 Unused 2
%0 Government Document	%0 Unused 3
%0 Grant	%0 Web Page

EndNote Tags and Corresponding Fields

The table below shows the tags recognized in the EndNote Import format and the corresponding EndNote field into which each tagged item is imported for the Generic reference type. For other reference types, you can find the fields associated with the tags by examining the EndNote Import filter template. See [Templates](#)

for [Different Reference Types in Import Filters and Connection Files](#) for information on viewing or editing filter templates.

Note: The Figure field is not included for importing.

Tag	EndNote Generic Field Name
%A	Author
%B	Secondary Title (of a Book or Conference Name)
%C	Place Published
%D	Year
%E	Editor/Secondary Author
%F	Label
%G	Language
%H	Translated Author
%I	Publisher
%J	Journal Name
%K	Keywords
%L	Call Number
%M	Accession Number
%N	Number (Issue)
%O	Alternate Title
%P	Pages
%Q	Translated Title
%R	DOI
%S	Tertiary Title
%T	Title
%U	URL
%V	Volume
%W	Database Provider
%X	Abstract
%Y	Tertiary Author/Translator
%Z	Notes
%0	Reference Type
EndNote Tags Table	

Tag	Generic Field Name (Continued)
%1	Custom 1
%2	Custom 2
%3	Custom 3
%4	Custom 4
%6	Number of Volumes
%7	Edition
%8	Date
%9	Type of Work
%?	Subsidiary Author
%@	ISBN/ISSN
%!	Short Title
%#	Custom 5
%%\$	Custom 6
%]	Custom 7
%&	Section
% (Original Publication
%)	Reprint Edition
%*	Reviewed Item
%+	Author Address
%f	Figure
%^	Caption
%>	File Attachments
%<	Research Notes
%[Access Date
%=	Custom 8
%~	Name of Database
EndNote Tags Table (Continued)	

Creating a Custom "Tagged" Format

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

This topic outlines the basic steps to convert a bibliography into a tagged text file.

Step 1. Save a Copy of Your File

- Open your bibliography in a word processor and save a copy of the file with a new name (this is your backup).
- Remove everything but the reference data from the file.

Step 2. Add Descriptive Field Tags

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

Suppose your references look like this:

Jones, M. (2020) "Quail Intelligence" Avian Science. Vol. 3 no. 2.

Billoski, K. (2012) "Parakeet Smarts" Avian Digest. Vol. 23 no.5.

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

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

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

XX- Jones, M. (2020) "Quail Intelligence" Avian Science. Vol. 3, no. 2.

XX- Billoski, K. (2012) "Parakeet Smarts" Avian Digest. Vol. 23, no.5.

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

Step 3: Create a Filter for Non-Delimited Data

Using EndNote, create a new filter to read your data file (see [Creating a New Filter](#)). The template of a filter for the above data file would look like this example.

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

Each field listed for the Tag must appear in each of your references. If a reference field is missing, all of the data will appear in a previous field. For instance, if you were using the above reference format and a Volume field was not present, the filter would place the Issue data in the Journal field.

To resolve this issue, each iteration of a reference must be entered into the filter according to a hierarchy of formats (longest is always on top).

XX- Author (Year) "Title" Journal. |Vol. Volume no. Issue|.

XX- Author (Year) "Title" Journal. |Vol. Volume|.

XX- Author (Year) "Title" Journal. |`DOI:`DOI|.

To ensure that each source line is imported into your library during import even if it does not match one of the templates you set up, you can turn on the *Import Source Into* option from the *Source Parsing* option in the filter. Just identify your source tag, then select *import source into* and select a field.

Step 4: Clean Up the Data

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

If you cannot get the filter to import everything exactly as you want, you may have to do some manual editing to correct this, either before or after importing the data into EndNote. You might find it useful to import into a test library, then use the [Change Fields Move/Copy Fields](#), and [Find and Replace](#) options to clean up the data. Then, transfer these references to your real library with drag-and-drop, copy and paste, or the Import command.

Creating a Tab-Delimited Format

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

Preparing the Data Before Exporting

Author Names

Before you export data from a database or spreadsheet into a text file, we recommend that you separate multiple author names with a semicolon (;) or two forward slashes (/). For example:

McCartney, P./Harrison, G./Lennon, J.

If you cannot easily do this in your database, you can do it after exporting or manually edit the data after it is in EndNote.

Reference Types

If possible, you should make sure that each reference in your tab-delimited file includes a field indicating the reference type. Use EndNote's Reference Type names so that EndNote is able to recognize the formats. If you have only one type of reference (such as Journal Articles), it is not necessary to do this—the import settings can indicate that all references should be imported as the same type.

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

Paragraph/Line Breaks within Records

Each reference must end with a paragraph mark. There should be no paragraph marks or line breaks within a reference. For example, spreadsheet programs such as Excel will allow you to enter line breaks within a

cell. When saved as a tab-delimited file, these line breaks may be interpreted as the end of a record, breaking the reference into separate EndNote references.

Preparing the Data File for Import

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

First Line: The Default Reference Type

If all the references in the file are for the same reference type, the first line of the file must define the default reference type for the entire file. The format for the first line is an asterisk (*) immediately followed by a valid EndNote reference type, followed by a paragraph break (shown below as <¶>). For example:

```
*Journal Article<¶>
```

The second line should contain the field names used for that reference type. A file of journal articles would contain the fields used in the Journal Article reference type. It might look like this:

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

Tab-Delimited File Example for a Single Standard EndNote Reference Type as the Default

First Line: A Custom Reference Type

Just like when importing a tab-delimited file for a standard reference type, the field names for a custom reference type must match the reference type, so you will need to know the field names you used in your custom reference type. To find them, follow these instructions.

1. Select *Preferences* from the *EndNote* menu.
2. Select *Reference Types*.
3. Click the *Modify Reference Types* button. Find your custom reference type and make a note all the fields used in it.

Note: You can find templates of all the reference types using the [List of Reference Types](#). These templates can be printed out to help you record changes you make to the reference types.

A file for which you are using a custom reference type as the default might look like this:

```
*My Reference Type<¶>
[F1]          <tab> [F2]    <tab> [F3]      <tab> [F4]          <tab> [F5]  <¶>
Jones, J//Shoe, S <tab> 1994  <tab> Easy Food  <tab> J. of Eating  <tab> 1        <¶>
Woo, W//Lee, L   <tab> 1995  <tab> Rain Hats  <tab> J. of Clothing <tab> 2        <¶>
Carlos, C//Luis, L <tab> 1991  <tab> Cell Phone <tab> J. of Phones <tab> 3        <¶>
```

Tab-Delimited File Example for a Single Custom EndNote Reference Type as the Default

Note: Ensure that the field names that appear in the second line match those assigned to your custom reference type. In the example above "My Reference Type" would be the name of the custom reference type, and "F1," "F2," etc. would be the name of the fields used in the custom reference type. Tabs are indicated by "<tab>" in the examples above.

First Line: Using Multiple Reference Types

If you could not make separate files based on reference type, you can specify each reference type within one file. In this case, your first line must be an asterisk (*), followed by "Generic" and a paragraph mark. then the list of field names found in the Generic reference type, starting with a field for "Reference Type." Use the Reference Type column to define the actual EndNote reference type names. For example:

*Generic<¶>

Reference Type	<tab> Author	<tab> Year	<tab> Title	<tab> Publisher	<¶>
Book	<tab> Jones, J	<tab> 1994	<tab> Easy Food	<tab> Avalon	<¶>
Book Section	<tab> Woo, W//Lee, L	<tab> 1995	<tab> Rain Hats	<tab> Nourse	<¶>
Web Page	<tab> Carlos, C	<tab> 2020	<tab> EndNote	<tab> Clarivate	<¶>

Tab-Delimited File Example with No Default Reference Type

Note: Ensure that the generic field names for the reference type (Modify Reference Types dialog) appear in line 2. In the examples above, note that in the first example for the standard Journal Article reference type there is a "Journal" field name, but the Generic name for that field would be "Secondary Title." When importing multiple reference types, "Secondary Title" would appear in the field names, not "Journal."

Second Line: EndNote Field Names

As stated above, the second line of the tab-delimited file must contain the actual field names used by EndNote. The order of the field names does not matter as long as they correspond to the order of the data in the rows beneath them and correspond to the names of the default reference type (or to the generic names when importing multiple reference types).

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

*Journal Article<¶>

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

EndNote Field Names Table for Journal Article Fields

Note: The field names must be separated by tabs and a paragraph break must follow the last field name.

Additional Considerations

- ANSI, ASCII, or UTF-8 formatted plain text files can be imported. This means that no font styles or text styles can be preserved during import.
- All field names and reference type names in the file must be identical to those in EndNote. See the [List of Reference Types](#) for a listing of all of the reference types. Use the links in the list to access templates showing the field names.

- Multiple author names should be separated by semicolons (;) or by two forward slashes (/).
- Fields cannot contain tabs or paragraph marks. Let the lines of data "wrap" to the next line.
- Leading and trailing spaces are removed during importing.
- No uppercase or lowercase conversion is made during importing.
- A reserved field name called "Unused" may be used for data that you do not want imported into EndNote.

Importing References from Other Bibliographic Software Programs

Many programs include an option to export data in the RIS format, which can easily be imported into EndNote. See [Importing Text Files](#) for instructions on importing a text file in the RIS format.

If a program does not include an option to export to the RIS format, information on converting from many programs is available at the [EndNote Support](#) website.

Copying and Pasting References from a Document into EndNote

If you have a bibliography that is too inconsistent or difficult to parse using your word processor (as suggested in [Creating a Custom "Tagged" Format](#)), you can use the Copy and Paste commands as an alternative method for getting your data into EndNote and still avoid a lot of retyping.

To transfer the references into EndNote:

1. Open the list of references in a word processor.
2. Select a reference and copy it using the *Copy* (⌘+C) command.
3. Open your EndNote library, and select *New Reference* (⌘+N) from the *References* menu to create a new reference.
4. Put the cursor in the *Title* field of the new reference and select *Paste* (⌘+V) from the *Edit* menu.

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

Cite While You Write in Microsoft Word

Overview of the Cite While You Write Process in Word

Use Cite While You Write™ (CWYW) with Microsoft Word 2016, 2019, or Office 365 (locally installed desktop version only) to easily and quickly cite references, figures, and tables, and create a paper with properly formatted citations, a bibliography, figures, and tables.

Cite While You Write gives you access to EndNote references and formatting commands through an EndNote tab in Word.

You can start by [inserting a citation](#) into a document. A bibliography formatted according to any one of thousands of styles is created. [Instant formatting](#) technology can automatically update your citations and bibliography as you write. You can even [insert figures and tables](#) found in EndNote references.

A [Traveling Library](#) allows you to reformat references in your Word document even when your EndNote library is not available. If you are collaborating with other authors, you can rely on the Traveling Library to supply reference information.

You can use your EndNote desktop application or EndNote online to Cite While You Write. See [Using Cite While You Write with EndNote Online](#).

How to Cite While You Write with Microsoft Word

The basic steps required to cite a reference and generate a bibliography with Microsoft Word are summarized below.

To Cite While You Write:

1. Open the EndNote library or libraries that contain the references you wish to cite.
2. Start Microsoft Word and open the paper you are writing.
3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.
4. On the *EndNote 20* tab, click the *Insert Citation* button. A Find & Insert My References dialog appears. (If you click on the drop-down list arrow at the bottom of this button, you will be given choices beyond finding and inserting citations.)
5. In the text box at the top, enter identifying text for EndNote to locate the appropriate reference. This could be an author's last name, a year, a keyword, or any other combination of terms found in the reference.
6. Click *Find* and EndNote compares the identifying text to your EndNote references and then lists the matching reference(s).

7. Identify and highlight the appropriate reference(s).
8. Use the *Insert* button drop-down to display a menu, and select from:
 - **Insert:** To insert the citation and format it as defined by the currently selected output style. (This would be the same result as simply clicking on the *Insert* button.)
 - **Display as: Author (Year):** Select this menu option to display both the author name and the year in the highlighted citation, but with the author name appearing to be outside the citation marker.
 - **Exclude Author:** Select this to omit the author name from the formatted citation.
 - **Exclude Year:** Select this to omit the date from the formatted citation.
 - **Exclude Author & Year:** Select this to omit both the author name and the year from an Author-Date formatted citation. This is usually used when you want only page numbers to appear in the citation.
 - **Show Only in Bibliography:** Select this option to display the selected citation only in the bibliography, not in the body of the paper.
9. Go back to step 3 to insert the next citation, and continue citing references this way.

Note: When Instant Formatting is turned on, each time you insert a citation it is formatted and a bibliography is updated at the end of your document. When you are done inserting citations, your document is done! Instant Formatting is turned on by default. See [Instant Formatting in Microsoft Word](#) for more information.

10. If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, click the *Update Citations and Bibliography* button on the *EndNote 20* tab.
11. If you want your paper formatted with a different style, select the style you want from the drop-down *Style* menu. If you do not see the style you want on the list of favorites, click *Select another style* to see the list of all styles installed on your computer. See [Installing Additional Output Styles](#) for information on installing more styles.

Your paper is ready for publication!

If you want to insert figure or table citations, see [Inserting and Formatting Figures and Tables](#).

Word Processor Compatibility

To [Cite While You Write](#) in Microsoft Word, you must use Microsoft Word 2016, 2019, or Office 365 (locally installed desktop version only).

Install the latest service pack from Microsoft. Cite While You Write can convert and use Word documents that used earlier versions of Cite While You Write.

Word displays Cite While You Write commands on an EndNote 20 tab.

If you use Apple Pages as your word processor, see [How to Cite While You Write in Apple Pages](#).

If you use a word processor other than those listed above, or an older version of these word processors, save your document as an RTF file and use [Format Paper](#).

To create a standalone bibliography that is not based on the citations in a paper, see [Introduction to Independent Bibliographies](#).

Note: Only one word processor at a time should be open when inserting citations and formatting documents.

Setting Cite While You Write Preferences in Microsoft Word

You can access and set Cite While You Write preferences from either EndNote or Word. The same dialog appears, and changes are saved in the same place:

- From EndNote's *Tools* menu, go to the *Cite While You Write (CWYW)* submenu and select *CWYW Preferences*.
- In Word, on the *EndNote 20* tab, select *Preferences*.

Cite While You Write preferences include general preferences (see [General Preferences in Microsoft Word](#)), the ability to assign keyboard shortcuts to menu commands (see [Keyboard Preferences in Microsoft Word](#)), and the ability to control the placement of figures (see [Figures and Tables Preferences in Microsoft Word](#)).

For information about other EndNote preferences that directly affect Cite While You Write, see [Related EndNote Preferences](#).

The Application Tab in the Cite While You Write Preferences Dialog

Use the Application tab to indicate which version of EndNote to use when you use Cite While You Write.

1. On the *EndNote* tab, select *Preferences*.
2. Select the *Application* tab.
3. From the drop-down *Application* menu, select which version of EndNote you want to use with Cite While You Write.
 - EndNote is your desktop version of the EndNote bibliographic application. Select this option if you want to work with your desktop libraries. This option will cause a tab called EndNote 20 to appear.
 - EndNote online is the online version of EndNote. Select this option if you want to use references from a group shared with you. See [Sharing Groups](#). This option will cause a tab called EndNote to appear.

OR

Select *Search: Shared Groups* in the *Find & Insert My References* dialog to temporarily search

shared groups without changing the tab. Change it back to *Search: Libraries* to search your desktop libraries again.

Select *EndNote online* from the *Application* menu if you want to make any changes to your EndNote online accounts, such as changes to your e-mail address or your password.

1. Select *EndNote online* from the *Application* menu.
2. Enter or confirm the EndNote online URL: <https://www.my.endnote.com:80/>.
3. Enter your e-mail address and password. Your e-mail address and password are remembered in Sync Preferences.
4. Mark the *Remember my address and password* checkbox if you want EndNote to remember these changes. If you are working on a shared computer, leave this box unmarked so the next person using that computer does not have access to your account.

Finding, Editing, and Deleting References in a Library

Finding Cited References in a Library

You can quickly jump from a bibliographic in-text citation (not a figure citation) to the corresponding EndNote reference.

To find an EndNote reference:

1. Make sure both your Word document and your EndNote library are open.
2. Highlight the citation(s) in your Word document.
3. On the *EndNote* tab, select *Edit Library Reference(s)*.

EndNote goes to the corresponding reference for editing.

Editing a Reference in the Library

You may insert a citation in a Word document, and then later edit the corresponding reference in EndNote. Are those changes reflected in your Word document?

Your citations and bibliography will reflect the edits the *next* time the citations in the paper are updated with the EndNote library open. Open your document, open your EndNote library, and click *Update Citations and Bibliography* on the *EndNote 20* tab.

EndNote will not be able to make the update if the library is not open during formatting. Instead, it will take the original reference information from Word's Traveling Library (see [The Traveling Library](#)).

Note: The author's last name and the publication year are both used to identify a reference, so changes to these items in an EndNote reference are not reflected in the in-text citation. Cite While You Write will no longer identify a match between the citation and the reference if the citation is unformatted. If the citation is formatted, it will use reference information from Word's field codes to update the citation and bibliography ([The Traveling Library](#)).

If you make changes to a figure in an EndNote reference, you must manually replace the figure in your Word document.

Deleting a Reference from the Library

The first time a citation is formatted, EndNote uses information from the unformatted citation to look in the open library and find the corresponding reference. If you later reformat, EndNote again looks in the library for that reference. If the reference has been deleted from the library, EndNote takes the reference information from hidden [Field Codes in Microsoft Word](#) ([The Traveling Library](#)).

So, if you deleted a cited reference from the library, the required information is still available in the hidden field codes surrounding each formatted citation—even though the reference is no longer in the library.

However, an unformatted citation is a temporary placeholder. If a citation is unformatted, and you have deleted the corresponding reference from the EndNote library, EndNote will not be able to find the reference information for formatting.

If you add the reference to the library again, it will be assigned a different record number. You would need to reinsert the citation in Word.

Record Numbers

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in temporary citations to ensure that the correct reference is used when the paper is formatted:

{Argus, 1991 #11}

The record number for a reference is also visible in the title bar of the Reference panel.

Note that:

- EndNote automatically assigns a record number sequentially to each reference as it is added to a library.
- If the same reference appears in two different libraries, the record numbers will most likely be different.
- Record numbers are never reused or reassigned within a library. When you delete a reference, the corresponding record number is never used again in that library.
- You cannot modify or reassign record numbers.
- We recommend that you not rely on EndNote's record numbers as a means of filing or numbering your office reprints, because you have no control over this number. Instead, enter your own unique number into the Label field, and use that number for your reprints.

If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find a match to your unformatted citation when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Cite While You Write Commands and Field Codes

Cite While You Write Commands

When Cite While You Write is installed, several EndNote commands appear on an EndNote 20 tab in Word.

When you select an EndNote command from the EndNote 20 tab, the EndNote program starts (if not already running) and a Cite While You Write submenu becomes active on EndNote's Tools menu, displaying some of the same EndNote commands available in Word.

Note: When you use Cite While You Write Preferences to choose EndNote online as the active Cite While You Write Application in Word, the tab changes. The EndNote online tab contains a smaller set of CWYW commands.

Below are brief descriptions of the Cite While You Write commands found on the EndNote tab in Word.

- **Insert Citation > Insert Citation:** Search for EndNote references to select and insert as citations in your Word document. See [Finding and Inserting Citations in Microsoft Word](#).
- **Insert Citation > Insert Selected Citation(s):** Insert a citation for each reference currently selected in the open EndNote library. You can insert up to 250 references in a citation. See [Inserting Selected Citations in Microsoft Word](#).
- **Insert Citation > Insert Note:** Add custom text citations to your Word document. See [Including Notes in the List of References in Microsoft Word](#).
- **Insert Citation > Insert Figure:** Search for an EndNote reference that contains a figure, and insert a figure or table in your Word document. The figure or table is numbered, and automatically added to the document. Figures inserted in the document will not appear in the bibliography. See [Finding and Inserting Figures and Tables](#).
- **Go To EndNote:** Bring EndNote to the front of your screen. This command launches EndNote if it is not already running.
- **Edit & Manage Citation(s):** Edit existing individual or multiple citations. You can omit author and/or year from citations, add prefix or suffix text (such as page numbers) to citations, or delete formatted citations from the paper. See [Editing Citations in Microsoft Word](#).
- **Edit Library Reference(s):** Select citations in your Word document, then select this command to directly edit the corresponding references in EndNote. See [Editing a Reference in the Library](#).
- **Style:** Select an output style from the list to format (or reformat) your paper according to the rules of the selected style. The styles listed are marked as "favorites" in the EndNote style manager.

- **Update Citations and Bibliography:** Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. This command also updates the formatted figures and tables found within the body of the document or in a list at the end of the document.
- **Configure Bibliography:** Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. See [Configuring the Bibliography in Microsoft Word](#).

Note: By default, Instant Formatting is turned on, so your citations and bibliography are automatically formatted as you work.

- **Categorize References:** Create a bibliography organized by categories you create. See [Reference Type Categories in Output Styles](#).
- **Instant Formatting:** Turn instant formatting on or off for the document, set how frequently EndNote scans for temporary citations, and whether EndNote checks for citation changes.
- **Tools > Convert to Unformatted Citations:** Unformat a selected citation before editing it or unformat the whole document. This removes style formatting for the selected citations, and leaves temporary citations which usually consist of the author's last name, the year, and the record number surrounded by delimiters. See [Unformatting Citations](#).
- **Tools > Convert to Plain Text:** Save a copy of your document without formatted Cite While You Write field codes. Formatted citations and the bibliography are saved as text. See [Field Codes in Microsoft Word](#) and [Removing Field Codes](#).
- **Export Traveling Library:** Create an EndNote library from the references used in a paper. See [Exporting Word's Traveling Library to an EndNote Library](#).
- **Manuscript Matcher:** Use Manuscript Matcher for an analysis of the journals most likely to publish a paper like yours. See [Manuscript Matcher](#).
- **Cite While You Write Preferences:** Change general Cite While You Write preferences, change the EndNote keyboard shortcuts available in Word, change figure and table settings, or switch to EndNote online Cite While You Write. See [Setting Cite While You Write Preferences in Microsoft Word](#).
- **Help:** Display help about Cite While You Write features.

Note: Several Cite While You Write commands also appear on the Tools menu in EndNote. To use these commands from within EndNote, you must use at least one Cite While You Write command from within Word during the current session.

Field Codes in Microsoft Word

Cite While You Write places field codes around and inside your formatted citations in Word. These hidden codes allow EndNote to format, unformat, and reformat citations within Word.

For example, this formatted citation:

(Pepperberg, 2009, p. 32)

contains these field codes:

```
{ ADDIN EN.CITE
<EndNote><Cite><Author>Pepperberg</Author><Year>2009</Year><RecNum>2299</RecNum><Pages>32</Pages><DisplayText>(Pepperberg, 2009, p. 32)</DisplayText><record><rec-number>2299</rec-number><foreign-keys><key app="EN" db-id="50wxdpzd9vd5r7e9t5b595djrfpttrw9avp" timestamp="1566392612" guid="c7917588-b354-4ba4-8cdf-3fd39f717fcd">2299</key></foreign-keys><ref-type name="Electronic Book">44</ref-type><contributors><authors><author>Pepperberg, Irene M.</author></authors></contributors><titles><title>Alex & me: How a scientist and a parrot discovered a hidden world of animal intelligence — and formed a deep bond in the process</title></titles><num-vols>Kindle</num-vols><edition>Kindle</edition><keywords><keyword>African gray parrot Behavior.</keyword><keyword>Cognition in animals.</keyword><keyword>Animal communication.</keyword><keyword>Human-animal relationships.</keyword></keywords><dates><year>2009</year><pub-dates><date>March 15, 2013</date></pub-dates></dates><pub-location>New York, NY</pub-location><publisher>Scribe Publications</publisher><isbn>ASIN: B00APOWOXC</isbn><urls><related-urls><url>http://www.amazon.com/Alex-scientist-discovered-intelligence-ebook/dp/B00APOWOXC/ref=sr_1_2?s=digital-text&ie=UTF8&qid=1363823581&sr=1-2&keywords=alex+%26+me</url></related-urls></urls></record></Cite></EndNote>
```

Note: We recommend that you not view field codes in Word. If you choose to view field codes, do not modify them. Always keep backups of your papers! To automatically turn off the display of field codes when you open a Word document, see [General Preferences in Microsoft Word](#).

Field codes for formatted citations include a Traveling Library of the EndNote references cited. The reference data saved with each citation includes all fields except Notes, Research Notes, Abstract, Figure, and Caption. This allows you to use the document on a computer that does not contain a copy of your EndNote library. See [The Traveling Library](#).

EndNote's Cite While You Write field codes are supported by all the versions of Word compatible with EndNote 20. See [Word Processor Compatibility](#) for information on if your version of Word is supported.

Once you start using Cite While You Write, you must take precautions before opening those files in other word processors or another version of Word. If a formatted document is opened and saved with an incompatible word processor, the formatted EndNote citations and bibliography lose their field codes. When this happens, EndNote cannot reformat the document.

Before you open a paper in a different word processor, or give a publisher an electronic copy of your final formatted document, see [Sharing Your Word Documents](#).

Installing Cite While You Write Support in Word

EndNote's installation program installs Cite While You Write support for Microsoft Word 2016, 2019, or Office 365 (locally installed desktop version only).

If you install Word after installing EndNote, you must use the Customizer to install Cite While You Write.

In Word, EndNote commands appear on an EndNote 20 tab.

Citing Sources as You Write

Forms of Citations in Microsoft Word

A "citation" is the brief bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. A citation typically consists of a bibliography number or the author and year in parentheses:

... of the species at hand¹.
... of the species at hand (Argus, 1991).

Citations can appear as either unformatted or formatted in your Word document.

Unformatted (Temporary) Citations

An unformatted citation is a temporary placeholder, and does not reflect final output. It may appear after you insert selected citations.

Note: If you have Instant Formatting turned on, you may never see an unformatted citation. Instant Formatting is turned on by default. See [Instant Formatting in Microsoft Word](#).

An unformatted citation typically consists of the first author's last name, the year, and the EndNote record number, with citation delimiters at each end to identify the text:

{Author, Year #Record Number}.

For example:

{Alvarez, 1994 #8}

EndNote relies on these temporary citations to determine which references to include in the bibliography.

Formatted Citations

The Configure Bibliography or Update Citations and Bibliography commands use an output style to convert all unformatted citations into formatted citations, and reflects final output.

Note: When Instant Formatting is turned on, formatting is done as you insert citations—but you can still change the style or layout of your citations and bibliography.

Formatted citations include hidden Word field codes in case you want to reformat the bibliography again later, even if the original library is not open.

Citations formatted in an Author-Date style might look like this:

(Alvarez 1994; Turnhouse 1987)

This is the same citation formatted in the Numbered style:

[1,2]

You can easily revert from formatted citations back to unformatted citations at any time. See [Unformatting Citations in Microsoft Word](#).

Finding and Inserting Citations in Microsoft Word

You can search for EndNote references and insert them without ever leaving Word.

This is the easiest way to find and insert a citation into a Word document:

1. Open the EndNote libraries that contain the references you wish to cite.
2. Open the Word document and position the cursor at the location where you would like the citation.
3. On the *EndNote 20* tab, click the *Insert Citation* button, or select the *Insert Citation* drop-down and then *Insert Citation*.
4. In the text box at the top, enter text to identify the reference you wish to cite. EndNote assumes an "and" between each word, and will search all fields in all the references in your open EndNote library.
5. Press *Return* and EndNote compares the text to text in your EndNote references and lists the matching reference(s). If no references match your text, you need to modify your search text and search again.
6. Identify and highlight the appropriate reference(s).
7. Use the *Insert* button drop-down to display a menu, and select from:
 - **Insert:** To insert the citation and format it as defined by the currently selected output style. (This would be the same result as simply clicking on the *Insert* button.)
 - **Display as: Author (Year):** Select this menu option to display both the author name and the year in the highlighted citation, but with the author name appearing to be outside the citation marker.
 - **Exclude Author:** Select this to omit the author name from the formatted citation.
 - **Exclude Year:** Select this to omit the date from the formatted citation.
 - **Exclude Author & Year:** Select this to omit both the author name and the year from an Author-Date formatted citation. This is usually used when you want only page numbers to appear in the citation.
 - **Show Only in Bibliography:** Select this option to display the selected citation only in the bibliography, not in the body of the paper.

Note: You can click the *Insert* button (not select the drop-down) to quickly select the default Insert command.


Citations are inserted directly into your paper in the same font as the surrounding text, using the Normal style font. Once a citation is inserted and formatted, it contains complete reference information in hidden codes.

You can insert citations in an existing manuscript or as you write. Remember to save your document as you work.

To format your citations and generate a bibliography, see [Configuring the Bibliography in Microsoft Word](#). In most cases, Instant Formatting applies as you insert citations (see [Instant Formatting in Microsoft Word](#)).

Inserting Selected Citations in Microsoft Word

To insert references selected in EndNote:

1. Open the Word document and position the cursor at the location where you would like the citation.
2. On the *EndNote 20* tab, select *Go to EndNote*.
3. Highlight the desired reference(s) in your EndNote library.
4. From the *Tools* menu in EndNote, select the *Cite While You Write* submenu and select *Insert Selected Citation(s)*, or click the *Insert Selected Citations* button () , or on the *EndNote 20* tab in Word, select the *Insert Citation* drop-down, and then *Insert Selected Citation(s)*.

Finding and Inserting from Highlighted Text in Microsoft Word

To find and insert a citation from highlighted text:

1. As you are typing, enter text to identify the reference you wish to cite, and select that text.
2. On the *EndNote 20* tab, click the *Insert Citation* button. EndNote will automatically enter the selected text into the search field of the *Find & Insert My References* dialog and bring up a list of matching references from your open library.
3. Identify and highlight the appropriate reference(s).
4. Use the *Insert* button drop-down to display a menu, and select from:
 - **Insert:** To insert the citation and format it as defined by the currently selected output style. (This would be the same result as simply clicking on the *Insert* button.)
 - **Display as: Author (Year):** Select this menu option to display both the author name and the year in the highlighted citation, but with the author name appearing to be outside the citation marker.
 - **Exclude Author:** Select this to omit the author name from the formatted citation.
 - **Exclude Year:** Select this to omit the date from the formatted citation.
 - **Exclude Author & Year:** Select this to omit both the author name and the year from an Author-Date formatted citation. This is usually used when you want only page numbers to appear in the citation.

- **Show Only in Bibliography:** Select this option to display the selected citation only in the bibliography, not in the body of the paper.

Note: You can click the *Insert* button (not select the drop-down) to quickly select the default Insert command.

Using Drag-and-Drop or Copy and Paste in Microsoft Word

You can drag selected citations from your EndNote library and drop them into your paper at the desired location for the citation.

You can also copy citations from the EndNote Library and paste them into the document using *Copy* (⌘+C) from EndNote's *Edit* menu and then *Paste* (⌘+V) from Word's clipboard.

Inserting Multiple Citations in Microsoft Word

There are several ways to insert multiple references in one in-text citation. When formatted, they appear as one multiple citation, sorted as your bibliographic style requires:

Unformatted: {Hall, 1988 #77; Baker, 1988 #16}

Formatted: (Baker, 1988; Hall, 1988)


You can insert up to 250 references in a single in-text citation, although the limit could be lower depending upon limitations on the amount of data a Word field code can contain.

Note: If one of the citations in a multiple citation is not matched during formatting, the entire citation remains unformatted. Notes cannot be inserted as part of a multiple citation.

To insert multiple citations from Word:

1. On the *EndNote 20* tab, click the *Insert Citation* button.
2. Enter a search term that will find the references you want, and press *Return*.
3. Hold down the *Command*(⌘) key while clicking on the desired references in the list (or hold down the *Shift* key to select a continuous range of references) in order to highlight the references.
4. Click the *Insert* button.

To insert multiple selected citations from EndNote:

1. In EndNote, hold down the *Command*(⌘) key while clicking on the desired references in your library (or hold down the *Shift* key to select a continuous range of references).
2. From the *Tools* menu in EndNote, select the *Cite While You Write* submenu and select *Insert Selected Citation(s)*, or click the *Insert Selected Citations* button (.

To insert multiple citations individually:

Another option is to insert citations individually, but immediately next to each other. Cite While You Write merges adjacent citations during formatting. Citations do not merge if any character separates them—including a space or punctuation mark.

Unformatted: {Hall, 1988 #77}{Baker, 1988 #16}

Formatted: (Baker, 1988; Hall, 1988)

Note: You can add citations to an existing in-text citation or change the order of citations within the delimiters with the Edit Citations dialog. See [Editing Citations in Microsoft Word](#).

To insert, remove, or edit citations within an existing in-text citation:

1. Click on the formatted citation.
2. On the *EndNote* tab, click *Edit & Manage Citation(s)*. All of the cited references in the document are listed, with the reference you clicked selected. Each citation will show how it is formatted above the references for that citation, as a subheading within the list. Click on the Reference tab below the list to see details for the reference.
3. Highlight a citation, and then select an option from the drop-down menu at the right:
 - Click *Remove Citation* to delete it.
 - Click *Insert Citation* to add another reference within the same citation.
 - Use the arrow buttons at the left to change the order of the citation in a multiple citation. (If a Citation Sort Order is applied by the current output style, changing the order of citations in a multiple citation has no effect.)

You can use the other features on this dialog as described in [Customizing Individual Citations](#).

Inserting from Multiple Libraries in Microsoft Word

You can cite references from multiple libraries. Simply open the selected libraries before you begin inserting citations.

If possible, though, we recommend that you use a single library when writing a paper. Keeping all of your references in one library simplifies the writing process because you know exactly where to find each reference, there is little likelihood of duplicate references, and you only need to have one library open when inserting citations.

Note: If you plan to insert citations from more than one library into a paper, read about the [Merge Duplicates in Bibliography](#) preference

Customizing Individual Citations

There may be cases where you want individual citations to differ from the standard format. You may want to remove the year or author from a citation if either was mentioned in the context of the sentence. Or, you might want to add a page reference or comment before or after the citation.

For example, assume a formatted citation looks like this:

Hall's discovery (Hall, 1988)

You can omit the author's name from the citation:

Hall's discovery (1988)

You can omit the date from the citation:

the 1988 discovery (Hall)

You can add a suffix with page number(s) to the citation:

the discovery (Hall, 1988 p.4)

You can add a prefix to the citation:

the discovery (see Hall, 1988)

To customize a formatted citation:

1. Insert and format the citation.
2. Click on the formatted citation.
3. On the *EndNote 20* tab, click *Edit & Manage Citation(s)*. All of the cited references in the document are listed, with the citation you clicked on selected. Each citation will show how it is formatted above the reference(s) for that citation, as a subheading within the list. Click on the *Reference* tab below the list to see details for the reference. Click on the *Edit Citation* tab below the list to edit the reference.
4. Select the citation you want to customize.
5. To change the format of the citation, select one of these options from the drop-down *Format* menu:
 - **Default Format:** Select this menu option to display the citation and format it as defined by the currently selected output style.
 - **Display as: Author (Year):** Select this menu option to display both the author name and the year in the highlighted citation, but with the author name appearing to be outside the citation marker.
 - **Exclude Author:** Select this to omit the author name from the formatted citation.
 - **Exclude Year:** Select this to omit the date from the formatted citation.
 - **Exclude Author & Year:** Select this to omit both the author name and the year from an Author-Date formatted citation. This is usually used when you want only page numbers to appear in the citation.
 - **Show Only in Bibliography:** Select this option to display the selected citation only in the bibliography, not in the body of the paper.
6. To add additional text to the citation, use the options below:
 - **Prefix:** Enter text here to print immediately before the citation text (include spaces).
 - **Suffix:** Enter text here to print after the citation text (spaces and punctuation should be included). You can enter page numbers here if you always want them to print after the citation in a custom format, even if the style doesn't normally include them.

- **Pages:** Page numbers entered here are considered entered into a "Cited Pages" field, so they can be manipulated by the style, just like any other EndNote field. In order to print, the Cited Pages field must be listed in the citation template and/or footnote template of your output style. This is typically used to print the page numbers within a full footnote citation. Most EndNote styles that require a special format for citations in footnotes are already configured this way. You can modify the Citation Template in your output style to include the Cited Pages field.

7. Click *OK* to implement the change(s) to the citation.

Including Notes in the List of References in Microsoft Word

Some journal styles require that you include notes along with the list of works cited at the end of the document. In such a system, notes are numbered just like citations, and are included in the reference list in order of appearance, along with bibliographic references.

Including notes in this way makes sense only when you are formatting your paper with a numbered style (not an author-date style). Therefore, this feature works only with numbered in-text styles.

To insert text as a numbered note in the reference list:

1. Position the cursor at the location in your text where you would like the number indicating the note.
2. On the *EndNote 20* tab, select *Insert Note* from the *Insert Citation* drop-down menu.
3. Type your note text into the text box. There is no limit on the amount of text you can enter.
4. Click *OK* to insert the numbered note.

When your paper is formatted by EndNote using a numbered style, the note text is assigned a number and listed along with the references at the end of the paper.

The way that notes are displayed when unformatted can be changed in the [Temporary Citations Preferences](#).

To manually type text as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.
2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:" followed by a space and your note text. For example:

```
{NOTE: The authors would like to acknowledge the support of...}
```

Restrictions on the Use of the "NOTE" Feature:

- This feature requires that a numbered style be used for formatting; otherwise, the note appears as text in the body of your paper.
- Enter alphanumeric text only. Do not enter graphics, equations, or symbols.

- Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker, the prefix marker, and the multiple citation separator may be used.
- Notes cannot be combined with regular bibliographic citations within the same set of delimiters (such as parentheses or brackets). They must be cited separately—each in its own set of delimiters.

Inserting Citations into a Formatted Paper in Microsoft Word

To add a new reference to an existing citation, insert the new reference next to (not within) the existing citation, with no spaces or punctuation between them, like this:

(Hockney and Ellis, 1996){Argus, 1984 #1}

Adjacent citations are merged during formatting, and the formatted citations are sorted according to the style:

(Argus, 1984; Hockney and Ellis, 1996)

Note: Do not insert a citation into the middle of a formatted citation. Insert it immediately before or after the existing citation, with no space between them.

Citing References in Footnotes and Endnotes

Once you have created a footnote or endnote in Microsoft Word, you can cite references in that footnote or endnote just like you cite them in the body of the document.

To cite a reference in a footnote or endnote:

1. Use the appropriate command in Word to create the footnote or endnote. (EndNote does not create the footnote or endnote in the document, but is used to insert and format citations in the note.)
2. Position the cursor in the footnote or endnote where you would like the citation to appear.
3. Insert the citation as you normally would.

Note: You can edit a full reference footnote citation to exclude author name, year, or author/year. Note that the Author(Year) option does not apply to full-reference footnotes.

The selected EndNote style determines how citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See [Bibliography and Footnote Templates](#).

If you are citing full references in footnotes, you can include specific page numbers to be formatted like a regular EndNote field. See [Customizing Individual Citations](#). Or, if you are manually typing citations, see [Citing Specific Page Numbers in Footnotes](#).

Typing Citations into Your Paper

There are many ways to insert citations in your paper. One way is to manually type temporary citations directly into your paper.

The rules described in the following topics govern how EndNote recognizes and interprets temporary (unformatted) citations. Use these rules when typing temporary citations directly into your document.

Note: For new documents or documents that have never been formatted, when Instant Formatting is enabled, it is not triggered when you manually type a reference into a document. You must use the EndNote 20 tab in Word to either insert another citation or format the citations and a reference list. If a document has been successfully formatted, and you manually type in a temporary citation, that citation will be instantly formatted.

- [Notes About Temporary Citations](#)
- [Components of a Temporary Citation](#)
- [Omitting Authors or Years from Citations](#)
- [Citation Prefixes](#)
- [Citation Suffixes](#)
- [Including Semicolons and Other Citation Delimiters in a Citation](#)
- [Examples of Modified Citations](#)

Notes About Temporary Citations

- Each citation must match only one reference in the library.
- When Instant Formatting is turned off, a temporary citation is enclosed in citation delimiters and typically includes the first author's last name, the year of publication, and the record number for that reference. For example:

{Schwartz,1990 #5;Billoski,1992 #28}.

If you would prefer to use the Label field or Accession Number field instead of the record number in temporary citations, see [Temporary Citations Preferences](#) for information on this setting.

- Within one set of citation delimiters you can have several citations separated by semicolons.
- Curly braces ("{" and "}") are the default temporary citation delimiters, although they can be changed (see [Temporary Citation Delimiters](#)). EndNote looks for these markers to find citations in your word processing documents.
- In addition to the citation delimiters, there are other possible components to a temporary citation: Author, Year, Record Number, Prefix Text, Suffix Text, and any other text found in the record. You can also use a special tag to format the citation as Author (Year). See [Components of a Temporary Citation](#).

- Any part of a temporary citation can be omitted, as long as enough information remains to match just one reference in the library. If you omit an author or year from a temporary citation, those components are omitted from the formatted citation as well—although you can change this preference. See [Omitting Authors or Years from Citations](#) for more information. Additionally, you can omit the entire citation so that the entry only appears in the bibliography (see [Components of a Temporary Citation](#)).

Components of a Temporary Citation

The typical EndNote temporary (unformatted) citation consists of an author's last name, a year, and a record number, all enclosed in citation delimiters. However, temporary citations can take on various other formats.

Temporary citations must begin and end with the opening and closing citation delimiters, but the other components of a temporary citation can vary.

You can type any string of text found in the reference, as in:

```
{dinosaur extinction}
```

Or, you can type any of these items in this order (comma placement is significant):

```
{Prefix \Author, Year #Record Number Suffix}  
{Prefix \Author, Year, Any Text, Suffix}
```

Each component is briefly described below; more detailed information follows.

Author's Last Name: Only the last name of one author is listed in a temporary citation. It can be any author associated with the reference, not just the first author. Include a comma after the author's name to limit the search only to author fields:

```
{Schwartz, 1990}
```

Year: The year should appear exactly as it does in the reference, and it should be preceded by a comma. Even if you leave out the author name, include a comma and a space before the year to limit the search to the Year field:

```
{, 2001}
```

Record Number: The record number will always be unique for the library it resides in. However, it is not a permanent number. If a reference is moved to a different library, it will be assigned a new record number. If it is synchronized across computers or shared with colleagues through EndNote Sync, it will probably be assigned a new number. If it is cut and then pasted back into the same library, it will be assigned a new number. See [Record Numbers](#). It is also possible to use the Accession Number or the Label fields in place of record numbers for temporary citations (see [Temporary Citations Preferences](#)). The record number must be preceded by a number sign:

```
{Jones, 1987 #84}
```

Any Text: Any text that appears in the reference can be used to help EndNote locate the reference in the library. In order for this to be helpful, select words that are unique to that reference. Enter the specific text only or enter the text in place of the record number part of the temporary citation and after a second comma:

```
{greenhouse}  
{Schwartz, 1990, any text}  
{Schwartz, , any text}
```

In the third example, where the date is omitted, you must insert a space between the two commas or EndNote will not recognize any citation matches.

Note: When using Any Text, EndNote will not search for whole words. If the text is part of a longer word, it will still be found. The more complete the information in the temporary citation, the better chance of a match. For example, you might find it helpful to follow the format used by EndNote online. EndNote online does not use record numbers for the third identifier; it uses the reference title. So an unformatted/temporary citation might look something like this: {Koepke, 2015, Delayed Gratification: A Grey Parrot (Psittacus erithacus) Will Wait for a Better Reward}.

Prefix Text: To add text to print before the formatted citation, type the text immediately after the opening brace and then a backslash "\" to separate prefix text from the search text:

```
{see \Jones, 1987 #84}
```

Suffix Text: To add text to print after a formatted citation, enter the suffix text immediately after the record number or enter a third comma after the search text and then type the suffix text (the third comma will be included in the formatted citation):

```
{Smith, 1995 #98 p.293}  
{Smith, 1995, dinosaur, p.293}  
{Smith, 1995, #98, section 3}
```

Note: Suffix text will always appear in the formatted citation. It is not dependent on the Cited Pages field being included in the style. This field can be used to add any type of information, not just page numbers.

Page Numbers: To add page numbers to a temporary citation, type @ and the page numbers after the record number. Page numbers require the Cited Pages field be included in the style and will be formatted according to the style settings.

```
{Jones, 1987 #84@23}
```

Page Numbers Only: If you have a citation where you want only the page numbers to appear, formatted according to a style that includes the Cited Pages field, remove both the Author and the Year from the temporary citation:

```
{#95@53}
```

Caution: This works well only when using a single library, without using EndNote Sync. When working with multiple libraries, or a library on multiple computers synchronized through EndNote Sync, there is a danger of having the same record number assigned to different references.

Author (Year) format: To add a citation that is formatted as Author (Year) in your text, include @author-year after the pages designator:

```
{Hesse, 2003 #95@@author-year}  
or  
{Hesse, 2003 #95@237@author-year}
```

Bibliography Only format: To insert a citation that only appears in the bibliography, include @@hidden, where the first @ is needed as the pages placeholder:

```
{Smith, 1995 #98@@hidden}
```

Note: For an easy way to modify individual Cite While You Write citations once they are formatted, see [Editing Citations in Microsoft Word](#).

Omitting Authors or Years from Citations

While your style may normally include the author's name and date in each in-text citation, you may want to omit the author and/or year from a particular citation. This is useful if you have mentioned the author or year in the context of the sentence and do not want to repeat the information in the citation.

To remove the author's name or date from a citation, leave that information out of the unformatted citation.

To omit the author's name, enter:

...Wyatt's recent discovery {, 1993 #38}.

which will format as:

...Wyatt's recent discovery (1993).

To omit the date, enter:

...about his 1993 discovery {Wyatt, #38}.

which will format as:

...about his 1993 discovery (Wyatt).

Note: Numbered citations do not print the author name or year in any case, so these settings would be ignored.

If you want a reference to appear in your bibliography, but not as a citation in your paper, you can exclude both the author and year, leaving only the record number. When you format your paper with a style that formats authors and years in the citations, this particular citation will not display in text, but will be included in the bibliography.

However, if you would rather have the author and year appear in the formatted citation regardless of whether or not they are in the temporary citation, select *Preferences* from EndNote's *EndNote* menu, select the *Formatting* option, and uncheck the setting to *Omit Author and/or Year from formatted citation if removed from temporary citation*. With this setting turned off, you may enter just the record number {#34} as a temporary citation, and still format the paper accurately with a style that requires authors and years in the in-text citations.

Caution: The option immediately above works well only when using a single library, without using EndNote Sync. When working with multiple libraries, or a library on multiple computers synchronized through EndNote Sync, there is a danger of having the same record number assigned to different references.

Note: For an easy way to modify individual Cite While You Write citations once they are inserted, see [Editing Citations in Microsoft Word](#).

Citation Prefixes

You can type a prefix in front of any unformatted in-text citation, using a backslash to separate the prefix text from the reference. For example, an in-text citation such as:

{see also \Hall, 1988 #77}

formatted in the APA style would be:

(see also Hall, 1988)

When there is only one prefix in a multiple citation and it is at the beginning of the citation, it will stay there regardless of how the citations are sorted. For example, this citation:

{e.g. \Hall, 1988 #77; Argus, 1991 #11}

after being formatted in the APA style will appear as:

(e.g. Argus, 1991; Hall, 1988)

If the prefix is not at the beginning of the multiple citation, or if there is more than one prefix in a multiple citation, the prefix text remains with the reference it precedes. For example, this citation:

{Argus, 1984 #11; especially \Hall, 1988 #77}

formatted in the Author-Date style will be:

(Argus, 1984; especially Hall, 1988)

Changing the Citation Prefix Marker

You can change the prefix marker from a backslash to another character by selecting *Preferences* from EndNote's *EndNote* menu, selecting the *Temporary Citations* option, and changing the character in the *Citation Prefix Marker* box. Use a character that is not otherwise used in the citations. Letters, numbers, semicolons, "@," and commas cannot be prefix markers. See [Temporary Citations Preferences](#).

Citation Suffixes

Text typed after the record number or search text in an unformatted citation appears immediately after the citation when it is formatted. For example, these citations:

{Hall, 1988 #77, p. 5}
{Smith, 1995 #58, section 3}

after being formatted in the APA style will appear as:

(Hall, 1988, p. 5)
(Smith, 1995, section 3)

In multiple citations, the suffix text remains with the citation that it follows, even if the citations are sorted differently during the formatting process. For example, this citation:

{Hall, 1988 #77 p. 5; Argus, 1991 #11}

formatted in the Author-Date style will be:

(Argus, 1991; Hall, 1988 p. 5)

Note: A space, punctuation mark, or letter should follow the record number, never a number. If a number appears directly after the record number, EndNote will interpret it as part of the record number.

Including Semicolons and Other Citation Delimiters in a Citation

In order to print an actual semicolon or the prefix marker (\) as part of a citation, type an accent grave (`) before the character. The accent grave tells EndNote to treat the following character as regular text, and not as a significant character for parsing the citation (a delimiter). For example, to create a citation that is formatted as:

(see Figure 1; Jackson, 1994)

the unformatted citation must look like this:

{see Figure 1`; \Jackson, 1994 #28}

The ` character before the semicolon tells EndNote not to treat the semicolon as a separator between citations.

Citing Specific Page Numbers in Footnotes

When citing full references in footnotes, you might want to include specific page numbers. EndNote provides a way to do this where the page numbers that you type into a temporary citation can be manipulated by the EndNote style just like a field in your EndNote reference. You can add specific pages to the temporary citation, and have the EndNote style include them wherever they need to be in the formatted citation. The style can also apply special pages formatting, like deciding whether to add "p." or "pp." before the page numbers, and how to list the range of pages.

The easiest way to add cited pages is to use the Edit Citations dialog. See [Editing Citations in Microsoft Word](#).

To manually include specific page numbers to a reference in an unformatted footnote citation, enter the page number preceded by "@" at the end of the temporary citation:

{Smith, 1999 #24@145-6}

All text that follows the @ symbol (up to the next space) is considered the "Cited Pages." You must also configure the EndNote style used to format the paper to use "Cited Pages" in the footnote template. Most EndNote styles that require a special format for citations in footnotes are already configured this way.

When EndNote formats the citation, the cited pages ("145-6" in the example above) are inserted in the correct location and formatted as appropriate for the style.

Note: If you enter page numbers at the end of the temporary citation without the "@" character, they will still appear in a formatted in-text citation, but EndNote will not be able to manipulate them by changing the page format or by moving them to a different position in the formatted citation. They will appear, as entered, at the end of the formatted in-text citation. This is a perfectly acceptable way to enter page numbers for in-text citations (or for footnotes formatted just like your in-text citations). See [Citation Suffixes](#) to see how this works. This method will not work for citations in footnotes that are formatted as full bibliographic references or with a special footnote format. For those cases, you must use the @ symbol to identify the cited pages in the temporary citation.

Examples of Modified Citations

The following examples demonstrate how different modifications to a temporary citation affect its formatted citation in either an author/year or numbered style. In the first column is an example of a modified temporary citation before formatting, and to the right are two examples of that citation formatted in different styles.

Citation	Formatted with APA	Formatted with Numbered	Comments
{Smirnova, #2309}	(Smirnova)	[1]	To remove the year from the formatted citation, delete it from the unformatted citation.
{, 2011 #2309}	(2011)	[1]	To remove the author from the formatted citation, delete just the author's name from the unformatted citation. Note that the comma remains in the temporary citation to indicate the omission of the author.
{#2309}	No citation appears	[1]	This temporary citation removes the author and the year from the formatted citation. When formatted with an author-date style, the in-text citation is eliminated, but the reference still appears in the bibliography. Numbered citations appear as usual.
{Smirnova, 2011 #2309@23}	(Smirnova, 2011, p. 23)	[1]	Adding the page number indicator followed by a page number will cause the page number to show in styles that include the Cited Pages field in the citation. The formatting of the Cited Pages field in the style controls how the page number will look.
{Smirnova, 2011 #2309, section 3}	(Smirnova, 2011, section 3)	[1, section 3]	Adding suffix text after the record number will cause it to always appear at the end of the citation, exactly as formatted. See Citation Suffixes .
{see \Smirnova, 2011 #2309}	(see Smirnova, 2011)	[see 1]	To add text before the formatted citation, type the text immediately after the opening curly brace, and type a backslash (\) to separate the text from the author's name. See Citation Prefixes .
{Smirnova, 2011 #2309; check errata}	(Smirnova, 2011; check errata)	[1; check errata]	The accent grave (`) before the semicolon (;) alerts EndNote to treat the semicolon as text instead of as a delimiter. Normally the semicolon would indicate the end of one citation and beginning of another in a grouped citation. See Including Semicolons and Other Citation Delimiters in a Citation .

Editing, Moving, Copying, and Deleting Citations

Editing Citations in Microsoft Word

Once you have inserted and formatted a citation, you should not edit it directly (even though you are able to do so). Direct edits are lost the next time EndNote formats the bibliography.

You can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation (as described here).

Note: An easy way to omit the Author or Date from an individual citation is to select the citation, *Control+click*, select *Edit Citation(s)* and then *Exclude Author* or *Exclude Year*.

To edit a formatted citation:

1. Click on the citation you wish to change.
2. On the *EndNote 20* tab, click *Edit & Manage Citation(s)*. All of the cited references in the document are listed, with the citation you clicked on selected. Each citation will show how it is formatted above the reference(s) for that citation, as a subheading within the list. Click on the *Reference* tab below the list to see details for the reference. Click on the *Edit Citation* tab below the list to edit the reference.
3. Select the appropriate citation from the list and make any of the following changes to the highlighted citation:

Default Format: Select this menu option to format the citation as defined by the currently selected output style.

Display as: Author (Year): Select this menu option to display both the author name and the year in the highlighted citation, but with the author name appearing outside the parentheses for the citation. This feature does not apply when editing a citation in a footnote. When using this option with a numbered in-text style, the author name(s) will appear before the citation.

Exclude Author: Select this to omit the author name from the formatted citation.

Exclude Year: Select this to omit the date from the formatted citation.

Show Only in Bibliography: Select this option to display the selected citation only in the bibliography, not in the body of the paper.

Prefix: Enter text here to print at the beginning of the citation text (spaces are significant).

Suffix: Enter text here to print at the end of the citation (spaces are significant).

Pages: Enter page numbers here to show as Cited Pages, formatted according to the selected style. To show, the Cited Pages field must be included in the citation or footnote template of the output style.

4. Within the Edit & Manage Citations window, you can add or remove citations from a multiple citation or change the order of citations.

Insert Citation: Select this option from the drop-down menu at the right of the citation to add another citation within the same set of delimiters.

Remove Citation: Highlight a citation, then select this option from the drop-down menu at the right of the citation to delete it from the in-text citation.

Up and Down Arrows: Highlight a reference and use the arrows to the left of the citation to change the order of display within the citation. (If a Citation Sort Order is applied by the current output style, using this dialog to change the order of citations in a multiple citation has no effect.)

5. Click *OK* to implement your change(s).

On the EndNote 20 tab, select *Update Citations and Bibliography* to reformat your bibliography with your changes.

Moving or Copying Citations in Microsoft Word

You can highlight any text that includes citations, use the *Cut* or *Copy* commands, and then *Paste* the text elsewhere in the document. You can do this with formatted or temporary (unformatted) citations.

To move or copy only the citation itself, make sure you highlight the entire citation (including surrounding delimiters). Then Cut or Copy and Paste it elsewhere in the document. If the entire field code for the citation is not included in the cut text, it could result in corrupted citations.

Note: Some issues may arise when you use the Cut, Copy, and Paste commands in a document with Track Changes turned on. If this occurs, turn off Track Change when you use these edit commands.

Deleting Citations

To delete an unformatted citation, highlight the entire citation (including delimiters), and press the *Backspace* or *Delete* key.

While it is possible to highlight a formatted citation and press the delete key on your keyboard, we do not recommend that you do this. If you do not completely delete the citation and all associated codes, you could corrupt your citations.

To safely delete a formatted citation:

1. In Word, highlight the citation you want to delete.
2. On the *EndNote 20* tab, select *Edit & Manage Citation(s)*.
3. In the *Edit & Manage Citation(s)* dialog, ensure that the citation you want to delete is highlighted. If the citation is part of a multiple citation, make sure you select just the citation you want to delete.
4. From the drop-down menu at the right of the citation, select *Remove Citation*.
5. Click *OK*.

Unformatting Citations in Microsoft Word

Unformatting reverts formatted citations to temporary citations, removes the bibliography, and turns off instant formatting.

Note: Unlike formatted citations, unformatted citations require that you have the original corresponding EndNote library open in order to format the paper again. Unformatting removes [The Traveling Library](#). (A synced copy of the library will probably not work for reformatting the citations because the record numbers will be different. You should use the original copy of the library.)

To unformat citations:

1. Determine which citations you want to unformat:
 - To unformat a particular citation, highlight only that citation.
 - If the citation you want to unformat is part of a multiple citation, highlight the multiple citation. All citations within the delimiters will be unformatted.
 - To unformat a section of the document, highlight that section.
 - To unformat the entire document, either select nothing or highlight the entire document.
2. On the *EndNote 20* tab, select *Tools*, and then select *Convert to Unformatted Citations*. If you are unformatting the entire document, this unformats all of the in-text citations and removes the current bibliography.

You can tell when a paper is unformatted because the citations appear in the temporary citation format (such as {Smith, 1999 #25}).

Unformatted citations are temporary placeholders that do not reflect final output. You can format the paper again at any time. To save the formatted paper as text with formatted citations, see [Removing Field Codes](#).

Note: When you unformat citations, [Instant Formatting in Microsoft Word](#) is disabled. To format your paper, select *Update Citations and Bibliography* on the *EndNote 20* tab.

Generating Bibliographies

Adding Styles to the Output Styles Menu

The bibliographic style selected determines how EndNote formats the citations in your paper and the references in the bibliography. The style defines the text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

You can use the *Styles* drop-down menu on the *EndNote* tab to select a different style and reformat your document at any point.

For a typical installation, EndNote initially installs only the most popular output styles, although more styles are available. See [Installing Additional Output Styles](#).

To mark an installed output style as a favorite, so it will appear in the *Styles* menu:

1. In EndNote, go to the *Tools* menu, select *Output Styles*, and then select *Open Style Manager*.
2. Find the style that you need.
 - Select a style by typing its name or scroll through the list to find the style you need.
 - Click on the column headings to sort the styles by either name or category. Click a second time to reverse the sort order.
 - Use the *Find by Category* list to find entire categories of styles.

The *Style Info/Preview* button can toggle between *Style Info* or *Style Preview* to display

information about a style or a preview of how the selected style formats EndNote's references. Use the *More Info/Less Info* toggle button to display or hide this dialog.

3. Mark the box by a style to select it as one of your favorites. The Mark All button selects all styles. The Unmark All clears all selections.
4. Close the Style Manager by selecting *Close Style Manager* from the *File* menu.

Styles marked as favorites appear in the Styles menu, wherever it appears.

You can modify any style to meet your specifications. You can also create new styles if necessary. See [Modifying Style Templates](#) for more information.

Configure Categories Dialog in Microsoft Word

This feature allows you to add categories to your Microsoft Word documents. When EndNote creates the bibliography in Word, it organizes your citations based on the categories set.

There are two ways to create category configurations: Use a style with categories configured in it or configure custom categories manually. If using a style with categories configured already, you can still customize that configuration in Word.

Using Styles with Defined Categories

Styles can include category definitions based on reference type. When using such a style, all references of a reference type defined in the Categories section of the style will automatically be sorted in Word. One example of such a style is APA 6th CV, which has the following preset categories.

Publications

Book
Journal Article

Manuscripts under review

Unpublished Work

Manuscripts in Progress

Manuscript

Conference Presentations

Conference Proceedings

Posters

Conference Paper

Using or creating a style with categories defined makes it very easy to organize categories based on reference type, as long as all the reference types you are using are included in the style. See [Reference Type Categories in Output Styles](#) for information on creating or editing styles with defined categories.

Group References by Custom Categories in Word Manually

If you don't want to use a style with defined categories, or want to use categories that are not based on reference type, you can create your bibliography categories manually when you first begin writing a paper or at any time during a writing project.

1. Open your Microsoft Word document.
2. On the *EndNote 20* tab, select *Categorize References > Configure Categories* to open the Configure Categories dialog.
3. Create your categories by clicking the *Category Headings (+)* button, entering the name of your new category, then pressing *Return*. Repeat until you have created the categories you need for your paper.
4. Using the drag-and-drop method, drag a specific reference to the appropriate category under the Category Headings section. A reference can only appear in one category.
5. Continue this process until all references are assigned a category.
6. Check the "Not Yet Assigned to a Category" section to ensure that all references have been assigned to a category.

You can modify your categories at any time. For example, you can rename a category, delete a category, move a category, or move references (using drag-and-drop) from one category to another.

The left panel contains two groups: References and Category Headings. See details below.

The upper-right panel shows the list of references within the group or category selected at the left. The lower-right panel shows the details for the reference selected above.

References

This section displays the references in your paper, and which of those references have not yet been categorized. Select a reference to see details for that reference at the right.

- **All References in Bibliography:** Select this group to see all the references in the bibliography in the right-side of the window. The following fields appear at the top of the right panel for each reference.
 - Author
 - Year
 - Title (of publication)
 - Reference Type
 - Category (name of the category that you defined under the Category Headings section)

The lower part of the panel displays detailed information about the reference. For example, Reference Type, Author, Year, Title, and more.

- **Uncategorized References:** This displays each citation that has not been assigned to a category. Select a reference to see the details for that reference in the right panel. Use the drag-and-drop method to assign an unassigned citation to a category.

Category Headings

This section displays all the categories that you have defined for the paper. The default categories for a new document containing categories, when you are not using a style, are Primary Sources and Secondary

Sources. Create categories by clicking the *Category Headings* (+) button in the upper left corner of the dialog. This will display a blank text field. Enter a unique name to identify each category. For example:

Category Headings

References

Suggested Reading

To rename categories, select the category, then *Control+click* and select *Rename* from the list. Type the new name for the category, then press *Return*.

Delete categories by clicking the minus sign (-) to the left of the category. Deleting a category does not delete any references from your paper. Any references assigned to that category will be added to the Uncategorized References list.

Note: For the "Suggested Reading" category above, the references should appear in the bibliography but not in the text of the document. See the Show Only in Bibliography section of [Editing Citations in Microsoft Word](#) for information on how to hide references in the text but have them appear in the bibliography.

Displaying the Categories in the Bibliography

To display the references in your paper in the categories you have created, on the *EndNote 20* tab select *Categorize References > Group References by Custom Categories*. This is a toggle, so select the option to *Group References by Custom Categories* again if you ever want to disable the categories display.

Important Points About Categories

- Use styles with categories defined for automatically assigning references to categories based on reference type.
- Organize categories based on how you want the categories to appear in the bibliography in Word.
- Enter a unique name to identify each category that you want to create in the current document.
- Use drag-and-drop to add references to the appropriate bibliography categories.
- Go to the "Uncategorized References" list to see if any references have not been assigned to a category.
- If you delete a reference from a particular category, the reference is only removed from the category. The citation remains in your document and the reference goes back to the Uncategorized References section.
- EndNote maintains all references in the All References in Bibliography list. A reference added to any defined category will still appear in the All References list.

Creating a Bibliography from Multiple Documents

For very large documents, you can use the Microsoft Word's Master Document feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of book chapters. (As an alternative for smaller documents, we recommend using a single Word document split into Sections. See [Creating Multiple Bibliographies in a Single Document](#).)

Master documents are used to assemble many smaller Word documents at the end of a project to create a single table of contents, bibliography, etc., when a single large document would be difficult to work with. A master document is usually used only for this final assembly, not for working in the individual documents.

Before creating a master document, make a backup of all the documents you will be using for sections. A backup is always advisable before making large changes to any project, and how smoothly this process goes will depend on factors such as how consistent the formatting is for all the subdocuments and the master document. The present author always uses copies of documents when working with a master document and subdocuments.

To generate a single bibliography:

1. In each of your documents or chapters, insert your citations to link them to references in an EndNote library.
2. In each document, on the *EndNote* tab, select *Tools > Convert to Unformatted Citations*.
3. Close all of your documents.
4. Create a new document.
5. Use the *Outline* view to designate the new document as a master document, then insert and display each of your chapters as subdocuments. (Check Word's documentation if you need step-by-step instructions.)

Note: If you have collapsed subdocuments to hide their content in Outline view, make sure you expand them in order to display the contents of all subdocuments before continuing.

6. On the *EndNote* tab, select *Configure Bibliography*.

Note: Your documents must allow read/write access; they cannot be designated Read-only (locked).

7. Verify the formatting options and click *OK*.

EndNote creates the bibliography, using citations from the master document and all displayed subdocuments, and places it at the end of the master document. You can move the bibliography anywhere within the master or subdocuments, and it will remain in that location even when you reformat.

Note: If you select Word's Insert > File command, and then select the Link option to insert a document into the text, EndNote will not format the linked document when you format the main document. The text from the linked document will be skipped.

If you want to format a bibliography for each subdocument plus a cumulative bibliography at the end of the master document, follow the instructions above, but use an output style that allows formatting of Sections. See [Creating Multiple Bibliographies in a Single Document](#) and [Sections Options in Output Styles](#) for additional information. In the case of a master document, subdocuments are treated as sections.

Creating Multiple Bibliographies in a Single Document

By default, EndNote creates a single bibliography at the end of each of your Word documents. However, you may want to create a separate bibliography for each section (or chapter) in your document. Output style options are available so that you can choose to:

- Create a single, complete bibliography at the end of the document (the default setting for almost all of the supplied output styles).
- Create a bibliography for each section in the document.
- Create a bibliography for each section and also a complete bibliography at the end of the document.

In Microsoft Word, Break Your Document into Sections

EndNote can format each section individually. You may want to break each chapter into its own section. In the case of a master document, subdocuments are treated as sections.

In Word, on the *Layout* tab, click on *Breaks*, and then select one of the four options under *Section Breaks*: Next Page, Continuous, Even Page, or Odd Page.

Modify the Output Style as Needed

If you are using the APA style and want to add bibliographies in sections, try APA 5th or 6th (sections). These styles are already defined to format a bibliography for each section, and do not require modification.

Otherwise, we recommend that you start by copying an existing output style and giving it a unique name. This leaves the original style intact. See [Copying Styles](#).

Next, click on the *Sections* panel in the output style. This is where you select the appropriate option for creating a single bibliography from all sections, a separate bibliography for each section individually, or both. For a complete description of the formatting options for Microsoft Word sections, see [Sections Options in Output Styles](#).

Save your changes and close the output style.

Format Your Word Document with the New Output Style

Format your bibliography as you normally would, but make sure you first select the new output style that you created. See [Configuring the Bibliography in Microsoft Word](#).

Additional Formatting Notes

When working with sections in Word, note that:

- EndNote will always insert a blank line between the final text of each section and the reference list for that section.
- When you format a reference list at the end of each section, the bibliography title will be used from the Layout tab of the Configure Bibliography dialog. If you do not want a title for each section bibliography, make sure the "Bibliography Title" text box on the Layout tab is empty. See [Configuring the Bibliography in Microsoft Word](#).
- If you have instructed the output style to "Create a bibliography for each section and a complete bibliography at the end of the document," but you have only one section in the Word document, a complete bibliography will appear twice—once for the end of the section, and once as a complete bibliography for the entire document.

- If you have multiple sections in your Word document, and switch from formatting with a style that formats sections individually to a style that formats a single, cumulative bibliography...you will see the section bibliographies disappear! If you want them back, make sure to format with a style that formats sections individually.
- Word inserts section breaks when changing between portrait and landscape orientations. If you need to change the page orientation in your document for wide graphics or tables, the orientation changes will be perceived as section breaks for bibliographies when using the Sections feature in an EndNote style.

Deleting Bibliographies

To delete a bibliography, make sure [Instant Formatting in Microsoft Word](#) is disabled, select the bibliography, and then delete it.

Make sure you drag the cursor across the very beginning of the bibliography to select the entire bibliography field. Press the Backspace or Delete key. You can also cut the bibliography if you want to paste it somewhere else.

Directly Editing Bibliographies

It is always best to make changes to your final bibliography by correcting the data in the EndNote library, editing the output style you are using, or adding or deleting citations from your paper. Then, after making the necessary changes, format the bibliography to make the corrections automatically.

It is not always possible for EndNote to format the bibliography exactly as needed, so you might need to manually edit the formatted bibliography. If you must do this, remember that if you reformat a paper after editing the bibliography, EndNote will not preserve your edits. When EndNote reformats a bibliography, it deletes the existing one and puts a new one in its place.

You can edit the bibliography as you would any text. The bibliography may be shaded, but you can still edit it. If you later reformat the paper, your edits will be gone.

You can add text after the bibliography, but make sure to put it after the end of the formatted bibliography—outside of the bibliography field.

Note: See [Modifying Style Templates](#).

Generating Bibliographies

Formatting a bibliography serves two functions:

- It formats each in-text citation according to the selected bibliographic style.
- It adds a complete bibliography to the document (unless you override this with a setting in the output style).
- The format used for citations and references is determined by the output style selected. When you have finished writing your paper in Word, and all of your EndNote citations have been inserted into the text, you are ready for EndNote to format the paper and generate a bibliography. This can be done in one of these ways:

- Instant Formatting actually works as you insert citations and is enabled when you first start using Cite While You Write. EndNote uses the currently selected style to format citations and update the bibliography each time a citation is inserted. However, if you want to change the style or layout of references, you can use the *Format Bibliography* tab from the *Configure Bibliography* dialog. See [Configuring the Bibliography in Microsoft Word](#).
- Configure Bibliography allows you to modify bibliography preferences such as style and layout before formatting your document.
- Update Citations and Bibliography is available on the EndNote tab in Word. EndNote uses the currently selected style to format the citations, the bibliography, plus figures and tables. You could also select a new style from the Style list in the Bibliography group.

On the *EndNote* tab, click the *Configure Bibliography* button.

1. On the *Format Bibliography* tab, use the *With Output Style* option to select an output style to format references.
2. Click *OK* to format all citations and build the bibliography.

Configuring the Bibliography in Microsoft Word

The Configure Bibliography dialog allows you to customize options for the citations and bibliography beyond those set in the style.

You may be halfway through inserting citations or you may have finished writing your paper. You may have instant formatting enabled or you may have manually inserted citations with formatting disabled. It does not matter. As long as you have citations entered in your document, you can format your paper at any time.

Note: The first time a citation is formatted, the corresponding EndNote library must be open. After that, EndNote can use [The Traveling Library](#) for reference information.

To format citations and generate a bibliography:

1. On the *EndNote* tab, click the *Configure Bibliography* button.
2. On the *Format Bibliography* tab, change or verify these settings.

Format document: Make sure the appropriate Word document is selected from the list of open Word documents.

With output style: Select the appropriate output style to format references. You can experiment by reformatting with various output styles. To add more output styles to the list, see [Adding Styles to the Output Styles Menu](#).

Temporary citation delimiters: These are the opening and closing delimiters for temporary citations. Make sure they are unique delimiters, and not characters you would normally use in your paper. The defaults are curly braces.

Link in-text citations to references in the bibliography: This option is selected by default, creating hyperlinks between in-text citations and their corresponding references in the bibliography. Clear the selection to remove links between in-text citations and their matching references in the bibliography.

Note: Links between citations and bibliography entries only works with in-text citations. You cannot link between full-reference footnotes or endnotes and their matching bibliography entries. Author-date citations within Word footnotes or endnotes can be linked, but not full-reference footnotes or endnotes.

Underline linked in-text citations: Select this option to add underlines to in-text citations. Clear the checkbox to remove underlines from in-text citations in your paper. This option is only available if the "Link in-text citations to references in the bibliography" checkbox is selected.

3. On the *Layout* tab, change or verify these settings:

Font and Size: These are the text font and size used for the bibliography.

Bibliography Title: To print a title at the top of your bibliography, type the title in this text box. This title will always be centered. If you want to use Word's formatting options for the bibliography title, perhaps to match headings being at the left in your paper, leave this field blank and add a title above the bibliography manually.

Text Format: Highlight the bibliography title text and then use the *Text Format* button to display a dialog where you can change the format of the highlighted text.

Start with Bibliography Number: Enter a starting reference number if you want a numbered bibliography to start with a number other than one. This works only for in-text numbered styles; it does not affect footnotes or endnotes.

First Line Indent and Hanging indent: Use these settings to set a paragraph indent (where the first line of a paragraph is indented), a hanging indent, or no indent at all. The hanging indent applies to the second and subsequent lines of a reference in the bibliography. Type measurements as centimeters (cm), inches (in), lines (li), or points (pt).

Line Spacing and Space After: Set the *Line spacing* for within a reference and the *Space after* for spacing between references.

4. Click *OK* to save changes and format your citations and bibliography.

Note: You do not have to verify each tab every time you format. Changes set will remain in effect until you change them manually.

Moving Bibliographies in Microsoft Word

Cite While You Write always creates the initial bibliography at the end of the Word document. If you move the bibliography to a different location in the document, EndNote keeps it there even if you reformat the paper. You can drag-and-drop the bibliography, or, if Instant Formatting is disabled, you can Cut and Paste the bibliography.

If you unformat all the citations in the document, then format a new bibliography, it will again be placed at the end of the document. Unformatting removes the Word codes for the new location of the bibliography.

Note: When Instant Formatting is enabled, use drag-and-drop to move a bibliography, not Cut and Paste. If you try to use Cut and Paste, Instant Formatting will create a new bibliography at the end of the document before you have a chance to Paste.

Instant Formatting in Microsoft Word

Instant Formatting works while you write your paper. As you insert citations, EndNote uses the currently selected style to format citations and update the bibliography. By default, Instant Formatting is enabled the first time you insert a citation or format the bibliography.

To turn Instant Formatting on or off, use the *Instant Formatting is On/Off* toggle on the *EndNote* tab.

For new documents or documents that have never been formatted, when Instant Formatting is enabled, it is not triggered when you manually type a reference into a document. You must use the *EndNote* tab in Word to either insert another citation or format the citations and a reference list. If a document has been successfully formatted and you manually type in a temporary citation, that citation is instantly formatted.

To enable or disable Instant Formatting in the current document, on the *EndNote* tab, select your preferred option from the *Instant Formatting is On/Instant Formatting is Off* drop-down. It is a toggle which will show the current status of Instant Formatting in the tab.

To set preferences for Instant Formatting, on the *EndNote* tab, select the *Turn Instant Formatting Is On/Instant Formatting Is Off* drop-down, then select *Configure Instant Formatting*. Set your options for the two choices shown below, then click *OK* to close and save your changes.

- **Scan for temporary citations** turns on scanning of temporary citations. This finds and formats all citations, including those you may have entered manually. You can select how often EndNote scans your document.
- **Check for citation changes** turns on background scanning that looks for citation changes.

When Instant Formatting is enabled, leaving the Configure Bibliography dialog will always trigger formatting in your document.

Note: To turn Instant Formatting on or off for new Word documents, see [General Preferences in Microsoft Word](#)

Reformatting Papers in Microsoft Word

Adding New Citations to Formatted Papers

If you add more citations to your paper after the formatting process, you can update the citations and the bibliography by clicking *Update Citations and Bibliography* or by using the *Configure Bibliography* dialog. To open the Configure Bibliography dialog, on the *EndNote* tab click the *Configure Bibliography* button.

Note: You do not need to unformat your citations in order to reformat them.

Reformatting with Different Styles

To reformat your paper in a different style, select the new style from the drop-down *Styles* menu on the *EndNote* tab. Your citations and bibliography are updated for the new bibliographic style. See [Adding Styles to the Output Styles Menu](#) for information about expanding the list of available styles.

Inserting and Formatting Figures and Tables

Once images are organized in an EndNote library, they are available for inserting into a manuscript with Cite While You Write commands. The finishing touch is the automatic creation of a figure list and/or a table list that presents a sequential list of all graphics inserted in a manuscript from EndNote. Graphics not inserted from EndNote will not appear in figure or table lists.

A figure citation is a brief numbered citation in the body of a paper that refers the reader to a figure at the end of the paragraph or to a figure in a complete list of figures at the end of the paper.

In-text figure citations are sequentially numbered and formatted like this:

Marrella is a small "arthropod" somewhat reminiscent of a trilobite. This illustration also shows the dark "blob" produced by body contents which were squeezed out of the animal after burial. (Figure 1)

It includes the word "Figure" (or "Table"), the sequential number, and surrounding parentheses. The field may be shaded by Word to help you see citations, but shading does not print. You can turn field shading off in Word.

The current output style determines the placement of formatted figures and tables. They appear either within the body of the paper, directly after the paragraph where they are cited, or in a list at the end of the document, after the bibliography.

Note: Figure citations are not bibliographic citations and will not appear in the bibliography. If the figure is from a reference, you must insert the reference as a citation separately to have it appear in the bibliography.

See [Finding and Inserting Figures and Tables](#).

Notes About Formatting Figures and Tables

- Do not use Microsoft Word Captioning in conjunction with EndNote figure captioning or in-text citations.
- Images found in the "Chart or Table" reference type are inserted into word as tables, which are labeled and numbered separately from figures. (You still use the generic Insert Figure command.)
- If you open an existing document that already has figure citations in the body (that were not inserted with EndNote's Insert Figure command), those figures will not be included in the figure list. You will need to add the existing figures to references in EndNote, and then use the Insert Figure command to insert them into the document.
- You can format figures either directly after the paragraph in which they are cited or in a list at the end of the document. See [Figures and Tables Preferences in Microsoft Word](#).
- The Instant Formatting that applies to bibliographies does not apply to figures. In-text figure citations are always formatted as you insert them, but if you move or delete a figure citation in your paper, you must select Update Citations and Bibliography on the EndNote tab.
- Figure and table captions are added from the Caption field in the EndNote reference.

- If more than one in-text figure citation references the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in a figure list.
- You can manually insert a page break between figures if you prefer each figure on a separate page. These page breaks will be remembered if you select Update Citations and Bibliography again.

Finding and Inserting Figures and Tables

You can search EndNote references and insert a graphic or file from the figure field of a reference into your Word document. The figure field in your references may be titled figure or have a custom name assigned by you.

Note: The file types accepted are dependent on your version of Word and other software installed on your computer.

To insert a graphic or file that is stored in an EndNote reference:

1. Open the EndNote library that contains the figure you wish to insert.
2. In the Word document, position the cursor at the location where you would like the figure citation to appear.
3. On the EndNote tab in Word, select the *Insert Citation* drop-down menu, and then select *Insert Figure*.
4. In the text box at the top, enter text to identify the reference that contains the figure. EndNote assumes an "and" between each word, and will search all fields in your records, including the Caption field.
5. Press *Return*, and EndNote compares the text to text in your EndNote references and lists each matching reference that contains an image.

EndNote displays the Author, Year, Title, and Caption field from each matching reference. Drag the vertical bars between the column titles to display more or less of a field. The Caption column should contain the contents of the record's Caption field.

6. Select and insert the appropriate figure.

If no references match your text, try modifying your search.

EndNote places an in-text figure citation at the cursor location, and inserts and labels the figure itself in the location set by the style.

Note: Images found in the "Chart or Table" reference type are inserted into Word as tables, which are labeled and numbered separately from figures.

The figure or table number represents the order of the image in the document.

You can insert figures and tables in an existing manuscript or as you write. Remember to save your document as you work.

Note: The Instant Formatting that applies to bibliographies does not apply to figures. In-text figure citations are always formatted as you insert them, but if you move or delete a figure citation in your paper, you must click *Update Citations and Bibliography* to update your changes.

Updating Figures and Tables

In-text figure citations are always formatted as you insert them. The graphic will appear in the location set in the style.

If you move or delete a figure citation in your paper, you must manually generate the figure list to update the figure citation numbering and placement.

On the EndNote tab, select *Update Citations and Bibliography*.

EndNote will number each figure and table citation sequentially in the Word document, as shown in this example:

This family tree is not a chronological progression. Rather, it illustrates how evolution incorporates traits that evolved for unrelated reasons into a novel structure. (Table 1)

Marella is a small "arthropod" somewhat reminiscent of a trilobite. This illustration also shows the dark "blob" produced by body contents which were squeezed out of the animal after burial. (Figure 1)

As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers. (Figure 2)

EndNote also inserts and displays the actual figures (graphics, figures, tables, charts, equations, or files) and labels them with figure or table numbers (to match each in-text reference) and caption text from the Caption field in the EndNote reference.

If your figures are listed at the end of the document:

- In a figure or table list, if more than one citation references the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in the list.
- You can continue to add figure citations to the Word document. If you change the position of figure citations in your document (with the Copy and Paste commands), select *Update Citations and Bibliography* again to update figures and tables.
- You can manually insert a page break between figures if you prefer each figure on a separate page. These page breaks will be remembered if you generate the figure list again. Or, direct the output style to always insert page breaks between figures.

Placing Figures and Tables

Figures and tables are formatted either after the paragraph where cited or in a list at the end of the manuscript. This placement is determined by the current output style.

Note: Images from any reference type other than "Chart or Table" are inserted and formatted as Figures. Images from the "Chart or Table" reference type are inserted and formatted as Tables. Both are inserted with the Insert Figure command. Both are formatted with the Update Citations and Bibliography command.

Automatic Placement by the Output Style

The selected output style determines where figures and tables are initially placed in a document and when you Update Citations and Bibliography.

By default, most output styles are set up to place figures and tables immediately after the paragraph in which they are cited. You can edit individual output styles to place figures and tables either after the paragraph in which they are cited or in a list at the end of the document.

For information about editing your output style for figure placement, see [Figures and Tables](#). The Figures panel determines the placement of figures and their captions, the Tables panel determines the placement of tables (images from the Chart or Table reference type) and their captions, and the Separation and Punctuation panel determines image separation and punctuation of labels and captions.

Selecting a Different Output Style

To apply a different output style in Word, on the *EndNote* tab, select the new style from the *Styles* drop-down menu.

The output style choice affects both bibliographic citations and figure and table citations.

Cite While You Write Override of the Output Style

As you work in your document, you may adjust the placement of actual figures and tables by cutting the pictures and pasting them elsewhere in the document. Normally, when the figure list is generated again, the output style puts them back in their initial location. You can override the output style, and tell EndNote to leave existing figures and tables where they are currently placed. See [Figures and Tables Preferences in Microsoft Word](#) for information about Cite While You Write preferences that affect Figures and Tables.

Moving Figures and Tables

Moving In-text Figure and Table Citations

To move or copy a figure or table citation:

1. Select the entire citation, including the surrounding parentheses. For example: (Figure 1).
2. Use *Copy* (⌘+C) or *Cut* (⌘+X) commands to copy or move the citation from its current location, then the *Paste* (⌘+V) command to put the citation in its new location. You can also use drag-and-drop to move a figure citation.
3. On the EndNote tab, select *Update Citations and Bibliography* to renumber the in-text citations and update figures and tables.

The selected output style determines whether figures and tables appear directly after the paragraph where cited or in a list at the end of the document. To modify this section of your output style, see [Figures and Tables](#).

Moving Individual Figures and Tables

To move an individual figure or table within the text of the manuscript:

1. *Cut* the figure (or table), including the label and caption, and *Paste* it in the appropriate position in your manuscript.
2. On the *EndNote* tab, select *Preferences*.
3. On the *Figures and Tables* tab, select the bottom button for custom placement of figures and tables and click *OK*.
4. On the *EndNote* tab, select *Update Citations and Bibliography*.

EndNote will update figure and table numbering, but will not change the position of existing figures and tables. See [Figures and Tables Preferences in Microsoft Word](#).

Note: This custom placement is honored only when the current output style is set up to print figures and tables within the text of the manuscript. When the output style is set up to list figures and tables in lists at the end of the document, regenerating the figure list will move figures and tables to the appropriate list at the end of the document.

Moving Figure and Table Lists

When an output style is modified to print figures and tables in a list at the end of a document, the lists appear after the bibliography. However, you may want the list to appear elsewhere in your document. Some publishers even require that figures be provided in a separate file.

To move a figure or table list elsewhere in your document, such as before the bibliography:

1. Select the entire list, especially the very beginning of the list which contains a hidden marker.
2. *Cut* the list to move it to the Clipboard.
3. Move the cursor to the new location.
4. *Paste* the Clipboard contents at the new location.

Each time you select Update Citations and Bibliography, EndNote looks for the beginning marker, so the list will be updated in its current location.

If multiple in-text figure citations reference the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in a figure list.

To provide a figure or table list in a separate file:

1. Finalize your manuscript and figure list.
2. Select the entire list, and then use the *Copy* and *Paste* commands to paste the list into another Word document.

3. *Delete* the figure or table list from the manuscript file.

Note: Do not select *Update Citations and Bibliography* again within either document.

Deleting a Figure Citation or Figure List

To delete a figure or table citation:

1. Highlight the entire citation, including the surrounding parentheses.
2. Press the *Backspace* or *Delete* key.
3. On the *EndNote* tab, select *Update Citations and Bibliography* to renumber the remaining in-text figure and table citations and update the formatted figures and tables.

To delete a figure or table list:

- To remove a single figure or table from the list, delete the corresponding in-text figure citation. Then, use *Update Citations and Bibliography* to generate an updated list at the end of the document.
- If you want to completely remove the figure or table list, first delete all in-text figure citations and update the list with *Update Citations and Bibliography*. Then, to completely remove any mention of a figure or table list, select the List of Figures marker or *List of Tables* marker and press *Delete*.

Note: Do not delete the figure (picture) itself from the document. Remove the in-text figure citation and then *Update Citations and Bibliography*. If you do not remove the in-text citation, regenerating the figure list will use the in-text citation to display the picture again!

Sharing Your Word Documents

You can directly share your Word files with colleagues. Each formatted citation is surrounded by field codes that contain reference information (see [The Traveling Library](#)), so colleagues may not even need access to your library to add citations or update the bibliography.

If you want to convert your document for use with a previous version of Word or a different word processor, you should *Unformat Citations* before saving in the different file format. Then, you may be able to reformat. The corresponding EndNote library (or libraries) must be available in order to format. See [Unformatting Citations in Microsoft Word](#).

To send a final, formatted document to someone, you may want to remove the field codes to save the formatted citations and bibliography as text. See [Removing Field Codes](#).

Of course, if you just want to print a copy of the paper for someone, you do not need to do anything to your document other than print it!

If you are working collaboratively with a colleague and would like to share your library as well as your documents, see [About Shared Libraries](#) and [Working on Different Computers](#).

The Traveling Library

Each formatted citation in your Word document is saved with field codes that embed reference data in the document. The paper contains a "Traveling Library" of references cited. See [Field Codes in Microsoft Word](#).

The first time a citation is formatted, EndNote looks in the open library and finds the corresponding reference. If you later reformat, EndNote again looks in the open library for that reference. However, if the library is not available or not open, EndNote uses the Traveling Library for reference information.

Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same EndNote library.

The reference data saved with each citation includes all fields except Notes, Research Notes, Abstract, Figure, and Caption.

Note: Do not unformat your document if you do not have the original references in your libraries. Unlike formatted citations, unformatted citations require that you have the corresponding EndNote libraries open in order to format references.

Exporting Word's Traveling Library to an EndNote Library

There may be occasions where you want to copy all of the references used in a Microsoft Word document to an EndNote library. Perhaps you received only the formatted Word document from a colleague, and would like to create EndNote references to use later. Or, you may have a large EndNote library, but want to create a smaller EndNote library with only the subset of references used in your paper.

Note: [The Traveling Library](#) does not contain Notes, Research Notes, Abstracts, Figures, or Captions.

To export references from a Word document to an EndNote library:

1. Open the document in Word.
2. On the *EndNote 20* tab, select *Tools*, and then select *Export Traveling Library*.
3. On the *Export Traveling Library* dialog, select either:
 - **An existing EndNote library:** Select a library from the drop-down list of open libraries, or click *Browse* to locate a library.
 - **A new EndNote library:** You will be prompted to name and save the new library.

Notes: We recommend that you export to a new EndNote library, so you can review the records before adding them to an existing library.

When you use the Export Traveling Library command, the exported references are renumbered and do not retain their original record numbers.

Working on Different Computers

If you are working on a paper and moving between different computers, you will want to have access to the references needed for your paper wherever you are. EndNote gives you options for accessing your references on different computers, as well as options for sharing those references with colleagues who may be working on the paper with you.

EndNote Sync and Sharing

EndNote Sync allows you to synchronize the references in your library to multiple computers. EndNote Sync does not synchronize the library as a whole; it creates a new library on the second (or third, or fourth, etc.) computer(s) and synchronizes all the reference data within the library to the new computer. Terms lists are not synchronized, and record numbers change during this process, but all the reference data remains intact from the original library. See [The Sync Feature](#) for information on syncing an EndNote library.

After a library is synced, the library can be shared with other EndNote desktop users. See [About Shared Libraries](#) for information on sharing your library with other EndNote users.

Caution: Avoid unformatting your citations and bibliography if using EndNote Sync or Sharing; the record numbers for the same references may be different on each computer. To work with unformatted citations, you need the record numbers used in the library the citations were originally inserted from; the record numbers in a synced library are unlikely to match.

Sharing Groups through EndNote Online

EndNote Sync synchronizes your references with your EndNote account, making them available from anywhere through a Web interface. These references can also be used in Word with Cite While You Write. You will have access to all the references in your EndNote account, and also have the ability to share just selected groups with collaborators. This may be a preferred option when you don't want to share your entire library. See [Using Cite While You Write with EndNote Online](#) for information on switching between using your desktop and online libraries in a paper; see [Sharing Groups](#) for information on sharing groups in your EndNote library.

The Traveling Library

The Traveling Library refers to a copy of the reference data from your EndNote library embedded in the Word field codes of the paper. Most of the time you don't see the contents of those field codes, you see the results of them: formatted EndNote citations. Only the reference data for citations used in the paper is included. Because that data is present in the paper, colleagues can add EndNote citations, or even change the EndNote Style, and the paper will be updated to include both your citations and those added by your colleague. You can find more information on the field codes used in [Field Codes in Microsoft Word](#).

Saving Files for Other Versions of Word and Other Word Processors

Formatted citations are Word "fields" specific to the version of Word that created them and the other compatible versions (Microsoft Word 2016, 2019, or Office 365 (locally installed desktop version only)).

If you open your document with a different version of Word, or use the Save As command to save a formatted copy of your paper in another format, you may lose the ability to format citations in that document.

If you plan to use your document with a different word processor or an earlier version of Microsoft Word, you should either Unformat Citations or Remove Field Codes (Convert to Plain Text) from the Word file before converting the document to the other file format.

- **Unformatting Citations:** Unformatted citations are regular text; however, they are temporary placeholders that do not reflect final output. See [Unformatting Citations in Microsoft Word](#). You may be able to unformat citations, save the document as an RTF file, and use Format Paper with the original library the citations came from to format citations from these placeholders. Because Format Paper has no travelling library, the record numbers for the unformatted citations must match the record numbers in the library. See [Basic Instructions for Using Format Paper](#) for information on using Format Paper.
- **Removing Field Codes:** When you remove field codes, you save a copy of the document and convert formatted fields to regular formatted text. Graphics are no longer linked, but are saved as though you had used the Copy and Paste commands. The copy reflects final, formatted output, but you cannot reformat later. See [Removing Field Codes](#).

For information about using your Word document with Apple Pages, see [Moving Documents between Word and Pages](#).

Submitting the Final Paper to a Publisher

Many publishers ask that you submit an electronic copy of your paper in addition to a printed copy. Because the field codes in your document may be incompatible with the publishing software, you may be asked to submit a copy of your paper without field codes, as described in [Removing Field Codes](#).

If your publisher uses EndNote, they may ask you to leave the field codes intact, enabling them to easily make changes to the citations or bibliography, if needed.

Removing Field Codes

You may need to remove Cite While You Write field codes in order to share your document with a publisher or colleague. See [Field Codes in Microsoft Word](#) for information on field codes.

- If your colleague is using the same version of Word that you are, you can share your formatted document as is; the document includes a Traveling Library, which includes all required information for the formatted citations and bibliography. See [The Traveling Library](#).
- If your colleague is using a different word processor or an incompatible version of Word, you could remove field codes to share your final document. However, removing field codes saves the formatted citations and bibliography as text, and does not allow reformatting.
- Removing field codes means deleting Word's Cite While You Write field codes and saving the formatted citations and bibliography as text. This removes only Cite While You Write field codes, and not all other Word field codes.
- When field codes are removed, in-text figure citations are no longer linked to an EndNote reference or to the figure list. In-text figure citations become plain text. Pictures in the figure list become picture files, as though they were copied and pasted into the document.
- Because EndNote and Cite While You Write cannot reformat or unformat your paper once field codes are removed, the Convert to Plain Text command makes a copy of your document without codes.

Note: If you are working with master and subdocuments in Word, the Convert to Plain Text command warns that it will strip codes from the original documents. You should first manually save copies of the master and subdocuments, and then remove codes from the copies.

To remove field codes and save the formatted citations and bibliography as text:

1. Open your formatted Word document. If it is a new document and has not been saved, save it before removing field codes.

If you are working with Master and Subdocuments, work with copies of your documents.

2. On the *EndNote 20* tab, select *Tools*, and then *Convert to Plain Text*. Click *OK* in the confirmation dialog to create a new document. A copy of the document, without field codes, appears in a new document window.
3. From the *File* menu, select *Save*.
 - **Single document:** In Word's Save As dialog, type a new name for this copy of your document and click *OK*.
 - **Master and Subdocuments:** You may be advised to save a copy of the master and each subdocument.

Word saves your document without embedded formatting codes, so you can submit your paper to a publisher or share your final paper with a colleague using a different word processor (including a different version of Word).

Note: The copy does not contain Cite While You Write field codes, so you cannot reformat with Cite While You Write. To reformat, start with the original document, which retains field codes.

If you find that removing EndNote field codes produces undesired layout or other formatting changes to your document, you can remove all Microsoft Word field codes, which may yield better results.

To remove all Microsoft Word field codes:

1. First save a backup copy of your document, because this will irretrievably remove the links between your document and your EndNote libraries as well as all other Word field codes.
2. Select all text in the document by pressing *Command+A* (⌘+A).
3. Press *Command+6* (⌘+6) to remove all Microsoft Word field codes from the document (not just Cite While You Write codes!) and leave the text, citations, and bibliography as they appear. (Be sure to use the number 6 on your keyboard, not the 6 on the keypad. For most U.S. keyboards, this will be the key that also includes the caret (^) symbol.)

Cite While You Write in Apple® Pages

Overview of the Cite While You Write Process in Apple Pages

Use Cite While You Write™ (CWYW) with Apple Pages to easily and quickly cite references and create a paper with properly formatted citations and a bibliography. Cite While You Write gives you access to EndNote references and formatting commands within Pages. See [How to Cite While You Write in Apple Pages](#).

Start by inserting a citation into the document. Cite While You Write technology formats the citation and creates a bibliography according to any one of thousands of styles.

You can download the plug-in through [Apple's EndNote Plug-In support page](#).

Note: The instructions provided in this section are for the version of Apple Pages available at the time of writing. Some features may work differently in older versions of Pages or with older versions of the EndNote plug-in.

Word Processor Compatibility for Apple Pages

You can Cite While You Write with Apple Pages.

Pages includes EndNote Citation commands on the Insert menu and the Edit menu.

EndNote commands were implemented in Pages by Apple, with the cooperation of Clarivate and using Cite While You Write technology provided by Clarivate. Changes to Cite While You Write in Pages may not coincide with updates to EndNote. You can find information on compatibility and downloading the Cite While You Write Plug-In for Pages at <https://support.apple.com/en-us/HT204395>.

If you use Microsoft Word as your word processor, see [How to Cite While You Write with Microsoft Word](#).

If you use a word processor other than Microsoft Word or Apple Pages, or an older version of these word processors, save your document as an RTF file and use Format Paper. See [Basic Instructions for Using Format Paper](#).

To create a standalone bibliography that is not based on the citations in a paper, see [Introduction to Independent Bibliographies](#).

Note: Only one word processor at a time should be open when inserting citations and formatting documents.

How to Cite While You Write in Apple Pages

The steps required to cite a reference and generate a bibliography with Apple Pages are given below.

First, insert citations:

1. Open the EndNote library that contains the references you wish to cite.
2. Start Pages and open the paper you are writing.
3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.
4. From the *Insert* menu, select *EndNote Citation*. A Find EndNote Citations dialog appears. If this is the first time you have used the Find EndNote Citations dialog, it may be completely blank because there are no previous search results to display.
5. In the *Find* box, enter identifying text for EndNote to locate the appropriate reference. This could be an author's last name, a year, a keyword, or any other combination of terms found in the reference.
6. Press *Return* and EndNote compares the identifying text to your EndNote references and then lists the matching reference(s).
7. Identify and highlight the citation you wish to insert.
8. Determine whether to apply the options at the bottom of the dialog:
 - Use the *Prefix* and/or *Suffix* text boxes to add text before or after the citation.
 - Use the *Citation Range* text box to enter a page range as part of the citation.

Page numbers entered here are considered entered into a Cited Pages field, so they can be manipulated on output just like any other EndNote field. For example, a "p." could be added by the style before a single page number or "pp." could be added before a range of page numbers, if the style required this. In order to print, the Cited Pages field must be included in the citation template and/or footnote template of your output style. This is typically used to print the page numbers within a full footnote citation, although some author-date formats also require page numbers. Most EndNote styles that require page numbers for citations are already configured this way.

- Use the *Exclude: Author* or *Exclude: Year* check boxes to leave that component out of the in-text citation. For example, if you are using an Author-Date format for your citations, but you have already mentioned the author's name in the text of your paper, you may want to leave the author name out of the citation.
 - Select the *Only insert into the bibliography* check box to include the reference only as part of the bibliography, and not format an in-text citation.
9. Click *Insert* to insert the selected reference(s) at the cursor in your paper. The citation is formatted according to the currently selected output style.
 10. Go back to step 3 to insert the next citation, and continue citing references this way.

Each time a citation is added to the paper, a cumulative bibliography is updated at the end of the paper.

Initially, the output style used to format the citations and bibliography is the style currently selected in your EndNote library. If you would like to change the output style selection, see [Reformatting with a Different Style in Apple Pages](#).

Cite While You Write Commands in Apple Pages

When EndNote, Apple Pages, and the [Apple Pages Plug-In](#) are installed, EndNote commands are available in Pages. EndNote commands appear on the Insert menu and the Edit menu in Pages.

When you select an EndNote command from the menu, the EndNote program starts (if not already running).

Below are brief descriptions of the Cite While You Write commands available in Pages.

The Insert Menu

EndNote Citation: Search for EndNote references to select and insert as citations in your Pages document. See [Finding and Inserting Citations in Apple Pages](#) for more information.

The Edit Menu

EndNote Citations: Select a different bibliographic style to format the citations and bibliography. The style list shows those styles marked as “favorites” in EndNote. See [Adding Styles to the Output Styles Menu](#) for information about how to add styles to the list. To install additional styles, see [Installing Additional Output Styles](#).

Citing Sources as You Write

Forms of Citations in Apple Pages

A “citation” is the brief bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. A citation typically consists of a bibliography number or the author and year in parentheses:

... of the species at hand.¹

... of the species at hand. (Argus, 1991)

Pages uses an EndNote output style to determine the format.

You can easily change the style of your citations at any time. See [Reformatting with a Different Style in Apple Pages](#).

Finding and Inserting Citations in Apple Pages

Search for EndNote references and insert them without ever leaving Pages.

To insert a citation in a Pages document:

1. Open the EndNote library that contains the references you wish to cite.

2. Open the Pages document and position the cursor at the location where you would like the citation.
3. From the *Insert* menu, select *EndNote Citation* to display the Find EndNote Citations dialog.
4. In the *Find* text box, enter text to identify the reference you wish to cite.
5. Press *Return* and EndNote compares the text to text in your EndNote references and lists the matching reference(s).
6. Identify and select the citation you wish to insert.
7. Determine whether to apply the options at the bottom of the dialog:
 - Use the *Prefix* and/or *Suffix* text boxes to add text before or after the citation.
 - Use the *Citation Range* text box to enter a page range as part of the citation.

Page numbers entered here are considered entered into a Cited Pages field, so they can be manipulated on output just like any other EndNote field. For example, a "p." could be added by the style before a single page number or "pp." could be added before a range of page numbers, if the style required this. In order to print, the Cited Pages field must be included in the citation template and/or footnote template of your output style. This is typically used to print the page numbers within a full footnote citation, although some author-date formats also require page numbers. Most EndNote styles that require page numbers for citations are already configured this way.

- Use the *Exclude: Author* or *Exclude: Year* check boxes to leave that component out of the in-text citation. For example, if you are using an Author-Date format for your citations, but you have already mentioned the author's name in the text of your paper, you may want to leave the author name out of the citation.
 - Select the *Only insert into the bibliography* check box to include the reference only as part of the bibliography, and not format an in-text citation.
8. Click *Insert* to insert the selected reference at the cursor in your paper. The citation is formatted according to the currently selected output style.
 9. Go back to step 3 to insert the next citation, and continue citing references this way.

Citations are inserted directly into your paper in the same font as the surrounding text.

You can insert citations in an existing manuscript or as you write. Remember to save your document as you work.

The citation and the bibliography are formatted according to the currently selected output style. To select a different output style, see [Reformatting with a Different Style in Apple Pages](#).

Citing References in Footnotes and Endnotes in Apple Pages

Once you have created a footnote or endnote in Pages, you can cite references in that footnote or endnote just like you cite them in the body of the document.

To cite a reference in a footnote or endnote:

1. Use the appropriate command in Pages to create the footnote or endnote. (EndNote does not create the footnote or endnote in the document, but is used to insert and format citations in the note.)
2. Position the cursor in the footnote or endnote where you would like the citation to appear.
3. Insert the citation as you normally would. See [Finding and Inserting Citations in Apple Pages](#).

The EndNote style that is currently selected determines how citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like “Ibid.” and other variations of shortened references, for when a citation appears more than once in the footnotes or endnotes. See [Bibliography and Footnote Templates](#).

Changing Existing Citations

Editing Citations in Apple Pages

Once you have inserted a citation, you cannot edit it directly. However, you can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation (as described below).

To safely edit a formatted citation:

1. Click on the citation you wish to change. You should see a dialog similar to the one below.

Text.(Billoski, 1992; Morehouse & Tung, 1993)

Title: Introduction to Paleontology
Author: Billoski, T.V.
Year: 1992

Prefix: Exclude: ☒ Author
Suffix: ☐ Year
Range:

Delete 1 / 2

2. The example is a grouped citation, with two references in it, so it shows the number of the showing reference and the total number of references at the bottom, with arrows to allow moving between the references. This dialog contains the following editing options:
 - **Prefix:** Enter text here to print immediately before the citation text (spaces are significant).
 - **Suffix:** Enter text here to print after the citation text (spaces are significant).
 - **Range:** Enter a page number or a range of page numbers to appear in the citation. The EndNote style must include the Cited Pages field for these numbers to appear in the formatted citation.

- **Exclude: Author:** Select this to omit the author name from the formatted citation.
- **Exclude: Year:** Select this to omit the date from the formatted citation.
- **Delete:** Select this to delete the citation from the paper. It will be removed from the grouped citation and from the bibliography at the end of the document (unless it also appears somewhere else in the document).

3. Click outside the dialog to close it.

Adding References to an Existing Citation in Apple Pages

To add a reference to an existing citation, insert the new reference immediately before or after the existing citation. (If you try to insert it within the citation, it will replace the existing citation.)

Adjacent citations are merged:

(Argus, 1984; Hockney and Ellis, 1996)

If you want the references formatted separately, leave a space between them:

(Argus, 1984) (Hockney and Ellis, 1996)

Moving or Copying Citations in Apple Pages

You can highlight any text that includes citations, then use the Cut or Copy, and then Paste commands to add it elsewhere in the document.

To move or copy only the citation itself, make sure you highlight the entire citation (including any surrounding delimiters). Then, *Cut* (⌘+X) or *Copy* (⌘+C), and then *Paste* (⌘+V) it elsewhere in the document.

Deleting Citations in Apple Pages

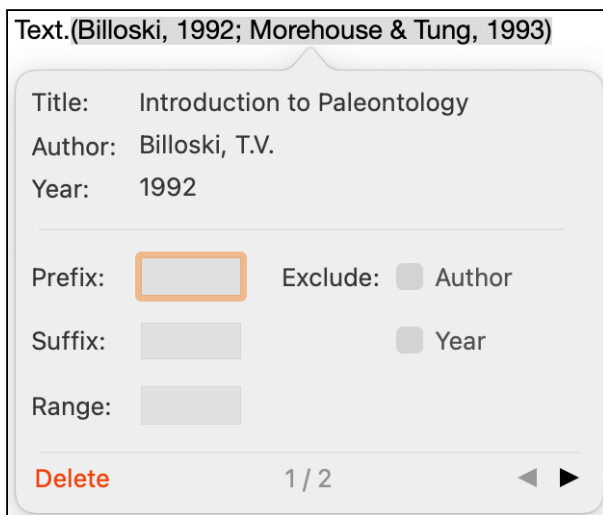
To delete a single formatted citation:

1. In Pages, click twice (slowly) in the citation you want to delete, to select the entire citation but not show the Citation-Editing Dialog, and then press the *Delete* or *Backspace* key on your keyboard. Clicking on the citation twice should select the entire citation, including all coding.

The citation will be removed from the text of the paper and from the bibliography.

To delete a citation from a grouped citation:

1. In Pages, click on the citation you wish to delete. You should see a dialog similar to the one below.



2. Use the arrows at the bottom-right of the dialog to move to the citation you want to delete from the group.
3. When the citation you wish to delete is showing in the dialog, click the *Delete* button.

The citation will be removed from the grouped citation and from the bibliography.

Reformatting with a Different Style in Apple Pages

When you insert a citation, Cite While You Write takes action:

- It formats each in-text citation according to the selected bibliographic style.
- It adds a complete bibliography to the document (unless you override this with a setting in the output style).

As you add citations to your paper, the bibliography is automatically updated, following the rules of the current output style.

To reformat your paper in a different style:

In Pages, go to the *Edit* menu, select *EndNote Citations*, and then select an output style from the available list. If

Your citations and bibliography are updated for the new bibliographic style.

The styles that are available in Pages are the styles marked as “favorites” in EndNote. See [Adding Styles to the Output Styles Menu](#) for information about expanding the list of available styles. To install additional styles, see [Installing Additional Output Styles](#).

Making Changes in the EndNote Library

Editing a Reference in the Library with Apple Pages

You may insert a citation in a Pages document, and then later edit the corresponding reference in EndNote. Are those changes reflected in your Pages document?

The answer is no. If you change a reference in EndNote, you must also replace that citation in Pages.

Deleting a Reference from the Library with Apple Pages

If a reference is cited in Pages, and you then delete the reference from your EndNote library, the change is not reflected in Pages. The citation remains until you specifically delete it.

Sharing Pages Documents

Working on Different Computers with Apple Pages

You can directly share your Apple Pages .page files with colleagues.

It is possible to use references from an EndNote library a colleague has shared with you through EndNote Sync, or with a synced copy of your own EndNote library, and more than one library can be open and be searched for citations at the same time. The library, or libraries, must be open in EndNote to be searched from Pages.

If you are inserting citations on only one machine, it is fine to move the document itself to other machines—as long as you will be accessing the document with the same version of Pages.

Moving Documents between Word and Pages

The Apple Pages/EndNote citing feature is fundamentally different from the Cite While You Write tools in Word, and they are not directly compatible.

Microsoft Word to Apple Pages

It is not currently possible to move documents from Microsoft Word to Pages in a way that maintains the link to EndNote. All citations and the bibliography will appear as plain text, with no links at all. If you wanted to change the formatting style, you would need to delete the existing text bibliography and replace every citation.

Apple Pages to Microsoft Word

You can use an EndNote style in Pages that simulates unformatted citations in Word, which would allow you to format the file in Pages then transfer it to Word. This is a one-way transfer and the EndNote library the paper was originally formatted with would be needed, to allow the record numbers to match.

To convert a Pages document for use with Microsoft Word:

1. Get a copy of the *Pages To Word* output style. See [this knowledge base article](#).
2. Unzip the downloaded style if your browser is not set to automatically unzip it.
3. *Double-click* on the *Pages To Word* output style you downloaded to open it in EndNote.
4. From the *File* menu, select *Save As*.
5. Remove "Copy" from the "Pages To Word Copy" file name and save the file.
6. From the *Tools* menu in EndNote, select *Output Styles*, and then select *Open Style Manager*.
7. In the list of styles find the *Pages To Word* style and mark the favorites box. *Close* the *Style Manager*.
8. In Pages, open the document to be sent to Word, and from the *Edit* menu select *EndNote Citations*, and then select the *Pages to Word* style.
9. Export the resulting document to Word as you normally would.
10. In Word, with the same EndNote library, or libraries, open, select the EndNote style you want to use for the new Word document, then select *Configure Bibliography* to format the citations in the style of your choice.

Format Paper

Word Processor Compatibility for Format Paper

You can create formatted citations and bibliographies for your papers without using Cite While You Write™ for Microsoft® Word or Apple Pages. Use Format Paper to cite references and create bibliographies for documents that can be saved as Rich Text Format (RTF) (see [Basic Instructions for Using Format Paper](#)). Word processors that can create RTF documents, including:

- Microsoft® Word
- OpenOffice Writer
- LibreOffice Writer
- Apple Pages
- Scrivener
- Nisus Writer
- TextEdit
- Mellel
- And almost any other application that can save as RTF (Rich Text Format)

Note: EndNote uses Unicode to appropriately display diacritics and other extended characters. If these characters do not display correctly when you format EndNote citations and references in your document, it may be because your word processor lacks Unicode support. Please refer to your word processor's documentation.

To format references and create a bibliography (Cite While You Write) with Microsoft Word, see [How to Cite While You Write with Microsoft Word](#).

To format references and create a bibliography (Cite While You Write) with Apple Pages, see [How to Cite While You Write in Apple Pages](#).

While you can use the Format Paper feature to format Word files saved as RTF, it is much easier and more efficient to use Cite While You Write.

To create a stand-alone bibliography that is not based on the citations in a paper, see [Introduction to Independent Bibliographies](#).

For up-to-date requirements and compatibility information, see our Web site at <https://endnote.com/>.

Basic Instructions for Using Format Paper

This topic describes how to create formatted citations and bibliographies for your papers without using Cite While You Write™ for Microsoft® Word or Apple Pages.

The basic steps are covered here. More details about how to switch between programs and various tips for citing references are described in the sections following these basic instructions.

Citing references is a straightforward process of copying temporary citations from EndNote and pasting them into your word-processing document. While writing a paper in your word processor, you can have EndNote running in the background so that it's easy to switch between the two programs when you need to cite a source. Although you can enter the EndNote temporary citations into a paper at any time, most writers find it convenient to enter the citations as they are writing the paper instead of waiting to insert them after the text is written.

Note: The Format Paper command works on Rich Text Format (RTF) documents or OpenOffice Writer (ODT) documents. See [Word Processor Compatibility for Format Paper](#). You create your paper and insert citations with your word processor. You can scan OpenOffice Writer documents directly. When you are ready to scan and format citations for other document types, you must first save a copy of your paper as RTF, and then scan that copy of the paper. .

To practice using the Format Paper feature, you can follow this procedure using one of the example documents found in the EndNote //Applications/EndNote 20/Examples folder. We recommend experimenting with the Sample_RichText.RTF or Sample_OpenDocType.ODT file.

Citing References in a Paper

To cite a reference in a paper:

1. Start your word processor and open the paper you are writing. As an example, you can locate and open Sample_RichText.RTF found in the //EndNote 20/Examples folder. If you use OpenOffice Writer, you can use Sample_OpenDocType.ODT as an example.
2. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.

...a commonly documented phenomena |.

3. Start EndNote and open your library, or libraries, (if not already open). See [Opening a Library](#) if you need help with this step.
4. Select the reference(s) in your EndNote library that you want to cite. Press the Command key (⌘) while clicking on the references to select multiple references; press the *Shift* key to select a range of references.
5. Select *Copy* (⌘+C) from the *Edit* menu, then return to your word processor and *Paste* (⌘+V) the temporary citation into the text of your document, or drag-and-drop the selected citations from EndNote into your paper. The pasted citation appears in EndNote's temporary format: first author's last name, year of publication, and record number, all enclosed in curly braces:

{Wiegerebe, 2008 #60}

If multiple references were selected, their citations appear together within one set of delimiters in the

order in which they are listed in the Library window.

{Wiegrebe, 2008 #60;Gorresen, 2018 #2469}

This citation is not the final citation, but rather a temporary citation that will be formatted later. The number in the temporary citation is not a bibliography number but a unique record number. When you format this paper, EndNote builds a bibliography based on the temporary citations that it finds in the paper, and reformats them according to the selected style.

Continue following steps 2-5 to insert citations as you write your paper.

Formatting the Citations and Bibliography

To save your document:

1. When you have finished adding citations, save the changes to your document.
2. If the file you created is not an OpenOffice Writer document or an RTF document, save a copy of the file as RTF. From the *File* menu, select *Save As*. In the file dialog, set the type of file as RTF. RTF retains most styles and formatting.
3. Close your document. You can leave your word processor running.

To generate the bibliography:

1. Return to EndNote.
2. Select *Format Paper* from the *Tools* menu, then *Format Paper...* (If you have previously formatted a paper and want to reformat it, you can also select it from the list of previously formatted papers.)
3. Navigate to the RTF or ODT file you created, and select it.
4. Click the *Open* button.

EndNote opens the Citations dialog and begins scanning the open library, or libraries, for matches to the temporary citations in the document. When scanning is complete, The Citations dialog lists the citations found in the paper together with the number of matching references in the open libraries. See [The Citations Dialog for Format Paper](#).

The citations in the Citations dialog appear in the order they are cited in the paper. If a reference is cited more than once in a paper, it is listed more than once in this dialog; however the reference will appear only once in the bibliography.

Every citation listed in the Citations dialog should have a "1" next to it in the Matches column, meaning that EndNote found exactly one reference in the open library, or libraries, to match the citation in the paper. When all of the citations in the window have a "1" next to them, you are ready to go on to the next step of formatting a paper. If a "0" or a number greater than one appears in the Matches column, you may need to resolve mismatched citations.

5. Check the Citations dialog to make sure that EndNote was able to find matching references for all of the citations.
6. Select a style from the *Output Style* menu on the Citations dialog. Enter a starting bibliography number if you wish.

The individual styles listed are the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list, choose *Select Another Style...* (If you chose *Select Another Style...*, select a style from the list and click the *Choose* button). If you do not see the style you want in the full list of installed styles, see [Installing Additional Output Styles](#).

7. In the Citations dialog, click *Format* to have EndNote create a copy of your paper complete with formatted citations and a bibliography.
8. You are then prompted to name and save the formatted copy of the paper.

By default, EndNote adds the name of the output style to your existing filename to create the new file name. You can change the name of the formatted document by typing a new name in the text box. You can also change the location where EndNote saves the file. By default EndNote saves the formatted file in the same location as the unformatted file.

Caution: Never save the formatted paper with the same name as the original unformatted document. The unformatted document is needed if you ever want to format the paper again.

While EndNote is formatting, the cursor changes to a wait cursor. When the formatting has finished, the cursor returns to an arrow and the Citations dialog remains open. Now that EndNote has generated a formatted copy of the paper, you can open that paper in your word processor.

1. Switch to your word processor.
2. Select *Open* from the word processor's *File* menu, and then select and open the formatted version of the paper. Remember that you want to open the file that has the name of the style appended to the file name (or the new name you assigned, if you changed the name).

In the formatted paper, EndNote has replaced the temporary citations with formatted citations and inserted a bibliography.

Making Changes to the Paper

If you need to make changes to the paper (such as to change a citation or add more text), you should edit the original unformatted document, and then format it again. EndNote will generate a new formatted copy of the paper. See [Reformatting a Paper](#).

Tips on Citing Sources

Temporary vs. Formatted Citations

A "citation" is the bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. Normally a citation consists of a bibliography number or the author and year in parentheses:

... of the species at hand.¹
... of the species at hand.(Argus, 1991)

When you first copy an EndNote citation and paste it into your paper, it appears in EndNote's temporary citation format. This format consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end.

{Author, Year #Record Number}

When EndNote formats this paper it replaces the temporary citations with formatted citations.

Temporary Citation: {Argus, 1991 #11}

Formatted Citation (in APA): (Argus & Matthews, 1991)

EndNote relies on the temporary citations to determine which references to include in the bibliography. During formatting, EndNote scans your word-processing document for temporary citations, finds their matching references in the EndNote library, and creates a duplicate of your document complete with formatted in-text citations and a bibliography at the end. This new document is called your "formatted" paper.

Note: By default, citation delimiters are curly braces. If you have other text within curly braces, you may want to change your citation delimiters.

Multiple References in One Citation

If you need multiple references in one in-text citation, you can accomplish this in one of two ways. One option is to insert all of the citations together:

To insert multiple citations:

1. In EndNote, hold down the *Command* (⌘) key while clicking on the desired references in your library (or hold down the *Shift* key to select a continuous range of references).
2. From the *Edit* menu, select *Copy* (⌘+C).
3. Position the cursor in your word processing document where you want the citations, and select *Paste* (⌘+V) from the *Edit* menu.

The citations are inserted together in one set of delimiters. Once formatted, they appear in one multiple citation, sorted as your bibliographic style requires:

Unformatted: {Hall, 2020 #90; Baker, 2015 #38}

Formatted: (Baker, 2015; Hall, 2020)

The other option is to add the citations to the paper individually. EndNote merges adjacent citations automatically during the formatting process. Citations do not merge, however, if any character, including spaces or punctuation, separates them.

Unformatted: {Hall, 2020 #90}{Baker, 2015 #38}

Merged when Formatted: (Baker, 2015; Hall, 2020)

Note: If one of the citations in a multiple citation cannot be matched during formatting, the entire citation will remain unformatted.

Citing References in Footnotes or Endnotes with Format Paper

Once you have created a footnote or an endnote in your word-processing document, you can cite references in the footnotes or endnotes just like you cite them in the body of the text.

To cite references in footnotes:

1. In your EndNote library, select the reference(s) that you would like to cite and select *Copy* (⌘+C) from the *Edit* menu.
2. Create the footnote or endnote using the appropriate command in your word processor. EndNote does not actually create the footnote or endnote in the document, but it is used to insert and format the citations in the notes.
3. Position the cursor in the footnote or endnote in your paper where you would like the citation(s) to appear and select *Paste* (⌘+V) from the *Edit* menu.

Note: You can edit a full reference footnote citation to exclude author name, year, or author/year. Note that the Author(Year) option does not apply to footnotes. See [Components of a Temporary Citation](#) and [Examples of Modified Citations](#) for information on customizing temporary citations.

The EndNote style that is selected in the Citations dialog determines how the citations in the footnotes or endnotes will be formatted. EndNote can format these citations as brief in-text citations or like the complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes.

Typing Citations into Your Paper in Rich Text Format (RTF) Files

Manually entering citations is the same whether you are using Format Paper with an RTF file or Cite While You Write with Microsoft Word. See these topics:

- [Notes About Temporary Citations](#)
- [Components of a Temporary Citation](#)
- [Omitting Authors or Years from Citations](#)
- [Citation Prefixes](#)
- [Citation Suffixes](#)
- [Including Semicolons and Other Citation Delimiters in a Citation](#)
- [Examples of Modified Citations](#)

Record Numbers

Record Numbers When Using Format Paper

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in the temporary citations to ensure that the correct reference is used when the paper is formatted:

{Argus, 1991 #31}

The record number for a reference is also visible in the title bar of the Reference panel.

You may also see record numbers in the Library window by selecting Record Numbers as one of the display fields for the Library window. See [Display Fields Preferences](#).

Because these record numbers are so important, keep the following points in mind:

- We recommend that you do not rely on EndNote's record numbers as a means of filing or numbering your office reprints, because you have no control over this number, and it is subject to change under certain conditions (read on). Instead, enter your own unique number into the Label field, and use that number for your reprints.
- EndNote automatically assigns a record number sequentially to each reference as it is added to a library.
- If the same reference appears in two different libraries, the record numbers will most likely be different.
- The record numbers are never reused or reassigned within a library. If you delete a reference, that number is never used again in that library.
- You cannot modify or reassign record numbers.
- When you sync a library, or share a library through EndNote Sync, the record numbers will likely be different on different computers. This is because EndNote is syncing the references to a new library on the new computer, and each reference is assigned a new number as it is synced to that computer.
- You can set EndNote to use the Label, Accession Number, or Pages field instead of the record number when inserting or copying temporary citations into word-processing documents using the Temporary Citations preferences in EndNote. This can alleviate problems arising from different record numbers for the same reference when working with synced libraries and Format Paper. See [Temporary Citations Preferences](#).

Deleting References in the Library

If you delete a reference from your library after you have cited it in a paper, EndNote will not be able to find it when it tries to format that paper. If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Formatting Citations and Creating Bibliographies

The Citations Dialog for Format Paper

The Citation Matches dialog opens in the EndNote program when you format a paper. It lists all of the citations found in a document, in the order in which they appear in the paper.

In the Citations dialog, EndNote brings special attention to unmatched and ambiguous citations. You can choose from the checkbox options to show only the Matched Citations, Unmatched Citations, or Ambiguous Citations.

The Citations dialog lists all of the citations found in the document and displays the number of matching references for each citation. If any number other than a 1 appears in the Matches column, the corresponding citation will be left unformatted in the document and will not be included in the bibliography EndNote generates.

Ambiguous Citations (Matches Greater than 1)

A number greater than 1 indicates that multiple references in the currently open library (or libraries) match the citation and EndNote does not know which reference to use. (EndNote automatically checks the matching references to see if any are duplicates. If so, they are not listed as separate possible matches.) To see which references are considered matches, highlight the citation in the Citations dialog and click Lookup. Reinsert the correct citation into the paper.

Unmatched Citations (A "Zero" Match)

A zero in the Matches column indicates that there is no matching reference in any open library for that particular citation. The Author, Year, and Record Number (if used in the temporary citation) must all match the Author, Year, and Record Number of a reference in an open library in order for EndNote to consider it a match.

If text in your document is surrounded by citation delimiters (such as "{sic}"), EndNote will treat the text as a mismatched citation. You can ignore the warning about it being a mismatched citation, and EndNote will leave the text as it was before formatting. (You could also change the Citation Delimiters, see [Temporary Citation Delimiters](#).)

Uncheck the Unmatched Citations box at the top of the Citations dialog to hide these items from view if you have numerous sections of bracketed text in your document and the corresponding unmatched citations are just cluttering the Citations dialog.

Correcting Mismatched Citations

Mismatched citations must be corrected either in the word-processing document or in the EndNote library—whichever contains the incorrect information. Normally, the easiest way to fix a mismatched citation is to search the word processing document for the mismatched citation, delete it, and then reinsert the citation from the library.

If there is a citation for which EndNote lists multiple matches, you can highlight the citation in the Citations dialog and click *Lookup*. EndNote displays the matching references in the Library window. You may then

select the appropriate reference and reinsert it into the paper. Mismatches of this type are only possible when the record number has been omitted from the temporary citation in the text.

After you have corrected the mismatched citations and saved your changes to the paper, *Format* again. (The Citations dialog is still available after formatting if you want to see the list of citations.)

The best way to avoid citation mismatches:

- Keep all of your references in one main library.
- Copy and paste your citations from EndNote to your word processing documents instead of typing them.

Bibliographic Styles and Format Paper

The bibliographic style determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of all text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

Select a style on the Citations dialog after selecting Format Paper. You can always run Format Paper to select a different style and reformat your unformatted (original) RTF document at any point. See [Formatting the Citations and Bibliography](#).

The EndNote Styles collection includes more than 7,000 styles, all of which can be modified to meet your specifications. You can also create completely new styles, if necessary.

See also

- [Adding Styles to the Output Styles Menu](#)
- [Installing Additional Output Styles](#)
- [Introduction to Output Styles](#)
- [Previewing Formatted References or Styles](#)

Previewing Formatted References or Styles

The Preview subpanel in the Reference panel of the Library window displays how the currently selected reference will be formatted in the bibliography by the current style. This Preview subpanel shows only one reference at a time.

To preview how multiple references will appear in a bibliography:

1. Select the references in the reference list.
2. From the *Tools* menu, select *Output Styles* and select the style that you would like to use.
3. From the *References* menu, select *Copy Formatted Reference* (⌘+K).
4. *Paste* (⌘+V) the selected references into a word processor document to see how they would look formatted with the selected style.

Reformatting a Paper

Since EndNote creates a copy of the paper during the formatting process, you can always reformat the original document, if necessary, to create a new document with the changes that you need.

Reformatting with Different Styles

The appearance of both the in-text citations and the bibliography in the formatted paper is determined by the selected style. If you need to create a copy of your paper in a different style than what you did originally:

1. From the *Tools* menu in EndNote, select *Format Paper > Format Paper*. Open the original unformatted copy of your paper (the one with the EndNote citations surrounded by curly braces or brackets).
2. On [The Citations Dialog for Format Paper](#), select a new output style from the *Output Style* drop-down list. You can select one of the "favorite" styles currently in the list or choose *Select Another Style...* to pick a style from the styles installed on your computer. See [Installing Additional Output Styles](#) for information on installing more styles.
3. If the Citations dialog shows that all the citations in the paper are correctly matched, click the *Format* button.
4. EndNote will prompt you to name and save the new formatted copy of the paper. Notice that the style name is included as part of the new paper's name. That will help you distinguish between various copies of one paper.

When you open the new formatted copy of your paper, you should see that your citations and bibliography use the new bibliographic format.

Note: When you need to make changes in your paper, remember to work only with the unformatted copy of the paper (the one with the bracketed temporary citations), rather than the formatted copy that EndNote created.

Adding New Citations to Formatted Papers

If you have already formatted your paper, and you see that it needs to be edited by either adding or removing citations, you must return to the original, unformatted copy of the document (the one with EndNote's temporary citations). Open that document in your word processor. Add, modify, or delete citations as necessary, and then save the paper as RTF. You may now format the paper (as described above) to create an updated copy of it.

Creating One Bibliography From Several Papers

EndNote can format a series of separate word processing documents and put a cumulative bibliography at the end of the last one. This is useful if you are collaborating with other EndNote users and you have each written a separate part of the paper or if you have separated a lengthy paper into different chapters.

To create one bibliography from several papers:

1. From the *Tools* menu, select *Format Paper > Format Paper* to open and scan the first paper.

2. A *Scan Next* button appears in the Citations dialog (see [The Citations Dialog for Format Paper](#)). Click *Scan Next* in the dialog to open each of the subsequent papers in the correct order. Each paper's citations will be added to the list of citations in the Citations dialog.
3. When the last paper has been scanned, select an output style in the Citations dialog and click *Format*.

During the formatting process, EndNote makes a formatted copy of each paper and puts a cumulative bibliography at the end of the last paper. Only the last paper in the series will include the bibliography. By default, each formatted paper retains its original name with the style name incorporated into it; however, you have the option to change the names.

Specifying the Starting Number of a Bibliography with Format Paper

When you select *Format Paper* to display a Citations dialog, EndNote includes an output style list to confirm or change the style that should be used to format the paper. It also gives you the option to change the starting number for your citations and bibliography.

If you would like EndNote's numbering to start with a number other than "1" for the document that you are formatting, enter that number here. This setting is ignored if you are formatting the paper with a style that does not create numbered references in the bibliography.

Copying Formatted References

There may be times when you want to insert a fully formatted reference into the body or footnotes of your paper without having to format an entire document.

To insert a fully formatted reference:

1. Select *Tools > Output Styles* and select the style you want from the list. If you do not see the style you want, select *Open Style Manager* and mark the style you want added to the list. The Style Manager will show all styles installed on your computer. If you do not see the style you want in the Style Manager, you can install more styles, see [Installing Additional Output Styles](#).
2. Select the reference(s) to copy.
3. Select *Copy Formatted Reference* (⌘+K) from EndNote's *References* menu.
4. Switch to your word processing document, position the cursor in the text, and select *Paste* (⌘+V) from the *Edit* menu.

If your word processor supports drag-and-drop, you may also drag the references and drop them on your paper with the *Option* key pressed. This produces the same results as using the *Copy Formatted Reference* command.

Multiple references are sorted according to the rules of the selected style. Fonts and character styles are transferred if you are pasting into a program that interprets styled text or Rich Text Format (RTF) information on the Clipboard.

Rescanning the Paper

If there is a problem with your citation matches after selecting Format Paper, leave the Citations dialog open and switch to your word processor to make the necessary changes. After saving your changes, close your document and switch back to EndNote. On the Citations dialog, click *Rescan*.

EndNote then updates the information in the Citations window to reflect the recent changes made to the paper.

Managing Your EndNote Library

Modifying References in Your Library

If you add or change a reference in your library while the Citations dialog is open, make sure you click *Rescan* to have those changes reflected in the Citations dialog and in the formatted paper.

For example, if you typed the citation {Geoffery, 1988} into your paper but forgot to enter the reference in the library, EndNote would list a 0 in the Matches column for that citation on the Citations dialog. You can leave the Citations dialog open and enter the Geoffery reference into your library. Bring the Citations dialog forward and use the *Rescan* button to recheck the library for matching references. This should change the "0" match to a "1."

Finding EndNote References for Editing When Using Format Paper

In the Citations dialog, you can select any number of matching references and then click Lookup to search and display those references in EndNote's Library window. If you edit a reference, make sure you *Rescan* your paper to reflect the changes.

Formatting with Multiple Libraries

Although EndNote can format papers using references from more than one library, we do not recommend that you use multiple libraries when writing a paper. Keeping all of your references together in one library simplifies the writing process because you know exactly where to find each reference, and you only need to have the one library open when formatting.

If you are collaborating with other authors on a document, however, using multiple libraries for a paper may be a useful and necessary thing to do.

If citations have been inserted into one document from multiple libraries, all of the necessary libraries must be opened in order for EndNote to format the paper correctly.

Note: Read about the [Merge Duplicates in Bibliography](#) preference if you plan to insert citations from more than one library into a paper.

Finding and Labeling References Used in a Paper

The [Citations Dialog for Format Paper](#) appears when you format a word processing document. It lists all of the citations found in a document, and displays the number of matching citations found in the currently open libraries.

The Citations dialog is visible in the EndNote program after the formatting is finished or if the formatting process is canceled. (If there are problems during formatting, consult the Citations dialog. This information can help you resolve problems.)

Double-click citations, or select a citation and click the *Lookup* button, in the Citations dialog to find the matching references in your EndNote library.

To locate all of the references in a library that were cited in a paper:

1. After formatting your paper, select all of the citations listed in the Citations dialog by selecting the first citation in the list, holding down the *Shift* key and scrolling to the bottom of the list to select the last citation in the list.
2. Click the *Lookup* button to display the list of references in the Library window. (Note that it can only show references from one library in the window.)

To add a keyword to all of these references for your own filing purposes:

1. Select *Change/Move/Copy Fields* from the *Library* menu.
2. On the *Change Fields* tab, select the *Keyword* field (or any other field you want to use) from the drop-down list of fields.
3. Enter the term or phrase you want to use to identify these references, select any Change options you want (such as inserting a space before the new text if you are adding it at the end of the field), and click *OK*.

Note: Any changes made using the Change/Move/Copy Fields command are permanent and there is no undo option. We strongly suggest making a backup copy of your library before using this command. See [Saving a Compressed Copy of a Library](#) and [Saving a Copy of a Library](#) for options for backing up your library.

Working on Different Computers

If you are working on a paper on different computers, be sure to keep a copy of your reference library on the same disk as your paper. That way, you will always access the same library when inserting citations. If you add references to a copy of the library at home and to a different version at work, the record numbers may not match, and EndNote will be unable to find references when it scans your paper.

Libraries synced to multiple computers or libraries shared through EndNote sync will have different record numbers than the original library, so using synced libraries is not suggested for use with Format Paper. See [Record Numbers](#).

Note: A compressed library will have the same record numbers as the original library. Although a working EndNote library should not be kept in a cloud-syncing folder or drive, a compressed library can be stored in one. Just remember to make a copy of it outside the cloud-syncing folder or drive, then open the copy that is outside the syncing folder or drive to work.

Independent Bibliographies and Exporting References

Introduction to Independent Bibliographies

There may be times when you want to create a bibliography without an associated paper. We call this an "independent bibliography" because EndNote does not generate the bibliography based on citations found in a paper—instead, the bibliography is generated independently of a paper.

Any one of the procedures described in this section can be used to create an independent bibliography. Each has its own advantages, so look for the option that best suits your needs:

- [Drag-and-drop](#) to instantly transfer a bibliography to a word processing document.
- [Copy formatted](#) references from a library and paste them into a word processing document.
- [Export](#) references from a library as RTF, Text Only, or HTML.
- Preview and/or [Print](#) references from EndNote.

Styles Determine the Look of the Bibliography

The appearance of your independent bibliography depends entirely on which EndNote style is selected. The styles determine what information is included in the bibliography, how it is arranged, and what punctuation and text styles are used. Select a style that meets your needs before exporting, printing, or formatting references.

To select a style, select *Output Styles* from the *Tools* menu. You will see a list of "favorite" styles. This list is based on a short list of popular styles, with your personal favorites added as you use them. If you do not see the style you need in the favorites list, select *Open Style Manager* from the *Tools > Output Styles* submenu, and mark the styles you want added to the favorites list. For more information, see [Adding Styles to the Output Styles Menu](#). For information about modifying styles, see [Modifying Style Templates](#).

The Style Manager shows all the styles installed on your computer. By default, EndNote installs only the more popular styles, but you can install more. For more information, see [Installing Additional Output Styles](#).

Introduction to Exporting References

EndNote can export references in formats that can be imported into databases or other bibliographic applications. The process is the much the same as exporting references in an independent bibliography, but the style used must be one that can be imported into the other program. See [Exporting References as an Independent Bibliography](#) and [Exporting References for Database Import](#).

Using Drag-and-Drop to Create an Instant Bibliography

"Drag-and-drop" is a way of moving or copying selected text (or other items) by clicking on the text and dragging it to a new location. Simply release the mouse button when the cursor is over the destination, and the text will either be moved or copied to the new destination.

If your word processor supports drag-and-drop, you can drag a bibliography from EndNote directly into your paper.

To drag your bibliography:

1. Open your library and select the desired references.
2. Select the necessary style from the *Output Style* submenu of EndNote's *Tools* menu.
3. Hold down the *Option* key as you drag the references from the library and drop them directly onto a word processing document in the background.

This creates a fully formatted bibliography with the references formatted and sorted according to the selected style. The font used for the bibliography in this case is the EndNote default font. You can change the font in your word processor.

If your word processor does not support drag-and-drop, see [The Copy Formatted Reference Command](#).

Note: Dragging with the *Option* key pressed transfers the formatted references to the word processing document. If you do not hold down the *Option* key, only the temporary citation is transferred. Use this latter method to cite references in your paper.

The Copy Formatted Reference Command

Use the Copy Formatted Reference command to quickly create and copy a bibliography that you can paste into a word-processing document. The references are sorted and formatted according to the rules of the selected style.

The font used for the Copy Formatted Reference command is the default EndNote display font, which can be changed in your word-processing document. All text style information (such as bold and italic) is retained if you paste into a program that recognizes RTF (Rich Text Format) or styled text.

To copy formatted references from EndNote and paste them into a word processing document:

Note: If EndNote runs out of memory during this procedure, and you are trying to format 50 or more references, select fewer references to copy at one time, or use the drag-and-drop or Export methods described in this chapter.

1. On the toolbar, go to the Output Style list and select the necessary style.
2. Select the desired references in EndNote.

3. From the *References* menu, select *Copy Formatted Reference* (⌘+K) to copy the references to the Clipboard.
4. Open a document in your word processor, and select *Paste* (⌘+V) from the word processor's *Edit* menu.

Exporting References as an Independent Bibliography

Exporting bibliographies from EndNote is easy and flexible. When you export from a library, EndNote creates a file of references formatted according to the chosen style.

You can export either all of the references in the current references list, or only the selected references in the current list. If any references in the Library window are selected, the EndNote export dialog gives you the option of exporting just those selected references.

To export a bibliography from EndNote:

1. Open the library from which you will export, and select the references you want to export.
 - To export all of the references in the library, click the All References group.
 - To export a subset of references, select a group or perform a search to show the subset of references you want to include. You can further limit the list of references to export by selecting just those references from the current reference list.
2. (Optional) References will be exported in the order specified by the selected output style. If you want to change the sort order, you must modify the output style:
 - a. From the *Tools* menu, select *Output Styles*, and then *Open Style Manager*.
 - b. Select the output style and click *Edit*.
 - c. In the left panel of the window, under *Bibliography*, select *Sort Order*.
 - d. Change the current sort order in the right panel. If you want to export references in the order in which they are listed in the current Library window, select *Order of appearance*.
 - e. Close and save the output style with a new name. Make a note of the new name so you can select it in step 5.
3. From the *File* menu, select *Export*.
4. From the *Save file as type* list at the bottom of the dialog, select the type of file to be exported. See [Supported Formats for Export](#) for more information on file types.
5. From the *Output style* list at the bottom of the dialog, select a style from your favorites, or choose *Select Another Style...* to choose from all installed output styles.
6. Select the *Export Selected References* option, if desired. If you want to export all of the references in the current list, clear the checkbox.

7. Navigate to the folder where you want to save the file, enter a name for the exported file, and click the Save button to save the file.

Note: The Export feature creates a new file; it does not append to an existing file. If you enter the name of a file that already exists, that file will be overwritten.

8. Open the exported file in a word processor to edit or print it. At this point, the file is just like any other text document. You can change the font, margins, line spacing, or other page layout features if necessary. (If you use the Open command in your word processor, make sure that the open file dialog is set to show files with the correct extension.)
9. If you exported the references in HTML format, your exported reference list is ready to be posted directly to your Web site. In your Web browser, set encoding to "Unicode-UTF 8 to appropriately display extended Unicode characters.

Note: The Export command exports only text; images are not included.

Creating Annotated Bibliographies

Annotated bibliographies include information beyond the standard bibliographic information. They may also include the abstract (the Abstract field), research notes (the Research Notes field), or other notes about the references (the Notes field).

To create a basic bibliography that includes abstracts, you can use the Annotated style included with EndNote. The Annotated style is based on the Author-Date style, and creates an alphabetical listing of the references (by author), with the abstract appended to each reference.

To create a custom annotated style, see the information below.

The Abstract, Notes, and Research Notes Fields

The fields most frequently used in annotated bibliographies are the Abstract, Notes, and Research Notes fields. You may add any of these fields to a style to create a custom style for your annotated bibliography.

- **Abstract:** Use this field to include an abstract of the reference material. When importing data from an online database, the abstract will be imported, if available.
- **Notes:** Use this field for general notes about the reference material. When importing from an online database, data that does not belong in a predefined field, but which might be of interest, is imported into the Notes field. This information may include variations on author names, information on related materials, information on photographs included in the material, etc.
- **Research Notes:** Use this field for your personal research notes and observations about the material. EndNote will never import data into the Research Notes field; it is reserved for your notes only.

Modifying a Style to Create an Annotated Bibliography

For this example, we will modify the APA 7th style to include the Research Notes field. (This type of style would be useful if a professor requested an annotated bibliography with all your personal notes on the references you plan to use for a thesis or dissertation.)

1. From the *Tools* menu, select *Output Styles*, and then select *Open Style Manager*.
2. Select the *APA 7th* (or the style of your choice) style, and then click the *Edit* button to open the style for editing.
3. Select *Layout* from the options under the *Bibliography* heading and click in the text box under the "End each reference with" heading. Text or fields inserted into this section appear at the end of each reference in the bibliography.
4. To insert the research notes on a new line after each reference: select *End of Paragraph* from the *Insert Field* list. This will ensure the contents of the Research Notes field will appear on a new line beneath the bibliographic data.
5. There are options available for quick insertion on the Insert Field list, including the Abstract and Notes fields, but the Research Notes field we need is not on the list. The field can still be added by typing it in manually, being very careful the name is entered exactly as it shows in the Generic reference type. In this case, "Research Notes" without the quotations marks.
6. (Optional) If you want an extra line break after the Research Notes, you can use the *Insert Field* list to add it at the end of the *End each reference with* text box.
7. From the *File* menu, select *Save As* and give the style a new name, but keep the .ens extension. Your new style will be saved in an //EndNote/Styles folder in your documents folder. By storing your custom styles in your documents folder, EndNote ensures they will not be removed if you uninstall EndNote or install a new version of EndNote that might overwrite the program styles.
8. Close the style.

The new style will now appear in the Output Styles submenu of the Tools menu. If you format a paper, print, or export references using this style, the research notes will be included in the bibliography.

Note: Some styles, such as the APA styles, are set to have a hanging indent for each paragraph. This means that each new line will start at the left margin and the subsequent lines in that paragraph will be indented. To adjust the Hanging Indent settings in your custom style, see [Hanging Indents](#).

Printing and Previewing References

To print references directly from EndNote, go to the *File* menu, and then select *Print* (⌘+P) to send a copy to your printer. Or, select *Print Preview* to format references onscreen. These are quick ways to view your formatted references on paper or onscreen—no special page layout options are provided. Typical uses might include trying out various output styles, printing a list of references to take to the library with you, printing your notes, or generating a complete printout of the references in an EndNote library.

Important Points about Printing

You can print either the selected references or all references showing in the list.

In addition to the selected style, the appearance of the printed references is determined by the following items:

- References will be printed in the order specified by the selected output style. If you want to change the sort order, you must modify the output style. If you want to export references in the order in which they are listed in the current Library window, change the output style's sort order setting to Order of appearance.
- Each printed page has 1-inch margins, left-justified text, and a header that displays the library name in the upper left corner and the page number in the upper right corner. There are no options to customize the margins, headers or footers of the printouts. Use one of the other options for creating an independent bibliography if you need to modify these aspects of your printout.
- The font and size of the printed references are determined by the EndNote display font. Use one of the other options for creating an independent bibliography if you need to modify the font.
- Select *Page Setup* from the *File* menu to specify other printing options, including the paper size and page orientation. Page setup options vary depending on the printer used.

Printing Instructions

To print a list of references directly from EndNote:

1. Make sure that all of the references you want to print are either selected. EndNote prints only the selected references.
2. From the *Tools* menu, go to the *Output Styles* submenu and select a style.
3. (Optional) References will be exported in the order specified by the selected output style. If you want to change the sort order, you must modify the output style:
 - a. From the *Tools* menu, select *Output Styles*, and then *Open Style Manager*.
 - b. Select the output style and click *Edit*.
 - c. In the left panel of the window, under *Bibliography*, select *Sort Order*.
 - d. Change the current sort order in the right panel. If you want to export references in the order in which they are listed in the current library window, select *Order of appearance*.
 - e. Close and save the output style with a new name, then select that style.
4. From the *File* menu, select *Print* (⌘+P).

In the print dialog, specify the number of copies and the range of pages to print.

5. Click *Print* to print the references.

Exporting References for Database Import

There may be times when you want to share your references with a colleague who is not using EndNote, or bring your references into a spreadsheet or advanced database program for analysis. EndNote references can be exported in formats for this purpose, thanks to the flexibility of EndNote's output styles. EndNote includes several styles suited for imports into other programs, but you can also create your own styles if you need to.

Included styles for transferring data to other programs include:

- BibTeX
- BibTeX Using EN Label Field
- RefMan (RIS) Export
- EndNote Export
- Refer Export
- Tab-Delimited

Exporting for Other Bibliographic Applications

When you export from a library, EndNote creates a file of references formatted according to the chosen style. To import those references into another application, choose a style that matches a format the other program can import.

You can export either all of the references in the current references list, or only the selected references in the current list. If any references in the Reference List are selected, the EndNote export dialog gives you the option of exporting just those selected references.

To export references from EndNote:

1. Open the library from which you will export, and select the references you want to export.
 - To export all of the references in the library, click the All References group.
 - To export a subset of references, select a group or perform a search to show the subset of references you want to include. You can further limit the list of references to export by selecting just those references from the current reference list.
2. From the *File* menu, select *Export*.
3. From the *Save file as type* list at the bottom of the dialog, select the type of file to be exported. For most databases, you will need to use the plain text (.txt) format. See [Supported Formats for Export](#) for more information on file types.
4. From the *Output style* list at the bottom of the dialog, select a style that matches the format needed for the target program. (A large number of programs can import data in the RefMan (RIS) Export format, so this is a good choice if you are unsure of the needed format.) If you do not see the style you need on your favorites list, choose *Select Another Style...* to choose from all installed output styles.
5. Select the *Export Selected References* option if desired. If you want to export all of the references in the current list, clear the checkbox.
6. Navigate to the folder where you want to save the file, enter a name for the exported file, and click the *Save* button to save the file.

Notes: The Export feature creates a new file; it does not append to an existing file. If you enter the name of a file that already exists, that file will be overwritten.

The Export command exports only text; images are not included.

Exporting to Spreadsheets or Databases

EndNote includes a Tab-Delimited output style to provide an export format compatible with most spreadsheet or generic database programs.

To export references from EndNote in the Tab-Delimited format:

1. Open the library from which you will export, and select the references you want to export.
 - To export all of the references in the library, click the All References group.
 - To export a subset of references, select a group or perform a search to show the subset of references you want to include. You can further limit the list of references to export by selecting just those references from the current reference list.
2. From the *File* menu, select *Export*.
3. From the *Save file as type* list at the bottom of the dialog, select the type of file to be exported. For databases, use the plain text (.txt) format. See [Supported Formats for Export](#) for more information on file types.
4. From the *Output style* list at the bottom of the dialog, select the *Tab-Delimited* style. If you do not see the style on your favorites list, choose *Select Another Style...* to choose it from the list of all installed output styles.
5. Select the *Export Selected References* option, if desired. If you want to export all of the references in the current list, clear the checkbox.
6. Navigate to the folder where you want to save the file, enter a name for the exported file, and click the *Save* button to save the file.
7. Open your spreadsheet or database program. Follow the instructions of your database program for opening or importing a tab-delimited file. To add a heading row to the file, see the field list below for a list of fields included in the style.

Notes: The Export feature creates a new file; it does not append to an existing file. If you enter the name of a file that already exists, that file will be overwritten.

The Export command exports only text; images are not included.

Field Order in the Tab-Delimited Style

To help you create column headings in your spreadsheet or databases, here are the fields included in the Tab-Delimited style, as of this writing, in the order they appear in the style:

- Reference Type
- Author

- Year
- Title
- Secondary Author
- Secondary Title
- Place Published
- Publisher
- Volume
- Number of Volumes
- Number
- Pages
- Section
- Tertiary Author
- Tertiary Title
- Edition
- Date
- Type of Work
- Subsidiary Author
- Short Title
- Alternate Title
- ISBN/ISSN
- DOI
- Original Publication
- Reprint Edition
- Reviewed Item
- Custom 1
- Custom 2
- Custom 3
- Custom 4
- Custom 5
- Custom 6
- Custom 7
- Custom 8
- Accession Number
- Call Number
- Label
- Keywords
- Abstract
- Notes

- Research Notes
- URL
- File Attachments
- Author Address
- Figure
- Caption
- Access Date
- Translated Author
- Translated Title
- Name of Database
- Database Provider
- Language

Exporting to EndNote XML

EndNote includes a proprietary XML output format which will allow other EndNote users to import your exported data into their library. This format is not designed to work with other bibliographic software applications.

The advantage to this format for transferring data between EndNote users is that text formatting such as italics, bolding, superscripts, and subscripts will be included. This would not be possible when exporting a plain text file, as must be done to transfer to other applications.

The data will be Unicode-compliant, so special characters and multiple languages will transfer without problems.

To export references from EndNote in the XML format:

1. Open the library from which you will export, and select the references you want to export.
 - To export all of the references in the library, click the All References group.
 - To export a subset of references, select a group or perform a search to show the subset of references you want to include. You can further limit the list of references to export by selecting just those references from the current reference list.
2. From the *File* menu, select *Export*.
3. From the *Save file as type* list at the bottom of the dialog, select the XML (.XML) format.
4. Do not select a style from the Output Styles list. This option is irrelevant when saving to XML.
5. Select the *Export Selected References* option, if desired. If you want to export all of the references in the current list, clear the checkbox.
6. Navigate to the folder where you want to save the file, enter a name for the exported file (keep the .xml extension), and click the *Save* button to save the file.

You now have a file you can give to a colleague who uses EndNote, which can easily be imported into their library.

Notes: The Export export feature creates a new file; it does not append to an existing file. If you enter the name of a file that already exists, that file will be overwritten.

The Export command exports only text; images are not included.

Supported Formats for Export

Formats for Exporting Independent Bibliographies

Use the Export command to create a free-standing bibliography in either of the following formats:

- **RTF (Rich Text Format)**

The RTF export is an ideal way to create a free-standing bibliography that can be edited or printed using a word processor. This format can be opened by all popular word processors and preserves font and text style information.

- **HTML**

Documents exported in HTML (HyperText Markup Language) provide an easy way to post reference lists on the World Wide Web.

In your Web browser, set text encoding to *Unicode-UTF 8* to appropriately display extended Unicode characters in the exported document.

Formats for Exporting to Other EndNote Libraries or Other Programs

- **Text File**

The Text File export option is suitable for draft purposes or exporting references to be imported into another bibliographic database programs. It is usually used with styles such as EndNote Export, Refer Export, RefMan (RIS) Export, or Tab-Delimited, or you can create custom styles, as needed. This format cannot include formatting, such as italics, bolding, superscripts, or subscripts.

- **XML**

The XML option exports in a proprietary EndNote XML format that can be imported into EndNote or EndNote online. The main advantage of this format over exporting a text file is that it can retain formatting that was applied to the original reference data, such as italics for species names, or superscripts or subscripts in chemical names.

Note: The Export command exports only text; images are not included. To reattach figures to your records, see [The Figure and Caption Fields](#).

Subject Bibliographies and Subject Lists

Overview of Subject Bibliographies

A general bibliography is a continuous listing of citations in a particular order. A subject bibliography is made up of smaller listings, each appearing under a distinct heading. Despite the name, a subject bibliography (or a subject list) can be based on any EndNote field or combination of fields.

An example of a subject bibliography might look something like this.

REFERENCE LIST:

animal cognition (2)

Pepperberg, I. M. (2008, Nov. 12) *'Alex & me': The hidden world of animal minds/Interviewer: T. Gross*. Fresh Air, WHYY/NPR, Philadelphia.

Shanahan, M. (2012). The brain's connective core and its role in animal cognition. *Philosophical Transactions of the Royal Society B-Biological Sciences*, 367(1603), 2704-2714. doi:10.1098/rstb.2012.0128

animal communication (2)

Pepperberg, I. M. (1999). *The Alex studies: Cognitive and communicative abilities of grey parrots*. Cambridge, Mass.: Harvard University Press.

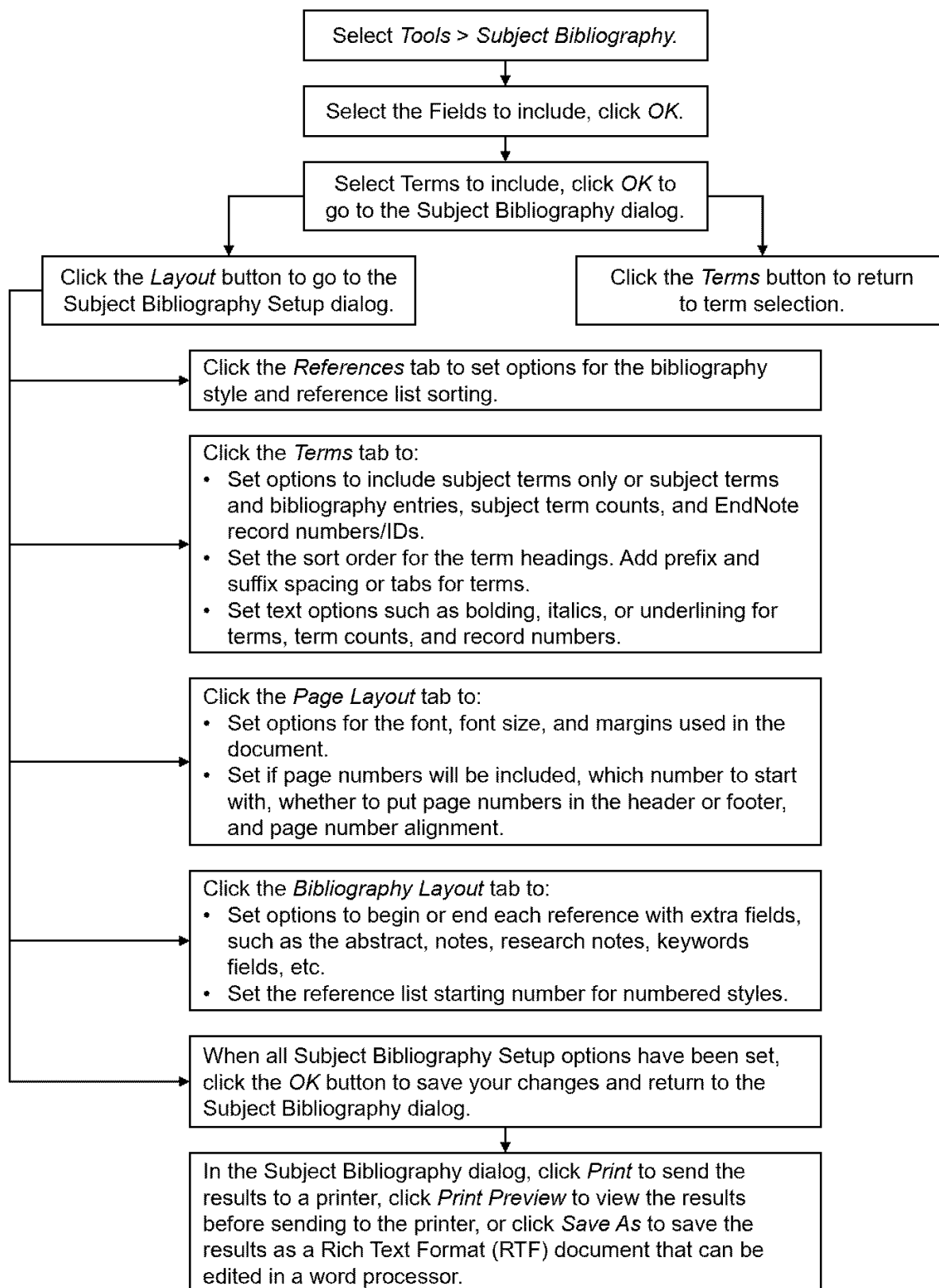
Pepperberg, I. M. (2009). *Alex & me: How a scientist and a parrot discovered a hidden world of animal intelligence – and formed a deep bond in the process* [Kindle](Kindle ed.). Retrieved from http://www.amazon.com/Alex-scientist-discovered-intelligence-ebook/dp/B00APOWOXC/ref=sr_1_2?s=digital-text&ie=UTF8&qid=1363823581&sr=1-2&keywords=alex+%26+me

Subject bibliographies have diverse uses, including: generating lists of journal abstracts, current awareness lists, subject indexes, or lists of holdings by category. Typical subject bibliography headings are by Keyword, Author, Journal Title, or Call Number.

You can print entire bibliographic citations, information from one or more fields, record IDs, or nothing at all under each heading.

When creating a subject bibliography, you have a large set of options to choose from. Below is a chart summarizing the steps and options available. This section will break these options down to help you understand the power available to you with this feature.

Subject Bibliography Flowchart



Subject Bibliography/List Dialog

Selecting a Subject Bibliography or a Subject List

Select *Subject Bibliography* from the *Tools* menu to see the Subject Bibliography/List dialog.

The dialog will display either a list of formatted references grouped by headings, or a list of terms. **Which of these shows is controlled by the *Reference List* setting in the *Terms* dialog of the *Subject Bibliography Setup* dialog.** The dialog title will always show "Subject Bibliography," even if a list of terms is displayed instead.

At the top of the screen are two buttons and a drop-down list:

Output Style: Use the *Output Style* list in the top left corner to select a style for formatted references. Only the styles selected as "favorites" are listed. If the style you want to use is not listed, choose *Select Another Style*. If you are displaying a simple list of terms, and not formatted references, this item is ignored. (You can also select a style, plus title and sorting options for your references, using the References dialog in the Subject Bibliography Setup tab. See [The Subject Bibliography References Tab](#).)

Layout: Click *Layout* to access the *Subject Bibliography Setup* dialog. See [The Subject Bibliography Setup Dialog](#).

Terms: Click *Terms* to return to the term selections, to either add or remove terms from the selected field(s). If you want to select a different EndNote field, you must close the Subject Bibliography/List dialog and select Subject Bibliography again from the Tools menu.

To access the Subject Bibliography Setup panel, click the *Layout* button. For information on the many options available in this dialog, see [The Subject Bibliography Setup Dialog](#).

Printing or Saving the Subject Bibliography or Subject List

When you have finished setting options in the Subject Bibliography Setup Dialog, you can return to the Subject Bibliography/List Dialog and finish creating your subject bibliography or list using one, or more, of the buttons below.

Print Preview: Click *Print Preview* to display a formatted page view.

Print: Click *Print* to display a Print dialog. Verify settings and click *Print* to send the list to your printer.

Save As : Click *Save As* to save a file in a text, RTF, or HTML format. A dialog appears for you to name the file. Select the file type, name and location of the file, and click *Save*.

Close: Click *Close* to close the Subject Bibliography dialog.

The Subject Bibliography Setup Dialog

The Subject Bibliography Setup dialog includes four buttons, each leading to a separate dialog controlling specific parts of the layout for a subject bibliography or subject list. See the topics below for details on each dialog.

- [The Subject Bibliography References Tab](#)
- [The Subject Bibliography Terms Tab](#)
- [Subject Bibliography Page Layout Tab](#)
- [The Subject Bibliographies Bibliography Layout Tab](#)

Note: Some subject bibliography settings are updated from the current output style, so changes you make are not saved for future subject bibliographies. If you have special settings that you want to always use for subject bibliographies, it may be easier to copy and modify an output style specifically for generating subject bibliographies.

The Subject Bibliography References Tab

Use the References tab to set the output style, reference list title, and reference list order. The options available are described below.

Output Style

From the drop-down *Output Style* list, select the EndNote style you want to use for formatting references. If the style you want to use is not on the favorites list, choose *Select Another Style* from the list to select from the styles installed on your computer. To add styles to the favorites list, see [Adding Styles to the Output Styles Menu](#). To install more styles, see [Installing Additional Output Styles](#).

Reference List Title

Enter the title that will print at the beginning of the subject list or subject bibliography. This can be more than one line. If the text box is empty, no title will print.

To apply character styles to the Reference List Title, select the text and use these keyboard shortcuts.

- Bold: ⌘+B
- Italics: ⌘+I
- Underline: ⌘+U

Reference List Order

This allows you to select a sort order for the references that print under each subject heading. Click on the appropriate radio button, or create a custom sort order by choosing the *Other...* radio button.

To reset the values on this tab, click the *EndNote Defaults* button.

The Subject Bibliography Terms Tab

The Terms tab options apply specifically to subject terms (or headings), not to references.

Note: The options on this tab are saved for the current subject bibliography session and for future sessions, until you change them again. So, if you generate a list of Subject Terms Only, the next time you select Subject Bibliography, you will produce a simple subject list again. To include formatted references, click the *Layout* button and the *Terms* button to select *Subject Terms and Reference List*.

Selecting a Subject List or Subject Bibliography

In the *Reference List* area, select one of the two radio buttons:

- **Subject Terms Only:** This option prints each unique subject term. It does NOT print formatted references below each term. Use this for a simple list of terms.
- **Subject Terms and Reference List:** This option prints each subject term with related references listed below it.

When printing subject terms with reference lists, EndNote typically prints each unique subject heading only once, with the related references listed below. You can select the *Repeating Subject Terms* box to print a subject term before each and every formatted reference (example below).

Avian cognition (2)
Pepperberg, I. M. (2011). Avian cognition and social interaction Fifty years of advances. *Interaction Studies*, 12(2), 195-207. doi:10.1075/is.12.2.01pep

Avian cognition (2)
Vick, S.-J., Bovet, D., & Anderson, J. R. (2009). How do African grey parrots (*Psittacus erithacus*) perform on a delay of gratification task? *Animal Cognition*, 13(2), 351-358. doi:10.1007/s10071-009-0284-2

Select the *Recycling Reference Numbers* box to restart reference numbering under each subject heading. If your starting reference number is 1, each list of references under each subject heading will start with 1. Deselect this item if you want sequential numbering throughout the document. This setting is used only if the current output style specifies reference numbering. To set the beginning number, see [The Subject Bibliographies Bibliography Layout Tab](#).

Recycling Reference Numbers	Continuous Reference Numbers
<i>Heading Number One</i> 1. First formatted reference 2. Second formatted reference <i>Heading Number Two</i> 1. First formatted reference 2. Second formatted reference	<i>Heading Number One</i> 1. First formatted reference 2. Second formatted reference <i>Heading Number Two</i> 3. First formatted reference 4. Second formatted reference

Including Subject Term Counts or Record IDs

Check the box to include:

- **Subject Term Counts:** This option prints a number next to the subject term to indicate how many records contain the term. For example:

Evolution (1)
Excavation (4)
Extinction (12)

Subject term counts always print on the same line as the subject term, surrounded by parentheses, and separated from the term by three spaces.

- **List of Record IDs:** This option prints the record IDs (the EndNote record number) of the records that contain the term. For example:

Excavation	34,	33,	6,	48				
Extinction	34,	46,	6,	10,	125,	132,	148,	162

Note: EndNote record numbers are not permanent and apply only to the library used to create the Subject Bibliography or Subject List. They can change when syncing or copying. See [Record Numbers](#).

Sorting the Subject Terms

You have four options for ordering your subject terms:

- **By Term — Alphabetical:** This option sorts subject terms by date for Year fields, and then alphanumeric order (1-9, A-Z) for all other fields.
- **By Term — Inverse Alphabetical:** This option reverses the By Term — Alphabetical order (Z-A, 9-1, Years).
- **By Term Count — Ascending:** This option lists terms based on how often they appear in records. For example, a term that appears in only one reference would display at the top of the list, whereas a term used in 20 references would appear further down in the list.
- **By Term Count — Descending:** This option reverses the By Term Count — Ascending order, so the most-used terms are listed first.

Note: This sort order setting affects subject headings only. If you want to change the order of the references printed below each heading, do so on the References tab of the Subject Bibliography Setup dialog. See [The Subject Bibliography References Tab](#).

Inserting Space or Text Around Subject Terms

Use the Prefix and Suffix text boxes to print text or punctuation before or after each subject term.

Each term may include a subject term count and/or a list of record IDs. The order of output is:

Text Before | Subject Term | Subject Term Count |
List of Record IDs | Text After | Reference List

You can use these special formatting codes in the text boxes:

New Paragraph	^p
New Line	^l
Tab	^t
Bold	⌘+B
Italic	⌘+I
Underline	⌘+U

By default, the Prefix box contains "^p" and the Suffix box contains "^p^p" in order to leave blank lines between each subject heading and the first citation listed below it.

When you print Subject Terms Only, you will probably want to print only a single "^p" after each term, so each subject term begins on a new line with no blank lines between them.

Applying Styles

In the Styles area, check the appropriate boxes to separately apply styles to Subject Terms, Subject Term Counts, and the List of Record IDs. You can combine styles in any way, such as:

Antarctica (2) **144, 12**
Antarctica **(2)** 144, 12

Apply styles to bibliographic references by modifying the output style.

If you save your list to a plain text file, all styles will be stripped.

Subject Bibliography Page Layout Tab

This tab includes options for font, font size, margins and page numbers.

Font and Size

Type or select a font and size for the references in your subject bibliography. EndNote lists currently available fonts. Sizes available depend on the printer and the selected font.

Margins

The margin is the distance between the edge of the page and the printed text. Enter your margins (in inches) into the appropriate boxes.

Page Numbers

Select whether or not to number the pages. If you choose to number pages, enter a starting page number. You can also choose whether or not to suppress the first page number for the title page.

Page numbers can appear in a header or a footer. The alignment can be left, right, or center.

The Subject Bibliographies Bibliography Layout Tab

The options available on the Bibliography Layout tab affect only the bibliographic references printed in a subject bibliography. These settings are not used when you print a simple subject list.

Note: When you select an output style, the settings on this tab change to reflect the settings found in the output style. You can override those settings for the current session, but changes to this tab are not saved after you close the subject bibliography window. If you want to make the changes permanent, edit the output style. You can make a copy of the output style to edit specifically for subject bibliographies.

Starting and Ending Each Reference with a Special Character or Text

Use the "Start each reference with" and the "End each reference with" text boxes to enter fields, text, or punctuation to print before and after every formatted reference.

Simply click in one of the text boxes and type text. You can use the Insert Field button to enter control characters or fields of information as described below.

Use the *Insert Field* buttons to insert any of the control characters below in a text box. These are standard control characters used in EndNote output styles.

End of Paragraph inserts a paragraph marker, which moves the following text to the next line.

Tab inserts a tab character. The spacing for tabs is determined by the ruler settings in your word processor.

Forced Separation inserts a vertical bar. Use vertical bars to detach punctuation from a specific field. See [Forced Separation—Using the Vertical Bar](#).

Link Adjacent Text inserts a non-breaking space. See [Link Adjacent Text \(Using the Nonbreaking Space\)](#).

Singular/Plural works with author (including editors) and pages fields to place different characters with the field depending on if there are a single or multiple number of authors or pages listed. For example, if there was one editor listed, it might show "John Smith, ed.," but if there were two editors, it might show "John Smith, Matt Jones, eds." See [Singular/Plural Term Separator \(Caret ^\)](#).

Enter these fields of information in the "Start each reference with" box by clicking the *Insert Field* button and selecting the field name:

Reference Type prints the Reference Type of each reference.

Label prints the Label field from each reference.

Citation prints the in-text citation form of each reference.

Bibliography Number prints a bibliography number. It is best to avoid using this option in subject bibliographies. Using a numbered style will include the bibliography number.

Record Number prints the Record Number from each reference.

Enter these fields of information in the "End each reference with" box by clicking the *Insert Field* button and selecting the field name:

Label prints the Label field from each reference.

Keywords prints the entire Keywords field for each reference.

Abstract prints the Abstract from each reference.

Notes prints the Notes field from each reference.

Record Number prints the Record Number from each reference.

Note: Although only the fields listed above can be entered from the drop-down list, any EndNote generic field name can be typed in manually. The generic field name must be typed in exactly as it appears in the Generic reference type.

Setting a Hanging Indent

Use the drop-down list to apply a hanging indent to paragraphs in each formatted reference.

Numbering References

Enter a starting reference number for bibliographic references printing below each heading. This setting is ignored if reference numbering is not applied from the current output style.

Creating a Subject Bibliography

To create a subject bibliography:

1. Select a group or perform a search to find the references to include in the subject bibliography. All showing references will be included.
 - Click on the *All References* group to include all references in the subject bibliography.
 - Click on a Group name to display only the references in a specific group.
 - Perform a search to find a subset of references for your subject bibliography. See [The Advanced Search Panel](#).
 - If none of the methods above work, you may find it easiest to create a custom group to hold the references you want to use for the subject bibliography.
2. Click in the reference list to make it the active panel.
3. From the *Tools* menu, select *Subject Bibliography* to display a list of EndNote fields by default field name.
4. Select the field(s) whose contents you wish to use as subject headings.
 - The most common selection is the single Keywords field to create a subject bibliography.
 - You can include any number of fields. If you build the list of headings from more than one field, the subject headings generated from these fields are combined into a single list.

- If you mix the Year field with other fields, the year will sort before alphabetic subject headings.
 - To quickly select all fields or clear all fields, use the buttons on the right side of the dialog.
5. Select checkboxes as needed to determine whether an entire field is used as a heading, or whether a field should be split into multiple headings.
 - **List each author separately:** When checked, this option will list each author name as a separate heading. If not checked, all authors from a single field will appear as a single heading.
 - **In other fields, list each entry that is separated by slash, carriage return, or line feed:** When checked, this option separates any nonauthor field into multiple subject headings if a slash, carriage return, or line feed is present.
 - Terms in the Keywords field are always listed as separate headings.
 6. Click *OK* to display the terms found in the fields you selected.
 7. Select those terms you wish to include as subject headings.
 - To quickly select all terms or clear all terms, use the buttons to the right of the dialog.
 - You may want to select all terms and then deselect the few terms you do not want included.
 8. Click *OK* to format the subject bibliography on the screen.

If you want to modify the term selections you just set, to either add or remove terms from the selected field(s), click on the *Terms* button.

Note: Subject headings print as they appear in your records. No special formatting of author names or keywords, and no journal title substitution is applied.

9. Click on the *Layout* button to open the Subject Bibliography Setup dialog. Use the options on the tabs available here to modify the layout and style of your subject bibliography or subject list. See the following sections for information on modifying the tabs shown:
 - [The Subject Bibliography References Tab](#)
 - Set options for the bibliography style and reference list sorting.
 - [The Subject Bibliography Terms Tab](#)
 - Set options to include subject terms only or subject terms and bibliography entries, subject term counts, and EndNote record numbers/IDs.
 - Set the sort order for the term headings.
 - Add prefix and suffix spacing or tabs for terms. Set text options such as bolding, italics, or underlining for terms, term counts, and record numbers.
 - [Subject Bibliography Page Layout Tab](#)
 - Set options for the font, font size, and margins used in the document.

- Set if page numbers will be included, which number to start with, whether to put page numbers in the header or footer, and page number alignment.
- [The Subject Bibliographies Bibliography Layout Tab](#)
 - Set options to begin or end each reference with extra fields, such as the abstract, notes, research notes, or keywords fields, etc.
 - Set the reference list starting number for numbered styles.

Use the Terms tab to set options specifically for subject headings. For a subject bibliography, it is important to select the *Subject Terms and Reference List* option to create a subject bibliography with references.

Click *OK* to save changes and close the Subject Bibliography Setup dialog.

10. Once your subject bibliography is set up the way you want it, you can do one of these:

- Display a formatted page view by clicking *Print Preview*.
- Print to your printer by clicking the *Print* button. A Print dialog will appear. Verify settings and click *Print*.
- Save a file (Text, RTF, or HTML) by clicking the *Save As...* button. A dialog appears for you to select the location and name the file. Select the file type, name, and location for the file, and then click *Save*.

Note: In your Web browser, set encoding to Unicode-UTF 8 to appropriately display extended Unicode characters in an exported HTML document.

11. Close the Subject Bibliography window when you are done viewing it.

Creating a Subject List

To create a subject list:

1. Select a group or perform a search to find the references to include in the subject list. All showing references will be included.
 - Click on the *All References* group to include all references in the subject bibliography.
 - Click on a Group name to display only the references in a specific group.
 - Perform a search to find a subset of references for your subject bibliography. See [The Advanced Search Panel](#).
 - If none of the methods above work, you may find it easiest to create a custom group to hold the references you want to use for the subject bibliography.
2. Click in the reference list to make it the active panel.
3. From the *Tools* menu, select *Subject Bibliography* to display a list of EndNote fields by default field name.

4. Select the field(s) whose contents you wish to see in your subject list.
 - The most common selection is the single Keywords field to create a list of the keywords used in your references.
 - You can include any number of fields. If you build the list of headings from more than one field, the subject headings generated from these fields are combined into a single list.
 - If you mix the Year field with other fields, the year will sort before alphabetic subject headings.
 - To quickly select all fields or clear all fields, use the buttons on the right side of the dialog.
5. Select checkboxes as needed to determine whether an entire field is shown in the list, or whether a field should be split into multiple list items.
 - **List each author separately:** When checked, this option will list each author name as a separate heading. If not checked, all authors from a single field will appear as a single list item.
 - **In other fields, list each entry that is separated by slash, carriage return, or line feed:** When checked, this option separates any nonauthor field into multiple list items if a slash, carriage return, or line feed is present.
 - Terms in the Keywords field are always listed separately.
6. Click *OK* to display the terms found in the fields you selected.
7. Select those terms you wish to include in the list.
 - To quickly select all terms or clear all terms, use the buttons to the right of the dialog.
 - You may want to select all terms and then deselect the few terms you do not want included.
8. Click *OK* to format the subject bibliography on the screen.

The initial default setting is to show terms as headings and references beneath them. To show just the terms in your list, click the *Layout* button to open the Subject Bibliography Setup dialog, then the *Terms* tab and select *Subject Terms Only*.

Note: Subject terms print as they appear in your records. No special formatting of author names or keywords, and no journal title substitution is applied.

9. On the Subject Bibliography Setup dialog, you will also have access to the tabs shown below. Use the options on these tabs to modify the layout and style of your subject list. See the following sections for information on modifying the tabs shown:
 - [The Subject Bibliography References Tab](#) (These options are not used for subject lists.)
 - Set options for the bibliography style and reference list sorting.
 - [The Subject Bibliography Terms Tab](#)
 - Set options to include subject terms only or subject terms and bibliography entries, subject term counts, and EndNote record numbers/IDs.
 - Set the sort order for the term headings.

- Add prefix and suffix spacing or tabs for terms. Set text options such as bolding, italics, or underlining for terms, term counts, and record numbers.
- [Subject Bibliography Page Layout Tab](#)
 - Set options for the font, font size, and margins used in the document.
 - Set if page numbers will be included, which number to start with, whether to put page numbers in the header or footer, and page number alignment.
- [The Subject Bibliographies Bibliography Layout Tab](#) (These options are not used for subject lists.)
 - Set options to begin or end each reference with extra fields, such as the abstract, notes, research notes, or keywords fields, etc.
 - Set the reference list starting number for numbered styles.

Use the Terms tab to set options specifically for terms. For a subject list, it is important to select the *Subject Terms Only* option to create a subject list without references.

Click *OK* to save changes and close the Subject Bibliography Setup dialog.

10. Once your subject list is set up the way you want it, you can do one of these:

- Display a formatted page view by clicking *Print Preview*.
- Print to your printer by clicking the *Print* button. A Print dialog will appear. Verify settings and click *Print*.
- Save a file (Text, RTF, or HTML) by clicking the *Save As...* button. A dialog appears for you to select the location and name the file. Select the file type, name, and location for the file, and then click *Save*.

Note: In your Web browser, set encoding to Unicode-UTF 8 to appropriately display extended Unicode characters in an exported HTML document.

11. Close the Subject Bibliography window when you are done viewing it.

Examples of Subject Bibliographies

Using Author Names as Subject Headings

This example uses author names as subject headings. The *List each author separately* box was checked on the Subject Fields dialog, so that single author names are used for headings rather than entire author fields. Uppercasing was applied to the Subject Terms on the Terms tab.

BONACCORSO, F. J.

Corresen, P. M., Brinck, K. W., DeLisle, M. A., Montoya-Aiona, K., Pinzari, C. A., & Bonaccorso, F. J. (2018). Multi-state occupancy models of foraging

habitat use by the Hawaiian hoary bat (*Lasiurus cinereus semotus*). *PLoS One*, 13(10), e0205150. doi:10.1371/journal.pone.0205150

BOON, L.

Van de Walle, I., Silence, K., Budding, K., Van de Ven, L., Dijkxhoorn, K., de Zeeuw, E., . . . Boross, P. (2021). ARGX-117, a therapeutic complement inhibiting antibody targeting C2. *Journal of Allergy and Clinical Immunology*, 147(4), 1420-1429.e1427. doi:10.1016/j.jaci.2020.08.028

BOROSS, P.

Van de Walle, I., Silence, K., Budding, K., Van de Ven, L., Dijkxhoorn, K., de Zeeuw, E., . . . Boross, P. (2021). ARGX-117, a therapeutic complement inhibiting antibody targeting C2. *Journal of Allergy and Clinical Immunology*, 147(4), 1420-1429.e1427. doi:10.1016/j.jaci.2020.08.028

Using Keywords as Subject Headings

This example uses keywords as subject headings, and restarts reference numbering after each subject heading. You would select *Recycle Numbering* in the *Subject Bibliography Setup* dialog on the *Terms* tab. The starting reference number is set on the *Bibliography Layout* tab. On the *Terms* tab, *Bold* and *Uppercase* were applied to the terms.

ACOUSTIC INTERFERENCE

1. Chiu, C., W. Xian, and C.F. Moss, *Flying in silence: Echolocating bats cease vocalizing to avoid sonar jamming*. Proceedings of the National Academy of Sciences of the United States of America, 2008. **105**(35): p. 13116-13121.

ACOUSTIC MONITORING

1. Smith, A.D. and S.R. McWilliams, *Bat activity during autumn relates to atmospheric conditions: implications for coastal wind energy development*. Journal of Mammalogy, 2016. **97**(6): p. 1565-1577.

ACOUSTIC STIMULATION

1. Jen, P.H. and C.H. Wu, *Echo duration selectivity of the bat varies with pulse-echo amplitude difference*. Neuroreport, 2008. **19**(3): p. 373-7.

ACOUSTICS

1. Arnett, E.B., et al., *Evaluating the Effectiveness of an Ultrasonic Acoustic Deterrent for Reducing Bat Fatalities at Wind Turbines*. PLoS One, 2013. **8**(6): p. e65794.
2. Fujioka, E., et al., *Rapid shifts of sonar attention by *Pipistrellus abramus* during natural hunting for multiple prey*. Journal of the Acoustical Society of America, 2014. **136**(6): p. 3389-3400.
3. Patterson, D.K. and I.M. Pepperberg, *A comparative-study of human and parrot phonation – acoustic and articulatory correlates of vowels*. Journal of the Acoustical Society of America, 1994. **96**(2): p. 634-648.
4. Patterson, D.K. and I.M. Pepperberg, *Acoustic and articulatory correlates of stop consonants in a parrot and a human subject*. Journal of the Acoustical Society of America, 1998. **103**(4): p. 2197-2215.

Reference Types

Your EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources reference types. EndNote provides built-in forms for these and other common reference types.

The reference type table shows which fields are used in each of the 57 different reference types (plus a Generic reference type) and what the fields are called. The Generic reference type is repeated several times so that you can easily compare an individual field to its Generic field name. For descriptions of special fields, see [Special Fields](#).

List of Reference Types

In addition to an all-encompassing Generic reference type, EndNote has three Unused and numerous predefined reference types. Click on a link below to see the default fields included for each reference type.

- [Aggregated Database](#)
- [Ancient Text](#)
- [Artwork](#)
- [Audiovisual Material](#)
- [Bill](#)
- [Blog](#)
- [Book](#)
- [Book Section](#)
- [Case](#)
- [Catalog](#)
- [Chart or Table](#)
- [Classical Work](#)
- [Computer Program](#)
- [Conference Paper](#)
- [Conference Proceeding](#)
- [Dataset](#)
- [Dictionary](#)
- [Discussion Forum](#)
- [Edited Book](#)
- [Electronic Article](#)
- [Electronic Book](#)
- [Electronic Book Section](#)
- [Encyclopedia](#)
- [Equation](#)

- [Figure](#)
- [Film or Broadcast](#)
- [Government Document](#)
- [Grant](#)
- [Hearing](#)
- [Interview](#)
- [Journal Article](#)
- [Legal Rule or Regulation](#)
- [Magazine Article](#)
- [Manuscript](#)
- [Map](#)
- [Multimedia Application](#)
- [Music](#)
- [Newspaper Article](#)
- [Online Database](#)
- [Online Multimedia](#)
- [Pamphlet](#)
- [Patent](#)
- [Personal Communication](#)
- [Podcast](#)
- [Press Release](#)
- [Report](#)
- [Serial](#)
- [Social Media](#)
- [Standard](#)
- [Statute](#)
- [Television Episode](#)
- [Thesis](#)
- [Unpublished Work](#)
- [Unused 1](#)
- [Unused 2](#)
- [Unused 3](#)
- [Web Page](#)

Important Points About Reference Types

- You can assign a particular reference type to each reference entered into your library.

- The Reference Types preference, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.
- The Reference Types preference allows up to 58 different types of references (including a Generic reference type), each capable of supporting up to 54 fields (including the name of the reference type). Of these, 52 fields can be edited. The Added to Library and Last Updated fields can be shown in the Reference List, but cannot be changed by the user.
- Of the 58 reference types, all but the Generic type can be modified.
- Use the Reference Types preference to add, delete, or rename fields. You can also add or hide complete reference types.
- The layout of the Generic reference type should be used as a guide when modifying or creating reference types. Rows reserved for Authors should be used only for names, the Year field should be used only for the year of publication, etc.
- Changes made to the Reference Types preference apply to all libraries opened under the current user account.
- If you move your library to a different computer, your references will follow the layout of the Reference Types preference for the current user account on that computer, unless you also transfer a copy of your reference type table. See [Backing Up or Sharing Your Reference Types Table](#).
- Do not enter reference data into the Reference Types preference. This dialog is designed to store just the names of the reference fields.
- When you use Cite While You Write to insert figures in Microsoft Word, figures found in the Chart or Table reference type are inserted as tables. Figures found in any other reference type in EndNote will format as figures in Word.

Reference Types and Data Entry

The chosen reference type specifies which fields appear in the Reference window. For instance, an EndNote journal article reference includes the fields Journal, Volume, and Issue, while a book reference includes fields such as Publisher and City. The Reference window only displays the fields that are relevant to the chosen reference type.

It is best to select the reference type before entering the bibliographic information in a reference. However, you can change the reference type of a reference at any time using the Reference Type list at the top of the Reference Edit panel.

Relationship Between Reference Types and Styles, Filters, and Connections

Styles, filters, and connection files can include templates for all of the different reference types. This enables various types of references to be formatted differently in a bibliography or imported differently, as necessary.

The reference types and fields available to you when editing a style, filter, or connection file depend on how the reference types are configured in the Reference Types preference. These files update automatically to reflect changes made in the Reference Types preference (such as changing the name of a field).

The Generic Reference Type

When entering references into your library, use the Generic type only for references that do not fit any of the other reference types. The more important function of the Generic reference type is to set up a guide for the other reference types to follow.

The Generic field names are used throughout the EndNote program (for example, in the Sort References dialog and the Search panel) to refer to a similar category of fields that can be found in the different reference types. When you choose a Generic field name in any of these dialogs, it refers to all field names assigned to that Generic row of the Reference Types preference. For example, if you use the Search command to search the Author field, EndNote searches all fields that appear in the Generic Author row of the Reference Types preference, including fields such as Artist, Reporter, and Cartographer.

The Generic Fields

The Generic Fields	The Generic Fields (continued)
Author	Custom 1
Year	Custom 2
Title	Custom 3
Secondary Author	Custom 4
Secondary Title	Custom 5
Place Published	Custom 6
Publisher	Custom 7
Volume	Custom 8
Number of Volumes	Accession Number
Number	Call Number
Pages	Label
Section	Keywords
Tertiary Author	Abstract
Tertiary Title	Notes
Edition	Research Notes
Date	URL
Type of Work	File Attachments
Subsidiary Author	Author Address
Short Title	Figure
Alternate Title	Caption
ISBN/ISSN	Access Date
DOI	Translated Author
Original Publication	Translated Title
Reprint Edition	Name of Database
Reviewed Item	Database Provider
	Language
	Added to Library
	Last Updated

Note: When editing the Reference Types preference it is important that you keep similar fields in the same row, as defined by the Generic field names of the row. Each reference type can call these fields by a different name; however, the content of the fields should be similar.

Using the Generic Type in Styles

Although the Generic reference type is rarely used for data entry, it plays an important role in formatting bibliographies. In addition to formatting Generic references, the Generic template in a style is used to format any reference types that are not specifically defined in the style. Consequently, every bibliographic style should contain a Generic template so that all references get formatted when EndNote creates a bibliography.

Setting a Default Reference Type

By default, the Journal Article reference type appears when you insert a new reference. While you can change the assigned reference type during data entry, you may want to change the default setting.

To change the default reference type setting:

1. From the *EndNote* menu, select *Preferences*.
2. Click on *Reference Types*.
3. Click the *Default Reference Type* list and choose from one of the available reference types.
4. Click *Save* to save the change.

The Reference Types Preference

The Reference Types preference displays the available reference types and the fields that each reference type contains. Use the Reference Types preference to add, remove, or rename fields—or to rename a reference type.

Note: Much like your EndNote library, any changes you make to your Reference Types should be backed up. See [Backing Up or Sharing Your Reference Types Table](#) for more information.

To access the Reference Types preference:

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Click the *Modify Reference Types* button and the Modify Reference Types dialog will open.
4. Use the drop-down list at the top to display one of the 57 editable reference types.

The first column of the Modify Reference Types dialog is reserved for the Generic reference type, which lists all of the available fields.

The rows correspond to the editable fields that each reference type can contain (including the name of the reference type). Each named cell in a column represents a field that appears in the reference. The names of the fields in each reference type should closely correspond to their Generic field names in the left column.

The Generic column is the complete set of fields that can be included in any type of reference—no fields can be added to this list, nor can the names of the Generic fields be changed. [The Generic Reference Type](#) serves as a model for constructing all other reference types.

Navigating in the Modify Reference Types Dialog

- Use the vertical scroll bar to see the additional fields available for each reference type.
- If you decide to undo your changes to the reference types and revert to the EndNote defaults, click *EndNote Defaults* to return all reference type settings to their original EndNote settings.

Note: Clicking EndNote Defaults in the Modify Reference Types dialog will revert the reference type you are editing to the default, but clicking EndNote Defaults in the Reference Types Preference dialog will revert **all** changes that have ever been made to the defaults.

- If you want the change you made to apply to all reference types, click *Apply to All Ref Types* to change the field for all reference types.

Caution: Use extreme caution with the Apply to All Ref Types button. It will change all fields that correspond to that field in the Generic reference type. For example, if you changed the Custom 2 field in the Manuscript reference type to My Keywords, then clicked Apply to All Fields, you would replace the PMCID field in the Journal Article reference type to My Keywords instead of PMCID.

- Click *OK* to save your changes and to close the Modify Reference Types dialog. Click *Save* when you return to the EndNote Preference dialog to save your settings **OR** click *Cancel* to exit from the Reference Types preference without saving any changes.

Customizing Reference Types

All of the reference types, except for Generic, can be modified using the Reference Types preference. Whenever you make a change to a reference type, you should also edit your styles to make sure that they correctly format the new or modified reference types.

Note: Much like your EndNote library, any changes you make to your Reference Types should be backed up. See [Backing Up or Sharing Your Reference Types Table](#) for more information.

If you plan to share your libraries with other users, you may want to limit the use of new and modified reference types. The changes you make to the Reference Types preference apply to all libraries opened on a computer from your user account. If your library is opened from a different computer or a different user account, your references will follow the layout of the Reference Types preference for that computer and user, unless you also transfer a copy of your reference type table. See [Backing Up or Sharing Your Reference Types Table](#).

If you modify a reference type for records in your EndNote library, you should make sure that the reference type is also created or modified on other computers that will access the library.

Do not try to edit the Reference Types preference to rearrange information within your references. For example, if you delete the Journal field and retype "Journal" elsewhere in the column for Journal Articles, you are telling EndNote to close the original Journal field and display a new field called "Journal" in another location—this does not move your data from the original Journal field to the new one. Any references that

had data in the original Journal field will still show that information, but the field will have its Generic name of Secondary Title. The new Journal field will remain empty.

Note: EndNote online will always use the default EndNote reference types, so changes you make to your reference types on the desktop will not be reflected in your EndNote account.

These topics can guide you in editing reference types:

- [List of Reference Types](#)
- [The Generic Reference Type](#)
- [Special Fields](#)
- [The Reference Types Preference](#)
- [Adding, Changing, and Hiding Reference Types](#)
- [Adding, Deleting, and Renaming Fields](#)
- [Backing Up or Sharing Your Reference Types Table](#)

Adding, Changing, and Hiding Reference Types

There are three Reference Types titled Unused, where you can define a new type of reference. If these are already in use, you can overwrite other reference types that you do not need in order to create new reference types. For example, if your subject area never involves art, you may have no use for the Artwork reference type; you could replace it with another reference type.

To add a new reference type:

1. From the *EndNote* menu, select *Preferences*.
2. Select the *Reference Type* option in the list of preferences, and then click *Modify Reference Types* to open the Modify Reference Types dialog.
3. Use the drop-down list at the top to select one of the Unused reference types. If all of the Unused reference types are in use, select a reference type that you are willing to overwrite.
4. Type a name for that new reference type into the column heading.

Note: A reference type must have fields defined in order to appear in the reference type list for new or existing references. If you change the name of an Unused reference type, it will not appear in your reference type list. You must also include fields in the reference type as described below.

5. Continue down the column for that reference type, adding new fields as necessary. (Delete or rename unwanted fields if you are overwriting another reference type.) Remember to match the meaning of the fields you add with the Generic row headings. It is often helpful to use other reference types as guides, too.
6. Click *OK* after you have added all of the necessary fields, and you will return to the main Preferences window for Reference Types.

7. Click *Save* to save your changes.
8. Click the *Close* button to close the Preferences window.

You can now use this new reference type when entering references. You should also edit your styles so that they correctly reflect the type of format required for this new reference type. If you overwrite an existing reference type, any references that used the old reference type will change to use the new reference type.

Note: If you ever plan to use journal articles in your library, do not overwrite the Journal Article or Electronic Article reference types. These two reference types are the only ones for which journal abbreviation replacements can be made with the Journals Term List.

To Hide an Unwanted Reference Type

1. From the *EndNote* menu, select *Preferences*, select the *Reference Type* option in the list of preferences, and then click *Modify Reference Types* to open the Modify Reference Types dialog.
2. Use the drop-down list at the top to find the reference type that you want to hide.
3. Add a period before the reference type's name in the column header to have EndNote remove that item from the Reference Type list in the Reference Edit panel, when creating a new reference, and elsewhere. The definition, however, remains in case you later wish to restore it by removing the period. (To find the reference type that you hid in the future, go to the top of the list of references, the period (.) before the name will be at the beginning because the reference types are in alphabetical order.)

For example, if you were hiding the Map reference type, the column heading would be .Map.

4. Click *OK* to return to the main Preferences window for Reference Types.
5. Click *Save* to save your changes.

Once you have hidden a reference type, you should not select it under Preferences as the default reference type for new references; if you do, EndNote will default to the Generic reference type.

Adding, Deleting, and Renaming Fields

There are different ways you can customize the various reference types. If an existing reference type does not contain all of the fields that you need, you can define a new field or rename an existing field. Similarly, if there is a field that you know you will never use, you can delete it from the reference type so that it no longer appears in your references.

Note: Be sure to read about [Special Fields](#) before changing any fields.

To Add a Field to a Reference Type

1. From the *EndNote* menu, select *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Modify Reference Types dialog.
2. Use the drop-down list at the top to find the reference type that you want to change.

3. Look at the field names listed in the Generic column and find the one with the most similar meaning to the field that you want to add. Make sure that the corresponding cell is blank for the reference type that you are modifying. If it is not blank, then you should use another field.
4. Click in the blank cell and type the name for the new field.
5. Click *OK* to return to the main Preferences window for Reference Types.
6. Click *Save* to save your changes.

To Rename a Field

1. From the *EndNote* menu, select *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Modify Reference Types dialog.
2. Use the drop-down list at the top to find the reference type that you want to change.
3. Within the column for that reference type, find the field name that you want to change, click on it, and type a new name for the field to replace the current name.
4. Click *OK* to return to the main Preferences window for Reference Types.
5. Click *Save* to save your changes.

Styles, filters, and connection files update automatically to use the new name.

To Delete a Field from a Reference Type

1. From the *EndNote* menu, select *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Modify Reference Types dialog.
2. Use the drop-down list at the top to find the reference type that you want to change.
3. Find the name of the field you want to delete and select it.
4. Press the *Delete* or *Backspace* key to clear that field name.
5. Click *OK* to return to the main Preferences window for Reference Types.
6. Click *Save* to save your changes.

The deleted field no longer appears in any references using that reference type. However, if there was any information in the deleted field, it still appears in the reference, but the field is displayed with its Generic name. For example, suppose you remove the Editor field from the Book reference type. Thereafter, when you add new book references to your library, there will be no available field for entering an editor. However, if you edit an old book reference, one in which you had entered an editor's name, the name would be displayed in the field titled Secondary Author. It is the same Editor field that was used originally, however it is now displayed with its Generic name.

Data in a field is not deleted by deleting a field from a reference type. To remove all text from a field, use the Clear Field option in the [Change Fields](#) command. You can also move data from one field to another using the [Change Fields](#) command.

Backing Up or Sharing Your Reference Types Table

An EndNote user can share a customized reference type table with another EndNote user. Keep in mind, however, that when you do this, you completely replace the recipient's existing reference type table.

Backup or Share a Reference Types Table

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Under *Reference Type Table*, click *Export* to display the Export Reference Types dialog.
4. Name the file, select a folder where you will be able to find it later, and click *Save*. EndNote will append an .xml suffix to the file name.

You now have a backup of your Reference Types Table.

To share your reference types with a colleague, send them a copy of the saved file.

Importing a Reference Types Table

Note: When you import another user's Reference Type Table, you will overwrite the entire contents of your current Reference Type Table, losing any customizations you have made to your reference types. We suggest creating a backup of your current Reference Type Table before importing a new table, using the instructions above.

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Under *Reference Type Table*, click *Import* to display a file dialog.
4. In the file dialog, locate, highlight, and open the .xml file that was previously exported.

Special Fields

EndNote includes 52 editable fields (including the first field, which contains the name of the reference type). Each of the different EndNote data fields is available for use by the different reference types. Initially, only the Generic reference type includes all fields. Few restrictions are placed on the type of text that can be entered. However, there are a few fields that are reserved for specific functions.

Note: Although the fields Added to Library and Last Updated are shown in the Reference Types and Fields tables, they do not appear in the Reference Types preferences because they cannot be edited. They are always present and can be shown in the Reference List, but cannot be changed by the user.

Author Fields

The Author, Secondary Author, Tertiary Author, and Subsidiary Author rows in the Reference Types are specially configured to handle [Author and Editor Names](#), and should not be used for any data other than names.

When EndNote creates a bibliography, the information in these fields is formatted according to the specifications of the selected style's Author List and Editor List settings. (The Author List is used for the Author field; Editor List is used for Secondary Author, Tertiary Author, and Subsidiary Author fields.) If you put text other than personal names in any of these fields, EndNote will still try to interpret it and format it as a person's name.

The first author's last name is used in temporary citations inserted into word-processing documents. The Reference List can display just the last name of the first author that it finds in the Author field, or a list of author names (see [Display All Authors in the Author Field](#)).

Note: If you have a corporate author name in an Author field, put a comma after the name so that EndNote does not interpret it as a first and last name. See [Author and Editor Names](#) for information on entering corporate and complex author names.

Title Fields

The three fields that the Generic type uses for the [Title Fields](#)—Title, Secondary Title, and Tertiary Title—are usually found under different names in other reference types. For example, a section of a book which is part of a series will use all three title fields: the chapter title would belong in the main Title field, the book title corresponds to the Secondary Title field, and the series title corresponds to the Tertiary Title field.

The Generic Secondary Title and Alternate Title fields map to the Journal and Alternate Journal fields, respectively. The fields listed below, found in specific reference types, are the only ones that can be used with the Journals term list to modify journal names in formatted bibliographies.

Journal Article reference type—Journal field

Journal Article reference type—Alternate Journal field

Electronic Article reference type—Periodical Title field

Electronic Article reference type—Alternate Title field

Pages Field

The fields in the row reserved for [page numbers](#) are the only ones that work with the Page Numbers option in the styles. This feature lets you specify how EndNote should format the page numbers in the bibliography (first page only, or a full or abbreviated range of pages). Similarly, any field in the Pages row of the Reference Types Table can take advantage of a special formatting character in the styles: the caret (^). This character allows you to pick a singular and plural form of a term to precede or follow the pages in a bibliography, for example "p. 25" and "pp. 32-45." If you enter page numbers in any other part of the reference, they cannot be used with these features.

URL Field

When a correctly formatted URL is entered into this field, the Open URL command in the References menu can be used to launch your Web browser and take you to that site.

When a reference is selected and Open URL is chosen, EndNote checks the URL field for a URL. No other fields are checked. See [The URL Field](#) and [Linking a URL to an EndNote Reference](#).

File Attachments Field

Use [The File Attachments Field](#) to store the path to files on your hard drive (such as graphics, word processing documents, and PDF files). You can specify an absolute path to a specific folder, or you can specify a relative path to copy the file to your library's .Data/PDF folder. You can link up to 45 files to each reference. See [Selecting a Relative Path or an Absolute Path for File Attachments](#) for more information on absolute and relative paths.

When a correctly formatted path and filename is entered into this field, the Open File command in the References menu can be used to open the file. See [Linking a File to an EndNote Reference](#).

Figure and Caption Fields

[The Figure and Caption Fields](#) store a single graphic or file attachment specifically for use in Microsoft Word, and the caption for that graphic. These fields are included in all reference types. See [Figures](#) for information about adding figures to a reference.

To add or remove the Figure or Caption fields from a reference type, use the Preferences dialog to edit reference types, as described in [Adding, Deleting, and Renaming Fields](#).

Date Stamp Fields

Two Auto Date Stamp fields are available that you can add to the Reference List display.

The Added to Library and Last Updated date fields are inserted when you save a new reference. The Last Updated date is reset each time you save changes to a reference. The date format of the Auto Date Stamp fields matches your default operating system settings (for example, 4/16/2021).

To add the two Auto Date Stamp fields to the Reference List display, select *Preferences > Display Fields*. From the *Field* column, select the *Added to Library* and/or *Last Updated* fields. EndNote populates the Heading column with your selection.

Another way to add these fields to the Reference List display is to *Control+click* on a column heading, then choose them from the list.

You cannot edit, print, or export either of the Auto Date Stamp fields. You can, however, display and sort these fields just as you can any other EndNote field.

Note: For references entered with EndNote version X1 or earlier, the Added to Library field is left blank and the Last Updated field displays the date of conversion to EndNote.

Reference Types and Fields

Aggregated Database

Generic	Aggregated Database
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Periodical
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	
Number	Publication Number
Pages	Pages
Section	Screens
Tertiary Author	
Tertiary Title	
Edition	Date Published
Date	Date Accessed
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN/ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	
Reviewed Item	

Generic (continued)	Aggregated Database (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Ancient Text

Generic	Ancient Text
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Publication Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Text Number
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	Volume Title
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviated Publication
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Ancient Text (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Artwork

Generic	Artwork
Author	Artist
Year	Year
Title	Title
Secondary Author	
Secondary Title	
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	
Number	Size
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Artwork (continued)
Custom 1	
Custom 2	
Custom 3	Size/Length
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Audiovisual Material

Generic	Audiovisual Material
Author	Author
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Extent of Work
Number	Number
Pages	
Section	
Tertiary Author	
Tertiary Title	Album Name
Edition	Edition
Date	Date
Type of Work	Type
Subsidiary Author	Performers
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Contents
Reprint Edition	
Reviewed Item	

Generic (continued)	Audiovisual Material (continued)
Custom 1	Cast
Custom 2	Credits
Custom 3	Size/Length
Custom 4	
Custom 5	Format
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Bill

Generic	Bill
Author	
Year	Year
Title	Title
Secondary Author	
Secondary Title	Code
Place Published	
Publisher	
Volume	Code Volume
Number of Volumes	
Number	Bill Number
Pages	Code Pages
Section	Code Section
Tertiary Author	
Tertiary Title	Legislative Body
Edition	Session
Date	Date
Type of Work	
Subsidiary Author	Sponsor
Short Title	Short Title
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	History
Reprint Edition	
Reviewed Item	

Generic (continued)	Bill (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Blog

Generic	Blog
Author	Author
Year	Year
Title	Title of Entry
Secondary Author	Editor
Secondary Title	Title of WebLog
Place Published	Place Published
Publisher	Publisher
Volume	Access Year
Number of Volumes	
Number	Date
Pages	Description
Section	Message Number
Tertiary Author	Illustrator
Tertiary Title	Institution
Edition	Edition
Date	Last Update Date
Type of Work	Type of Medium
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Contents
Reprint Edition	
Reviewed Item	

Generic (continued)	Blog (continued)
Custom 1	Author Affiliation
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Book

Generic	Book
Author	Author
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Series Volume
Pages	Number of Pages
Section	Pages
Tertiary Author	Editor
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Book (continued)
Custom 1	Issue
Custom 2	
Custom 3	Title Prefix
Custom 4	Reviewer
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Book Section

Generic	Book Section
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Book Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Series Volume
Pages	Pages
Section	Chapter
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	
Type of Work	
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Book Section (continued)
Custom 1	Section
Custom 2	
Custom 3	Title Prefix
Custom 4	Reviewer
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Case

Generic	Case
Author	
Year	Year Decided
Title	Case Name
Secondary Author	
Secondary Title	Reporter
Place Published	
Publisher	Court
Volume	Reporter Volume
Number of Volumes	Reporter Abbreviation
Number	Docket Number
Pages	First Page
Section	Filed Date
Tertiary Author	Higher Court
Tertiary Title	Decision
Edition	Action of Higher Court
Date	Date Decided
Type of Work	Citation of Reversal
Subsidiary Author	Counsel
Short Title	Abbreviated Case Name
Alternate Title	Parallel Citation
ISBN/ISSN	
DOI	DOI
Original Publication	History
Reprint Edition	
Reviewed Item	

Generic (continued)	Case (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Catalog

Generic	Catalog
Author	Author
Year	Year
Title	Title
Secondary Author	Institution
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Catalog Number
Number	Series Volume
Pages	Pages
Section	Number of Pages
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Catalog (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Chart or Table

Generic	Chart or Table
Author	Created By
Year	Year
Title	Title
Secondary Author	Name of File
Secondary Title	Image Source Program
Place Published	Place Published
Publisher	Publisher
Volume	Image Size
Number of Volumes	
Number	Number
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Version
Date	Date
Type of Work	Type of Image
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Chart or Table (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Classical Work

Generic	Classical Work
Author	Attribution
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Series Volume
Pages	Number of Pages
Section	
Tertiary Author	Editor
Tertiary Title	
Edition	Edition
Date	
Type of Work	Type
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN/ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Classical Work (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Computer Program

Generic	Computer Program
Author	Programmer
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Edition
Number of Volumes	
Number	
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Version
Date	
Type of Work	Type
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Contents
Reprint Edition	
Reviewed Item	

Generic (continued)	Computer Program (continued)
Custom 1	Computer
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Conference Paper

Generic	Conference Paper
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Conference Name
Place Published	Conference Location
Publisher	Publisher
Volume	Volume
Number of Volumes	Session
Number	Issue
Pages	Pages
Section	Paper No.
Tertiary Author	
Tertiary Title	
Edition	
Date	Date
Type of Work	Type
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Conference Paper (continued)
Custom 1	Place Published
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Conference Proceeding

Generic	Conference Proceeding
Author	Author
Year	Year of Conference
Title	Title
Secondary Author	Editor
Secondary Title	Conference Name
Place Published	Conference Location
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Issue
Pages	Pages
Section	
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	Date
Type of Work	
Subsidiary Author	Sponsor
Short Title	Short Title
Alternate Title	
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Source
Reprint Edition	
Reviewed Item	

Generic (continued)	Conference Proceeding (cont.)
Custom 1	Place Published
Custom 2	Year Published
Custom 3	Proceedings Title
Custom 4	
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Dataset

Generic	Dataset
Author	Investigators
Year	Year
Title	Title
Secondary Author	Producer
Secondary Title	Periodical Title
Place Published	Place Published
Publisher	Distributor
Volume	
Number of Volumes	Study Number
Number	
Pages	
Section	Original Release Date
Tertiary Author	
Tertiary Title	Series Title
Edition	Version
Date	Date of Collection
Type of Work	
Subsidiary Author	Funding Agency
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Version History
Reprint Edition	
Reviewed Item	Geographic Coverage

Generic (continued)	Dataset (continued)
Custom 1	Time Period
Custom 2	Unit of Observation
Custom 3	Data Type
Custom 4	Dataset(s)
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Dictionary

Generic	Dictionary
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Dictionary Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Number
Pages	Pages
Section	Version
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Dictionary (continued)
Custom 1	Term
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Discussion Forum

Generic	Discussion Forum
Author	Author
Year	Year
Title	Title of Message
Secondary Author	
Secondary Title	Title of List
Place Published	Place Published
Publisher	Publisher
Volume	Translated Message Title
Number of Volumes	Translated List Title
Number	
Pages	Pages
Section	Description
Tertiary Author	Author Affiliation
Tertiary Title	Attachments
Edition	Date Cited
Date	Post Date
Type of Work	Content Type
Subsidiary Author	Original Author
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	
DOI	DOI
Original Publication	Original Post
Reprint Edition	
Reviewed Item	

Generic (continued)	Discussion Forum (continued)
Custom 1	E-Mail Address
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Edited Book

Generic	Edited Book
Author	Editor
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Series Volume
Pages	Number of Pages
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Edited Book (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	Contents
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Editor Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Electronic Article

Generic	Electronic Article
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Periodical Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Document Number
Number	Issue
Pages	Pages
Section	E-Pub Date
Tertiary Author	
Tertiary Title	Website Title
Edition	Edition
Date	Date Accessed
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Electronic Article (continued)
Custom 1	Year Cited
Custom 2	Date Cited
Custom 3	PMCID
Custom 4	Reviewer
Custom 5	Issue Title
Custom 6	NIHMSID
Custom 7	Article Number
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Electronic Book

Generic	Electronic Book
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Secondary Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Version
Number	
Pages	Number of Pages
Section	
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	Date Accessed
Type of Work	Type of Medium
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Electronic Book (continued)
Custom 1	Year Cited
Custom 2	Date Cited
Custom 3	Title Prefix
Custom 4	Reviewer
Custom 5	Last Update Date
Custom 6	NIHMSID
Custom 7	PMCID
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Electronic Book Section

Generic	Electronic Book Section
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Book Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Chapter
Pages	Pages
Section	
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Electronic Book Section (cont.)
Custom 1	Section
Custom 2	
Custom 3	Title Prefix
Custom 4	Reviewer
Custom 5	Packaging Method
Custom 6	NIHMSID
Custom 7	PMCID
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Encyclopedia

Generic	Encyclopedia
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Encyclopedia Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Encyclopedia (continued)
Custom 1	Term
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Equation

Generic	Equation
Author	Created By
Year	Year
Title	Title
Secondary Author	Name of File
Secondary Title	Image Source Program
Place Published	Place Published
Publisher	Publisher
Volume	Image Size
Number of Volumes	
Number	Number
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Version
Date	Date
Type of Work	Type of Image
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Equation (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Figure

Generic	Figure
Author	Created By
Year	Year
Title	Title
Secondary Author	Name of File
Secondary Title	Image Source Program
Place Published	Place Published
Publisher	Publisher
Volume	Image Size
Number of Volumes	
Number	Number
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Version
Date	Date
Type of Work	Type of Image
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Figure (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Film or Broadcast

Generic	Film or Broadcast
Author	Director
Year	Year Released
Title	Title
Secondary Author	Series Director
Secondary Title	Series Title
Place Published	Country
Publisher	Distributor
Volume	
Number of Volumes	
Number	
Pages	Running Time
Section	
Tertiary Author	Producer
Tertiary Title	
Edition	Edition
Date	Date Released
Type of Work	Medium
Subsidiary Author	Performers
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	
DOI	DOI
Original Publication	Original Release
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Film or Broadcast (continued)
Custom 1	Cast
Custom 2	Credits
Custom 3	
Custom 4	Genre
Custom 5	Format
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Synopsis
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Government Document

Generic	Government Document
Author	Author
Year	Year
Title	Title
Secondary Author	Department
Secondary Title	
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	
Number	Issue
Pages	Pages
Section	Section
Tertiary Author	
Tertiary Title	Series Title
Edition	Edition
Date	
Type of Work	
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	Report Number
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Government Document (cont.)
Custom 1	Government Body
Custom 2	Congress Number
Custom 3	Congress Session
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Grant

Generic	Grant
Author	Investigators
Year	Year
Title	Title of Grant
Secondary Author	
Secondary Title	
Place Published	Activity Location
Publisher	Sponsoring Agency
Volume	Amount Requested
Number of Volumes	Amount Received
Number	Status
Pages	Pages
Section	Duration of Grant
Tertiary Author	
Tertiary Title	
Edition	Requirements
Date	Deadline
Type of Work	Funding Type
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	
DOI	DOI
Original Publication	Original Grant Number
Reprint Edition	Review Date
Reviewed Item	Reviewed Item

Generic (continued)	Grant (continued)
Custom 1	Contact Name
Custom 2	Contact Address
Custom 3	Contact Phone
Custom 4	Contact Fax
Custom 5	Funding Number
Custom 6	CFDA Number
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Hearing

Generic	Hearing
Author	
Year	Year
Title	Title
Secondary Author	
Secondary Title	Committee
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	Number of Volumes
Number	Document Number
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	Legislative Body
Edition	Session
Date	Date
Type of Work	
Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	History
Reprint Edition	
Reviewed Item	

Generic (continued)	Hearing (continued)
Custom 1	
Custom 2	Congress Number
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Interview

Generic	Interview
Author	Interviewee
Year	Year
Title	Title
Secondary Author	Interviewer
Secondary Title	Program
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	
Number	Number
Pages	Pages
Section	Section
Tertiary Author	Director
Tertiary Title	Location of Work
Edition	Edition
Date	Date
Type of Work	Format
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN/ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Interview (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Journal Article

Generic	Journal Article
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Journal
Place Published	
Publisher	
Volume	Volume
Number of Volumes	Part/Supplement
Number	Issue
Pages	Pages
Section	Start Page
Tertiary Author	
Tertiary Title	Errata
Edition	Epub Date
Date	Date
Type of Work	Type of Article
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Journal
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Journal Article (continued)
Custom 1	Legal Note
Custom 2	PMCID
Custom 3	
Custom 4	
Custom 5	
Custom 6	NIHMSID
Custom 7	Article Number
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Legal Rule or Regulation

Generic	Legal Rule or Regulation
Author	Author
Year	Year
Title	Title
Secondary Author	Issuing Organization
Secondary Title	Title Number
Place Published	Place Published
Publisher	Publisher
Volume	Rule Number
Number of Volumes	Session Number
Number	Start Page
Pages	Pages
Section	Section Number
Tertiary Author	
Tertiary Title	Supplement No.
Edition	Edition
Date	Date of Code Edition
Type of Work	Type of Work
Subsidiary Author	
Short Title	
Alternate Title	Abbreviation
ISBN/ISSN	Document Number
DOI	DOI
Original Publication	History
Reprint Edition	
Reviewed Item	

Generic (continued)	Legal Rule or Regulation (cont.)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Magazine Article

Generic	Magazine Article
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Magazine
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Frequency
Number	Issue Number
Pages	Pages
Section	Start Page
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Article
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Magazine
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Magazine Article (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Manuscript

Generic	Manuscript
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Collection Title
Place Published	Place Published
Publisher	Library/Archive
Volume	Volume/Storage Container
Number of Volumes	Manuscript Number
Number	Folio Number
Pages	Pages
Section	Start Page
Tertiary Author	
Tertiary Title	
Edition	Description of Material
Date	Date
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Manuscript (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Map

Generic	Map
Author	Cartographer
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	
Number	
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Map (continued)
Custom 1	Scale
Custom 2	Area
Custom 3	Size
Custom 4	
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Multimedia Application

Generic	Multimedia Application
Author	Rights Holder
Year	Year
Title	App Title
Secondary Author	Contributors
Secondary Title	
Place Published	Place Published
Publisher	Website Name
Volume	Platform
Number of Volumes	Content Rating
Number	Version
Pages	System Requirements
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reissue Date
Reviewed Item	

Generic (continued)	Multimedia Application (cont.)
Custom 1	
Custom 2	Credits
Custom 3	Size/Length
Custom 4	
Custom 5	Format
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Music

Generic	Music
Author	Composer
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Album Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	
Pages	Pages
Section	Section
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	Date
Type of Work	Form of Item
Subsidiary Author	Producer
Short Title	Short Title
Alternate Title	
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Music (continued)
Custom 1	Format of Music
Custom 2	Form of Composition
Custom 3	Music Parts
Custom 4	Target Audience
Custom 5	Accompanying Matter
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Newspaper Article

Generic	Newspaper Article
Author	Reporter
Year	Year
Title	Title
Secondary Author	
Secondary Title	Newspaper
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Frequency
Number	Start Page
Pages	Pages
Section	Section
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Issue Date
Type of Work	Type of Article
Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Newspaper Article (continued)
Custom 1	Column
Custom 2	Issue
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Online Database

Generic	Online Database
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Periodical
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	
Number	
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	
Edition	Date Published
Date	Date Accessed
Type of Work	Type of Work
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	Report Number
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Online Database (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Online Multimedia

Generic	Online Multimedia
Author	Created By
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Distributor
Volume	
Number of Volumes	Date Recorded
Number	Number of Screens
Pages	Short URL
Section	Embed URL
Tertiary Author	Contributors
Tertiary Title	
Edition	Time Stamp
Date	Date Accessed
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Online Multimedia (continued)
Custom 1	Year Cited
Custom 2	Date Cited
Custom 3	
Custom 4	
Custom 5	Format/Length
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Pamphlet

Generic	Pamphlet
Author	Author
Year	Year
Title	Title
Secondary Author	Institution
Secondary Title	Published Source
Place Published	Place Published
Publisher	Publisher
Volume	Number
Number of Volumes	
Number	Series Volume
Pages	Pages
Section	Number of Pages
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Pamphlet (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Patent

Generic	Patent
Author	Inventor
Year	Year
Title	Title
Secondary Author	Issuing Organization
Secondary Title	Published Source
Place Published	Country
Publisher	Assignee
Volume	Patent Version Number
Number of Volumes	US Patent Classification
Number	Application Number
Pages	Pages
Section	International Patent Number
Tertiary Author	International Title
Tertiary Title	International Author
Edition	International Patent Classification
Date	Date
Type of Work	Patent Type
Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	Patent Number
DOI	DOI
Original Publication	Priority Numbers
Reprint Edition	
Reviewed Item	

Generic (continued)	Patent (continued)
Custom 1	
Custom 2	Issue Date
Custom 3	Designated States
Custom 4	Attorney/Agent
Custom 5	References
Custom 6	Legal Status
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Inventor Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Personal Communication

Generic	Personal Communication
Author	Author
Year	Year
Title	Title
Secondary Author	Recipient
Secondary Title	
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	Communication Number
Number	Folio Number
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	
Edition	Description
Date	Date
Type of Work	Type
Subsidiary Author	
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Personal Communication (cont.)
Custom 1	Senders E-Mail
Custom 2	Recipients E-Mail
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Podcast

Generic	Podcast
Author	Author
Year	Year
Title	Title of Podcast
Secondary Author	Narrator
Secondary Title	Title of Show
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	Version
Number	Number
Pages	Pages
Section	Running Time
Tertiary Author	Producer
Tertiary Title	Series Title
Edition	Edition
Date	Date
Type of Work	Type
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN/ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Podcast (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Press Release

Generic	Press Release
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Secondary Title
Place Published	Place Published
Publisher	Publisher
Volume	
Number of Volumes	
Number	Number of Pages
Pages	Pages
Section	Section
Tertiary Author	Producer
Tertiary Title	Location of Work
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Translator
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN/ISSN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Press Release (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Report

Generic	Report
Author	Author
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Institution
Volume	Volume
Number of Volumes	Series Volume
Number	Document Number
Pages	Pages
Section	
Tertiary Author	Publisher
Tertiary Title	
Edition	Edition
Date	Date
Type of Work	Type
Subsidiary Author	Department/Division
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	Report Number
DOI	DOI
Original Publication	Contents
Reprint Edition	
Reviewed Item	

Generic (continued)	Report (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	Issue
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Serial

Generic	Serial
Author	Author
Year	Year
Title	Title
Secondary Author	Editor
Secondary Title	Secondary Title
Place Published	Place Published
Publisher	Publisher
Volume	Volume
Number of Volumes	Number of Volumes
Number	Series Volume
Pages	Pages
Section	Chapter
Tertiary Author	Series Editor
Tertiary Title	Series Title
Edition	Edition
Date	Date
Type of Work	Type of Work
Subsidiary Author	Volume Editor
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Publication
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

Generic (continued)	Serial (continued)
Custom 1	Section
Custom 2	Report Number
Custom 3	
Custom 4	
Custom 5	Packaging Method
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Social Media

Generic	Social Media
Author	Username
Year	Year
Title	Post Text
Secondary Author	Handle
Secondary Title	Full Post Text
Place Published	
Publisher	Provider
Volume	
Number of Volumes	
Number	
Pages	
Section	Share URL
Tertiary Author	Affiliated Organization
Tertiary Title	Embed URL
Edition	Time
Date	Post Date
Type of Work	Type of Work
Subsidiary Author	Original Author
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Original Post
Reprint Edition	
Reviewed Item	

Generic (continued)	Social Media (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Standard

Generic	Standard
Author	Institution
Year	Year
Title	Title
Secondary Author	
Secondary Title	Section Title
Place Published	Place Published
Publisher	Publisher
Volume	Rule Number
Number of Volumes	Session Number
Number	Start Page
Pages	Pages
Section	Section Number
Tertiary Author	
Tertiary Title	Paper Number
Edition	
Date	Date
Type of Work	Type of Work
Subsidiary Author	
Short Title	
Alternate Title	Abbreviation
ISBN/ISSN	Document Number
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Standard (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Statute

Generic	Statute
Author	
Year	Year
Title	Name of Act
Secondary Author	
Secondary Title	Code
Place Published	Country
Publisher	Source
Volume	Code Number
Number of Volumes	Statute Number
Number	Public Law Number
Pages	Pages
Section	Sections
Tertiary Author	
Tertiary Title	International Source
Edition	Session
Date	Date Enacted
Type of Work	
Subsidiary Author	
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	
DOI	DOI
Original Publication	History
Reprint Edition	
Reviewed Item	Article Number

Generic (continued)	Statute (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	Publisher
Custom 6	Volume
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Television Episode

Generic	Television Episode
Author	Producer
Year	Year
Title	Title
Secondary Author	Series Director
Secondary Title	Episode Title
Place Published	Location
Publisher	Distributor
Volume	Season
Number of Volumes	Network Name
Number	Episode No.
Pages	Running Time
Section	Station
Tertiary Author	Screenwriter
Tertiary Title	
Edition	Edition
Date	Broadcast Date
Type of Work	Medium
Subsidiary Author	Narrator
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	Reprint Edition
Reviewed Item	

Generic (continued)	Television Episode (continued)
Custom 1	Performers
Custom 2	Credits
Custom 3	
Custom 4	Genre
Custom 5	Format
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Synopsis
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Thesis

Generic	Thesis
Author	Author
Year	Year
Title	Title
Secondary Author	
Secondary Title	Academic Department
Place Published	Place Published
Publisher	University
Volume	Degree
Number of Volumes	
Number	Document Number
Pages	Number of Pages
Section	
Tertiary Author	Advisor
Tertiary Title	
Edition	
Date	Date
Type of Work	Thesis Type
Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Thesis (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Unpublished Work

Generic	Unpublished Work
Author	Author
Year	Year
Title	Title of Work
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Institution
Volume	
Number of Volumes	
Number	Number
Pages	Pages
Section	
Tertiary Author	
Tertiary Title	Department
Edition	
Date	Date
Type of Work	Type of Work
Subsidiary Author	
Short Title	Short Title
Alternate Title	Abbreviation
ISBN/ISSN	
DOI	DOI
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Unpublished Work (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	Access Date
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Unused 1

Generic	Unused 1
Author	
Year	
Title	
Secondary Author	
Secondary Title	
Place Published	
Publisher	
Volume	
Number of Volumes	
Number	
Pages	
Section	
Tertiary Author	
Tertiary Title	
Edition	
Date	
Type of Work	
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Unused 1 (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	
Call Number	
Label	
Keywords	
Abstract	
Notes	
Research Notes	
URL	
File Attachments	
Author Address	
Figure	
Caption	
Access Date	
Translated Author	
Translated Title	
Name of Database	
Database Provider	
Language	
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Unused 2

Generic	Unused 2
Author	
Year	
Title	
Secondary Author	
Secondary Title	
Place Published	
Publisher	
Volume	
Number of Volumes	
Number	
Pages	
Section	
Tertiary Author	
Tertiary Title	
Edition	
Date	
Type of Work	
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Unused 2 (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	
Call Number	
Label	
Keywords	
Abstract	
Notes	
Research Notes	
URL	
File Attachments	
Author Address	
Figure	
Caption	
Access Date	
Translated Author	
Translated Title	
Name of Database	
Database Provider	
Language	
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Unused 3

Generic	Unused 3
Author	
Year	
Title	
Secondary Author	
Secondary Title	
Place Published	
Publisher	
Volume	
Number of Volumes	
Number	
Pages	
Section	
Tertiary Author	
Tertiary Title	
Edition	
Date	
Type of Work	
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	
Original Publication	
Reprint Edition	
Reviewed Item	

Generic (continued)	Unused 3 (continued)
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	
Call Number	
Label	
Keywords	
Abstract	
Notes	
Research Notes	
URL	
File Attachments	
Author Address	
Figure	
Caption	
Access Date	
Translated Author	
Translated Title	
Name of Database	
Database Provider	
Language	
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Web Page

Generic	Web Page
Author	Author
Year	Year
Title	Title
Secondary Author	Series Editor
Secondary Title	Series Title
Place Published	Place Published
Publisher	Publisher
Volume	Access Year
Number of Volumes	
Number	Access Date
Pages	Description
Section	
Tertiary Author	
Tertiary Title	
Edition	Edition
Date	Last Update Date
Type of Work	Type of Medium
Subsidiary Author	
Short Title	Short Title
Alternate Title	Alternate Title
ISBN/ISSN	ISBN
DOI	DOI
Original Publication	Contents
Reprint Edition	
Reviewed Item	

Generic (continued)	Web Page (continued)
Custom 1	Year Cited
Custom 2	Date Cited
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	Accession Number
Call Number	Call Number
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	Author Address
Figure	Figure
Caption	Caption
Access Date	
Translated Author	Translated Author
Translated Title	Translated Title
Name of Database	Name of Database
Database Provider	Database Provider
Language	Language
Added to Library	Added to Library
Last Updated	Last Updated

Return to [List of Reference Types](#)

Output Styles

Introduction to Output Styles

What is an Output Style?

The term "output style" (or just "style") is used to describe a particular method of documenting your work. Each style is designed as a complete solution for formatting and editing in-text citations, footnote citations, and bibliographies for all types of references.

You can think of styles as templates that show EndNote how to arrange the information in each of your EndNote references for citations and bibliographies. For example, a single reference could be formatted in the Chicago style like this:

Emery, N. J., and N. S. Clayton. "Tool Use and Physical Cognition in Birds and Mammals." Review. *Current Opinion in Neurobiology* 19, no. 1 (Feb 2009): 27-33. <https://doi.org/10.1016/j.conb.2009.02.003>.

Or it could be formatted in the Nature style like this:

- 1 Emery, N. J. & Clayton, N. S. Tool use and physical cognition in birds and mammals. *Curr. Opin. Neurobiol.* 19, 27-33, doi:10.1016/j.conb.2009.02.003 (2009).

EndNote includes over 7,000 individual bibliographic styles. With a standard installation, only the most popular styles are installed in the Styles folder in your EndNote folder, but you can add more styles, if you wish. (See [Installing Additional Output Styles](#).)

The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal Nature, and the Chicago style is named after the Chicago Manual of Style. Styles in the Export category, such as RefMan (RIS) Export are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases. (See [Exporting References for Database Import](#) for information on exporting data from EndNote.)

To see the available styles in EndNote's Styles folder, select *Output Styles* from the *Tools* menu, and select *Open Style Manager*.... If your style is not available, you can download additional styles. Any style can be modified to suit your needs, plus you can create new styles.

- Styles can be downloaded or edited, and new styles can be customized, through EndNote's Style Manager. (Select *EndNote Output Styles* from the *Help* menu or click *Get More on the Web*... to download styles from the EndNote site.)
- The Style Manager allows you to find and preview installed styles. Commonly used styles can be marked as "favorites," which will appear in the Output Styles submenu of the Tools menu and in the list of available styles in Cite While You Write.

The Output Styles Menu

The style selected from the Output Styles submenu of the Tools menu determines how references are formatted for the preview subpanel in the Reference panel, as well as for the Format Bibliography, Format, Print, Export, and Copy Formatted Reference commands.

By default, these standard bibliographic styles are set as favorites in your Output Styles menu:

- **Annotated:** This style generates Author-Date citations. The bibliography includes abstracts.
- **APA 7th:** This style displays all authors if there are twenty or less; if there are twenty-one or more, it displays the first nineteen authors (or editors), followed by a comma and an ellipsis, followed by the last author (or editor).
- **Author-Date:** This style generates a bibliography alphabetized by author name, and in-text citations with the Author and Year.
- **Chicago 17th Footnote:** This style is based on the *Chicago Manual of Style*, 17th edition. It contains footnotes and a bibliography.
- **MHRA (Author-Date):** This style is based on the Modern Humanities Research Association style. An MHRA footnote style is also available.
- **Numbered:** This style generates a numbered bibliography with corresponding numbered in-text citations.
- **Show All Fields:** This style generates a list of the references as entered, including all fields and the names of the fields.
- **Turabian 9th Footnote:** This style is based on the 9th edition of *A Manual for Writers of Research Papers, Theses, and Dissertations*.
- **Vancouver:** This style is based on the "Medical Journal" requirements in *Citing Medicine*, published by the US National Institutes of Health at http://www.nlm.nih.gov/bsd/uniform_requirements.html.

Mark individual styles as your favorites in [The Style Manager](#) to have them appear in the Output Styles menu, the Reference Preview subpanel, and when using Cite While You Write, Format Paper, or Export commands.

The Style Manager

EndNote includes more than 7,000 individual bibliographic styles. By default, only the most popular styles are stored as individual files in the Styles folder in your EndNote folder. To install additional styles, see [Installing Additional Output Styles](#).

The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal *Nature*, and the Chicago style is named after the *Chicago Manual of Style*. Styles in the Export category, such as RefMan (RIS) Export are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases.

To see if your journal's style is installed in EndNote, peruse the list of styles in the Style Manager. If your style is not available, any style can be modified to suit your needs, you can create new styles, or you can install additional styles (see [Installing Additional Output Styles](#)).

To see the available styles in EndNote's Styles folder, select *Output Styles* from the *Tools* menu, and then select *Open Style Manager*.

The Style Manager lists the names of the original styles available in the Applications/EndNote 20/Styles folder as well as any new or modified styles in your personal Styles folder. It gives you options to edit styles or select them as "favorites" for quick access from the Output Styles menu on the Tools menu, or anywhere a styles list is shown. You can click and drag the corner of the dialog to increase the size.

Navigating in the Style Manager

Use the following features to locate the output style that you want to use:

- If you know the name of the style that you want to use, you may start typing it and the first file that matches what you type will be selected.
- Type text into the "Quick Search" text box on the toolbar and press Return to search for the style by the name of the file. You can enter a partial name or the full name. EndNote will display all matching results.
- Use the *Find by Category list* and choose a category (such as Biochemistry or Humanities) to find only the bibliographic styles for a specific discipline.
- Use the *Find by Category list* and select *All Styles* to return all of the installed styles to the displayed list.
- Click the column headings to sort the styles by name or by category. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.
- Click the *More Info* button at the bottom of the dialog to display additional information about the selected style (such as modification and creation dates, and any comments or limitations). More Info toggles with Less Info. You also have the option of displaying a preview of the style in the More Info panel.

Marking Your Favorite Styles

When you have found a style that you want to use, click the checkbox to mark it as a favorite. All styles that are marked as favorites appear in the Styles menu. This gives you easy access to the styles you use most often. All styles can be modified to meet your specifications. You can also create completely new styles if necessary.

To add a style to the Output Styles submenu on the Tools menu:

1. From the EndNote *Tools* menu, select *Output Styles*, and then select *Open Style Manager*.
2. Find the style that you need.
3. Click in the box to the left of the style's name to choose it as one of your favorites.
4. Close the Style Manager by clicking the *Close* button or selecting *Close Style Manager* from the *File* menu.

To select a whole category of styles as favorites, click the *Find by Category list* in the Style Manager, select the category of interest, and then select *Mark All* from the *Mark* drop-down menu when all of the styles for that category are displayed. Use the *Find by Category list* and select *All Styles* to bring all the styles back

into view. The *Unmark All* option on the *Mark* drop-down menu may be used to unmark all of the output styles that are showing in the list.

If You Cannot Find the Style You Need

Many bibliographic styles are variants of a small number of well-known bibliographic formats. EndNote includes over 7,000 different styles, but it may not include the exact style you need. If you can't find the specific style you need, you can:

- Check the submission guidelines for the publication to see if the style is a derivative of a well-known style. You may be able to use that style (perhaps with minor modifications).
- Try the interactive [Styles Finder](#) on the EndNote site. A shortcut to the Web Styles Finder is provided as *EndNote Output Styles* on the *Help* menu.

Previewing Styles and Showing Information

Click *More Info* in the Style Manager to show the information panel. (When you select *More Info*, the button changes to *Less Info*, which would hide the panel.) The information panel is used to display more detail about the selected style.

Use the Style Info/Preview button to toggle between these displays:

- **Style Information:** Details about the style are displayed in the Information panel. These include the creation and modification dates, category, which style guide the style is based on, and any limitations or comments about using the style.
- **Style Preview:** In the preview section, EndNote shows how a journal, book, and book section would be formatted with the selected style.

Previewing Styles Using Your Own References

EndNote uses built-in examples for the previews in the Style Manager window. If you want to preview a style using your own references:

1. In the Style Manager, mark the style as a favorite by clicking in the checkbox next to its name. This adds the style to the Output Styles favorites list.
2. From the *Tools* menu, select *Output Styles*, and select the style to preview.
3. Open a library, select a reference, and then expand the *Preview* subpanel in the *Reference Summary* panel. See [The Preview Subpanel](#).
4. Select any reference in your library to have it displayed in the Preview subpanel.

The Preview panel displays only one reference at a time. If you would like to preview a group of references, you can use the Copy Formatted Reference command:

1. From the *Tools* menu, select *Output Styles* and select a style.
2. Select one or more references in your library and select *Copy Formatted Reference* (⌘+K) from the *Edit* menu.

3. Paste (⌘+V) the formatted references into a word processor document to see them as they would appear in a bibliography.

Or, use the *Print Preview* command from the *File* menu to show how the formatted references would look.

Copying Styles

When you display a list of styles in EndNote, the list is comprised of the installed styles found in the Applications/EndNote 20/Styles folder as well as new or modified styles found in your personal Styles folder. For an explanation of where your files are stored, see [Folder Locations Preferences](#).

Because each style is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Finder.

To copy a style to a removable or network drive, select the style on your hard drive and drag it to the new location, or use the *Copy* (⌘+C) and *Paste* (⌘+V) commands. We recommend that you make a backup copy of any new or modified styles. (See [Backing Up Your EndNote Files](#)).

To make a copy of a style from within EndNote:

1. From the *Tools* menu, select *Output Styles* and select *Open Style Manager*.
2. Select the style you want to copy and click *Edit*.
3. Without making any changes to the file, select *Save As* from the *File* menu.
4. Give this copy of the file a new name and *Save* it.

The file is saved in your personal Styles folder. The new style will remain open. The original style will be left untouched.

Saving Styles

To save a new style that you have just created, or to save changes to a style you have just modified, select *Save* or *Save As* from the *File* menu.

If you have modified one of the styles EndNote originally installed, you must use *Save As* to save a copy to your personal Styles folder. If you have modified a style that is already located in your personal Styles folder, you can select either *Save* to directly modify the file, or *Save As* to make a copy with the changes. For a description of where your styles are stored, see [Folder Locations Preferences](#).

If you close a Style window before saving a style, EndNote prompts you to save or discard the changes you have made, or select *Cancel* to return to the style. If you quit from EndNote while a Style window is open, the same dialog appears.

EndNote automatically saves new styles to your personal Styles folder. You may also specify a different folder if necessary. For instructions see [Folder Locations Preferences](#).

EndNote styles use the file name extension of ".ens" (for EndNote Style), as in "Nature.ens."

Deleting Styles

To delete a style from EndNote:

1. From the *Tools* menu, select *Output Styles*, and then select *Open Style Manager*.
2. Select the style to be deleted.
3. Control+click on the style and select *Delete Style...* from the menu.

You can also delete an unwanted style by switching to the Finder, opening the appropriate Styles folder, and deleting the file (see [Folder Locations Preferences](#)).

Note: You must have read/write access to the Styles folder in order to delete a style. If you do not have administrator access, you likely will not be able to delete a file located within the Program Files (x86) folder.

Renaming Styles

Rename styles using the *Save As* command from the *File* menu. This allows you to make a copy of any style that you want to modify, so you can keep several variations of the same style. You can also rename styles by switching to the Finder, locating the style file in the Styles folder, clicking on the file name, and typing a new name.

For an explanation of where your files are stored, see [Folder Locations Preferences](#).

Closing a Style

To close a Style window, click the close button in the upper-left corner of the window, or select *Close Style* from the *File* menu. If you have not saved your changes to the style, EndNote prompts you and gives you the option to save or discard any changes that you have made.

What Should I Do if My Style Is Not Included?

EndNote supplies over 7,000 styles for your convenience; however, because there are so many journals published, the style you need may not be included. This should not be a problem because you can customize a style of your own or edit any of EndNote's preconfigured styles.

If a style that you need is not included with EndNote, we recommend modifying a style that is similar to what you need. To download more of the predefined styles, see [Installing Additional Output Styles](#).

To find and modify a similar style:

1. From the *Tools* menu, select *Output Styles*, and then select *Open Style Manager*.
2. In the Style Manager, change the setting in the information panel from *Style Info* to *Style Preview*. The preview of the selected style should now be displayed.
3. Scroll through the list of available styles to see if you can find one that is similar to what you need.
4. Once you have found a similar style, select it, and click the *Edit* button. The Style window opens.

5. From the *File* menu, select *Save As*, give this copy of the style a new name that corresponds to the name of the journal you want to use it for, and click *Save*. This will also keep the original style unchanged, in the event that you need to use it later.
6. The new Style window remains open for you to edit it as you need. For more details about editing parts of a style, read [Modifying Style Templates](#) and [Additional Style Formatting Options](#).

Once the new copy of the style has been saved, it will be added to your style menus.

Accessing Styles in Other Places

The Style Manager displays only the styles found in specific folders. We recommend that you copy additional styles to your personal Styles folder.

For an explanation of where your files are stored, or to change your personal Styles folder location, see [Folder Locations Preferences](#).

Basic Components of a Style

The best way to understand how a style works is to open one up and look at it.

- **To create a new style:** From the *Tools* menu, select *Output Styles*, and then select *New Style*. For more information on creating a new style, see [Creating a New Style](#).
- **To edit a style:** From the *Tools* menu, select *Output Styles*, and then *Open Style Manager*. Select the style to edit and click *Edit*. The most recently used style can also be opened by selecting *Output Styles* from the *Tools* menu, and then selecting *Edit "[recent style's name]"*.

The Style Window

After choosing the option to edit an existing style or create a new one, EndNote opens the Style window.

The options for editing a style are listed on the left side of the Style window. The first six items apply to citations, bibliographies, and citations in footnotes. They include:

- About This Style
- Punctuation
- Anonymous Works
- Page Numbers
- Journal Names
- Sections

The other options in the Style window are grouped under one of following four headings.

Citations: The items listed under the Citations heading apply only to citations in the body of the text.

Bibliography: The items listed under the Bibliography heading apply to the bibliography that EndNote creates when you format a paper. These settings are also used with the Export, Print, Copy Formatted Reference, Subject Bibliography, and Preview features.

Footnotes: The items under the Footnotes heading apply to citations that have been inserted into the footnotes or endnotes in a word-processing document. (You must first create the footnotes or endnotes in your word processor, and then insert EndNote citations into them.)

Figures and Tables: The items under Figures and Tables apply to EndNote figures and tables that have been inserted into a Microsoft Word document.

Click the *chevron* button (➤▼) next to one of the headings to expand or collapse the view, or to show or hide the related options. Click on an item under the headings to view the associated panel. You may switch between panels as needed while editing the file. No changes are saved in any of the panels, however, until you select *Save* or *Save As* from the *File* menu.

Style Templates

The Citation, Bibliography, and Footnote sections of the style all have a Template panel and other options for fine tuning the style.

The Templates panels are the major component of the styles. They include the field names and punctuation organized in the way EndNote should format the references for that particular style. The templates look like citations or bibliography entries, except that field names are used in place of the actual data. During the formatting process, EndNote replaces the field names with the corresponding information from the references.

For details about working with style templates see [Modifying Style Templates](#).

Other Style Options

Under each heading in the Style window (Citations, Bibliography, and Footnotes) there are a series of options for how to fine-tune the formatted references in citations, bibliographies, or footnotes. Many of these options are repeated for the three sections (such as the settings that determine how author names are treated), because each of these three areas of the document might require a slightly different format. The [Figures and Tables](#) section applies specifically to EndNote figures and tables inserted into a Word document.

Modifying Style Templates

If you are creating a bibliography that requires a style not included with EndNote, then you can modify a style to suit your needs. (See [What Should I Do if My Style Is Not Included?](#)) Editing a style requires a general understanding of how styles work and the components of a style. Read [Basic Components of a Style](#) to become familiar with the terms. These topics can help you in creating or modifying style templates:

- [Citations Template](#)
- [Bibliography and Footnote Templates](#)
- [Changing the Punctuation in a Formatted Reference](#)
- [Adding and Removing Fields in a Formatted Reference](#)

- [Adding New Reference Types](#)
- [Fonts and Text in Output Styles](#)
- [Rules for Working with Style Templates](#)
- [EndNote Cleans Up](#)
- [Special Formatting Characters](#)
- [Additional Style Formatting Options](#)

Opening the Style Window

To create or modify a style, you will first need to access the Style window by opening an existing style or creating a new style.

To open a style for editing or create a new style:

- **To create a new style:** From the *Tools* menu, select *Output Styles*, and then select *New Style*. For more information on creating a new style, see [Creating a New Style](#).
- **To edit a style:** From the *Tools* menu, select *Output Styles*, and then *Open Style Manager*. Select the style to edit and click *Edit*. The most recently used style can also be opened by selecting *Output Styles* from the *Tools* menu, and then selecting *Edit "[recent style's name]"*.

If you have opened an existing style, you will see a style window with options already set up, but ready for editing, with the style name at the top of the Style window. To save your customized version of the style, select *Save As* from the *File* menu.

If you have created a new style, you will see *Untitled Style* at the top of the Style window until you save the file with a new name. To save the file, select *Save As* from the *File* menu.

You can move between the Style window and other windows in EndNote by selecting the window of your choice from the *Window* menu in EndNote.

Citations Template

To access the Citations template, first open a style for editing or create a new style.

1. Select *Output Styles* from the *Tools* menu, then select one of the following options
 - *New Style* to create a new style.
 - *Edit "[name of recently used style]"* to open a style you have recently used for editing.
 - *Open Style Manager* to access the list of styles installed on your computer, then select a style and click the *Edit* button.
2. Then click *Templates* under the *Citations* heading.

The Citations template tells EndNote how to format the in-text citations in the body of your paper. The most popular formats for in-text citations are (Author, Year), numbered, and Author (Year). For example:

- An (Author, Year) format displays "(Author, Year)" in the Citation area of the template. When you insert an in-text citation in your paper using this format, the citation would look like this example:

(Binfield, 2008)

- A numbered format displays "[Bibliography Number]" in the Citation area of the template. Numbered styles commonly enclose the bibliography number in brackets or parenthesis, or use a superscript number. Instead of (Binfield 2008) as your in-text citation, the citation would look like this example:

[1] or (1) or ¹

The bibliography number corresponds to a numbered reference in your bibliography. If the same reference is inserted in the paper in more than one location, the same number will be used for that reference in each location. This differs from footnote or endnote styles, where a new number is used for each footnote or endnote.

- An Author (Year) format displays "Author (Year)" in the Citation — Author (Year) area of the template. When you insert an in-text citation in your paper using this format, the citation would look like this example:

Binfield (2008)

You may change the template by deleting unwanted field names or punctuation, retyping the punctuation you want, and inserting new fields with the Insert Field button. See [Modifying Style Templates](#) for information about editing templates.

Note: Both the Citation and the Citation — Author (Year) area of the template must be completed in order to use the Author (Year) format in a paper.

Multiple Citation Separators

Use the Multiple Citation Separators field to specify the punctuation to separate multiple citations in your papers. A multiple citation is an in-text citation that includes more than one reference within a single set of delimiters, such as: (Argus, 1993; Billoski, 1993; Hall, 1988). This example uses a semicolon and a space as the separator between citations.

The separator can be changed by typing other text in the *Multiple Citation Separator* field. Remember to include a space in the separator section, when necessary.

Adding Additional Fields to In-Text Citations

You can add other EndNote fields to the citation template. For example, If you would like EndNote to insert the journal name in the in-text citations of your paper, select the *Journal/Secondary Title* field from the *Insert Field* menu, as shown in the examples below.

- In the Citation area of the template, insert the Journal/Secondary Title field in the (Author, Year) field. For example: (Author, Journal/Secondary Title Year)

When you insert an in-text citation in your paper, the citation would look like this example: (Porter, British Journal of Aesthetics 2009)

- In the Citation — Author (Year) area of the template, insert the Journal/Secondary Title field in the Author (Year) field. For example: Author, Journal/Secondary Title (Year)

When you insert an in-text citation in your paper using this format, the citation would look like this example: Porter, British Journal of Aesthetics (2009)

Note: The field names shown on the Insert Field list and in the Citations Template must always be the EndNote generic field names. If you try to enter a field name manually that is not a generic field name, it will be interpreted as text to be added to the citation.

Year Format

If you would like EndNote to use 2-digit years (such as '09) in the in-text citations, check the *Use 2-digit years* option. Years from all centuries will be abbreviated to display just the last two digits. This applies only to the in-text citations.

Note: The use of 2-digit years in citations is very rare now, but was common in the 20th century.

Bibliography and Footnote Templates

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).)

Click *Templates* under the *Bibliography* or *Footnotes* heading in the Style window to see the templates for how those references are formatted.

For footnote and bibliography templates, each has a Generic template, and other reference-type-specific templates to format the various reference types in a bibliography.

The following examples show how journal articles, books, and book sections, respectively, would be formatted with the Numbered style. Notice that each reference type is formatted differently, which is why different templates are required:

1. Wang, L., et al., *Azure-winged magpies fail to understand the principle of mirror imaging*. Behavioural Processes, 2020. 177: p. 8.
2. Pepperberg, I.M., *The Alex studies: Cognitive and communicative abilities of grey parrots*. 1999, Cambridge, Mass.: Harvard University Press. 434.
3. Clayton, N.S. and N.J. Emery, *What Do Jays Know About Other Minds and Other Times?* in *Neurobiology of "Umwelt,"* A. Berthoz and Y. Christen, Editors. 2009, Springer-Verlag Berlin: Berlin. p. 109-123.

Generic Template

The Generic template is used to format references that use the Generic reference type or do not have their own template in the style. For example, if a Book template had not been included in the style, book references would be formatted using the Generic template.

Generic — Short Form Template

The Generic — Short Form template may be defined for each reference type just like the regular footnote. You can edit the short form in a template. The order of use is that:

1. The short form definition for a specific reference is used.
2. If the definition is not available, then the generic short form definition is used.
3. If no generic definition is available, then the full form of the reference for that type is used.
4. If the full form is not available, then the generic full form is used.

Other Reference Type Templates

The rest of the templates in the style tell EndNote how to format specific reference types, such as journals, books, and book sections. If a check mark appears next to a reference type in the Reference Type list, a template is already defined for it (you can edit the template).

Footnote Template Options

Styles have varying requirements for how citations in footnotes should be formatted. The options at the top of the Footnotes Templates panel in the Style window allow for the different conditions.

- For some styles, citations in footnotes are formatted just like in-text citations (in the body of the paper). In that case, there is no need to create a special template for footnotes; select the *Same as citation* option from the *Format citations in footnotes* list.
- Similarly, some formats request that citations in footnotes are formatted as full bibliographic references, exactly like the bibliography. For those styles, set the *Format citations in footnotes* option to *Same as Bibliography*.
- However, if you need the footnotes to use their own special format (most styles for the humanities require this), you would set the *Format citations in footnotes* option to *Using footnote format* to format citations in footnotes with a unique footnote format. For this option, you need to define the templates for how citations in footnotes should be formatted.

For information about how to treat repeated citations, such as using a short form for nonconsecutive repeated citations, and *Ibid.* for consecutive repeated citations, see [Repeated Citations in Footnotes](#).

For repeated citations, select the checkbox that tells the system to include the Title field only when needed to disambiguate a citation in the short form.

Changing the Punctuation in a Formatted Reference

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).) For this example, open the *Numbered* style.

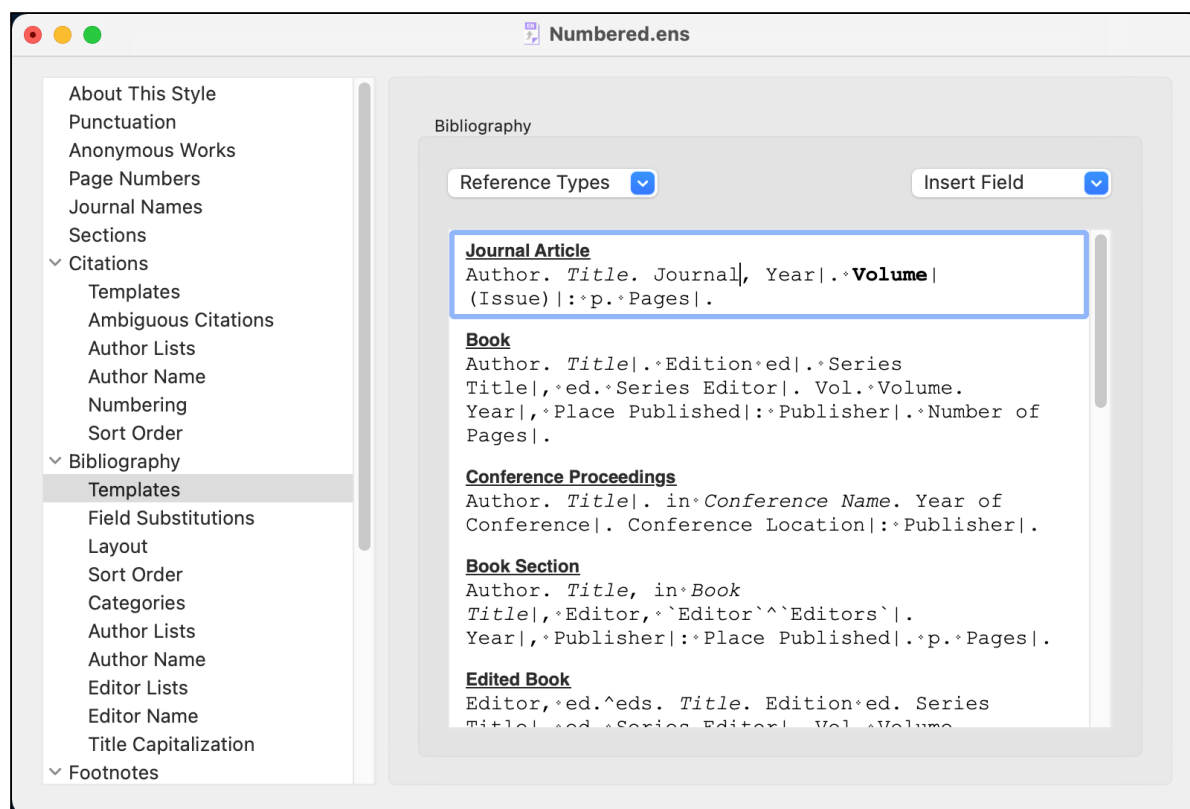
Punctuation that appears in your formatted references can be changed by editing the style you are using. When you edit a style, you can delete unwanted punctuation, replace it with other punctuation, or add additional punctuation where necessary.

For example, if the Numbered style creates a perfect bibliography for your document *except* that it puts a comma after the authors' names where you need a period, you can edit the Numbered style to make this change.

To edit the Numbered style:

1. Open the Numbered style. (See [Opening the Style Window.](#))
2. Click the *Templates* option under the *Bibliography* heading.
3. For each reference type (such as Generic, Journal Article, and Book), delete the comma that follows the field name *Author* and type a period.

The style's bibliographic templates should now look like the example below. Notice that the punctuation after the Author field in each template has been changed to a period.



4. From the *File* menu, select *Save As*. In the dialog that appears, enter a new name for this modified Numbered style, and then click *Save*.

Now you can use the new style to create a formatted bibliography that puts a period between the author names and the titles.

For information about making punctuation or spaces appear only under certain circumstances see [Special Formatting Characters](#). That topic explains the use of the nonbreaking spaces (°), vertical bars (|), accent grave (`), and the carets (^) that you see in the style templates.

Note: If you save a new style into a folder other than your personal Styles folder, it will not be available in the Style Manager. You should save new styles to your Styles folder, or change [Folder Locations Preferences](#) if necessary.

Adding and Removing Fields in a Formatted Reference

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).)

The field names (such as Author, Year, and Title) that you see when editing a style template indicate what information is included in your formatted reference. If you want to include a field, such as Notes, along with your references, you should add the Notes field to the style that you use. Similarly, to exclude unwanted information that is appearing in a bibliography, you must delete the field name that contains that information from the style's bibliography template.

The examples below show two common scenarios in which fields are added to or removed from the formatted bibliography. Whenever you change the fields in a style template be sure to check the surrounding punctuation to make sure that it is still accurate.

Adding a Field to a Style Template

To insert a new field into a style template:

1. Click on the *Templates* option under the *Bibliography* heading, and position the cursor at the location in the template where you want to add a field.
2. Click the *Insert Field* button and select the field to be added.
3. After the field is inserted, add any punctuation or spacing that is necessary to correctly incorporate the new field into the style.

Note: As a short-cut, you can use the options in the Layout panel to add text or punctuation before or after every reference in a bibliography. See [Bibliography Layout](#).

Deleting a Field from a Style Template

If EndNote includes information in your bibliography that you do not want to be there, you can edit the style and delete the unwanted field's name and any associated punctuation.

For example, if a style includes the issue number in your journal references, and you do not want the issue to appear:

1. Under the *Bibliography* heading, click the *Templates* option.
2. Select the text to be deleted (for example, ". Issue|"), and press the *Delete* or *Backspace* key.

Along with the Issue field, also remove the space and period that precede it and the vertical bar, a special formatting character that follows the Issue field. (See [Special Formatting Characters](#) for more information about the vertical bar.)

Adding New Reference Types

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).)

When a style does not include a template for a specific reference type, such as Report, EndNote uses the style's Generic template to format that reference type. Although there are times when the Generic format suffices, often it is not sufficient because the other reference types need to be formatted differently. Therefore, you should make specific templates for the different reference types that you will be including in your bibliographies.

To add a new reference type template to a style:

1. In the Style window, click the *Templates* panel under the *Bibliography* heading.
2. Select the name of the desired reference type from the *Reference Types* drop-down menu . (Reference Types that are already defined appear in the list with checkmarks next to their name.)

An empty new template for that reference type is added at the bottom of the Style window (scroll to the bottom of the Style window if you do not see it).

Defining the Format for the New Reference Type Template

Defining the format for a new template is a process of inserting the necessary fields and punctuation in the correct order. For this example, we want a report to look like this (Author, *Title*, Report Number. Year, Institution: City.):

We can insert the fields and type the punctuation to create a template for the Report reference type. Use the Insert Field button at the top of the Style window to insert the fields in the correct order. After inserting a field name, type the punctuation and spacing that should follow it. Apply text styles, such as italics for the Title, by selecting the text to change and using the Style toolbar.

The final template for the Report reference type looks like this:

Report
Author, · *Title*, · Report · Number · Year, · Institution: · City.

A Faster way to set up a new Reference Type Template

If there is another reference type template that is very close to the one you want to create, copy and paste the contents of that template into the new template you created. EndNote will automatically replace the field names from the original template with the equivalent fields for the new reference type. Next, proofread the fields to be sure they are correct and change any fields or punctuation, as needed. If needed, delete incorrect fields and use *Insert Field* to insert any needed fields into the template.

Fonts and Text in Output Styles

By default, text entered into a Style window appears in EndNote's Plain Font, Plain Size, and Plain Style settings, which allow the bibliography that EndNote creates to adopt to your word processor's Normal style settings in your paper. For example, if you type your paper in 10-point Times New Roman font by manually selecting the text and setting it to 10-point Times New Roman font, but the Normal style in your document is set to use 14-point Arial font, EndNote would use the 14-point Arial font for the paper's bibliography.

You can use the Edit menu or the Style toolbar to apply any font, size, or text style to your Style templates to override the default setting for specific fields that might require it, but it is generally better to use the Plain settings. (Note that only the standard Windows fonts are available.)

All text attributes entered into a style template will carry over into the bibliography that EndNote creates. You can use this feature, for example, to italicize titles or make the volume numbers bold. Any font or text style changes entered in an EndNote Reference window will carry through the bibliography as well. For example, any italicized terms in your references will still appear italicized in your bibliography, regardless of the text attributes that the EndNote bibliographic style applies.

To Apply Bold, Italic, or Underline Styles to Fields or Text

1. Select the field or text to be formatted.
2. Select the formatting option from the Edit > Font submenu.
3. Use the following shortcuts.
 - $\text{⌘}+B$ for bold
 - $\text{⌘}+I$ for italic
 - $\text{⌘}+U$ for underline
 - $\text{⌘}+Shift++$ (the last + is the plus sign, so this means to hold down the ⌘ key, the Shift key, and the + key together) for superscript
 - $\text{⌘}+Shift+-$ (the – is the minus sign, so this means to hold down the ⌘ key, the Shift key, and the – key together) for subscript

To Change the Font for Selected Text

Some styles require a different font to be used for some fields, usually the Title field. In these cases, the style must include a font change for just those fields that require it. To change the font for a specific field:

1. Select the field to be formatted.
2. *Control+click* on the selected text, then select *Font > Show Fonts* to see the macOS *Character Viewer*. Select the font you want from the list.

Note: If text is italicized in the library, then the field is italicized by the style, that text will still appear in italics in the formatted references. EndNote cannot reverse the italics in a field to plain text when the field is italicized in the style.

Rules for Working with Style Templates

There are four basic rules of dependence that govern how text, spaces, and field names influence each other when they are used in a style template. If necessary, these rules can be circumvented in specific situations using the special formatting characters described in the next section of this chapter.

Note: The middle dot (·) character indicates a space in examples.

Rule #1: Basic Dependence

Any text or punctuation that is not separated from a field by an ordinary space is dependent on the adjacent field.

In this context, "dependent" means that the text or punctuation adjacent to a field only appears in your bibliography if the adjacent field contains data. For example, in this excerpt:

Volume·(Issue)

the parentheses around "Issue" only appear in a formatted reference if there is an issue number for the reference.

Rule #2: The Preceding Field Takes Precedence over the Following Field

When punctuation appears between two fields with no intervening spaces, it is dependent on the preceding field.

In this example:

Volume:Issue

the colon is dependent on the Volume field. This means if there is no volume in the reference, the colon will not appear. If there is a volume, the colon will appear.

Note: This example shows a case where the rules of dependence might not do what you want. For example, you might want to have the colon only show when there is an issue. This can be done using the Forced Separation character. See [Special Formatting Characters](#).

Rule #3: The First Space after a Field Is Dependent on That Field; Additional Spaces Are Independent

The first ordinary space following a field is always dependent on that field. Any consecutive spaces after that are independent and will always appear in the formatted references.

For example, if EndNote formats an anonymous book using a template that has the Author field followed by a space and the Title field:

Author·Title

the title will not be preceded by a space in the final formatted reference because the space, just like the period, is dependent on the Author field. However, if the style includes two spaces between the Author and the Title:

Author··Title

the title will be preceded by one space for all anonymous references. The first space, being dependent on the Author field, disappears when there is no author, however the second space is independent, so it remains in the formatted reference.

Independent spaces can be forced to be dependent on an adjacent field using the [special formatting characters](#).

Rule #4: Independent Text Always Appears in the Bibliography

Any text or punctuation that is not dependent on a field name always appears in the formatted references. For example, if:

Edition·ed.

is entered into a style's Book template using only an ordinary space to separate the text "ed." and the field "Edition" the text "ed." will appear in all Book references—regardless of whether or not there is an edition for that reference.

Note: The nonbreaking space can be used in place of a regular space to link independent text to a field. See [Special Formatting Characters](#).

Special Formatting Characters

EndNote has special formatting characters that add flexibility and precision to the grouping of punctuation and fields in the style templates.

Note: Special characters appear in **this color** font here to make them more visible, but in the standard black font in EndNote. The nonbreaking space character may appear smaller in EndNote; it is larger here to make it more visible. Regular spaces are indicated by the dot (·) character.

Link Adjacent Text (Using the Nonbreaking Space)

If you type "Edition ed." into a style template and use an ordinary space to separate the field name "Edition" from the abbreviation "ed.", then "ed." will appear regardless of whether or not the reference has an edition (see [Rule #4: Independent Text Always Appears in the Bibliography](#)).

To avoid this problem, make "ed." dependent on the Edition field by linking "ed." to the Edition field with a nonbreaking space. Think of a nonbreaking space as bibliographic formatting glue. It joins two or more items together so they act as a single unit. Thus, any text or punctuation "glued" to a field will drop out of the bibliography if that field is empty.

You can insert a nonbreaking space by selecting *Link Adjacent Text* from the *Insert Field* list in the *Templates* panels. You can also enter it by typing *Option+Space*. It appears on the screen as a small diamond.

The nonbreaking space is converted to a normal space in the formatting process. Common uses of the nonbreaking space include (where "◇" is used as a nonbreaking space):

p^pp◇Pages
Edition◇ed.
vol◇Volume
Editor◇Ed.^Eds.

The nonbreaking space is also used in conjunction with the vertical bar (see below) to change the dependency of a punctuation mark from one field to another.

Volume|:◇Issue|.

In this case, the colon (:) is linked to the Issue field with a nonbreaking space, so it does not print in the bibliography if the Issue field is empty.

Forced Separation—Using the Vertical Bar

If you do not want text or punctuation to be dependent on the preceding or adjacent field, use the vertical bar character (|), to force a separation of the text from a field. The vertical bar can be found on the same key as the backslash (\). It can also be inserted from the *Insert Field* list in the *Templates* panels.

Think of a vertical bar as *breaking* dependence, or forcing separation between two dependent items. (The vertical bar works in exactly the opposite way as the nonbreaking space.)

For example, the Journal Article templates in some styles require a period between the volume and issue. A template for such a style might look like this (where "." indicates a space):

Journal Article

Author . "Title." Journal · Volume · Issue · (Year) : · Pages .

However, when this style formats a journal article that does not include an issue number, the bibliography entry will be incorrect, as in the following example:

Clark, H. and Carlson, T. "Hearers and Speech Acts." Language 58.(1982):
332-373.

Notice that the period used to separate the volume from the issue appears here in the absence of an issue because it is dependent upon the Volume (Rule #2). And the space separating the volume and the year is lost because that space is dependent upon the Issue field (Rule #3).

EndNote has a way of avoiding these problems. The vertical bar character (|) can be used to break the automatic grouping of spaces and punctuation with adjacent fields.

If you insert the vertical bar before the period in our example, the period's dependency switches from the Volume field to the Issue field. Add another vertical bar before the space that follows the Issue field, and the space will no longer be dependent on the Issue field. Use the vertical bar character in conjunction with the nonbreaking space. With these changes the style looks like this:

Journal Article

Author . "Title." Journal · Volume | . Issue | · (Year) | : ♦ Pages | .

And the formatted reference without an issue is correct:

Clark, H. and Carlson, T. "Hearers and Speech Acts." Language 58 (1982):
332-373.

Other common examples for using the vertical bar include:

Publisher | : ♦ City

Pages | . (to make the final period independent of the field before it)

Field Names in Bibliographies

Sometimes you may need to use text in a template that is also an EndNote field name for that reference type. For example, you may want to use the word "Editor" after the editor's name:

Jones, V.R., B.K. Marion, and R.L. Zeiss, *The Theory of Foraging*, in A History of Foraging Behavior, B.J. Bloggs, Editor. 1976, Smith and Barnes: New York.

Normally, EndNote interprets the word "Editor" as a field name when it appears in a book's style template. This is true even of field names that appear as part of a word, such as "Editors" or "Issued." Field names need not be capitalized to be recognized.

To force EndNote to interpret a word as just text and not as a field name in a template, put an accent grave character (`) before and after the word: `Editor`. The accent grave is found in the upper left corner of most keyboards, on the same key as the tilde (~). Remember to also use the nonbreaking space to link the text, `Editor`, to the Editor field.

Book Section

Author, . *Title* | . in Book . Title | , Editor , `Editor` ^ `Editors`
| . Year , . Publisher | : City | , . p . Pages | .

Singular/Plural Term Separator (Caret ^)

You can specify both singular and plural forms of labels for editors or pages in a formatted reference by using a caret (^) to separate the terms. For example, some styles put "Ed." after a single editor and "Eds." after several editors' names. Or, similarly, "p." might precede a single page, while "pp." precedes multiple pages. This feature can be applied to any field that corresponds to the Generic field for Author, Secondary Author, Tertiary Author, Subsidiary Author, Translated Author, Pages, or Cited Pages.

In the style template, enter both the singular and plural forms of the label separated by a caret (insert it from the *Insert Field* list or type *Shift+6*). Any text before the caret, back to but not including the preceding space, is used for the singular form; text after the caret, up to the next space, is used for the plural form. These terms must also be linked to the relevant field using a nonbreaking space. For example, a style template might look like this:

Edited Book

Editor , ed . ^ eds . . Title . . Number . of . Volumes ^ vols | . Vol . Volume | , . Series . Title
| . City | : Publisher | , Year | .

Or like this:

Journal Article

Author . . "Title," Journal , . Volume | . Issue | . (Year) | : p . ^ pp . Pages | .

Note: Spaces in EndNote style templates appear as small dots (.), as they do here. They are not special characters, they are shown this way here and in EndNote to make it easy to identify spaces in the style. Spaces show as dots in EndNote only when working in the style templates, not in other parts of the style.

EndNote Cleans Up

Too confused about all these rules? Well, even if you don't get everything quite right according to the rules, EndNote will do its best to clean up the formatted reference. Obvious problems are fixed automatically.

Normally, field text is entered into EndNote without ending punctuation, so that the selected output style can supply punctuation as required by that particular style. However, when you download references from various sources, some information providers may include punctuation.

For example, when an output style directs EndNote to insert a period after a field, EndNote must determine what to do with any punctuation that already exists at the end of the field in the reference.

Punctuation found, plus punctuation added by the output style:	Replaced with:
spaces, period	period
comma, period (,.)	period
semicolon, period (;.)	period
colon, period (:.)	period
double periods (..)	single period
question mark, period (?.)	question mark
exclamation point, period (!.)	exclamation point

EndNote treats other forms of extra punctuation like this:

Punctuation found, plus punctuation added by the output style:	Replaced with:
double spaces	single space
double commas (,,)	single comma
double semicolons (;:)	single semicolon
double question marks (??)	single question mark
double periods (..)	single period
comma, period (,.)	period
question mark, period (?.)	question mark
exclamation point, period (!.)	exclamation point
question mark, exclamation point (?!)	question mark
exclamation point, question mark (!?)	exclamation point

One set of punctuation that is never replaced is the period, comma (,.) because it may be used for abbreviations like ed., et al., etc.

Additional Style Formatting Options

Templates determine the general layout of the formatted references and citations (see [Modifying Style Templates](#)). The remainder of the panels in the Style window can be used to fine-tune certain aspects of a bibliographic style. See the following topics for more information:

- [Punctuation in Output Styles](#)
- [Anonymous Works](#)
- [Page Numbers](#)

- [Journal Names](#)
- [Sections Options in Output Styles](#) (Microsoft Word Only)
- [Ambiguous Citations](#)
- [Numbering Citations in Output Styles](#)
- [Author Lists in the Bibliography and Footnotes](#)
- [Citation Author Lists](#)
- [Author Names in the Bibliography and Footnotes](#)
- [Citation Author Names](#)
- [Editor List and Editor Names](#)
- [Bibliography Layout](#)
- [Sort Order: Bibliographies and Multiple Citations](#)
- [Title Capitalization in Output Styles](#)
- [Repeated Citations in Footnotes](#)
- [Figure and Table Placement and Captions](#)

Punctuation in Output Styles

Style guides in some regions require a space before the colon (and other punctuation marks) in the formatting of references. Other style guides do not.

Select either English or French in the Punctuation option in the output style. The default selection is English.

The English option tells EndNote to remove extra spaces before the following punctuation marks. Spaces before other punctuation marks and symbols are retained.

- Colon (:)
- Semicolon (;)
- Exclamation mark (!)
- Question mark (?)

The French option tells EndNote that a space is required before and after the following punctuation marks.

- Colon (:)
- Semicolon (;)
- Chevrons (<< >>) (opening and closing)
- Exclamation mark (!)

- Question mark (?)
- Percent sign (%)
- Dollar sign (\$)
- Pound sign (#)

Anonymous Works

Anonymous works are defined by EndNote as references where the Author field is blank (not "Anonymous"). The settings in the Anonymous Works panel applies to the in-text citations and bibliography templates.

Open styles for editing by selecting *Tools > Output Styles > Open Style Manager*, selecting a style, and then clicking *Edit*.

Leave Author Blank: The author section of the formatted reference is left empty. If the references are to be sorted by author names, the anonymous works would be sorted at the top of the list because they have no author.

Use Full Title in Place of Author: Where the author would have appeared, the title is used instead. If the references are sorted by author, the anonymous references will be sorted as though the title were the author.

Use Short Title in Place of Author: Where the author would have appeared, the short title is used instead. If the references are sorted by author, the anonymous references will be sorted as though the short title were the author. If EndNote encounters a reference that does not have anything entered into the Short Title field, it uses the contents of the regular Title field instead.

Use APA Specifications: The American Psychological Association format (used by many journals) requires a special variation of the Use Title in Place of Author option.

Insert Text: The text that you enter here appears in the author's place in the formatted reference, and it is used for sorting purposes if the references are to be sorted by author names. Commonly this text would be something like the word "Anonymous" or "Anon."

Page Numbers

The Page Numbers panel allows you to specify how the page numbers should be formatted in your references.

- **Don't change page numbers**
The contents of the Pages field are used directly in the formatted reference. No changes are made.
- **Show only the first page number**
Only the first characters in the Pages field are included in the bibliography. For example, "123-125" in the Pages field becomes "123" in the formatted reference.
- **Abbreviate the last page number**
Any digits of the last page number that are the same as the first page number are eliminated. For example, "123-125" in the Pages field becomes "123-5" in the formatted reference.

- **Abbreviate the last page, keeping two digits**

Any digits of the last page number that are the same as the first page number are eliminated, down to a minimum of two digits. For example, "123-125" in the Pages field becomes "123-25" in the formatted reference.

- **Show the full range of pages**

Leading digits are added to the last page number so the full page range is used. For example, "123-5" in the Pages field becomes "123-125" in the formatted reference.

- **Show only the first page for Journals, full range for others**

Journal articles are formatted differently from other types of references.

Note: [Special Formatting Characters](#) describes how to instruct EndNote to add text such as "p." vs. "pp.", or "page" vs. "pages" to the formatted references using the caret (^).

Journal Names

Different journals have different standards for abbreviating journal names. For example, some styles may require "Proceedings of the National Academy of Science" to be abbreviated as "Proc. Nat. Acad. Sci.," "P.N.A.S.," or "PNAS." EndNote's Journals term list provides a way for you store up to four variations of journal names (the full name and three forms of abbreviations) to be used in your bibliographies.

The Journals term list that is created for every library is automatically linked to the Journal and Alternate Journal fields, and therefore it is ready to be used with the Journal Names options. You need to be sure that the necessary information is in the Journals term list, and that your style is set up to use the correct form of the journal name.

If your Journals term list includes the name of the journal as it is entered in your EndNote references, and the form of the journal name that you would like to appear in your bibliographies, you may set your preference in a style to have EndNote substitute a form of the name in the Journals term list for what was entered into your references.

EndNote provides fourteen predefined journal abbreviation lists for different disciplines (including medicine, chemistry, and humanities). If you are interested in using one of these lists, you may import it into your Journals term list (see [Loading Supplied Journal Abbreviations](#)) and set up a bibliographic style to use one of the abbreviations for the formatted bibliography. If EndNote does not provide a journal term list that applies to your area of research, you may also enter the journal abbreviations yourself. See [Important Points About Entering Journal Names](#).

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).)

To modify a style to use the abbreviations in a Journals term list:

1. Select the *Journal Names* panel from the list at the left of the Style window to see the available options:

- **Use Full Journal Name**

When creating a bibliography, EndNote replaces the Journal name in the reference with the form of that name in the first column of the Journals term list. This first column is normally used for full names.

- **Abbreviation 1**

- **Abbreviation 2**

- **Abbreviation 3**

- In the bibliography, the journal name for each reference is replaced with the form of that name in the second, third, or fourth column of the Journals term list, respectively.

- **Don't Replace**

- In the bibliography, EndNote uses the journal name exactly as it appears in the reference in the EndNote library. No changes are made.

- **Abbreviate Journal Articles Only**

- The substitutions made with the Journal Names option can apply to all Secondary Title fields, or to the Secondary Title field for only the Journal Article reference type. If this option is unchecked, EndNote applies this feature to all reference types, EndNote also abbreviates fields such as Conference Name, and the names of magazines and newspapers.

- **Remove Periods**

- Select this option to have EndNote eliminate the periods from all journal names in the bibliography that it is creating, regardless of the abbreviation being used. This option does not require that the journal names be in the Journals term list. For example, if the journal names are entered into your references using periods, and you do not have a Journals term list that includes the names without periods, you can still just check this option and the periods will be stripped out of the journal names when EndNote formats a bibliography.

If a journal name is not found in the specified column of the Journals term list, the style uses the journal name as it appears in the Reference window. No replacement is made for that journal.

The default setting is *Don't Replace*. EndNote uses the journal name exactly as it appears in the original reference.

Note: None of these changes actually takes place in the EndNote library. These options only determine what information goes into the bibliography that is generated using the Copy Formatted Reference, Print, Export, and Format Bibliography commands.

Sections Options in Output Styles

EndNote has always created a single bibliography at the end of your word processor documents. That is still true when you Cite While You Write in Pages, OpenOffice Writer documents, or format RTF files. However, EndNote includes additional output style options specifically for Microsoft Word.

You can choose to:

- Create a complete bibliography at the end of each document (the default setting for almost all of the supplied output styles).
- Create a bibliography for each section in the document (as defined in the styles APA 5th and 6th (sections)).
- Create a bibliography for each section and also a complete bibliography at the end of the document.

For more information about using sections in a Microsoft Word document, see [Creating Multiple Bibliographies in a Single Document](#).

Note: The Sections portion of an output style is ignored by Pages, OpenOffice Writer, and when formatting RTF files.

Create a complete bibliography at the end of each document

This default setting formats a single bibliography at the end of a document. Even if you have broken the document into multiple sections, a single bibliography will appear at the end of the document.

Create a bibliography for each section in the document

When you select this option, a bibliography is created at the end of each section, and includes only the citations within a section.

An additional checkbox is available for sections: *Continue numbering, or apply settings for disambiguation and repeated citations across sections*.

- When the checkbox is blank:
 - When a numbered bibliographic style is selected, citation numbering will be restarted at the beginning of each section.
 - When a numbered bibliographic style is not selected, ambiguous citation settings will be restarted and applied to each section individually. For more information about ambiguous citation settings, see [Ambiguous Citations](#).
- When the checkbox is selected:
 - When a numbered style is selected, selecting the check box will assure that numbering is continued across sections. For example, if citations in the first section are numbered 1 to 10, citations in the next section will start with number 11.
 - When a numbered style is not selected, ambiguous citation settings will apply across the entire document. For more information about ambiguous citation settings, see [Ambiguous Citations](#).
- When *Create a bibliography for each section and a complete bibliography at the end of the document* is selected:
 - This option creates a bibliography for each section as well as a complete bibliography of all the citations in the document.
 - When a numbered style is selected, citation numbering continues sequentially across all sections, without restarting for each section.
 - When a numbered style is not selected, ambiguous citation settings are applied across the entire document, without restarting for each section.
 - If a document is not divided into sections, EndNote formats a single, complete bibliography at the end of the document.

Ambiguous Citations

With in-text citations like (Smith, 1995) or (Smith 246-9), references can have identical in-text citations if they are by the same author or the authors have the same last name. This leads to ambiguity in the citations that would make it impossible for the reader of your paper to know to which reference by Smith you are referring. EndNote provides various ways to avoid this sort of ambiguity in your citations.

Any combination of the following options may be used. Click in the checkbox next to all options that apply. Note that these settings assume the author is used in the in-text citation. They are not relevant for styles that use bibliography numbers for the in-text citations as it is not possible to have ambiguous citations when they are uniquely numbered.

- **Include author initials in citation**

Check this option to have EndNote include initials with author names to distinguish between citations by different authors that happen to have the same surname. Select how the initials should appear from the Initials option in the section. For example, the MLA style uses just author names and page numbers in citations. Initials are added to clarify which Smith wrote the cited reference:

(S. Smith 241-5) and (L. Smith 12-20)

- **List more authors until citation is unique**

Some styles request that only a fixed number of authors be listed in the in-text citation, and then "et al." or "and others" is inserted to indicate that the author list was abbreviated. Select this option if you would like EndNote to list additional authors to make the citation unique. For example, if the in-text citations were set to list only 3 authors, and you have two references in which the first three authors are the same, EndNote would add a fourth author to the citations, and continue in that manner until the list of authors was different between the two citations.

- **Add the title for different works by the same author(s)**

If you have two works by the same author, it won't help to add initials or list more authors to differentiate the two. In this case, some styles request that the title of the reference (or a shortened form of the title) be added to the in-text citation. If you choose this option and select the Short Title option, EndNote includes the contents of the Short Title field when available. Otherwise, it uses the full title. The format of the title is taken directly from the bibliography. This is an example in the MLA style, which normally includes only the author and page number in a citation:

(Smith, *History of Our Times* 35)
(Smith, *Looking Forward* 77)

- **Add a letter after the year**

For citations in an (Author, Year) format, EndNote can add a letter to the year to make citations from the same author published in the same year distinguishable from each other. The letter appended to the year will appear in both the in-text citations and references in the bibliography.

(Smith 1995a)
(Smith 1995b)

Numbering Citations in Output Styles

The settings in the citation Numbering panel apply only when "Bibliography Number" is used in the Citation template (see [Citations Template](#)). This creates uniquely numbered citations in the text of the paper; the numbers correspond to entries in the bibliography. For papers formatted with a numbered style, these options are relevant to multiple citations grouped within one set of citation delimiters. For example:

Unformatted citation: {Keys, 1998 #93; Jen, 1996 #88}

Formatted citation: (1, 2) or [1, 2] or ^{1, 2}

Use Number Ranges for Consecutive Citations

When this option is checked, consecutive bibliography numbers appearing in a multiple citation are joined by a single hyphen, for example:

...as shown by the Berkeley studies conducted in 2015³⁻⁶ and 2017^{1, 7}.

Grouped References

The Grouped Reference option allows you to cite with one number any references that always appear together in the paper as multiple citations. The citations are not given their own numbers, but rather one number is used both in the text and the bibliography to identify the whole group of citations. With this setting, you also have the option to specify how the grouped references in the bibliography should be separated.

This option shows a semicolon and a space as a separator:

1. Wang, L., et al., Azure-winged magpies fail to understand the principle of mirror imaging. *Behavioural Processes*, 2020. 177: p. 8; Pepperberg, I.M., Symbolic communication in the grey parrot, in *The Oxford Handbook of Comparative Evolutionary Psychology*, J. Vonk and T.K. Shackelford, Editors. 2012, Oxford University Press: New York. p. 297-319; Vonk, J. and T.K. Shackelford, eds. *The Oxford handbook of comparative evolutionary psychology*. Oxford Library of Psychology, ed. P.E. Nathan. 2012, Oxford University Press: New York. 574.

Composite Citations

Within grouped references, you can differentiate individual citations with letters, as in the example below.

Citation: (1a, 1b, 1c)

Bibliography: 1. (a)Wang, L., et al., *Azure-winged magpies fail to understand the principle of mirror imaging*. *Behavioural Processes*, 2020. 177: p. 8; (b)Pepperberg, I.M., *Symbolic communication in the grey parrot*, in *The Oxford Handbook of Comparative Evolutionary Psychology*, J. Vonk and T.K. Shackelford, Editors. 2012, Oxford University Press: New York. p. 297-319; (c)Vonk, J. and T.K. Shackelford, eds. *The Oxford handbook of comparative evolutionary psychology*. Oxford Library of Psychology, ed. P.E. Nathan. 2012, Oxford University Press: New York. 574.

To define a composite citation:

1. Select the box to *Use letters to separate grouped references*.

2. Use the *Present letters in* list to select Lowercase or Uppercase letters.
3. Select the appropriate letter format for in-text formatted citations. The examples shown in EndNote illustrate how letters and numbers appear for consecutive citations and ranges.
 - (1a, 1b), (1a, 1b, 2a-c)
The number always appears with a stand-alone letter or with the first letter of a range. This is the default setting.
 - (1a, b), (1a, b, 2a-c)
Only the letter of the first citation of the composite is preceded with the number.
 - (1a, b), (1a, 1b, 2a-c)
The letter of the first citation of the composite is preceded with a number; additional letters include a number only if there could be ambiguity.
 - (1a, 1b), (1a, 1b, 2a-2c)
Letters are always preceded by a number.
4. Use the "Precede by" and "Follow by" boxes to enter any character(s) that you want to surround the letter in the bibliography.

Author Lists in the Bibliography and Footnotes

The Author Lists panels under the Bibliography and Footnotes headings let you specify exactly how the authors are to appear in the formatted bibliographic references or in your footnotes. You can format author names differently in the footnotes and bibliography, so be sure that you check the Author Lists settings under all these headings to adjust settings. The settings in these panels apply to all reference types formatted with the current style.

Note: In the example text below, dots (·) are used to indicate where a space should be added in the style. These dots will not appear in EndNote's Author Lists panels, spaces will appear instead. They are added here only to make spacing clearly recognizable.

Separators Between Author Names

In the "Author Separators" box, enter any punctuation and spaces that separate the individual author names in a citation or bibliographic reference. In references with multiple authors, it is standard to separate the names with a comma and a space.

- Use the *between* box to enter a comma and a space or any other required punctuation.
- Use the *before last* box to enter the separator that appears before the last author in a reference. Sometimes this is something other than a comma and a space, such as ", · and ·" or an ampersand (&) followed by a space.

Normally only the first row in the Author Separators box is used (with the range of authors set at "1 to 100") so that the separators in that row apply to all of the authors cited in a reference. However, there are styles in which two authors are listed as "Smith and Jones" (without a comma), and more than two are listed as "Smith, Jones, and Johnson" (with a comma before the word "· and ·"). In this case, make "· and ·" the "before last" separator when there are only two authors; and enter ", · and ·" when there are 3 or more authors.

Note: Include spaces before and after the word "and" and a space after commas.

Abbreviating the Author List

Some journals require that you abbreviate the list of authors, using "et al." or an equivalent, after a certain number of authors. The Abbreviated Author List section of the Author List panel allows you to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, and what the abbreviation should be.

- **List all author names**

Select this option if you do not want to abbreviate the author lists.

- **If ____ or more authors, list the first ____ author(s) and abbreviate with ____**

Select this option and fill in the blanks with the appropriate numbers and text (such as ", · et al.") if you would like the list of authors abbreviated.

APA Author List Setting

In the Author List settings for bibliographies there is a setting within the Abbreviated Author List settings that is sometimes referred to as the "APA setting." For the APA 6th and 7th styles, this option includes the following settings:

- **For APA 6th:** If 8 or more authors, list the first 6 authors, insert ... and add the last author's name.
- **For APA 7th:** If 21 or more authors, list the first 19 authors, insert ... and add the last author's name.

This setting allows you to display a set number of author names (or editor names for the Edited Book reference type) followed by an ellipsis (...), followed by the last author name (or editor name for the Edited Book reference type). This option is already set up for the APA styles included with EndNote, but you can also use it for other styles based on the APA style, if needed.

For Subsequent Works by the Same Author

In some bibliographic styles, if there is more than one work by an author (or group of authors), the first appearance of that author name is formatted differently from subsequent works. For example, the first reference might list the full author name, while subsequent references display a line of dashes in place of the author name.

You can print the entire author list for each reference, completely leave out the author list for subsequent works, or replace repeated author lists with a text string.

Abbreviated Author List — Short Form (footnotes only)

- **List all author names**

Select this option if you do not want to abbreviate the author lists.

- **If ____ or more authors, list the first ____ author(s) and abbreviate with ____**

Select this option and fill in the blanks with the appropriate numbers and text (such as ", · et al.") if you would like the list of authors abbreviated.

When entering an abbreviation such as ", · et al." You can italicize the abbreviation by selecting the "Italic" checkbox in the dialog.

Remember to save your style after making your changes. See [Saving Styles](#).

Citation Author Lists

If the style you are using lists the author names in the Citation template of the Style window, you can use the Author List options (as well as the Author Names panel) to control how the authors appear in your in-text citations. If your citations do not include the author names, ignore the Author List panel.

Note: In the example text below, small dots (·) are used to indicate where a space should be added in the style. These dots will not appear in EndNote's Author Lists panels, spaces will appear instead.

Separators Between Author Names

In the *Author Separators* box, enter any punctuation and spaces that separate the individual author names in a citation. In references with multiple authors, it is standard to separate the names with a comma and a space.

- Use the *between* box to enter a comma and a space, or any other required punctuation.
- In the *before last box*, enter the separator that appears before the last author in a reference. Sometimes this is something other than a comma and a space, such as ", · and ·" or an ampersand (&) followed by a space.
- In the *before last in format: Author (Year)* box, enter the separator that appears before the last author in the Author (Year) format. The behavior of this option is the same as the *before last* box. This allows you to meet the specifications of some styles that require different formats depending on whether the format used is the default format or the Author (Year) format.

Normally only the first row in the Author Separators box is used (with the range of authors set at "1 to 100") so that the separators in that row apply to all of the authors cited in a reference. However, there are styles in which two authors are listed as "Smith and Jones" (without a comma), and more than two are listed as "Smith, Jones, and Johnson" (with a comma before the word "and"). In this case, make ", · and ·" the *Separator before last author* when there are only two authors; and enter ", · and ·" when there are 3 or more authors.

Note: Include spaces before and after the word "and" and a space after commas.

Abbreviating the Author List, First Appearance

Some journals require that you abbreviate the list of authors, using "et al." or an equivalent, after a certain number of authors. The Abbreviated Author List section of the Author Lists panel allows you to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, and what the abbreviation should be.

- **List all author names**

Select this option if you do not want to abbreviate the author lists.

- **If ____ or more authors, list the first ____ author(s) and abbreviate with ____**

Select this option and fill in the blanks with the appropriate numbers and text (such as ", · et al.") if you would like the list of authors abbreviated.

Abbreviating the Author List, Subsequent Appearances

In some bibliographic styles, if a reference is cited more than once in your paper the first appearance of it in an in-text citation is formatted differently from subsequent citations. For example, the first citation might list all authors, while subsequent citations list only the first author followed by "· et al."

Use the First Appearance author list settings to specify the way the authors appear the first time the reference is cited. Use the Subsequent Appearances options to format authors in all other appearances of the citation.

Author Names in the Bibliography and Footnotes

Name Format

There is an Author Names panel for bibliographies and footnotes, as well as for citations. Some styles request that author names are formatted differently in all three cases. Be sure that you select the Author Names panel from under the appropriate heading. The author names format for citations is described in [Citation Author Names](#). This topic describes the options that are available for both the footnote and bibliography Author Names panels.

These settings are for choosing how author names should look—for example, whether the first or last name should come first, whether there should be a comma after the last name, and how the names should be capitalized.

- **First Author/Other Authors**

Using the lists for First Author and Other Authors, you can have the first author appear differently from the other authors in a reference. From these lists, select the example that shows the name in the order that you want in the reference.

- **Capitalization**

Specify how author names should appear.

- **As Is** (as entered in the reference)
- **Normal** (first letter of each name is capitalized)
- **All Uppercase** (all letters are capitalized)
- **Small Caps** (the first letter of a name is a large capital and other letters are smaller capitals; these may or may not be supported by your word processor)

If you apply a capitalization option to author names, but have a specific name that you do not

want changed, you can use the *Change Case* preference to leave that name as entered. See [Change Case Preferences](#).

- **Capitalize only the author's last name**

This option allows you to format only the author's last name in all uppercase. For example, JONES, Edward.

- **Initials**

Select from the available options in the list to specify how the initials should appear in the formatted references. Click the Initials list to choose how the authors' first and middle names should be formatted. If you have not entered the full first names and you select the Full Names option, EndNote uses the names as you have entered them into the reference. Select Last Only to show just the last name, with no first or middle initials.

Note: Initials entered into an EndNote reference must be separated by a period, a space, or a period and a space (such as M.J. Stein, M J Stein, or M. J. Stein). Two letters together (such as MJ Stein) will not be interpreted as two initials, but instead as a two-letter first name.

Name Format — Short Form (Footnotes only)

There is an Author Names panel for displaying footnotes in the short form.

- **First Author/Other Authors**

Using the list for First Author and Other Authors, you can have the first author appear differently from the other authors in a footnote. From these lists, select the example that shows the name in the order that you want in the footnote.

- Jane Smith
- Smith, Jane
- Smith Jane

- **Capitalization**

Specify how author names should be capitalized. The options are:

- As Is
- Normal
- All Uppercase
- Small Caps

- **Initials**

Select from the available options in the list to specify how the name or initials should appear in the formatted footnote. The options are:

- Full Name

- Last Name Only
- A. B.
- A.B.
- A B
- AB (You cannot enter initials in your library in this format, but EndNote can configure them to look this way in the output.)

When you are finished, remember to save your changes. See [Saving Styles](#).

Citation Author Names

Name Format

The Name Format section allows you to specify how the author names should look—whether the first or last name should come first, and whether there should be a comma after the last name.

First Author/Other Authors: Using the list for First Author and Other Authors, you can have the first author appear differently from the other authors in a reference. From these lists, select the example that shows the name in the order that you would like it to be in the citation. If the in-text citations use only the last name, this setting is not important.

Capitalization: Specify how you would like the author names to appear.

Specify how author names should appear.

- As Is (as entered in the reference)
- Normal (first letter of each name is capitalized)
- All Uppercase (all letters are capitalized)
- Small Caps (the first letter of a name is a large capital and other letters are smaller capitals; these may or may not be supported by your word processor)

If you apply a capitalization option to author names, but have a specific name that you do not want changed, you can use the *Change Case* preference to leave that name as entered. See [Change Case Preferences](#).

Capitalize only the author's last name: This option allows you to format the author's last name in all uppercase. For example: JONES, Edward

Initials: Select from the available options in the list to specify how the initials should look in the citations. Select *Last Name Only* if you only need the last name of the authors to appear in the citations.

Use initials only for primary authors with the same name: This option allows for initials to be used only when there are primary authors with the same last name included in the bibliography. Regardless of whether or not the resulting citations are ambiguous (that is, they could be from different years, so not ambiguous), EndNote will add the initials to those citations to clarify that they are from different authors who happen to have the same surname.

Note: The Publication Manual of the American Psychological Association requires this option for citations where different authors have the same last name, even if the citations are from different years. See section 6.14 of the APA 6th edition or section 8.20 of the 7th edition of the manual. EndNote APA styles are set to follow this requirement.

Consecutive Citations by the Same Author

If a multiple citation includes works by the same author, some styles request that you not repeat the author name. Check the setting to *Omit repeated authors* and EndNote will omit the author name from the citation after it first appears. In order for this setting to be used, the citations must all be grouped together in a multiple citation, and the citations by the same author must appear one right after the other.

For example, a reference such as this:

(Smith, 1993; Smith, 1999; Wyatt, 2000)

would be changed to look like this:

(Smith, 1993, 1999; Wyatt, 2000)

You may also choose the separator to use between these citations. Notice that in the example above the style normally uses a semicolon to separate multiple citations. But when there are a series of citations by the same author, the repeated author names are dropped and the years are separated by commas. In this case, a comma and a space should be entered as the punctuation with which to separate the consecutive citations by the same author.

If you have entered citations with suffixes and you would like those citations excluded from this formatting, check *Don't omit authors from citations that have suffixes*. For example, if two references by the same author included page numbers:

(Smith, 1993 p 24; Smith, 1999 p 5; Wyatt, 2000)

some styles request that you leave the author name in the second citation for clarity.

Editor List and Editor Names

To specify how the editors' names are to be formatted for reference types other than Edited Book, select *Editor List* or *Editor Name* from under the *Bibliography* or *Footnote* heading. In these panels you will find some of the same settings that have been described for formatting author names.

The Editor List settings apply to the generic Secondary Author, Tertiary Author, and Subsidiary Author fields. These fields include Editor in the Book Section, Electronic Book Section, Encyclopedia, and Conference Proceedings reference types, among others, and Series Editor in the Book and Edited Book reference types.

Note: "Editors" are considered primary authors for the Edited Book reference type. The Author List and Author Names settings apply to the primary author field of each reference type. Therefore, Author List and Author Names settings apply to the editor's name in an Edited Book, and the Editor List and Editor Names settings apply to the Series Editor's name in an Edited Book reference type.

The instructions for the Editor List panel are identical to those described for the corresponding Author List panel (see [Author Lists in the Bibliography and Footnotes](#)). Similarly, the Name Format options in the Editor Name panel are the same as those for Author Name panels (see [Author Names in the Bibliography and Footnotes](#)).

Name Format — Short Form

To specify how the editors' names and the abbreviated editors' list are to be formatted in the footnote short form, select *Editor Lists* or *Editor Name* from under the *Footnote* heading. In those panels you will find some of the same settings that have been described for formatting author names.

Use the menus to select how you want to format the following in footnotes:

- First author
- Other authors
- Capitalization
- Initials

Remember to save your style after making your changes. See [Saving Styles](#).

Bibliography Layout

Under the Bibliography heading there is a Layout setting that provides options for inserting text before and after each reference in a bibliography, as well as applying hanging indents to your references.

Adding Text Before Each Reference

In the *Start each reference with* section, you can specify what information, if any, should appear before each reference in your bibliography. (For information on how to add a prefix before a citation, see [Citation Prefixes](#)).

A common reference prefix is the bibliography number, which is used by all numbered styles to number the references in a bibliography.

If you have not yet done so, open the Style window for the style you wish to work with. (See [Opening the Style Window](#).)

To add a bibliography number before each reference:

1. In the Style window, select *Layout* from under the *Bibliography* heading.
2. Click in the text box below the *Start each reference with* section, and select *Bibliography Number* from the *Insert Field* list.
3. Type the necessary punctuation after the bibliography number (such as a period and a space) or insert a tab from the *Insert Field* list.

With a style configured in this way, EndNote creates a bibliography with numbered references, such as:

1. Argus, M.V. New paleontological excavation techniques. Nature 19, 234-237 (1993).

Note: To create a hanging indent, where the second and subsequent lines of a reference are indented, see [Hanging Indents](#) below.

Other Reference Prefix Fields

Other commonly used reference prefixes appear in the *Insert Field* list.

- **Reference Type:** This option will insert the reference type (such as Journal Article or Book) before each reference.
- **Label:** Some bibliographic styles use a Label in the citation and the bibliography to refer to each entry with a short mnemonic code, often the author's name and the last two digits of the year. When you enter references into your library, you can type the mnemonic code directly into the Label field. When EndNote builds a bibliography, it can put that code before each reference.
- **Citation:** Selecting Citation as a reference prefix allows you to label the references in the bibliography with the in-text citation.
- **Record Number:** This option will insert the record number before each reference. The record number is the number that EndNote assigns to each reference in the library, and it is also used in the unformatted in-text citations. Add Record Number as a reference prefix in any style in order to print all the references in your library with their unique EndNote record numbers. Record numbers are not unchangeable identifiers and should not be used as permanent identifiers. See [Record Numbers](#).

Adding Text After Each Reference

Use the *End each reference with* section of the *Layout* panel to specify what information, if any, should follow each reference in your bibliography. (For information on how to add text after an in-text citation in your document, see [Citation Suffixes](#)).

The *Insert Field* drop-down can be used to add the content of the Label, Keywords, Abstract, or Notes field, or the Record Number. Any other text or punctuation can also be entered as a reference suffix and it will appear at the end of each reference in the formatted bibliography. Two common uses for the Reference Suffix command are shown below.

Note: Although only a limited list of fields is shown on the *Insert Field* drop-down, any EndNote generic field name can be used in the *Start each reference with* or *End each reference with* sections. To add another field, such as Research Notes or Accession Number, just type the generic field name into the text box.

Example: Adding Research Notes to the Bibliography

If you have research notes that you want to print together with your references, you should add the Research Notes field as a reference suffix in the style that you are using to print or format the references.

1. With the Style window open, select *Layout* from under the *Bibliography* heading.
2. Click in the text box below the *End each reference with* and type "Research Notes" into the field. This will append the Research Notes field to every reference in the bibliography when you format a paper with the style. (Research Notes is a field reserved for your personal research notes, and

EndNote never imports data into it. In comparison, the Notes field may contain data imported from online databases. Because "Research Notes" is a generic field name, it can be used to begin or end a reference with any reference type.)

If you want the research notes to begin on a new line after the reference, select *End of paragraph* from the *Insert Field* list before "Research Notes." If you want the notes to be indented, select *Tab* from the *Insert Field* list before the words "Research Notes."

Adding or Removing Blank Lines Between References

Another common use for the Layout options is to add a blank line between references. To do this, edit the style as described above, and insert a paragraph mark, using *End of paragraph* on the *Insert Field* list, into the *End each reference with* section.

To tighten up the bibliography and get rid of the blank line after each reference, edit the style, click on the *Layout* panel, and select and delete the paragraph mark to get rid of the blank line.

Hanging Indents

Many numbered bibliographic styles require a hanging indent, as shown in this example:

1. Vonk J, Shackelford TK, editors. The Oxford handbook of comparative evolutionary psychology. New York: Oxford University Press; 2012.
2. Zorina ZA, Obozova TA. New Data on the Brain and Cognitive Abilities of Birds. Zoologicheskyy Zhurnal. 2011;90(7):784-802.
3. Smirnova AA. On the capability of birds for symbolization. Biology Bulletin. 2011;38(9):878-84.

EndNote provides a few hanging indent options. Normally, each reference is one paragraph, so some of these options would not apply. But if you have a reference that includes more than one paragraph, EndNote gives you options for which paragraph within a reference the hanging indents should apply. Examples of multi-paragraph references include annotated bibliographies where the research notes follow each reference, or a style such as those common in anthropology journals where the authors are on a line of their own.

Hanging indent options include: None, All Paragraphs, First Paragraph Only, Second Paragraph Only, and All Paragraphs but the First. The following is an example of when you would use Second Paragraph Only. The style requires that authors begin on the left margin, and then the year (and the rest of the reference) starts on a new line and is indented. The style applies a hanging indent to the second paragraph only, and inserts a tab before and after the year. In the word processing document, the spacing for the hanging indent should be aligned with the second tab stop.

Smirnova, A. A.
2011 On the capability of birds for symbolization. Biology Bulletin
38(9):878-884.

Vonk, Jennifer, and Todd K. Shackelford, eds.
2012 The Oxford handbook of comparative evolutionary psychology. New
York: Oxford University Press.

Zorina, Z. A., and T. A. Obozova
2011 New Data on the Brain and Cognitive Abilities of Birds. Zoologi-
cheskyy Zhurnal 90(7):784-802.

The spacing used for tabs and indents is determined by the ruler settings in your word processor.

Note: If you are creating a numbered bibliography, as shown in the previous example, insert a tab after the bibliography number to have the references line up correctly.

Tabs

Tabs may be inserted from the *Insert Field* list. A tab entered into a style will appear as a tab in the formatted bibliography. The tab appears as an arrow on the screen. The width of the tab as it appears in the bibliography is determined by the tab settings in your word processor.

Tabs are often entered after the bibliography number as part of the Layout settings. This helps to align the start of each reference after the number, which is especially important if the bibliography entries use a hanging indent.

Sort Order: Bibliographies and Multiple Citations

Each style has instructions for sorting references in the bibliography, and how to sort formatted multiple citations in the text of your paper. Select *Sort Order* from under either the *Citations* or *Bibliography* headings.

Multiple Citation Sort

The *Sort* panel under the *Citation* heading allows you to set the order that the style uses to sort multiple in-text citations. For example, an unformatted multiple citation looks like this:

```
{Lee, 2015 #5; Jacob, 2020 #22; Zolner, 2011 #19}
```

Formatted with the Author-Date style, the citations are sorted chronologically and the formatted citation looks like this:

```
(Zolner 2011; Lee 2015; Jacob 2020)
```

Options for sorting multiple citations include:

- **Same as Bibliography:** Sorts multiple citations in the same order as the Bibliography Sort Order.
- **Author + Title:** Sorts multiple citations first by authors and then by title.
- **Author + Year + Title:** Sorts multiple citations first by authors, then by year, and then by title.
- **Year + Author:** Sorts multiple citations chronologically. Then citations from the same year are sorted based on author names.
- **Don't Sort:** Multiple citations remain in the same order as they appear in the unformatted temporary citations.
- **Other:** A custom sort order is applied to multiple citations. See [Custom Sorting](#).

Bibliography Sort Order

The Bibliography Sort Order section determines how the bibliography should be sorted. Common options are listed, and you may also configure a custom sort order.

- **Order of Appearance:** References are listed in the order in which they are cited in the paper.
- **Author + Title:** References are sorted by the Author field. References with identical authors are sorted by title.
- **Author + Year + Title:** References are sorted by the Author field, then references with identical authors are sorted by year. References with identical authors and years are then sorted by title.
- **First Author + Year + Other Authors:** References are sorted by just the first author, then references with identical primary authors are sorted by year. References with identical primary authors and years are then sorted based on the other authors in the reference.
- **First Author + # of Authors + Year:** References are sorted by just the first author, then by the number of authors in the reference. For references with the same primary author and the same number of authors, they are then sorted chronologically based on the Year field.
- **Other:** A custom sort order is applied to the references in the bibliography. See [Custom Sorting](#).
- **Sort Edited Works After Original Works By Same Author:** Some styles request that if the same person is the author for a book and the editor for an edited book, the original works by that author are sorted first, and then the edited works follow. This is an exception to the sorting rules that can be applied to the other sort options provided.

Note: When sorting by Author field, EndNote sorts based on all information in the Author field, including all author names (not just the first author) and initials. To see about omitting parts of author names or the initial words of a title when sorting, see [Sorting Preferences](#).

Custom Sorting

To sort references or multiple citations differently from the options in the Citation Sort Order or Bibliography Sort Order sections, select the option for *Other*, and then select from the drop-down field lists any combination of up to five fields, in ascending or descending order.

This dialog is identical to the one that appears when you select *Sort Library* from the *Library* menu. You do not need to use all five options. The button at the right of each box controls the direction of the sort, either ascending or descending order. Clicking these buttons toggles the sort order between ascending and descending order.

At the bottom of the dialog is a drop-down menu of languages. The default will be the language used by your operating system, but you can change the language rules used for sorting here.

Once you have set up your sorting strategy, click *OK* to return to the main *Sort Order* panel for the style. The *Other* section will now display your custom sorting instructions.

Reference Type Categories in Output Styles

This feature allows you to add subject categories to your Microsoft Word documents that are associated with specific reference types. When EndNote creates the bibliography in Word, it organizes your citations based on how you have set up the categories in the output style.

Creating a Reference Type Category Style Template

1. From the *Tools* menu, select *Output Styles*, and then select the *Open Style Manager* command.
2. Select a style.
3. Select the *Categories* option from under the *Bibliography* section to open a blank style template.
4. Add categories (subheadings) to the text box in the template. Enter a unique name to identify each category.

You can align your categories to the left or center the text. You can also use various styles such as bold, italics, and underline to make your categories stand out.

5. Under each category, insert one or more reference types. You can insert as many reference types as you like. However, insert any specific reference type only once.
6. Continue to create categories and insert reference types until you have included all the reference types you think will be used in your papers.
7. From the *File* menu, select the *Save as* command.
8. Give the style a name and save the style.

Select Your Output Style in Microsoft Word

1. Open your Microsoft Word document.
2. Select the EndNote 20 tab.
3. Select the output style that contains the text categories and reference types defined in your new style.
4. Insert the needed citations in your Word document.
5. When you are finished writing your paper, go to the end of the document to review the bibliography.

EndNote creates a bibliography and inserts the selected references under the appropriate categories based on the reference type. At this point, you can modify and edit the bibliography (see [Configure Categories Dialog in Microsoft Word](#)). For example, you can:

- Rename a category.
- Delete a category.
- Move references (using drag and drop) from one category to another.

Important Points About Categories and Reference Types

- Insert one or more reference types under each bibliography category.
- Enter a unique name to identify each category that you create.

- Organize categories in the template based on how you want the categories to appear in the bibliography.
- Insert only one reference type per line.
- Insert a reference type only once per output style. For example, do not insert the Journal reference type under several categories.
- Apply text styles only to categories—not to reference types. EndNote treats a reference type as plain text (not as a reference) in the bibliography if you apply any text style to it.
- If you have not included a reference type in the Categories section, EndNote will place undefined reference types into a generic Uncategorized References category.

Field Substitutions in Bibliographies and Footnotes

If Fields Are Empty

The Field Substitutions panels under the Bibliography and Footnotes headings allow you to substitute another field in the bibliography or footnotes of a reference if one of the following fields is empty. A set of common substitution options are shown as defaults, but you can change the substitution field, and the formatting for it, if you wish.

- DOI
- PMCID
- Volume and Pages (Both fields must be empty.)

You can choose to activate field substitutions by selecting the checkbox by the field that might be empty. For example, if you select the *If the DOI field is empty, use* checkbox, by default the URL field will be used instead, EndNote uses the URL if the DOI field is empty in the bibliography and footnotes of a reference. If the DOI field is not empty, EndNote displays the DOI information.

You can also select another field from the Insert Field list if you do not want to use the default value.

To substitute field values in a bibliography and/or footnote:

1. In the Style window, select *Field Substitutions* from under the *Bibliography* or *Footnotes* heading.
2. Activate field substitution by selecting the checkbox of each field.
3. Accept the default, or delete it from the text box and replace it with a field on the *Insert Field* list.
4. Add any formatting or punctuation that is needed for the new field.
5. Save your changes to the style. If unsure how to save changes, see [Saving Styles](#).

Note: Even if you are using the default substitution, check the punctuation provided for it against the style's requirements. You may need to change the punctuation to match your journal's or style manual's requirements.

Examples of When to Use This Feature

- You are citing a prepress article that has a DOI number but not volume or page information. Some guidelines indicate that the DOI should be included in a reference for the prepress articles.
- You are citing a PubMed article; it has been assigned an NIHMSID, but it has not yet been assigned a PMCID. Style guidelines may indicate that the NIHMSID should be used as a substitution.

What is the difference between a PMCID and an NIHMSID? The PMCID is the unique permanent identifier assigned when an article is approved for publication at PubMed Central (PMC). The NIHMSID is a temporary identifier assigned when an article is submitted for publication at PubMed Central. The NIHMSID is only to be used for the first 90 days after it is assigned or until an article has been granted a PMCID. You can find more information on this at <https://www.ncbi.nlm.nih.gov/pmc/about/public-access-info/>.

If Editor and Translator Fields Are the Same

Some style guidelines request if the editor and translator of a reference is the same person, you should enter only the Editor field with preceding text indicating the same person did both. The default is "edited and translated by Editor."

Repeated Citations in Footnotes

Most of the complex formatting in footnotes is relevant only to styles in the humanities. There are a wide variety of formats required for citing references that are repeated in the footnotes of a paper. Citations that are not repeated in consecutive footnotes are covered by the short form set in the footnote template. See [Bibliography and Footnote Templates](#) and [Rules for Working with Style Templates](#) for information on setting up templates, including the short form template.

Some styles take the shortening of references in footnotes even farther when the repeated references appear in consecutive footnotes (or in the same footnote). EndNote provides additional options for the special handling of these cases in the Repeated Citations panel.

If the Same Reference Repeats in Consecutive Citations

When the same reference repeats in consecutive footnotes, you have three general options for how the repeated citation will be handled.

- **Replace repeated data with:** This option will allow you to replace the repeated data with text and/or a field of your choice. This is normally "Ibid." (or a variation of the term). You may also select an option from the Insert Field list. For example, the Cited Pages option lists the page numbers when the same reference repeats in consecutive footnotes. In this instance, you would have to go to the *Edit & Manage Citations* dialog in Cite While You Write, or use the "@" sign and the page numbers to enter a temporary marker if using Format Paper, so the cited pages would show in the document. See [Editing Citations in Microsoft Word](#), [Editing Citations in Apple Pages](#), and [Citation Suffixes](#) for information on editing citations to include cited pages.
- **Omit repeated data:** This option allows you to omit the repeated data and replace it with nothing.
- **Use short form:** This option will use the Short Form template defined in the Footnote Templates panel.

Note: The option to include the Volume field only applies to the Book and Book Section reference types. It does not apply to all reference types.

If the Same Source Repeats in Consecutive Citations

This setting does not apply to the identical reference that repeats in consecutive footnotes, but rather if any of the source data repeats in two consecutive citations in multiple citation format. For example, if two different references happen to be from the same journal, these settings would apply to the journal name, volume, and issue (or whatever portion of that source information is identical).

- **Replace repeated data with:** This option will replace the repeated data with "Ibid" (or text of your choice). If you choose this option, you may also limit the replacement to only the Secondary Title field (this includes the journal, magazine, or newspaper name, or the title of a book for a book section).
- **No special handling:** This option will use the Short Form template defined in the Footnote Templates panel.

Note: We realize that many of these detailed settings for the style can be confusing. We have done our best to configure the styles for you so that you will not need to edit them and work through these details on your own. However, if you find that you need to modify these parts of your styles, consult your style guide for more detailed descriptions and examples of handling repeated citations in footnotes.

Title Capitalization in Output Styles

Both the Footnotes and Bibliography sections have a Title Capitalization panel. This lets you enter one style of capitalization for the titles in your bibliographic references, and another format for when the references appear in footnotes.

Options for title capitalization include:

- **Leave titles as entered:** No changes are made.
- **Headline style capitalization:** The first letter of every significant word is capitalized, following the American English rules for capitalization, wherein articles, conjunctions, and prepositions are not capitalized. If you are working with a language other than English, you may wish to choose *Leave titles as entered* and edit the references to match the capitalization requirements of that language.
- **Sentence style capitalization:** Only the first letter of every title is capitalized.

Note: See [Change Case Preferences](#) to enter words or acronyms that should not be adjusted when EndNote changes the capitalization of titles.

Figure and Table Placement and Captions

The Figures and Tables settings apply to images inserted into a Word document from EndNote. You can place images where they are cited in a document or at the end of the document, and you have control over the placement and punctuation of labels and captions.

While style guidelines tend to be very specific in regard to formatted citations and bibliographies, they are often vague about figure and table placement. They may require different placement for different document types (theses, term papers, journal articles, and so on), or they may not offer instructions at all.

If an EndNote style's figure and table placement options do not meet your needs, you can change them. Please check your own style documentation (or check with your editor or teacher) for specific guidelines about image placement for the type of document you are creating.

Note: Additional Figures and Tables settings are available in the Cite While You Write Preferences, and can override output style settings. See [Figures and Tables Preferences in Microsoft Word](#).

Figures and Tables

Under the Figures and Tables heading in the left column of the output style editor, select either Figures or Tables. Tables are images inserted from the Figure field in the "Chart or Table" reference type. Figures are images inserted from the Figure field of any other EndNote reference type. The same options are available under each, which allows you to place figures differently than tables.

Placement

Under Placement, select a button to either place the images within the text of the document, near the reference to the figure, or to place images in a list at the end of the document.

If your images are placed in-text, you can use Cite While You Write preferences to override this automatic placement when your document is reformatted. This is helpful if you have moved your images around in the document and want to retain their placement. See [Figures and Tables Preferences in Microsoft Word](#).

Caption

Next, under Caption, select a button to place the label and caption either above or below the image. You can also select the checkbox to place the label and caption on separate lines.

Note: The label inserted by EndNote is "Figure #" for images found in the Figure and Equation reference types as well as for most other reference types. The label is "Table #" for images found in the "Chart or Table" reference type. The Caption is the text typed into the Caption field of a reference.

Separation and Punctuation for Figures and Tables

Under Image Separation, you can enter separators for images inserted within the text of a document and for images that are listed at the end of a document.

Note: The settings on this panel affect both figures and tables.

Image Separation

When images are inserted in-text, you can specify the number of lines to insert before and after the image to separate it from text. This setting affects both figures and tables that are placed in-text. If your images are placed in a list at the end of the document, this setting is ignored.

When images are placed in a list at the end of the document, you can separate each figure or table with a page break or a specified number of blank lines before and after each image. If your images are placed in-text, this setting is ignored.

Caption Punctuation

For each figure or table inserted into Word from an EndNote reference, EndNote generates a label and then inserts the caption from the Caption field of the EndNote reference. For example:

Table 1. Avian Developmental Stages

You can select the checkboxes to insert a period after the label and/or after the caption. This affects the labels and captions for both figures and tables.

EndNote will attempt to remove double punctuation in case you inadvertently include a period within the record as well as selecting one here.

Creating a New Style

It is often easier to modify an existing bibliographic style that closely resembles a style you need than it is to create a new style from scratch. (See [Modifying Style Templates](#)). If you do wish to create a new style, [Creating an Author Date Style](#) gives you a general overview of the process.

Creating a bibliographic style involves building templates for the in-text citations and the bibliographic references to mimic how you want them to appear in your paper. Then adjust the various options to be sure that authors, titles, pages, and other fields are being formatted according to your requirements. [Creating an Author Date Style](#) guides you through the creation of a fictitious author-date type of style.

Creating an Author Date Style

A new style need only contain a Citation template and a Generic Bibliography template for it to produce citations and bibliographies for any paper. The Citation template applies to all in-text citations, and the Generic bibliography template applies to all reference types that do not have templates of their own in the style. The Generic template should be considered a default template, and you should add additional templates for the standard reference types which you use. If you define a specific template for any reference types, they are formatted according to that template, and not the Generic format.

Note: For the example text in templates shown below, a small dot (·) is used to indicate a standard space. This is just to clarify spacing in the style. The dots will only show in the style when working in the templates; they do not show in other style panels. On the macOS, dots will not show for multi-word field names, such as Series Editor or Document Number.

Create a New Style

1. To create a bibliographic style, go to the *Tools* menu, select *Output Style*, and then select *New Style*, and a new Untitled Style window appears.

Create the (Author, Year) Citation Template

1. Select the *Templates* panel under the *Citations* heading.

2. Place the cursor in the text box under the *Citation* heading in the *Citations Templates* panel.
3. Type an open parenthesis.
4. Click the *Insert Field* button and select *Author* from the list of available fields.
5. Type a comma and a space.
6. Select *Year* from the *Insert Field* list.
7. Type the closing parenthesis.

Create the Author (Year) Citation Template

1. Select the *Templates* panel under the *Citations* heading.
2. Place the cursor in the text box under the *Citation — Author (Year)* heading in the *Citations Templates* panel.
3. Click the *Insert Field* button and select *Author* from the list of available fields, then type a space.
4. Type an open parenthesis.
5. Select *Year* from the *Insert Field* list.
6. Type the closing parenthesis.

Note: To see more font options when working in a style template, select the text to be formatted, *Control+click*, and select *Font > Show Fonts* from the menu. This will open the Fonts window.

Set the Number of Authors in the Citation

1. Select *Author Lists* under the *Citations* heading.
2. The default setting for *Abbreviated Author List — First Appearance* is to list all author names in the citation. For this example, let's change this setting to show up to three author names the first time a reference is cited, and two authors and "et al." in italics if there are more than three authors.
 - a. Click the radio button under *Abbreviated Author List — First Appearance* that starts with *If 3 or more authors...* (3 is only the default).
 - b. Change the 3 to a 4 where it says *If 3 or more authors*, then change 1 to 2 where it says *list the first 1 author(s)*, then mark the Italic checkbox. It should now show something like this:

If 4 or more authors, list the first 2 author(s) and abbreviate with , et al. ☒ Italic

With this setting, if there are up to three authors, all authors will appear in the citation. If there are more than three authors (4 or more authors), only two authors will appear, followed by ", et al."

3. The default setting for *Abbreviated Author List — Subsequent Appearances* is also to list all authors. Let's change this to show only the first author and when repeated citations have more three authors.

- a. Click the radio button under *Abbreviated Author List — Subsequent Appearances* for the option that begins with *If 3 or more authors...*
- b. Change the 3 to 4 where it says *If 3 or more authors*, then leave the option set to 1 where it says *list the first 1 author(s)*, and finally, mark the *Italic* box. (If you wanted it to show something other than ", et al." you could change the text.) It should now show something like this:

If 4 or more authors, list the first 1 author(s) and abbreviate with , et al. ☒ Italic

With this setting, if there are up to three authors, all authors will appear in the repeated citation. If there are more than three authors (4 or more authors), only the first author will appear, followed by ", et al."

Set the Author Names to Show Only the Last Name in the Citation

1. Select *Author Name* under the *Citations* heading.
2. For the citations, we want only the author's last names to show, with no special capitalization options, so we will leave most of these settings as shown in the defaults. However, we would like the author name to be shown only once if an author has two references in the same grouped citation. For example, instead of (Smith, 2012; Smith, 2020), we want it to show (Smith, 2012, 2020). Set this by marking the checkbox *Omit repeated authors* under *Consecutive Citation by the Same Author*. To use a comma instead of a semicolon between the years, mark the box *Separate these citations with* and leave the default option to use a comma and a space as it is.

Create a Generic Bibliography Template

Next, define the Generic format which serves as the default template for reference types that do not have their own template.

Our style uses the author name and the year in the citation. They are surrounded by parentheses and separated by a comma. Most styles that show the author and year in citations also begin with those fields and sort the bibliography by the author name, then by the year, then by the title, so we will create bibliography settings to do so.

1. Select *Templates* under the *Bibliography* heading, then click on *Generic*. Your cursor should now be located in the Generic text box, where you can enter the fields and punctuation for your style.
2. Select *Author* from the *Insert Field* list to add the Author field to the style template. (You can also type "Author" but it is safer to select the field name from the list, to avoid typos.) Type a period and a space. Continue adding fields and punctuation until you have a line that looks like the one below.

Author. (Year). Title. Place Published. Publisher.

Note that in the above example, there is no dot shown for a space in "Place Published." This is because this is a field name, a placeholder which will be replaced with data from a reference in a formatted bibliography, and no punctuation or extra spacing can be inserted inside a field name in the template.

3. In this style, the title must be italicized, so double-click the word *Title* to select it and apply italic formatting. Select the option from the *Edit > Font* submenu. See [Fonts and Text in Output Styles](#) for more information on working with fonts in EndNote. You can also use the following shortcuts to apply text formatting.
 - a. ⌘+B for bold

- b. ⌘+I for italic
 - c. ⌘+U for underline
 - d. ⌘+Shift++ (the last + is the plus sign, so this means to hold down the ⌘ key, the Shift key, and the + key together) for superscript
 - e. ⌘+Shift+- (the – is the minus sign, so this means to hold down the ⌘ key, the Shift key, and the – key together) for subscript
4. Save the new style by selecting *Save As* from the *File* menu. In the dialog that appears, type "Practice Style" as the name of this style and click *Save*. This will save the style and add it as an option in the *Output Styles* submenu of the *Tools* menu.

Test the Style

Open your library, select a reference, and expand the *Preview* subpanel on the *Reference > Summary* panel. Select different references in your library to see how they format. You will probably see that the books look good, but journal articles do not display enough information. You will need to return to the style and create a template to format journal articles.

Create a New Template for Journals

In the *Templates* panel under the *Bibliography* heading, select *Journal Article* from the *Reference Type* drop-down list. This will create a new section for a Journal Article template. Insert the fields and punctuation to create a template as shown below:

Author·(Year). Title. Journal. Volume (Issue) Pages.

Save the style by selecting *Save* from the *File* menu. Return to the Library window, and check the preview to see how journal article references are formatted.

Setting a Sort Order

Our practice style's bibliography and citations need to be sorted by Authors, Year, and then by the Title. To do this:

1. Select *Sort Order* under the *Bibliography* heading to set the sorting options for the bibliography.
2. Select the third option, *Author + Year + Title*.
3. Select *Sort Order* under the *Citations* heading to set the sorting option for the Citations.
4. Select the first option, *Same as bibliography*. This will sort citations within a grouped citation in the same order they would be sorted in the bibliography.

To explore more options for sorting citations in a style, see [Sort Order: Bibliographies and Multiple Citations](#).

Finishing the Style

Continue testing how other reference types format, and include additional reference type templates as necessary. See [Modifying Style Templates](#) for specifics about creating and modifying style templates. See

[Special Formatting Characters](#) for information on how to use special characters to provide more control over formatting in templates.

Look at how the author names are formatted, and change the necessary settings. You should also take a close look at pages, title capitalization, the sort order of the references, and various other options provided in the Style window. These are described in the section on [Additional Style Formatting Options](#).

Additional Style Formatting Options

- [Punctuation in Output Styles](#)
- [Anonymous Works](#)
- [Page Numbers](#)
- [Journal Names](#)
- [Sections Options in Output Styles](#) (Microsoft Word Only)
- [Ambiguous Citations](#)
- [Numbering Citations in Output Styles](#)
- [Author Lists in the Bibliography and Footnotes](#)
- [Citation Author Lists](#)
- [Author Names in the Bibliography and Footnotes](#)
- [Citation Author Names](#)
- [Editor List and Editor Names](#)
- [Bibliography Layout](#)
- [Sort Order: Bibliographies and Multiple Citations](#)
- [Title Capitalization in Output Styles](#)
- [Repeated Citations in Footnotes](#)
- [Figure and Table Placement and Captions](#)

Import Filters

Introduction to Filters

The Import command on the File menu provides a way to import text files of reference data into EndNote libraries, or EndNote XML files exported from EndNote. EndNote has a number of built-in import options as well as a large collection of configurable import filters. Filters are designed to import references downloaded from specific online bibliographic databases, or to import data exported from other bibliographic software programs.

You can edit and create import filters. The process of importing references using the Import command is described in [Importing Reference Data into EndNote](#).

EndNote provides hundreds of import filters for a variety of sources. By default, only the most popular filters are stored as individual files in the Filters folder in your EndNote program folder. To install additional filters, see [Installing Additional Filters](#).

What is a Filter?

Import filters provide a wide range of import options. A filter is selected during the import process to show EndNote exactly how to interpret the information in your data file (the records downloaded or saved from an online database or exported from another program). A filter does this by mapping the information in each downloaded reference to the corresponding fields in EndNote.

Because each database offered by the various information providers has its own way to organize reference data, there needs to be a different filter for each database. Each filter provided with EndNote has been configured to import data files from a specific database offered by a single information provider. You can easily modify any of the supplied filters or create a new filter to import from other databases.

A Comment About Difficult Data Files

Although EndNote's filters are very powerful and flexible import tools, there are still some data files that cannot be conquered. Whereas some databases provide very clean tagged data, others are almost impossible to discern. Lack of consistency in the source data and the omission of reference type tags often make it difficult for a person to understand the information: the task of creating a perfect filter to handle these files is futile. When fine tuning our filters, we have done our best to capture the necessary data—even if that means dropping it all into the Notes field. If you find filters that can be further improved, please let us know. It may also help to contact your information provider to let them know that the inconsistencies in the data entry for the database are keeping you from most efficiently making use of it.

Installing Additional Filters

See [Installing Additional Filters](#) for instructions on installing additional filters.

The Filter Manager

EndNote provides hundreds of import filters for a variety of sources. By default, only the most popular filters are stored as individual files in the Filters folder in your EndNote program folder. To install additional filters, see [Installing Additional Filters](#).

To access the Filter Manager, select *Import Filters > Open Filter Manager...* from the *Tools* menu.

The Filter Manager lists the names of the original filter files available in the //Applications/EndNote 20/Filters folder, as well as any new or modified filters in your personal Filters folder, and gives you the option to edit them or select them as "favorites" for quick access when you use the Import command. You can click and drag the corner of the dialog to increase the size.

Use these features to locate the import filter you want to use:

- If you know the name of the filter that you want to use, you may start typing it and the first filter name that matches what you type will be selected.
- Type text into the *Quick Search* text box and press *Return* to search for a filter by the name of the file. You can enter a partial name or the full name. EndNote will display all matching results.
- Click the *Find by Category* button and select an information provider's name (such as OCLC) to find only the import filters for a specific information provider.
- Click the *Find by Category* button and select *All Filters* to return all of the import filters to the displayed list.
- Click a column heading to sort the import filters by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending order. Click again to set it back to ascending order.
- Click the *More Info* button at the bottom of the dialog to display additional information about the selected filter.
- Click the *Get More on the Web* button to open your browser and navigate to the EndNote download site to access more filters.

Marking Your Favorite Import Filters

When you have found a filter that you will want to use in the future, mark the checkbox to the left of it in the *Favorites* column to add it as a favorite. All filters that are marked as favorites appear in the Import Options list in the Import dialog. You can get to the Import dialog by selecting *Import* from the *File* menu. This gives you easy access to those files you use most often.

To mark all of the filters for a specific information provider, click the *Find by Category* button and, from that list, select the name of the information provider. Then, with just that subset of filters listed in the Filter Manager window, select *Mark All* from the *Mark* drop-down list. The *Unmark All* option may be used to unmark all of the filters that are showing in the list.

Editing Import Filters

If you would like to modify a filter, select it in the list and click *Edit*. These topics can help guide you:

- [The Basic Components of a Filter](#)
- [The Filter Editor Window](#)
- [Working with Filter Templates](#)
- [The Filter Options](#)
- [Modifying an Existing Filter, an Example](#)

Saving Filters

To save a new filter that you have just created, or to save changes to a filter you have just modified, select *Save As* from the *File* menu. The new filter will be saved in your personal filter's folder. For a description of where your styles are stored, see [Folder Locations Preferences](#).

EndNote filters use the file name extension of ".enf" (for EndNote Filter), as in "PubMed (NLM).enf."

Copying Filters

When you display a list of filters in EndNote, the list is comprised of the installed filters found in the // Applications/EndNote 20/Filters folder, as well as new or modified filters found in your personal Filters folder. For an explanation of where your files are stored, see [Folder Locations Preferences](#).

There are two ways to copy filters. Since each filter is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Finder.

To make a copy of a filter from within EndNote:

1. From the *Tools* menu, select *Import Filters* and select *Open Filter Manager*.
2. Select the filter you want to copy and click *Edit*.
3. Without making any changes to the filter, select *Save As* from the *File* menu.
4. Give this copy of the filter a new name, and then save it.

The file is saved in your personal Filters folder. The new filter will remain open. The original filter will be left untouched.

Deleting Filters

To delete a filter from within EndNote:

1. From the *Tools* menu, select *Import Filters > Open Filter Manager*.

2. Control+click on the filter to be deleted and select *Delete Filter...* from the menu.
3. You will be asked for a confirmation of if you really want to delete the filter. Select *Yes* to delete the filter or *No* to keep it.

You can also delete an unwanted filter by opening Finder and opening the appropriate Filters folder (see [Folder Locations Preferences](#)). Then, drag the filter from the Filter folder to the Trash.

The Basic Components of a Filter

You need to know the basic components of a filter if you want to customize or create a filter.

- To create a new import filter: From the *Tools* menu, select *Import Filters*, and then select *New Filter*. If you are interested in creating a new filter, also read [Creating a New Filter](#).
- To edit a filter: From the *Tools* menu, select *Import Filters*, and then select *Open Filter Manager*. Select the filter to edit and click *Edit*. The most recently used filter can also be easily edited by selecting *Import Filters* from the *Tools* menu, and selecting *Edit [Filter Name]*.

These topics explain the basic components of a filter:

- [The Filter Editor Window](#)
- [About this Filter](#)
- [Working with Filter Templates](#)
- [The Filter Options](#)

The Filter Editor Window

After choosing the option to edit an existing filter or create a new one, EndNote opens the Filter Editor window.

All of the different options for editing a filter are listed on the left side of the Filter Editor. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you select *Save As* from the *File* menu.

To close a Filter window, click the *Close* button in the upper left corner of the window, or select *Close Filter* from the *File* menu. If you have not saved your changes to the filter, EndNote prompts you and gives you the option to save or discard any changes that you have made.

About this Filter

The Filter Editor opens to display the About This Filter panel. This panel contains descriptive information about the filter. None of the information used in this panel has any impact on how well the filter works, it is just descriptive.

File Name: Displays the name of the filter as it appears in the Filters folder in the EndNote folder. The file name extension (.enf) is not displayed. The name of the filter cannot be changed here; you would need to close this window and switch back to the Finder to rename the filter.

Full Name: This name will not be displayed in the Filter Manager, but this field allows you to assign a longer, more descriptive name, if you choose.

Based On: Enter any information about what documentation was used to create the filter. Commonly the server documentation is available on the Web, so you could enter a URL here as well to make it easy to later retrieve that information.

Information Provider: The category is typically the information provider (such as OCLC), but you may enter anything that will help you categorize and organize your filters. The category information is also shown in the Filter Manager window, in the column next to the name of the filter. In that window, you may sort filters by category and also search for them by category.

Created: The date the filter was installed or created.

Last Modified: The date the filter was last modified.

Comments and Limitations: Enter any helpful information such as how to download references in the format that works with this filter.

All of the information except the Full Name in this panel is visible in the Filter Manager if you click the *More Info* option at the bottom of the Filter Manager window. (The Information Provider appears as "Category" in the More Info view.) This is helpful because you do not need to edit a filter to view the comments or other descriptive information. You may scroll through the available filters in the Filter Manager window and view the information there.

Working with Filter Templates

Filter Templates in Import Filters and Connection Files

The most important part of a filter or connection file is the Templates section. The templates define how the various lines of tagged data in your data file should be imported and filtered into the different EndNote fields (such as Author, Year, and Title). Different sets of templates are required for the different reference types that may be in your data file.

The Templates panel consists of individual Reference Type templates which correspond to the way the reference data is presented in the data file. These topics will help you:

- [Navigating in the Templates Panel in Import Filters and Connection Files](#)
- [Tags and Fields in Import Filters and Connection Files](#)
- [Templates for Different Reference Types in Import Filters and Connection Files](#)
- [Adding and Deleting Rows in the Filter Template in Import Filters and Connection Files](#)
- [Cutting, Copying and Pasting Rows in Import Filters and Connection Files](#)
- [Literal Text vs. EndNote Fields in Import Filters and Connection Files](#)
- [The {IGNORE} Field in Import Filters and Connection Files](#)
- [The Source Line in Import Filters and Connection Files](#)

- [The Reference Type Tag in Import Filters and Connection Files](#)
- [Fields with Special Characteristics](#)
- [When Punctuation Repeats within a Field in Import Filters and Connection Files](#)

Navigating in the Templates Panel in Import Filters and Connection Files

The Templates panel in a filter is divided into a Tag column and a Field(s) column. The tag and its corresponding field(s) are two separate cells in a row. If a cell is active, an outline appears around the cell.

Tag	Field(s)
TI:	Title

To move from one cell to the next, press the Tab key or click the mouse in the desired cell. To move back to the previous cell, hold down the *Shift* key while pressing the *Tab* key.

To change the width of the Tag column in the Filter window, position the cursor over the vertical line dividing the Tag and Field(s) columns. The cursor changes to indicate that you are in the correct place. Click and drag to the right or left to resize the column widths.

Click the Reference Types list to change the view to a different reference type (such as from Journal Article to Book).

Tags and Fields in Import Filters and Connection Files

There are two columns shown in the template of an import filter: Tag and Field(s). The Tag precedes the data that will be imported into EndNote; the Tag itself is not imported. There must be at least one space between the Tag and the data for EndNote to import the data.

Importing works by pattern matching. The pattern of the tag and the pattern of the field data in the text file must match the pattern in the Tag column and the contents of the Field(s) column of the filter.

Tag	Field(s)
TI:	Title

Tag	Field(s)
TI:	Title

Notice the difference in the Tag columns of the examples above. In the first example, there are no spaces before the tag. This would work when importing if the original data file had the tag at the left margin, with no preceding spaces. However, if the original data file had three spaces between each tag and the left margin, You would need to build your filter as shown in the second example, with three spaces before the tag in the Tag column.

When setting up the Tag for filters, include any spaces that precede the tag in the original data file.

Along with the spacing needing to be the same, the tag must be capitalized the same way in the filter as it is in the data.

Templates for Different Reference Types in Import Filters and Connection Files

The Templates panel includes templates for all of the various reference types (Journal Article or Book, for example).

Click the *Reference Types* list to change the view to a different reference type (such as from Journal Article to Book).

The reference types that have a check mark displayed next to them already have a template defined (you can edit the template if you wish). The reference type that appears in bold type is currently the default reference type.

The only reference types templates that need to be filled in are the ones that correspond to the reference types in your data file. For example, if the database from which you are downloading contains only journal articles, you would only need to fill in the templates for the Journal Article section in that particular filter.

Importing works through pattern matching. The pattern of the template must match the pattern of the data being imported. Within each reference type template there is a list of tags and their corresponding EndNote field names. These templates should exactly match the way the information is organized in the data file. Any text, leading spaces (including spaces from the left margin to the beginning of a tag), or punctuation that you see that is not part of a field name (such as "vol." before the Volume) is included to make the template exactly match the data file.

Adding and Deleting Rows in the Filter Template in Import Filters and Connection Files

When adding and deleting rows, the order of the tags does not have to match the order of the tags in the data file. There is one case in which the order of the tags is important: if you are entering multiple variations of one tagged line, you should enter the repeated lines for that tag in order from the most complex to the simplest. This is because EndNote looks for matches starting from the top of the window working down the list of tags. It stops at the first template that matches the tagged data.

To start a new row immediately below the active row, position the cursor in the Field(s) cell, and press *Return*.

To start a new row immediately above the active row, position the cursor in the Tag cell, and press *Return*.

To delete a row, select the row and then select *Cut* from the *Edit* menu.

Cutting, Copying and Pasting Rows in Import Filters and Connection Files

You may use the Cut, Copy, and Paste commands to move or duplicate a cell or a row of cells. To do so:

1. Select a row by dragging the mouse across both columns. (Dragging the mouse vertically across more than one row selects a range of rows.)

2. To duplicate the selected row(s) elsewhere in a filter, select *Copy* (⌘+C) from the *Edit* menu. If you want to delete the selected row and move it to another location, select *Cut* (⌘+X).
3. Click where you would like the cut or copied row to appear, and select *Paste* (⌘+V) from the *Edit* menu. If the cursor is in the Tag column, the pasted row will be inserted above the row where the cursor is; if the cursor is in the Field(s) column, the pasted row will be inserted below. (Pasting when an entire row is selected will replace the row.)

Copying and Pasting Between Reference Type Templates

By choosing *Select All* (⌘+A) from the *Edit* menu, you can select all of the rows in a given Reference Type template. This is useful for copying an entire template to a new reference type or filter. After copying the entire set of templates for a reference type, you may select a different reference type from the Reference Type list at the top of the window, click in the *Tag* cell for the new reference type, and select *Paste*.

When you copy information from one reference type (such as Journal Article), and paste the rows into another reference type (such as Newspaper), the field names automatically change to reflect the names used by the new reference type. If there is not a corresponding field name in the new reference type, the original field name in the template is replaced with {IGNORE}, indicating that the data for that tag will be ignored. You can edit the new template to match the data, as needed.

Literal Text vs. EndNote Fields in Import Filters and Connection Files

When you look at a filter, you will notice that some of the templates contain information other than EndNote field names. For EndNote to identify which data should go into a particular EndNote field, you must include punctuation and any literal text or spaces that appear in your data file. Punctuation and literal text act as delimiters, allowing EndNote to parse the data into multiple EndNote fields. None of these delimiters actually gets imported into an EndNote library, they merely serve as guides for EndNote to correctly import the data.

Here is an example of a data file's source line where, in addition to punctuation, there is literal text such as "v", "n" and "p" preceding the data:

SO: Youth Theatre Journal. v6 n4 p3-6.

The "v", "n" and "p" are considered literal text because they are not EndNote field names; they represent the literal text from the data file that precedes the data that you want to import. In this particular source line, there are four different pieces of information: the journal name, volume, issue, and pages. To help EndNote determine when one field ends and the next one begins, you must insert the literal text, punctuation, and spaces found in the data file next to the appropriate field name.

As a result, the above SO: tag line should be represented in a filter like this:

Tag	Field(s)
SO:	Journal. vVolume nIssue pPages.

In some databases, you may find lines of data that include a word that is also an EndNote field name. The following source line contains the word "pages" before the page numbers:

SO: Town-planning-review. vol. 62, no. 4, pages461-469.

If entered into the filter, EndNote would normally interpret the word "pages" as a field name. (This is true whether you type it in the filter or insert it using the Insert Field list.) To force EndNote to read a field's name as literal text, surround the name with accent grave characters (`), as in `pages`. The accent grave character is found in the upper left corner, under the tilde (~) key on most English keyboards. To match the source line shown above, the source line in the filter should appear as:

Tag	Field(s)
SO:	Journal. vol. Volume, no. Issue, `pages`Pages.

The {IGNORE} Field in Import Filters and Connection Files

There may be pieces of information in a line of data that you do not want imported into your EndNote library. To force EndNote to ignore pieces of information, use the Insert Field list to insert {IGNORE} in the appropriate place. For example, suppose you want EndNote to ignore bracketed text that sometimes follows the title of an article:

TI: Research funds are dwindling. [letter]

You should add a new TI tag and template to your filter that looks like the example below. This line should be above the TI: Title line because this line is more complex, with added information in it. EndNote will try to match information to each template line with the same tag from top to bottom, so the more complex line goes above the simpler line.

Tag	Field(s)
TI:	Title. [{IGNORE}]

The Source Line in Import Filters and Connection Files

The source line is typically the most complex line of data in a record because it contains all of the information about the source of the publication. For a journal article, the source line may contain the journal name, the volume number, the issue number, page numbers, and the year of publication. For a book, the source line may contain the publisher, the city, and the number of pages.

The source line in your filter must match exactly the source line in the data file in order for EndNote to distinguish one piece of information from another. You will often find more than one variation of a source line for a given reference type in a single data file, in which case you will need to create a separate source line for each variant, starting with the most complex source. The three source lines displayed below come from a single database:

SO: Semin-Onco1. 76(3):465-71 1998
SO: Semin-Onco1. 127:5-24 1999
SO: Eur-J-Cancer. 118/6 (654-657) 1998

In the first SO: tag line, parentheses enclose the issue number "(3)." In the second SO: tag line, there is no issue, so a colon separates the volume number and the page numbers "127:5-24." In the third SO: tag line, a slash separates the volume number and the issue number "118/6" and parentheses enclose the page numbers "(654-657)."

Each variant in the data file's source lines must be defined in your filter. Since EndNote tries to match the source line in the data file with the first defined source line in your filter, you should place the most detailed source line first, followed by progressively less detailed source lines.

The filter for the above source lines should look like this:

Tag	Field(s)
AU:	Author
TI:	Title
SO:	Journal. Volume(Issue):Pages Year
SO:	Journal. Volume/Issue (Pages) Year
SO:	Journal. Volume:Pages Year
KW:	Keywords

Note: If the filter fails to match a variation of the source line for a journal article, it is possible to have EndNote interpret the data on its own. See [Source Parsing in Import Filters and Connection Files](#).

The Reference Type Tag in Import Filters and Connection Files

A Reference Type tag identifies the kind of work or publication being referenced in a particular record in your data file. In the Filter window, a Reference Type tag is only defined by the characteristic of having literal text, and no fields, entered into the field column. This literal text is not imported into EndNote, but it is used only to identify a record's reference type.

Although a Reference Type tag can be any tag at all, two common Reference Type tags are "DT" and "PT" (which stand for Document Type and Publication Type).

```
JN- Am J Occup Ther; 47 (11) p998-1008|
CP- UNITED STATES|
PY- Nov 1993|
SN- 0272-9490|
JC- 304|
CN- MCJ-009105|
LA- ENGLISH|
DT- Analytic; Serial| ←Reference Type Tag
JA- 9404|
```

To ensure that EndNote imports the data into the correct reference type, you must type the Reference Type tag in the Tag column, and the reference type name (or other identifying text) exactly as it appears in the data file in the Field(s) column. (The matching is case-sensitive.) The Reference Type tag can be placed anywhere in the appropriate Reference Type template.

When EndNote imports a record, it first scans the data file, looking for a Reference Type tag in your filter. Then it looks for a match in the record it's importing. The first Reference Type tag match encountered determines which of the Reference Type templates EndNote will use to parse the record. This match also determines which reference type EndNote assigns the record in the EndNote library.

When entering the Reference Type tag in your filter, the text you enter in the Field cell must be interpreted by EndNote as literal text. A problem can arise when you have text that contains an EndNote field name. For example, the following Reference Type tag contains the field name "Journal":

Tag	Field(s)
DT:	Journal Article

Because the field name "Journal" appears in the template, EndNote will not interpret this DT: tag line as the Reference Type tag. Instead, the filter would import the word Journal (from the data file's DT: line) into the Journal field.

To force EndNote to interpret the word Journal (or any other field name) as literal text, put an accent grave (') character at the start and end of the word. (The accent grave character is usually found in the upper left corner of the keyboard, under the tilde (~) key.) The above Reference Type tag should appear in a filter as:

Tag	Field(s)
DT:	`Journal` Article

If the database you use does not specify a Reference Type tag, all reference types in your data file will import as the default reference type (see [Reference Type in Import Filters and Connection Files](#)).

Fields with Special Characteristics

Certain EndNote fields contain special restrictions on what sort of data can be imported. These settings cannot be modified and apply to all import filters.

- **Author Fields:** The words "And Others" get converted to "et al" and the word "and" is omitted. Years as well as parenthetical or bracketed text are removed by default. See [Author and Editor Parsing in Import Filters and Connection Files](#).
- **Year:** Only 4-digit numbers (1### or 20##) are imported.
- **Title:** The following punctuation is removed from the end of a title.

Removed Characters at End of Title	
.	Period
,	Comma
;	Semicolon
:	Colon
/	Forward slash
\	Back slash
(Opening parenthesis
-	Hyphen
^	Caret

- **Pages:** A "P" or "p" before the number is automatically removed.
- **Volume:** A "V" or "v" before the number is automatically removed, as is a number that appears to be a year.
- **Issue:** An "N" or "No" or "No." before the number is automatically removed (this is not case sensitive).

When Punctuation Repeats within a Field in Import Filters and Connection Files

A special formatting character called a "vertical bar" (|) can be placed in a filter to indicate a repeating separator within a field. For example, you may have a data file where a period followed by a space separates a journal name from the volume. However, in some cases, this separator is part of the journal name itself, with the result that a period and a space cannot be reliably used to distinguish a journal name from the volume. For example:

SO: Science. 10 (3): p. 80-90

The above source line would be defined in a filter as:

Tag	Field(s)
SO:	Journal. Volume (Issue): p. Pages

Another source line in the same data file might look like this:

SO: Proc. Nat. Acad. 19 (5): p. 23-24

The problem arises in the second source line where the separator between the journal and volume (period and a space) is found repeatedly within the journal name. The SO: line in the filter instructs EndNote to import the data up to the period and space into the Journal field. Consequently, EndNote would parse "Proc." as the journal name, and everything after the period up to the open parenthesis as the volume, so the volume would be "Nat. Acad. 19."

There is a way to indicate a repeating separator within a field in the filter. If you place a vertical bar (|) before the separator, this instructs EndNote to read up to the last occurrence of this separator. In the example above, if we place a vertical bar before the repeating Journal field separator (period and space), the SO: line in the filter would look like this:

Tag	Field(s)
SO:	Journal . Volume (Issue): p. Pages

This SO: line in this filter instructs EndNote to import all the data up until the last period followed by a space separator as a journal. Here, EndNote would import "Proc. Nat. Acad." as the Journal, and "19" as the Volume.

The Filter Options

The remainder of the options listed in the Filter window below Templates provide the tools for fine tuning your filter. These options include, among other things, how author names should be interpreted, how text is indented in your data file, and which characters should be omitted when you import records into an EndNote library.

EndNote's "Smart" Settings

When possible, EndNote provides a Smart option for your choices in configuring the filters. Wherever you select a Smart option, it means that EndNote will do its best to interpret the data. If you do not know exactly how the reference is configured in the data file, or if there is a lot of variability among the format of the references, then the Smart options are probably going to be the most reliable settings. In cases where the Smart option does not work for your data file, you may try the other options provided for that particular setting.

These topics describe the various filter options:

- [Author and Editor Parsing in Import Filters and Connection Files](#)
- [Continuation Lines in Import Filters and Connection Files](#)
- [Reference Type in Import Filters and Connection Files](#)
- [Field Editing in Import Filters and Connection Files](#)
- [Record Layout in Import Filters and Connection Files](#)
- [Source Parsing in Import Filters and Connection Files](#)

Author and Editor Parsing in Import Filters and Connection Files

Use the Author Parsing panel to specify how author names are arranged in your data file. These settings apply only to authors in EndNote's main (Generic) Author field. The Editor Parsing panel applies to editors, translators, and other authors; all those that are in EndNote's Generic Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author fields.

Name Order

Use the "Name Order" settings to specify the order in which first and last names are arranged in the data file. Examples appropriate to each setting are shown below:

- **Last Always Precedes First**

AU: Smith, J.; Caton, K.; Jordan, L.

- **First Always Precedes Last**

AU: J. Smith, K. Caton, L. Jordan

- **Name Order is Inconsistent**

AU: Smith, J., K. Caton, L. Jordan

Interpreting First Names

The *Interpret First Names as* option allows you to specify exactly how EndNote should interpret the part of the author name that it has identified as the first name or initials.

The default is set to Smart, which uses the following rule: If there are three or fewer contiguous uppercase letters, these letters are imported as initials. Otherwise, the letters are imported as a whole name. For example, if the author's name appears in the data file as:

AU: Childs, Jackie D.

Smart parsing will interpret "Jackie" as the first name, and "D" as the middle initial. This author name would import as:

Childs, Jackie D.

If the author's name appears in the data file as:

AU: von Braun, ED

Smart parsing will interpret ED as initials; thus the author name would import into EndNote as:

von Braun, E. D.

EndNote would only import ED as a first name "Ed" if you selected the Whole Names option.

The Whole Names and Initials Only options should only be used in special cases. The Whole Names option should be used in the case where the authors in your data file are all uppercase (because Smart parsing would recognize mixed case names as full names), and full names are used. This option prevents EndNote from converting names consisting of two or three uppercase letters, as in "SUE" or "AL" to initials. For example, if the author's name appears in the data file as:

AU: TOBIES, SUE

the Whole Names option would correctly import the author's first name as "Sue." By contrast, EndNote's Smart Parsing would interpret the whole name SUE as three initials, as "S.U.E. Likewise, if you select Initials Only, EndNote imports all first names as initials only. You would only choose this latter option if the all the first names in your data file are initials.

Author Name Separators

The Author Name Separators tell EndNote how to extract the individual authors from a line containing several authors.

Between Authors

The "Between Authors" option refers to the punctuation that is used to separate individual author names. It is extremely important that this setting is correct so that the author names import correctly into EndNote. Author names in an EndNote reference are listed one name per line.

The default for the Between Authors option is set to Smart. With this option selected, EndNote looks for a common separator, either a semicolon (;), a caret (^) or a vertical bar (|), and uses this delimiter to identify where one name ends and the next name begins.

In this example, multiple authors are separated by a semicolon:

AU: Bunting ME; Hanzlik JR

EndNote's Smart parsing recognizes the semicolon separating the two author names and correctly imports them into an EndNote library as:

Bunting, M. E.
Hanzlik, J. R.

Therefore, in this example, you do not need to change the setting. However, if your data file has a delimiter other than a semicolon (;), a caret (^), or a vertical bar (|) separating multiple authors, you must select another option from the adjacent list. To type any punctuation, such as a hyphen or a slash, select Other and type the character there. A space and a return (where the authors are listed one per line) can be selected directly from the list.

If you select Import As Is from the list, EndNote will not try to separate the names that follow the author tag. Everything that follows that tag in the data file will be imported exactly as it appears in the file.

Last and First Names Separator

Once EndNote knows how to identify an individual author name in a list of authors, it looks at that name and tries to determine what the first name is and what the last name is. The Last & First Names separator is used to do this, along with the Name Order settings.

The default Last & First Names setting is Smart. With this option selected, EndNote attempts to interpret an author's name based on the following separators: a space, a comma, or a period. In your data file, if the separator used between the last name and the first name is something other than a space, a comma, or a period, you can select a separator from the adjacent list.

Parenthetical Data in Author Field

It is not uncommon for information providers to include additional information about the authors (such as date of birth or institutional affiliation).

AU: Takahashi, J (1974-); Izumi, R (1989-)

When this information is mixed in with the list of authors on the tagged author line, EndNote provides two options for what to do with it.

- **Discard:** All parenthetical information is discarded during the import.
- **Import Into:** All parenthetical data mixed in with the author names is imported into the field that you choose. We suggest that you import it into the Notes field, Author Address, or another custom field that is appropriate.

Note: It is not appropriate for EndNote to import that data into the Author field because it would produce an incorrectly formatted bibliography to have the parenthetical data included with the author names.

Continuation Lines in Import Filters and Connection Files

In general, EndNote ignores lines of text which do not begin with a tag unless the lines of text are continuations of a previous tagged item. We call these continuation lines. Here is an abstract from a data file illustrating the concept of continuation lines (all but the first are considered continuation lines):

AB- A single-subject research design that used
multiple baselines across behaviors compared
traditional adaptations to computers.

Because EndNote only imports tagged lines and continuation lines, it can avoid importing extraneous text that might interrupt a reference, such as your logging on or logging off text. Examples of extraneous lines are:

-->>Press any Key to continue

<Record 5 of 42>

EndNote provides two general options for dealing with continuation lines:

- **Ignore Indents: Untagged lines are always a continuation of the preceding line**

With this option set, every line of text in the data file will import according to the tags that are defined in the Templates panel. Do not select this option if there is any text in your data file that is not tagged. If you use this option and do not want to import certain tagged lines, you must use the {IGNORE} option (see [The {IGNORE} Field in Import Filters and Connection Files](#)).

- **Continuation lines must be indented**

This option allows you to specify the exact number of spaces on the left margin for the continuation lines.

The following example is an abstract where the first line of data (including the Tag, which takes three "spaces") begins four spaces from the left margin, and the continuation lines are indented four spaces, so all the data text aligns at the left. EndNote's default Smart Indent Identification would import this abstract correctly. (Spaces are shown as periods (.) for clarity.)

AB-.Two experiments compared the performance of 23 12
....old dyslexics with that of 8 age-matched controls on a
....battery of tests of motor balance. A dual-task paradigm
....was used: Ss performed each test as a single task and as
....a task concurrent with a secondary task. In all single-
....task conditions there was no difference between groups.

However, you may find data files where the continuation lines are not aligned with the first line of data. In the following example, the continuation lines are indented two spaces from the left margin, whereas the first line of data (including the Tag, which takes three "spaces") begins four spaces from the left margin.

AB-.Beyond the inevitability of countertransference feelings
..is the question of countertransference enactments. From a
..two-person, participant-observer or observing-participant
..perspective, enactments are inevitable. The analyst becomes
..influenced by the patient (and influences the patient as
..well) and enmeshed in the patient's internalized
..interpersonal configurations.

For EndNote to treat the subsequent lines as continuation lines in the preceding example, the filter must specify the exact number of spaces indented on the left margin. In the example just given, you would enter "2" in the Indented Spaces option.

If most of the lines in a data file import a fixed number of spaces (like two spaces in the example above), but one tagged field is indented differently (perhaps keywords are indented four spaces), you can enter exceptions in the table provided. Simply enter the number of spaces in the left column next to the tag. You only need to enter a number for the tagged field with the inconsistent import. All other lines that are left blank will use the general indent setting.

Note: For a quick and reliable way to count how many spaces are inserted on the left margin, turn on the setting in your word processor to display formatting characters. It can also help to use a monospace, or "fixed width," font to display the data.

Reference Type in Import Filters and Connection Files

Default Reference Type

The default reference type tells EndNote which reference type to use if it cannot identify the reference type of a record. For example, suppose that in one filter you specify Journal Article as your default reference type, and create a template for it. If you import a data file containing conference proceedings records for which you have not defined a Reference Type template, any conference proceedings records will import as Journal Articles. Also, if the database that you use does not specify a Reference Type tag, all reference types in your data file will import as your default reference type. (See [The Reference Type Tag in Import Filters and Connection Files](#) for information about defining the reference types tag in a template.)

Note: The default reference type is always indicated with bold text in the Reference Types list on the Templates panel.

Identifiers

Some information providers provide Identifier tags with the name of the vendor (the data provider) and the database.

These identifiers are also used to import data files that contain references from multiple databases. EndNote can import multi-source files like that as long as each record in the data file has a vendor and a database tag at the start of the reference. The identifiers must also be entered into the appropriate filters in the Filters folder. When you are ready to import a file that has data from multiple sources in it, be sure to select the Multi-Filter import option in the Import dialog.

The way that EndNote is able to know which filter to use is by these Identifier tags entered into the filter. Both identifiers must be used. The first identifier should be the tag that includes the name of the information provider. For this example it is "VN." The exact text that follows that tag for each record should be entered into the corresponding box in the Identifiers section. The next tag is used to identify the database, such as Medline or BIOSIS. Enter the tag used for the database name, and then enter the database name exactly as it appears in each reference.

For example, for EndNote to read this data correctly:

```
<1>
VN - Ovid Technologies
DB - Ovid MEDLINE(R)
AU - Jacobson, R; Campbell, S
PY - 1999
```

For Vendor Identification, enter the Tag " VN -" and the Text "Ovid Technologies" and for Database Identification, enter the Tag "DB -" and the Text "Ovid MEDLINE(R)" as shown above.

Field Editing in Import Filters and Connection Files

To access this feature, select *Import Filters* or *Connection Files* from the *Tools* menu. Open the Manager, select a filter or connection file, and then select the *Edit* option.

Converting Text from Uppercase to Lowercase

If all of the text for a field in your data file appears entirely in uppercase letters, EndNote can convert the text to either Sentence, Headline, or Lowercase format, depending on which option you specify in the Field Editing panel.

To control the lowercasing of a field, select the appropriate field from the *Field Editing for* list at the top of the window. The EndNote fields are listed here by their Generic names. Then pick a capitalization option from the *Change UPPERCASE text to* list.

A title that appears in a data file as "COMPOST AS A HUMAN NUTRIENT AND HORMONE CARRIER" would import in Headline capitalization as:

Compost as a Human Nutrient and Hormone Carrier

or in Sentence capitalization as:

Compost as a human nutrient and hormone carrier

To keep a field's text entirely in uppercase characters, select the Do NOT Lowercase option.

You can apply lowercasing on any field as long as all the text in the field is uppercase. If any of the text in the field is in mixed case, EndNote will import it in mixed case.

Note: For a list of reference type fields and their corresponding Generic field names, use the [List of Reference Types](#) to access the reference type settings for any predefined reference type.

The Author, Editor, and Translator fields are treated differently from all other EndNote fields. Upon importing author fields into an EndNote library, these fields are automatically converted from uppercase to headline. Due to the special characteristics of these particular fields, the option to change the case is not available in the Field Editing panel.

Omitting Unwanted Characters

Some lines of data have superfluous characters, such as an asterisk (*) or a hyphen (-), that you may not want to import. For example, in the following lines of data there are hyphens in the journal name, and there is an asterisk before each keyword:

```
SO- American-journal-of-preventive-medicine; 12(9)
DE- *COMPUTER SYSTEMS DESIGN; *DISPLAY DEVICES; *INTERFACES
```

To prevent unwanted characters from being imported into your EndNote library, use the Field Editing panel to specify the characters that you want to omit:

- From the *Field Editing for* list, select the EndNote field that contains unwanted characters. You will find that the EndNote fields are listed by their Generic names. For a list of reference type fields and their corresponding Generic field names, use the [List of Reference Types](#).
- Type the unwanted text in the *Enter text to be omitted* box, and then click *Add* to add it to the omission list.

When you prevent characters from being imported into an EndNote field, you are omitting the characters from the corresponding Generic field, so the omission applies to every reference type field that corresponds to the particular Generic field. For example, the Secondary Title field corresponds to both the Journal field in a Journal Article reference type and the Series Title in a Book reference type. Therefore, if you omit a hyphen (-) from the journal name, any hyphens found in a Series Title for a Book reference type will also be omitted.

Each item that you want to omit should be entered on a separate line. For example, let's say that you wanted to omit both underscores (_) and forward slashes (/) from your records' keywords. First add the underscore, and then add the forward slash. Entering both items on the same line would cause EndNote to omit only instances of "_/", while all other instances of underscores and forward slashes would end up in your keywords. You can omit up to 254 characters per EndNote field.

To remove an item from the list, select the item and click *Remove*. You may select more than one item by holding down the Shift or Command(⌘) key while clicking on multiple items.

Note: The more items added to the list, the longer it takes EndNote to import records into EndNote, but it is generally faster than running a manual Find and Replace after import. If you would prefer to manually replace characters after import, see [Find and Replace](#).

Record Layout in Import Filters and Connection Files

Use the options in the Record Layout panel to modify how EndNote interprets the end of a reference in a data file.

Smart Record Identification

Smart Record Identification, EndNote's default setting for record termination, creates a new record in EndNote each time a tag in the data file repeats out of sequence and is preceded by a blank or extraneous line. EndNote will not create a new record if the same tag appears in succession, provided that they are not separated by a blank line.

For example, some databases list authors one per tagged line, with the AU tag appearing two or more times in succession, as in the following example:

AU- D'Orazio, MG

AU- Tamura, TS

When EndNote sees consecutive tags, it does not start a new reference unless it finds the same tag preceded by a blank or extraneous line.

More Specific Record Layout Options

A more precise way of identifying a new record is to specify in your filter exactly how the records are terminated in your data file. The remaining options in the Record Layout panel allow you to do this.

To determine how records are terminated, open your data file in either a word processor or text editor. Check for the pattern consistently separating one record from another. Once you have determined the correct record termination, click the appropriate button on the Record Layout panel to select the best option for your data file. You may choose only one option as a record terminator.

- **Blank line separates records**

Select this option if the only blank lines in a data file are the ones in between references.

- **Using "First Tag" and "Last Tag" Options**

This option lets you specify a first tag that starts the record and/or a final tag that ends each record. Only one tag is required.

- Before choosing this option as your record terminator, verify that the first or last tag is consistently present in each record. This option will function correctly only if the chosen tag appears in every record.
- You do not need to enter both a first and last tag; either tag will suffice to distinguish one record from the next.
- Enter the tag exactly as it appears in the data file, including the delimiter that follows the tag (for example, a colon or hyphen following the tag). EndNote treats these delimiters as part of their respective tags.
- You do not need to include these tags in the templates of your filter, unless you wish to import the associated data.

- **Each record ends with**

Select this option if your references consistently end with a specific set of unique characters. Note that whatever you enter into this option needs to be unique enough that it does not appear elsewhere in your references. One common set of characters that is used to terminate each record is ||.

- **Each record starts with**

Select this option if your references consistently start with text that is not a tag. For example, it is common for some information providers to begin each reference with a counter such as:

<1>
or
Record 1 of 53

In these cases, enter the text exactly as it appears in the data file, but substitute a number sign (#) for the actual number. For the examples above, you would enter "<#>" and "Record # of #" in the field.

Example

The following example illustrates a data file that contains neither a blank line, nor text terminating each record. However, there is a consistent first tag, "ND:" starting each record. So for this example you would want to specify "ND:" to identify the beginning of a record by clicking the "First Tag" button, and typing "ND:" in the box.

```
ND: 430529953 |  
BASE: BA83 |  
AU: HILDEN
```

Source Parsing in Import Filters and Connection Files

The [source line](#) refers to the line in the data file that represents the source information for the journal (typically journal, volume, issue, pages, and sometimes the year). It is usually the most complex and inconsistent line of data in your data file—and it is also the most important. As a result, the EndNote filters provide a sort of safety net to catch inconsistently entered source data.

The tags and templates defined in the Templates panel are used first to import source data. If a source line in a data file does not match any of the options in the templates, then EndNote provides you with additional options for how to handle that. The first thing you need to do is to make sure that EndNote has correctly identified the journal article source tag.

Identifying the Source Tag

If the source tag for the Journal Article reference type in the Templates section of a filter is SO or JN, EndNote automatically identifies this tag as the source tag. However, if the source tag defined in your filter is something other than a SO or JN, you must choose the appropriate tag from the Journal Article Source Tag list. (All of the tags that have been defined in the Journal Article template will appear in the Source Tag list.)

When Source Data and Filter Templates Do not Match

If a journal article's source line in your data file does not match a source line in your filter, you can choose how EndNote should treat the unmatched source line. The default option is Use Smart Parsing. EndNote's Smart Parsing does its best to distinguish the journal name, the volume number, the issue number, the page numbers, and the year, and import each into the corresponding EndNote field. Any information that is not identified as a journal, volume, issue, pages, or year is imported into the Notes field, along with the comment "Using Smart Source Parsing." (After importing, if you suspect that some references may not have matched the defined source template, it is helpful to use EndNote's Search command to search for the text "Using Smart Source Parsing" in the Notes field of the imported references. You may then check those records to see if EndNote correctly interpreted the data.)

If you choose the other option, to import the source data into a separate field, EndNote does not attempt to parse the source information, and instead imports the entire unmatched source line into whatever field you have specified.

For any reference type other than a Journal Article, unmatched source lines are automatically imported into the Notes field. Therefore, if you have not defined an exact match for a source line found in a book record in your data file, EndNote imports the entire source line into the Notes field.

Importing MARC Records

What Are MARC Records?

"MARC" stands for Machine Readable Cataloging format. It is a standardized format developed by the U.S. Library of Congress for producing machine-readable bibliographic records. It is much more difficult to read than regular tagged data formats, but it can still be imported in much the same way using EndNote's filters.

The MARC Format and Connection Files

Many connection files use the MARC format because it is specified as part of the Z39.50 standard. When creating a new connection file, the Templates and MARC Records portions of the connection file are automatically set up to import standard USMARC (MARC21) data. If you need to customize these parts of the connection file, the instructions in this section would apply.

Example of a MARC Filter

For a good example of the filter options used with MARC data, look at the filter sections of the connection file for the U.S. Library of Congress. To open this file for editing, select *Connection Files > Open Connection Manager* from the *Tools* menu, then select the *Library of Congress* file and click *Edit*.

Unique Aspects of MARC Records

MARC records differ from other bibliographic records in three important ways; they include numeric tags and subfields, and they do not generally include line breaks.

Numeric Tags

The primary way in which MARC records differ from non-MARC bibliographic records is in their reliance on numeric tags. Numeric tags typically consist of three digits, followed by one or two spaces, and one or two more digits. For example:

```
050 00  $aPS3503.E53 $bB6 1986
082 00  $a811/.52 $219
100 1    $aBenét, Rosemary, $d1900-1962.
245 12  $aA book of Americans / $cby Rosemary and Stephen Vincent Benét ;
        illustrated by Charles Child.
260      $aNew York : $bH. Holt, $c1986.
300      $a114 p., [1] leaf of plates : $bill. ; $c22 cm.
490 0    $aAn Owlet book
```

Subfields

The second way in which MARC tags differ from other bibliographic records is the use of subfields.

Each numerically tagged line in a MARC record may contain any number of subfields. A subfield typically consists of two consecutive characters, the first of which is the subfield delimiter which denotes the start of a new subfield. Examples of subfields are "\$a" and "\$x." The subfields do not have to be consecutive.

If you were creating a conventional filter for importing bibliographic records from a MARC database, you would have to anticipate a vast number of possible combinations, both of tags and of subfields.

Because it is difficult to anticipate every possible combination of tags and subfields in MARC records, EndNote provides you with a simplified way of creating filters for MARC records. The two sections that follow tell you how to create a filter specifically for MARC records, and then alert you to the different rules that EndNote uses when importing MARC records into an EndNote library.

No Line Breaks

When you save a text file from an online database, there are generally line breaks with tags at or near the left margin which can be used to create filter templates from. Line breaks are necessary for creating filters because the tag identifier is "read" in relation to the left margin. Raw MARC data has no line breaks, making it impossible to download most MARC data as a text file and build an import filter for it. For this reason, MARC data is seldom seen in import filters but common in connection files.

When importing data through a connection file, EndNote inserts the necessary line breaks. When looking at the connection log, the data is shown with the line breaks EndNote has inserted, which allows the filter portions of connection file to be built. This means if you see an option to download a MARC file for an online database, it is likely you will not be able to create a filter for it, but you can use the Import command to import the Connection.log file created during an online search. See [The Connection Log File](#).

Creating a Filter for MARC Records

Note: It is very rare to build an Import Filter for MARC data because raw MARC data does not include line breaks. Therefore, these instructions will usually be applied to the filter portion of a connection file. See [No Line Breaks](#) in [Unique Aspects of MARC Records](#). See [Creating Connection Files](#) for information on creating a new connection file.

Once you have created a new filter or connection file, or you have opened an existing filter or connection file, select the *MARC Records* panel.

Click the *Process data file as a MARC record* checkbox. The dollar sign (\$) will appear in the MARC Subfield Delimiter box, since this is the most common subfield delimiter. If the subfield delimiter is something other than a dollar sign, delete the dollar sign and type in the appropriate delimiter.

Data Start Column

The reference data in a MARC reference normally starts in column 8 (that is, the eighth character from the left margin). This is the default setting you will find in the "Data starts in column" text box. If the MARC records in your data file start the actual reference data (as opposed to tags and subfield delimiters) in some other position, enter that number in the "Data starts in column" text box.

Note: Always enter a value of 6 or higher in the "Data starts in column" text box. If you enter a lesser value (for example, you enter the number 5), the value will change back to 8 when you leave the Marc Records panel even if you have saved your changes. This only happens in the "Data starts in column" text box. If you make other changes, then those values are saved when you return to the Marc Records panel.

Accession Numbers

The Accession Number is a unique number assigned to each record in a database (the information provider's database, not the EndNote library). The provider may not call it an Accession Number; PubMed uses PMID, and some systems use Unique Identifier. These numbers sometimes appear immediately after the numeric tag, and without the two-digit subfield codes seen in other MARC fields. Since a common type of accession number often appears after the 001 tag, EndNote includes an Import 001 tags as Accession Numbers checkbox which lets you import this number into EndNote's Accession Number field. Accession numbers which appear in lines other than 001 often begin with a subfield, so you can set up the filter to import the number into the Accession Number field.

Note: Only one item can be imported into the Accession Number field. If the contents of the 001 field are imported to the Accession Number field and another tag is also set to import to the field, the data set to import into the field under any other tag will be ignored. If there is no data already in the Accession Number field, then the contents of the second tagged field will be imported.

If the First Field Has No Subfield Delimiter

Normally the first character that precedes the record data is the subfield delimiter (commonly a dollar sign \$). If this subfield delimiter is not present for the first field of each tagged line, you will need to tell EndNote how to interpret the first character by checking the appropriate option under the MARC records dialog. Is it part of the real data of a reference or is it a field designator (such as "a" or "b") that just happens to be missing the subfield delimiter?

Rules for MARC Import Filters

EndNote observes these rules when importing MARC records:

- EndNote allows you to specify only the first three digits of the tag when designing a filter for MARC records. You can disregard spaces and digits appearing immediately after the first three digits. The tag for both of the following examples would be 245.

```
245 10 $a When you realize you have too many kids:  
$b a guide / $c Hugh B  
245 14 $a The angel with a dirty mouth /$c NickSteel  
; illustrated by Melissa
```

- You do not have to define all the subfields in a tagged line. There may be some subfields that contain information you do not want to import into your EndNote library. EndNote will ignore any subfields that are not defined in your filter.
- Source lines cannot take advantage of the Smart Source Parsing option. You may, however, enter multiple variations of the subfields in a source line. Be sure to enter all subfields after the same tag (do not repeat the tag for each), and list the most complex subfield formats first. For example:

```
773 $gVolume(Issue), p. Pages$gVolume, p.Pages
```

- With the exception of the reference type tag, EndNote allows you to define a MARC tag only once; therefore you should include all of the subfields that contain data you want to be imported. For example, the following line in a filter for MARC records would successfully import any or all of the three lines that follow:

Tag	Field(s)
245	\$a Title \$b Title \$c Notes

245 14 \$a The hollow horn : \$b Bob Dylan's reception in
the United States and Germany / \$c by Dennis Anderson.
245 10 \$a Bob Dylan, spellbinding songwriter /\$c Nathan
245 00 \$a Down in the groove.

Modifying an Existing Filter, an Example

Modifying an existing filter is useful if you want to create a new filter for a different database by the same provider. Although some information providers offer radically different formats for their different databases, there are others who provide fairly consistent tags and organized data across their databases.

Common reasons for editing a filter include adding a tag to import additional information; removing a tag or using {IGNORE} to omit unwanted data; or fine-tuning the current settings for importing authors or journal source data. The specifics about how to work with templates and options are described earlier in this chapter. This example is intended to provide a general overview of the process of editing a filter.

Adding a Tag and Field to a Filter

Let's say that you want to modify a filter to import the language of the publication into EndNote's Language field. In this hypothetical database, the language is preceded by the tag LA-.

```
TI- Zum beginn des mathematischen Frauenstudiums i Preussen. |
TI- <Translated> The beginnings of mathematical studies for women
    in Prussia |
AU- Tobies. Renate
JN- NTM Schr. Geschichte Natur. Tech. Medizin |
SO- <JN> NTM Schriftenreihe fur Geschichte der Naturwissenschaften
    Technik und Medizin |
SO- <PY> 1991 |
SO- <VO> 28 |
SO- <NO> no. 2, |
SO- <PG> 151-172. |
LA- German |
DT- Journal |
```

To add the LA- tag and direct its contents to the Language field:

1. From the *Tools* menu select *Import Filters > Open Filter Manager*.
2. In the Filter Manager, select the filter that you want to edit, and then click *Edit*. (Editing the most recently used filter will also appear as an option in the Import Filters submenu.)
3. Select the *Templates* option in the left panel of the window to open the Templates panel.
4. Click the mouse in any cell of the Journal Article template, and then press *Return* to create a new row. (Tags do not need to be in the same order as in the original data.)

5. Type LA- in the *Tag* cell (including any preceding spaces), and then press the *Tab* key to move to the *Field(s)* cell. Insert the *Language* field from the *Insert Field* list. Doing so tells EndNote to import the language information following the LA- tag into EndNote's Language field.
6. You can add the LA- tag to the remaining Reference Type templates in the filter. Use the *Reference Type* list to switch to each reference type template in your filter and repeat the process described above. (Reference types with check marks next to them in the list are the ones that have templates defined for them.)
7. From the *File* menu, select *Save As*. Enter a new name for the modified version of the filter, and then click *Save*.

Creating a New Filter

This topic provides a general overview of how to create a new filter. For more information, you can also view an example of a data file, and the templates portion of a filter to match it (see [Example Data File and Template](#)).

The basic steps to create a new filter are:

1. From the *Tools* menu, select *Import Filters*, and then select *New Filter*.
2. In the *About This Filter* panel, enter a category for the filter (usually the information provider is used for the category), and any other comments about what the filter is based on or instructions on how to save the data.
3. Click on the *Templates* option.
4. From the *Reference Types* list, select the first reference type that you would like to define, and enter the necessary tags and the corresponding fields into the reference type template. See the [Sample Record from a Data File](#) for sample fields you can use to build your template. Also see [Working with Filter Templates](#).
5. Define additional reference types, as necessary, by selecting them from the *Reference Types* list and entering the tags and fields for them as well.
6. Click the *Reference Type* option in the list of panel names, and select the default reference type for the filter.

If this were a real filter, you might have entered enough information at this point to use the filter successfully. You could try it out by choosing it as the import option to import your data file into a new, empty library. You would review the imported references to be sure that they imported correctly. If they did not, you could fine tune the filter as necessary (see [The Filter Options](#)).

Notes: It's a good idea to create an empty testing library for importing when working on a filter, to limit the chance of importing poor data into your working library. After you have perfected your filter, you can use it to import into your regular library.

If you need a reference type that does not appear in the Reference Type list, see [Adding, Changing, and Hiding Reference Types](#).

For additional help, see [Tips for Entering Tags and Fields](#) and [Example Data File and Template](#).

Tips for Entering Tags and Fields

- Not every tag in your data file needs to be in your filter.

There is no need to define every tag that appears in your data file, provided that the contents of the corresponding field start on the same line as the tag itself; and the records' continuation lines are not flush left. If you need to define every tag that appears in a record, but only want to import the information associated with certain tags, insert the {IGNORE} field from the Insert Field list where appropriate.

Note: You do not need to specify all data fields, unless each tag appears on a line by itself, with the data starting below it on the next line. You may also want to specify all tags if the continuation lines in your records are flush left, in which case an undefined tag appearing immediately after a continuation line will be read in as text.

- You might need to enter multiple variations of a source line.

You will often find more than one variation of a source line for a given reference type in a database, in which case you will need to define a separate source line in your template for each such variant. The most complex source line should appear first, followed by source lines of decreasing complexity. In the case of Journal Articles, be sure to specify the appropriate Source Parsing option (see [Source Parsing in Import Filters and Connection Files](#)).

MARC formats are an exception. See [Rules for MARC Import Filters](#).

- A colon, hyphen, space, or other character that appears along with a tag is treated as part of the tag.

When defining tags in a filter, these characters need to be included in the tag column of the filter for EndNote to find an exact match. If spaces are inserted within a tag, they need to be defined as part of the tag as well. See [Tags and Fields in Import Filters and Connection Files](#).

- Using a monospace font to view data files can help you count spaces which will need to be included in the template.

Monospace, or fixed width, fonts are fonts where each letter takes up the same amount of space; proportional fonts are fonts where thinner letters, such as i or l, take up less space than wider letters, such as m or w. With proportional fonts, the size of spaces are not the same size as letters, making it easy to miscalculate the number of spaces used in tags or text. Examples of monospace fonts are Courier, Courier New, Lucida Sans Typewriter, Monaco, and MS Mincho, among others.

Example Data File and Template

Below is a modified sample of a record from PubMed Central, along with a matching sample filter template for a Journal Article reference type. See [Working with Filter Templates](#) for details about configuring templates.

Red periods (.) in the text indicate spaces. They are colored red to differentiate them from periods included in the original text.

Sample Record from a Data File

```

VI.--.105
IP.--.6
DP.--.2020.Jun
TI.--.Geriatric.assessment.in.older.patients.with.a.hematologic.malignancy:.a
....systematic.review.
PG.--.1484-93
FAU.--.Scheepers,.Ellen.R.M.
AU.--.Scheepers.ER
AD.--.Department.of.Internal.Medicine,.Diakonessenhuis.Utrecht,.Utrecht,.the
....Netherlands
FAU.--.Vondeling,.Ariel.M.
AU.--.Vondeling.AM
AD.--.Department.of.Geriatric.Medicine,.Diakonessenhuis.Utrecht,.Utrecht,.the
....Netherlands
LA.--.eng
PT.--.Journal.Article
PT.--.Review
PHST--.2019/12/24.[received]
PHST--.2020/04/02.[accepted]
PMC.--.PMC7271571
PMID--.32381581
JT.--.Haematologica
AID.--.10.3324/haematol.2019.245803.[doi]
AID.--.1051484.[pii]
SO.--.Haematologica..2020.Jun;105(6):1484-93..doi:10.3324/haematol.2019.245803.
    
```

To create a template for the Journal Article reference type in a new filter:

1. Select *Journal Article* from the *Reference Types* list.
2. Type "PT.--" (red periods indicate spaces) in the first tag cell, then press Tab to move to the Field column. Insert "Journal Article" as the first field, typing it exactly as entered in the data. This is the tag identifying the reference type and tells EndNote that any record with "Journal Article" following the PT tag should be imported using the Journal Article template.
3. Press *Return* to move to the next line.
4. Type the next tag to import and insert the corresponding field. Continue entering the rest of the tags and fields until all of the necessary information is covered by the filter. Skip or use {IGNORE} in the Field(s) column for any tags that you are not interested in importing.

This is what the resulting Templates panel of the filter should contain:

Tag	Field(s)
PT.. ₁ -	Journal.Article
VI.. ₁ -	Volume
IP.. ₁ -	Issue
DP.. ₁ -	Year.Date
DP.. ₂ -	Year
TI.. ₁ -	Title
PG.. ₁ -	Pages
FAU.. ₁ -	Notes
AU.. ₁ -	Author
AD.. ₁ -	Author.Address
LA.. ₁ -	Language
PHST-	Notes
PMC.. ₁ -	PMCID
PMID-	Accession.Number
JT.. ₁ -	Journal
AID.. ₁ -	DOI.[`doi`]
AID.. ₂ -	{IGNORE}.[pii]
SO.. ₁ -	Notes

Note: For this example, the source line contained no data that was not already contained in other fields, so it was sent to the Notes field. If data needs to be extracted from the source line, set up the various source line combinations and select the appropriate Source Parsing option. See [Source Parsing in Import Filters and Connection Files](#).

Connection Files

Introduction to Connection Files

The Online Search command on EndNote's Tools menu, and the Online Search groups, connect you to online databases and library catalogs so that you can search them from within the EndNote program and retrieve references directly into EndNote. EndNote is able to make these connections using the information stored in the thousands of individual connection files.

This section describes how to edit and create connection files. The process of using the Online Search command is described in [Searching an Online Database](#).

EndNote provides thousands of connection files for a variety of sources. By default, only the most popular connection files are stored in the Connections folder in your EndNote folder. You can view all available connection files by selecting *Connection Files > Open Connection Manager* from the *Tools* menu.

To install additional connection files, see [Installing Additional Connection Files](#).

What is a Connection File?

A connection file contains all the information necessary to connect to, search, and import references from an online database or online library catalog. Each connection file represents a different online database (such as the U.S. Library of Congress or PubMed from the National Library of Medicine).

The Connection Manager

EndNote provides thousands of connection files for a variety of sources. By default, only the most popular connection files are stored as individual files in the Connections folder in your EndNote program folder. To install additional connection files, see [Installing Additional Connection Files](#).

To access the Connection Manager, select *Connection Files > Open Connection Manager* from the *Tools* menu.

The Connection Manager lists the names of all of the original connection files available in the //Applications/EndNote 20/Connections folder as well as any new or modified connection files in your personal Connections folder, and gives you the options to edit them or select them as "favorites" for quick access in the Online Search group set. You can click and drag the corner of the dialog to increase the size.

Locating the Connection File You Want to Use

- If you know the name of the connection file that you want to use, start typing it to select the first file that matches what you type.
- Type text into the *Quick Search* text box and press *Return* to search for a connection file by name. You can enter a partial name or the full name. EndNote will display all matching results.

- Click *Find by Category* and select an information provider's name (such as OvidSP or OCLC) to find only the connection files for a specific information provider.
- Click *Find by Category* and select *All Connections* to return all of the connection files to the displayed list.
- Click the *column headings* to sort the connection files by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.
- Click the *More Info* button at the bottom of the dialog to display additional information about the selected connection file. Click *Less Info* to hide the additional information.

Marking Your Favorite Connection Files

When you have found a connection file that you will want to use in the future, click the checkbox next to it to mark it as a favorite. All connection files (up to 500) that are marked as favorites appear as an Online Search group set in the Library window. This gives you easy access to the files you use most often.

An easy way to mark a whole category of connection files (such as all of the connections for OvidSP databases) is to click *Find by Category* and choose a category from the list. Then, with just that subset of connection files listed in the Filter Manager window, select *Mark All* from the *Mark* drop-down list. The *Unmark All* option may be used to unmark all of the connection files that are showing in the list.

Saving Connection Files

To save a new connection file that you have just created, or to save changes to a connection file you have just modified, select *Save As* from the *File* menu.

If you have modified one of the original installed files in the //Applications/EndNote 20/Connections folder, you must use *Save As* to save a copy to your personal Connections folder. If you have modified a connection file that is already located in your personal Connections folder, you can select either *Save* to directly modify the file, or *Save As* to make a copy with the changes. For a description of where your styles are stored, see [Folder Locations Preferences](#).

EndNote automatically saves new connection files to your personal Connections folder. You may also specify a different folder, if necessary. For instructions see [Folder Locations Preferences](#).

EndNote connection files use the file name extension of .enz, as in "Medline (OvidSP).enz."

Copying Connection Files

When you display a list of connection files in EndNote, the list is comprised of the installed connection files found in the //Applications/EndNote 20/Connections folder, as well as new or modified connection files found in your personal Connections folder. For an explanation of where your files are stored, see [Folder Locations Preferences](#).

There are two ways to copy connection files. Since each connection file is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Finder.

To make a copy of a connection file from within EndNote:

1. From the *Tools* menu, select *Connection Files*, and then select *Open Connection Manager*.
2. Select the connection file you want to copy and click *Edit*.
3. Without making any changes to the connection file, select *Save As* from the *File* menu.
4. Give this copy of the connection file a new name, and then save it.

The file is saved in your personal Connections folder. The new connection file will remain open. The original connection file will be left untouched.

Deleting Connection Files

To delete a Connection File from within EndNote:

1. From the *Tools* menu, select *Connection Files > Open Connection Manager*.
2. Control+click on the connection file to be deleted and select *Delete Connection...* from the menu.
3. You will be asked for a confirmation of if you really want to delete the connection file. Select *Yes* to delete the connection file or *No* to keep it.

You can also delete an unwanted connection file by opening Finder and opening the appropriate Connections folder (see [Folder Locations Preferences](#)). Then, drag the connection file from the Connections folder to the Trash.

Basic Components of a Connection File

Topics describing the basics of a connection file are listed below. This information is useful if you want to modify or create a connection file. To create a new connection file, see [Creating Connection Files](#).

- [Editing a Connection File](#)
- [The Connection Editor Window](#)
- [About this Connection](#)
- [The Connection Settings](#)
- [Search Attributes in Connection Files](#)
- [Filter Information in Connection Files](#)

Editing a Connection File

To edit a connection file:

1. From the *Tools* menu, select *Connection Files > Open Connection Manager*.

2. Select the file to edit, and then click *Edit*.

The most recently used connection file can also be easily edited by selecting *Connection Files* from the *Tools* menu, and then selecting *Edit [connection_file_name]*.

3. Make your changes to the connection file.
4. If you are editing one of the original, installed connection files:
 - a. From the *File* menu, select *Save As* (the *Save* command will not be available).
 - b. Name the file and click *Save*.
5. If you are editing a connection file that you created, select *Save* from the *File* menu.

EndNote saves the file in your personal Connections folder. For a description of where connection files are stored, see [Folder Locations Preferences](#).

The Connection Editor Window

After choosing the option to edit an existing connection file or create a new one, EndNote opens the Connection Editor window.

All of the different panels of the Connection Editor are listed on the left side of the Connection Editor. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you select *Save* or *Save As* from the *File* menu.

To close the Connection File, select *Close Connection* from the *File* menu or click the *Close* button in the top left corner of the window.

About this Connection

When the Connection Editor opens, it displays the About this Connection panel. This panel contains descriptive information about the connection file, and has no impact on establishing the connection.

Name: Displays the name of the file as it appears in the Connections folder of the EndNote folder. The name of the connection file cannot be changed here; you would need to close this window and switch back to the Finder to rename the file.

Based On: Enter any information about what documentation was used to create the connection file. Commonly the server documentation is available on the Web, so you could enter a URL here to make it easy to later retrieve that information. If this connection file is a modified copy of another connection file, it may be helpful to enter the name of the original file in this field for future reference.

Category: The category is typically the information provider (such as OvidSP or OCLC), but you may enter anything that will help you categorize and organize your connection files. The category information is also listed in the Connection Manager window in the column next to the name of the file. In that window, you may sort connection files by category and also search for them by category.

Created: The date the connection file was installed or created.

Last Modified: The date the connection file was last modified.

Comments and Limitations: Enter any useful comments here that would help you remember how to search the online database. Limitations to preconfigured connection files may be documented here as well.

All of the information in this panel is visible in the Connection Manager if you click the *More Info* button at the bottom of the Connection Manager window. This is helpful because you do not need to edit a connection file to view the comments or other descriptive information. You may scroll through the available connection files in the Connection Manager window and view the information there.

The Connection Settings

Click *Connection Settings* to view the panel where the data to establish a connection is stored. The Connection Settings information is required for EndNote to be able to connect to the online database. These terms and descriptions are part of the Z39.50 standard.

Server Description: The name of the information provider or institution. EndNote displays this name in the title of the Retrieved References window and it is also listed in the Connection Manager window. This information is not used to establish the connection.

Server Address: The server address for the online database. This can be either a numerical IP address or a URL.

Database Description: The name used to refer to the online database. This name is displayed in the Title bar of the Retrieved References window to help you identify the database to which you are connected. It is not used to establish the connection.

Database Name: The file name command used to select the database on the remote server. This is not the name you would use to talk about the database; it is a command for "starting up" the exchange of information with the database.

Element Set Name: This is normally F for Full or B for Brief. The Element Set Name determines the amount of information that is provided by the server for each retrieved reference. Not all servers support both options, and the fields returned for each option also vary. For most databases, the Full option is preferred.

Port ID: The TCP/IP port at the server that is used for a Z39.50 connection. The two most popular ports are 210 and 7090, but other ports can be used. The port to be used is controlled by the server and EndNote must match it. These are not the same ports used by your browser, except for the PubMed and Web of Science™ Core Collection connection files. Because they are not used by browsers, they are frequently blocked by network firewalls. See [Problems Connecting](#).

Batch Download: EndNote typically retrieves references in batches, for speed and memory reasons. However, some servers are too slow, or their record data is too large, to support batch downloads. You will need to turn batch processing off for such sites. If you are having trouble downloading from a site, you can try deselecting this option.

Record Syntax: Many formats used by Z39.50 servers are supported by EndNote, such as UNIMARC (Universal Machine Readable Cataloging), SUTRS (Simple Unstructured Text Record Syntax), and OPAC (Online Public Access Catalog). When you create a new connection file, it is set up for the MARC21 format. For other formats, the filter section for connection files must be constructed manually. UNIMARC and OPAC use variations of the MARC format (OPAC commonly adds holdings data). The SUTRS format, because it is "unstructured," does not have a standard format among different databases. The SUTRS format often uses tags (such as "AU" or "Author") to identify the reference data. Check with your database provider for the appropriate settings.

Text: The Text option is used to specify how EndNote should interpret the incoming text characters. Options include ANSEL, Unicode (UTF-8), Unicode (UTF-16), and many other language choices. If you do not have the correct setting, extended characters may import as asterisks, or may be dropped completely. Check with your database provider for the appropriate setting.

Login Information Required: This section is divided into four separate options: User ID, Password, Group ID, and Custom. Select the options required to login to the online database in order to have EndNote prompt you for that information when you connect. You can also store your password and/or IDs in the connection file so that you do not have to enter them each time you connect. Simply type the password or ID into the box provided.

Notes: Passwords and IDs may be saved in the connection file for convenience, but **do so at your own risk:** passwords are not protected or encrypted. If someone else copies or uses your connection file, they will be able to use your stored password.

The password and User ID requested by the host will generally not be your personal password and ID. It is usually the User ID and password assigned to your institution (the exception to this might be if your institution has a local copy of the database). These institutional User IDs and passwords are usually not shared with individuals within an institution. However, access may be granted to anyone connecting to the database from an IP address within the institution. If you are off-site and cannot access a database that you could access when onsite, use VPN to connect to your institution's network first, then try the connection file again. If you do not have VPN access to your institution's network, check with your network administrator.

Custom ID Authentication String

Sometimes a database server requires a custom format for presenting the password and IDs. For these situations, you may skip the regular password or ID option, check the "Custom" option, and enter the text specified by your server's Z39.50 documentation. You may either enter your actual password and ID along with the text, or use one of the following placeholders to have EndNote prompt you for the necessary items: ?PASSWORD, ?USERID, ?GROUPID.

For example, a system may require that passwords be presented by Z39.50 clients in the following manner:

```
pass=?PASSWORD/ dla_ui=yes
```

If you wanted to store your password ("abc123" for this example) it would look like this:

```
pass=abc123/ dla_ui=yes
```

Search Attributes in Connection Files

The Search Attributes section of a connection file contains a table that defines the various search options for a particular database.

- **Search Field Name:** The first column identifies the name of a search. This is the word or phrase that appears in the menus in the Search dialog.

Use EndNote's Generic field names as the search field names whenever possible. Doing so makes it easier to have a search apply to various online sources and local EndNote libraries.

EndNote's preconfigured connection files often use parenthetical text after the search field name to help describe the search, if necessary. This parenthetical text is not considered part of the search field name when you change the focus of the search and EndNote looks for a matching search field

name. See [Changing the Focus of the Search](#). Also see [The Generic Fields](#) for a list of Generic field names.

- **Attributes:** The rest of the items in a particular row are the various search attributes that control what index is being used for the search, and how the search term is interpreted.

What Is an Attribute?

A Z39.50 **search attribute** is a value used to define the characteristics of a search term. For example, if your search term is "ebola virus," the various attributes would be sent to the server along with that term to tell the server where to look for "ebola virus" and what qualifies as a matching reference.

Available attributes, as defined by the Z39.50 standard, are:

1. **Use:** The index to be searched (such as Keywords)
2. **Relation:** The relation of the search term to the index (such as equal, greater than, or less than)
3. **Position:** The position of the search term in the MARC record field (first, last, anywhere, and so on)
4. **Structure:** The structure of the term, such as a word or phrase
5. **Truncation:** Available truncation options used to interpret the search term (for example: right truncation, wildcards, no truncation)
6. **Completeness:** Indicates whether or not the search term should be the complete subfield in the MARC record corresponding to the field searched

The "Use" attribute is the most important here, indicating which index will be searched to find the search term. The other attributes will all have varying default values for each online database. These options are most often left blank to use the server's defaults, but the default attribute values can be overridden by entering another value for the attribute. See [Using Search Attributes](#) for more information on customizing the search attributes.

Each database has its own supported subset of Use attributes and associated combinations of the other attributes. Consult the configuration information for the online database to determine which values for these attributes are supported. Clarivate does not provide this information. You will need to obtain it from the organization (or information provider) that maintains the server.

Using Search Attributes

Search attributes control the query that is sent to the server. They are independent of the information that will be sent back. Think of these as being **how** you ask the question. You can ask a general question or a very detailed question, depending on the attributes you use. Different databases will support different sets of attributes, so you may need to experiment with these settings. Most of the time, using the default settings will fit your needs, and to use those you can simply leave most of the fields blank. You can use the information below to customize the search attributes, but please remember that the Z39.50 server you are connecting to controls which attributes it will accept.

The Use Attribute

This attribute describes what type of information is being searched for. It's easy to think of this as just the field being searched, but it is more detailed than that. For example, Use value 1 equals a personal name, so you might use it when searching for a person's name but not a corporation's name. Use attribute 2 equals a

corporate name. Not all use attributes will be supported for all databases. When you create a new, blank connection file it will be prepopulated with the most commonly-used use attributes, but can then be edited.

For a detailed list of Use attributes, see <https://www.loc.gov/z3950/agency/defns/bib1.html>.

The Relation Attribute

EndNote does not support editing this field.

The Position Attribute

The position attribute specifies the location of the search term within the field or subfield in which it appears. The options are—

- **1 = First in field:** The search term must be the first data in the field.
- **2 = First in subfield:** The search term may appear in any subfield but must be the first data in the subfield.
- **3 = Any position in field:** The search term may appear anywhere in the field.

The Structure Attribute

The structure attribute specifies the type of search term, for example a single word or a phrase.

- **1 = Phrase:** One or more groups of characters separated by blanks, in exactly the order they are entered.
- **2 = Word:** A group of characters with no blanks.
- **3 = String:** The entire term is to be treated as a string, rather than a sequence or set of individual words. An example might be a telephone number with blanks within it.
- **4 = Word List:** One or more groups of characters separated by blanks, in which there is no implied order.

The Truncation Attribute

Truncation determines if one or more characters may be omitted when matching the search term. The effects of truncation vary depending on what the structure attribute is set to, as explained below.

- **1 = Right Truncation:**
 - Word or Phrase:** Last word of the term is right truncated.
 - String:** Entire term is right truncated.
 - Word List:** Each word is right truncated.
- **2 = Left Truncation:**
 - Word or Phrase:** First word of the term is left truncated.
 - String:** Entire term is left truncated.
 - Word List:** Each word is left truncated.
- **3 = Left and Right Truncation:**
 - Word or Phrase:** First word of term is left truncated and last word of term is right truncated.

String: Entire term is left and right truncated.

Word List: Each word is left and right truncated.

- **100 = Do Not Truncate:** No truncation is applied.

The Completeness Attribute

- **1 = Incomplete Subfield:** Words other than those in the search term may appear in the subfield or field in which the term appears.
- **2 = Complete Subfield:** No words other than those in the search term should appear in the entire subfield in which the term appears, but additional words may appear in other subfields in the field.
- **3 = Complete Field:** No words other than those in the search term should appear in the entire field in which the term appears.

Tip for Editing Search Attributes

When modifying the search attributes in a connection file, it is useful to first test the search with the new attribute combination before actually changing the connection file. If you are an advanced user and familiar with Z39.50 terminology, you can do this by entering the new attribute values using the command-line search method. This lets you test new attribute combinations without having to edit and save the connection file, and then reconnect to the server every time you want to test a modification. See [Using the Z39.50 Command-Line Syntax](#).

You can find more information on Z39.50 search attributes at <https://www.loc.gov/z3950/agency/defs/bib1.html>.

Filter Information in Connection Files

The Filter section of the connection file contains the information used to import each reference and get the reference data into the correct EndNote fields.

For most connection files, the filter is set up to interpret references in the MARC format. When you create a new connection file, the Filter section will be set up to interpret references in a standard MARC21 format.

This part of the connection file is identical to the regular Import Filter window. For more information about editing a filter, consult [Importing MARC Records](#) and [Working with Filter Templates](#).

If the retrieved references are not importing the way you would like, you should compare the filter settings of the connection file to the original text that EndNote receives from the online database. To do so, select *Show Connection Status* from the *Tools* menu when retrieving references. Set the view in the Status window to show *Record Data* and compare the record data to what is in the filter.

The connection record data is also stored in the Connection.log file. See [The Connection Log File](#) for information on file location and how to import the log file. Importing the log file allows you to test new filter templates without having to connect to the online database repeatedly.

Creating Connection Files

Before you begin actually creating or modifying a connection file, you must obtain the Z39.50 client configuration instructions for the database you want to access. Contact your librarian or information provider for this information.

Note: If the database is not available on a Z39.50 server, you will not be able to use EndNote's Online Search feature to access it directly. Instead, use the Import feature to import references that have been downloaded to text files. See [Importing Reference Data into EndNote](#).

Once you have the Z39.50 client configuration information in hand, follow these steps to create a new connection file:

Create the File and Enter the Basic Information

1. From the *Tools* menu select *Connection Files*, and then select *New Connection....*
2. A new window opens called "Untitled Connection" and displays the About this Connection panel. Enter any comments or descriptions here for your own use. (These comments do not affect how the connection functions.)
3. Click on the *Connection Settings* option and enter the connection information. (See [The Connection Settings](#).)
4. Click on the *Search Attributes* option to modify the default search attributes, if necessary. (See [Search Attributes in Connection Files](#) and [Using Search Attributes](#).)
5. From the *File* menu, select *Save As*. Name the new connection file and save it. It will be saved in your personal Connections folder. To change the location your connection files are saved, see [Folder Locations Preferences](#).
6. (Optional) If you would like to add your new connection to your Favorites list, select *Connection Files > Open Connection Manager* from the *Tools* menu to open the Connection Manager. Locate your new connection file and mark the checkbox next to it to add it to your Favorites list. It will then appear in the Online Search group set.

Test the Connection and Searching

1. From the *Tools* menu, select *Online Search* and select your new connection file, or select it from the *Online Search* group set if you have made it a Favorite. If the connection cannot be established, check the settings in the Connection Settings panel of the connection file, save your changes, and try again. If you still have trouble connecting, see [Problems Connecting](#) and [Problems Finding the Host](#).
2. If the connection was established, the Search panel should open automatically. Enter a simple search to see if the search attributes were correctly configured. If the Search does not work correctly or it returns an error, check the Search Attributes settings in the connection file. (If you modify the connection file at this point, you must save the connection file, then close the Retrieved References window and reconnect in order for your changes to take effect.)

Test the Filtering of Reference Data

1. Once you are able to connect and search, retrieve a dozen or so references to test how accurately they are filtered into EndNote references. Double-click a retrieved reference to open it to verify that the data are in the correct fields.

Note that if you are paying for the references you retrieve, these may not come through correctly, so it is best to retrieve only a few. All references retrieved are saved to a connection log file, so they are not lost and can be used for testing your filter changes without reconnecting to the online database. This log file is replaced the next time you open EndNote.

2. If the reference data is not being correctly filtered into the appropriate fields in the EndNote references, you will need to compare the downloaded data to the filter templates in your connection file.

Open the Connection.log file in a word processor to view the original format of the retrieved references. See [The Connection Log File](#) for information on locating the log file and importing its contents to test your filter without needing to reconnect to the online database.

3. From the *Tools* menu, select *Connection Files*, and then select *Edit [Your_Connection_File]* to edit the newly created connection file. Look at the *Templates* panel of the connection file and compare the templates there to the reference data in the Connection.log file. Make changes as necessary. See [Creating a Filter for MARC Records](#) and [Working with Filter Templates](#) for information about modifying filters.

Default Values for New Connection Files

When creating a new connection file, a few basic search attributes are entered by default. It is not guaranteed that these will work, as each database may only support its own subset of the Z39.50 attributes.

Consult the Z39.50 client configuration instructions from your information provider or your librarian to set up the connection file correctly for the online database you want to access.

Default settings for a new connection file are:

Port ID: 210

Element Set Name: F (Full)

Record Syntax: MARC21

Text: ANSEL

Search Fields (Use Attributes): Any Field (1016), Author (1003), Year (31), Title (4), and Subject (21).

Filter: MARC21 filter settings are used. Templates are defined for the following reference types.

- Artwork
- Audiovisual Material
- Book
- Computer Program

- Electronic Book
- Generic
- Manuscript
- Map
- Patent
- Thesis
- Web Page

See [Working with Filter Templates](#) and [Importing MARC Records](#) for information on creating filters for additional reference types.

Using the Z39.50 Command-Line Syntax

Note: This topic is intended only for people who are familiar with Z39.50 terminology and have access to the Z39.50 client configuration information for their online databases. The advanced search strategies are documented here only for more technical EndNote users; this knowledge is not required for basic searching of online databases. These command-line searches do not work with PubMed or the Web of Science™ Core Collection connection files.

It is possible to set up a search of an online database that is not supported by the EndNote Search panel or the connection file you are using. For instance, if you know about the Z39.50 attributes supported by the online database, you can enter a Z39.50 search which EndNote passes directly to the server, without any translation. This lets you use searches that are not already supported by your connection file and is useful for testing various search attribute combinations when creating or modifying a connection file.

These advanced searches are entered directly into the search line just as you would enter a search term. EndNote ignores the search menu for that item when it detects that you have entered an advanced search. If other search terms are needed, enter them into the subsequent search lines and select the appropriate AND, OR, or NOT connectors (just like any other search).

An advanced search uses the following format:

```
\\search term&/ATTRIBUTE TYPE/ATTRIBUTE VALUE
```

The first two characters (\\) tell EndNote this is an advanced search of an online database. The next part, up to the ampersand (&), is the search term. The numbers of the Z39.50 attribute type and values follow. They are entered first with a slash and the number for the attribute type, then a slash, and the attribute's value. Repeat that pattern for as many attributes as you want to specify. Not all attributes need to be included. See [Using Search Attributes](#).

The following is a common search example that should work for most servers. This search, looking in *Any Field* and using the *Contains* operator, should find all references in which the title begins with "child."

```
\\child&/1/4/3/1/5/100
```

- A Use attribute (1) of 4 has been specified, so the search will be restricted to the Title for this database.
- A Position attribute (3) of 1 further narrows the search by having the search term be found as the first word in the field.

- A Truncation attribute (5) of 100 specifies no truncation.

Note: Even if a search, such as the one above, is restricted to the Title field, you may see records downloaded that do not have the search term in the Title field of the record. This is because the Title (4) Use attribute is not searching only the main Title field, but all fields considered titles, such as series titles. If the term is found in a field that is not included in your filter, you may not see the term appear in your record at all.

Tip for Modifying Search Attributes

If you wanted to test how variations of the search attribute settings would impact your search, here's an easy way to do it— without having to edit your connection file.

1. With the connection already established, select *Show Connection Status* from the *Tools* menu. Keep the view set to *Status Messages*.
2. Start with a basic search using the Search panel (without the command-line syntax). For example, search for "child" in the Title field.
3. Look in the Status window, and you will see which attributes are being used. For example:

Searching for: [child&1/4/3/3/4/2/5/100|]

(The complexity of what you see will depend on the Search Attribute settings in the connection file. This example shows looking for the word "child" in the Title field, in any position in the field, as a word, with no truncation.)

4. You can copy the search command out of the Status window, and paste it onto the Search panel (remember to add the "\\" prefix to identify it as a command-line search), then add or modify the attribute values as necessary.
5. Click *Search* to try out your new combination of attributes.
6. When you have found a combination of search attributes that does what you need, edit your connection file and make those changes to the Search Attributes panel.

Preferences

EndNote Preferences

The settings for configuring EndNote's display, formatting preferences, and other options are organized in the Preferences section of the EndNote program.

To access EndNote preferences:

1. From the *EndNote 20* menu, select *Preferences*.
2. A list of the available preference panels appears on the left side of the window. Click on the name of a panel in the list that corresponds to the setting you would like to change. Below are the topics covering these preferences.
 - [Change Case Preferences](#)
 - [Display Fields Preferences](#)
 - [Display Font Preferences](#)
 - [Duplicates Preferences](#)
 - [Find Full Text Preferences](#)
 - [Folder Locations Preferences](#)
 - [Formatting Preferences](#)
 - [Libraries Preferences](#)
 - [PDF Handling Preferences](#)
 - [Read/Unread Preferences](#)
 - [Reference Types Preferences](#)
 - [Sorting Preferences](#)
 - [Sync Preferences](#)
 - [Spell Check Preferences](#)
 - [Temporary Citations Preferences](#)
 - [Term Lists Preferences](#)
 - [URLs & Links Preferences](#)

Saving or Discarding Your Changes

All of the preferences panels have the following options:

- **EndNote Defaults:** Reverts the settings for just the current panel to the original EndNote settings.
- **Revert Panel:** Removes any changes made to the current panel since it was last saved.
- **Save:** Saves the changes made to the current panel.

Where Preference Settings are Saved

Preference settings are saved to the current user account, which allows multiple users to access a single library while preserving each user's preferred settings. Many EndNote preferences are saved in a `com.ThomsonResearchSoft.EndNote.plist` file found in the folder `Users/[Your Folder]/Library/Preferences/EndNote`. You can reset many preferences to the default setting by quitting EndNote, deleting the preference file, and then restarting EndNote to recreate the preference file.

Reference Type definitions are saved in a `RefTypeTable.xml` file which is located in the folder `Users/[Your Folder]/Library/Application Support/EndNote`.

Change Case Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Change Case* in the list of preferences.

EndNote styles can be configured to change the capitalization of the author names or titles. Use the Change Case preferences to list the words that should not be modified when EndNote changes the case of titles. This can be used for special acronyms, equations, proper nouns, or compound names that require consistent capitalization.

For titles, this preference is used only when an output style is set up to apply "Headline style capitalization" or "Sentence style capitalization" (rather than "Leave titles as entered").

- To add words to the list, enter the term in the text box at the top of the dialog, and then click Add.
- To remove an item from the list, select the term and click Remove.

Where This Information Is Saved

The list of terms entered into the Change Case preferences panel is stored in the `Users/[Your Folder]/Library/Application Support/EndNote/EndNote Case Words` file. For a quick way to duplicate the lists for another computer running EndNote, copy this file to the same location on the other computer.

Display Fields Preferences

Use the Display Fields preferences to choose which fields to display in EndNote's Library window. These settings apply to all libraries opened on the computer under the same User account.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Display Fields* in the list of preferences.

Select the desired field from each *Field* list. You may select up to ten fields to display in the Library window. To show fewer than ten fields, select *[Do not display]* instead of a field name.

By default, the first column in the Library window displays a Read or Unread indicator followed by:

- File Attachment
- Author
- Year
- Title
- Rating
- Journal
- Last Updated
- Reference Type

In most cases, the column heading in the Library window is the same as the Generic name of the field. Exceptions to this rule include the Figure field, which is indicated by a figure icon *fig.* header and the File Attachments field, which is headed by a paper clip icon. If you would like to change the name for the Library window display, enter a new name in the Heading column next to the chosen field.

Display All Authors in the Author Field

If you would like to display all author names under the Author heading column in the library reference list, select the *Display all authors in the Author field* checkbox. For all new installations, this is the default setting.

If this option is not marked, only the last name of the first author will appear in the Reference List.

Display Font Preferences

The Display Fonts panel gives you the option of changing the font size that EndNote uses to display text throughout the program.

Duplicates Preferences

The Duplicates preferences panel sets criteria for the Find Duplicates command on the Library menu (that command is described in [Finding Duplicate References](#)).

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and click *Duplicates* in the list of preferences.

Compare References

By default, EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year, and Title fields. Use this panel to customize the way EndNote identifies duplicate references.

To select the fields that EndNote should compare when finding duplicate references, click in the checkboxes to the left of the field names.

The Generic names of the fields are used here. For details about which Generic field name corresponds to which specific field name for each reference type, see [List of Reference Types](#). You may select as many fields as you want to make the duplicate detection more or less stringent.

Criteria Panel

You may also set the *Criteria* to have EndNote compare the fields and look for an exact match or be more lenient in the comparison by ignoring spacing and punctuation.

Find Full Text Preferences

This panel allows you control over which sites, services, and technology EndNote uses when attempting to find the full text for a reference. You can limit the options in order to speed up the Find Full Text operation.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Find Full Text* in the list of preferences.

The checkboxes determine which pieces of information will be used from your EndNote references. These represent unique identifiers for locating exact reference matches.

If your institution allows access to an OpenURL server, you can configure this panel to allow EndNote access to the site. Select the *OpenURL* checkbox and enter the *OpenURL* path to direct to the online site. If the site requires authentication to verify that you are allowed access, you can enter an *Authentication URL*. The Authentication URL directs EndNote to the site's login page. When you attempt to Find Full Text, you will be directed to that page to enter authentication information (typically a user ID and password). If you are unsure of your institution's OpenURL settings, consult your local library Web page or a librarian at your institution.

To learn more about using the Find Full Text feature and about adding access to your institution's library, see [Finding Full Text for a Reference](#).

Folder Locations Preferences

The Folder Locations preferences panel is where you set the personal folder locations for new or modified styles, import filters, and connection files.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Folder Locations* in the list of preferences.

The many styles, filters, and connection files provided with EndNote are installed in the Styles, Filters, and Connections folders, which are located in the EndNote program folder.

```
//Applications/EndNote 20/Styles  
//Applications/EndNote 20/Filters  
//Applications/EndNote 20/Connections
```

When you display a list of styles, filters, or connection files in EndNote, the list is compiled from two locations: the installation folders listed above and your personal folders.

The default personal folder locations for your modified styles, filters, and connection files are—

```
//Users/[User Folder]/Documents/EndNote/Styles  
//Users/[User Folder]/Documents/EndNote/Filters  
//Users/[User Folder]/Documents/EndNote/Connections
```

Initially, your personal folders do not exist; they are created once you create a new file or save changes to an existing file. For example, when you open an existing style and make changes, you cannot Save, but must select Save As. You can give the file the same name or a modified name, but the file is saved to your personal Styles folder. The next time you view a list of output styles, you will see your modified style on the list. If you gave the file a different name than the original file, both are listed. If you gave the file the same name as the original, you will see the modified style listed, and not the original file, although it still resides in the program folder.

Why do we bother with personal folders? Why not change or add to the installation folders? We implemented personal folders so that:

- If you reinstall EndNote for some reason, you will not overwrite a modified file with the same name. (We know you may have spent hours getting your file just right, and do not want to risk losing your work.)
- When you upgrade to a newer version of EndNote, you will not delete a new or modified file.
- When you download EndNote program updates, you will not overwrite a modified file.
- You can write protect a shared program folder, yet still use your own customized styles, filters, and connection files.

To change your personal folder locations:

1. From the *EndNote 20* menu, select *Preferences*.
2. Click on *Folder Locations*.
3. To change a folder location, click the *Select Folder* button for the Styles Folder, Filters Folder, or Connections Folder.
4. Locate the folder that you would like to designate as the new Style, Filter, or Connection folder, and then click the *Open* button.

Formatting Preferences

The Formatting preferences panel allows you to control the formatting of bibliography entries in a word processor and whether EndNote automatically omits duplicate references from a bibliography.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then select *Formatting* from the list of preferences.

Suggest Formatting with EndNote's Cite While You Write if the Document Type Is Supported

While the Format Paper feature for RTF files can be used on most word processor files, we recommend that you always use Cite While You Write for Microsoft Word. It is much easier and allows more control, and for Microsoft Word provides more options to give you the exact output you want.

When this item is selected, and you attempt to use Format Paper on a document that could be formatted with Cite While You Write, a message will appear recommending that you use Cite While You Write. You can still save the document to RTF and use Format Paper if you wish.

Omit Author and/or Year from Formatted Citation if Removed from Temporary Citation

EndNote's default behavior is to remove the author or year from the formatted citation if you remove either of those items from a temporary (unformatted) citation. For example, "{, 1999 #24}" would format as just "(1999)" when using a style that creates (Author, Year) citations. If you prefer to type just the record number into your papers as the temporary citation, you should turn this preference off so EndNote will not remove the author and year from all of your formatted citations.

Note: Using just the record number in the paper will cause difficulties if you are working with more than one library, working with the same library on multiple computers with EndNote Sync, or working with your library and a library shared with you through EndNote Sync. This is because the same record number may appear in each library for different references. See [Record Numbers](#) and [Components of a Temporary Citation](#) for more information.

Merge Duplicates in Bibliography

When you select this option, EndNote automatically omits duplicate references from a bibliography. Use this option if you are citing references from multiple EndNote libraries in one paper. In this situation, the same article reference might appear in two libraries and would have two different record numbers. EndNote will not identify the records as duplicates unless you have this option set to merge duplicates.

When you select this option, EndNote checks the bibliography for duplicate references during the formatting process. If duplicates are found, they are removed. References are considered duplicates if they are the same reference type (such as Journal Article or Book) and the following fields are identical: Author, Year, Title, Secondary Title (Journal, Newspaper, Magazine, Book Title, Series Title, Conference Name, and so on), Volume, Issue, and Pages.

Note: The [Duplicates Preferences](#) settings do not apply to this feature. The criteria for determining duplicates is separate and fixed for the Merge Duplicates in Bibliography setting.

Libraries Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Libraries* in the list of preferences.

Choosing a Library to Open

Use the Libraries preferences section to specify which libraries should open by default when you start EndNote. First, use the drop-down list to choose from these options:

- Open the most recently used library
- Open the specified libraries
- Prompt to select a library

- Do nothing

If you opt to *Open the specified libraries*, you must list those specified libraries here. To add a library to the list:

1. If the library is not already open, close the preferences dialog and open the library. Do this by selecting *Open* from the *File* menu, and then selecting the desired library.

You can have more than one library open in EndNote, and you can set EndNote to open more than one library automatically when the program starts. Just open all the libraries you want to open automatically, then select the *Open the specified libraries* option.

2. Return to the *Libraries* section of the *Preferences* dialog, and click *Add Open Libraries* to add all open libraries to the list.

To remove a library from this list, select it in the Libraries panel, and then click *Remove Library*.

Of course, once EndNote is started, you can always open a library by selecting *Open* from the *File* menu.

Enabling Support for Spotlight

Spotlight is a comprehensive searching feature available on macOS. By default, EndNote libraries are not included in a Spotlight search.

Turn Spotlight searching on for EndNote from the Libraries preferences panel. When you enable Spotlight searching, EndNote creates a Spotlight folder in each library's Data folder. There are three options available.

- **Never:** EndNote libraries will not be included in Spotlight searches. This is the default.
- **Always:** EndNote libraries will always be included in Spotlight searches.
- **Ask Me:** EndNote will ask if you want to enable Spotlight searching when you create a new library, and ask if you want to update information for that library periodically.

When a Spotlight search points to an EndNote reference, that reference appears in Spotlight as a "file" with the extension .esl. These EndNote search files are named "EndNote Record," and appear with an EndNote library icon. Double-click on an .esl file to launch EndNote, open the appropriate library, and display the reference that matches the Spotlight search.

Note: The EndNote application folder must reside in your main Applications folder in order to find EndNote references with Spotlight.

PDF Handling Preferences

PDF Handling preferences allow you to define the automatic renaming process of PDF documents that you want to import to an EndNote library. These settings only apply to the renaming of PDF documents that have relative attachment links, and so are stored in the library's .Data folder. (See [Selecting a Relative Path or an Absolute Path for File Attachments](#).)

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then select *PDF Handling* from the list of preferences.

The renaming and auto-import processes work in the background when you open an EndNote library and while you are working in a library.

Auto Renaming Options

Select an auto-renaming option.

Don't Rename: This is the default option. EndNote does not rename PDF documents when they are imported into a library.

Author + Year + Title: EndNote uses these fields as the first, second, and third fields in the PDF filename. A filename is created from the available data in the selected fields.

Author + Title: EndNote uses these fields as the first and second fields in the PDF filename. A filename is created from the available data in the selected fields.

Author + Year: EndNote uses these fields as the first and second fields in the PDF filename. A filename is created from the available data in the selected fields.

Title: EndNote uses only the Title field in the PDF filename. A filename is created from the available data in the selected field.

Custom: You can select up to three fields to base the name on, as described below.

Custom Option

The Custom option allows you to create a personalized method of renaming PDF documents.

A Rename Options dialog opens when you select this radio button. The dialog lets you choose up to three fields (or None) in the PDF filename. For example, you could select:

- Author, Year, Title (default setting)
or
- Title, Author, Year
or
- Title, Year
or
- You can select any combination of fields from the menu. However, you cannot select the following fields.
 - Figure
 - File Attachments
 - Last Updated
 - Rating
 - Read Status

Note: Look at the text box below the Custom radio button after you have made your selections from the dialog to ensure that you selected the needed fields.

PDF Auto Import Folder

Select the *Enable automatic importing* checkbox to enable automatic importing of your PDFs.

Select the folder from where you want EndNote to import PDFs into your library automatically. Download or copy your PDF files to this folder for automatic importing and renaming. EndNote imports all PDFs in your PDF Auto Import Folder and stores them in a temporary group called Imported References. This group will not appear the next time you open EndNote, but the references will still be in your library. If you wish to put the references in a custom group, you should do so before closing EndNote, while they still appear in Imported References.

After EndNote runs the import operation, EndNote creates a subfolder called Import within the Auto Import Folder. During the import, EndNote creates a copy of the PDF in the .Data folder of the library, and then moves the original PDF to this subfolder after importing. To save disk space, you may want to occasionally clean out this subfolder.

Keep in mind that EndNote does not import PDFs from subfolders within the PDF Auto Import Folder.

File Renaming Conventions

- Files names — 50 character maximum count, including the period (.) and filename extension.
- 15 character maximum count per field.
- Year Field — 4 character limit.
- A hyphen (-) is used to separate fields
- An underscore (_) is used for any characters that cannot be represented in a file name.

EndNote replaces the following characters with an underscore (_) during the renaming process.

- Quotation Mark (")
- Asterisk (*)
- Slash Mark (/)
- Colon (:)
- Left Angle Bracket (<)
- Right Angle Bracket (>)
- Question Mark (?)
- Backslash (\)
- Vertical Bar (|)

File Naming Rules

- You can rename attached PDF documents at any time by selecting a reference containing a PDF attachment, and then selecting from the *References* menu, *File Attachments > Rename PDFs*. All the PDFs attached to that reference will be renamed according to the rules. See [Renaming Attachments and PDF Files](#).
- If a PDF file name exceeds the 50 character limit, then EndNote truncates the file name during the renaming process.
- Unicode characters are accepted during the renaming process.
- If you select Author-Year-Title renaming, and the PDF document does not have a year, EndNote inserts a hyphen (-) between the author name and the title to replace the missing year data.

Import File and Import Folder Options

EndNote renames all PDF documents that you import via the Import File and Import Folders commands based on your current renaming preferences.

For example, if you define renaming as Author+Title, then EndNote renames the PDF by author name and title and ignores the date of the published work.

This rule also applies to Custom preference settings.

Read/Unread Preferences

Use these settings to apply Read or Unread status tags to your references in order to track your research.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Read/Unread* in the list of preferences.

Read/Unread Options

The options are Mark a References as Read Upon—

- Viewing it in the Reference, PDF, or Preview within the Library window.

By default, EndNote changes the status of a reference from Unread to Read after you view a reference in the Reference Edit or Preview panels, or open the PDF for viewing in a separate PDF window (see [The PDF Panel](#)).

If you clear the checkbox, the status of an Unread reference remains the same after you view a reference in the Reference Edit or Preview panels, or in a separate window.

- Changing its rating.

If you select this checkbox, EndNote changes the status of a reference from Unread to Read after you change the Rating of the reference from the Reference List.

If you clear the checkbox, the status of an Unread reference remains the same after you change the Rating of the reference.

Library Window Option

Clear the *Show unread references in bold text* checkbox to view all your references in normal text. The default value shows all unread references in bold text.

Read/Unread Features

- All new references are marked as Unread by default.
- By default, the first column in the Library window displays a Read or Unread indicator. You can change the order of the fields in the column headings of the Library window. See [Display Fields Preferences](#) for more information.
- Each reference has either a Read or an Unread status. If the Read/Unread field is shown in the Reference List, clicking the *Unread* button changes the status to Read. Clicking the *Read* button changes the status to Unread.
- If the Read/Unread field is not shown in the Reference List, you can change the status by *Control-clicking* on a reference, or set of references, and selecting the new status from the drop-down list.
- EndNote automatically saves the status of a reference whenever you change the status from Read to Unread or vice-versa.
- A reference changes to an Read status if you edit a field in the Reference Edit panel.
- In the Reference List, by default the text of a reference with an Unread status appears in bold. The text of a reference with a Read status appears in normal font. This can be changed using the Library Window option as described above.

Reference Types Preferences

Use the Reference Types preferences panel to customize your settings for the fields (such as Author, Year, and Title) and reference types (such as Journal Article or Book) that are used by EndNote. Any changes that you make in this panel apply to all of the libraries that open on the computer for your user account.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Reference Types* in the list of preferences.

Default Reference Type

When you create a new reference in your EndNote library (by selecting New from the References menu), the new reference is set up for a journal article by default. If you would rather have new references automatically appear as books, patents, or some other reference type, change the *Default Reference Type* setting:

- Click the *Default Reference Type* list and choose from one of the available reference types.

If you need a reference type that is not in the list, you will need to create a reference type for it and define it yourself (see [Customizing Reference Types](#)).

Defining Reference Types

If you need to modify any of EndNote's fields or reference types, click the *Modify Reference Types* button. This opens the EndNote Reference Types preference where you can add, delete, and rename EndNote's reference types and fields.

See [Customizing Reference Types](#) for more information about reference types and how to customize them.

Reference Type Table

You can use the Export and Import buttons to share a customized reference type table with another EndNote user. See [Backing Up or Sharing Your Reference Types Table](#) for step-by-step instructions.

Note: Replacing another user's RefTypeTable.xml file overwrites all changes to his/her current Reference Types table.

Sorting Preferences

When EndNote sorts author names and titles, you can identify which words or names to ignore for sorting purposes.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Sorting* in the list of preferences.

- To add a word to be ignored by sorting, enter the term in the text box below either the *Author Field* or the *Title Field* and click *Add*.
- To remove a word from either list, select the term and click *Remove*.

Click EndNote Defaults to revert both lists to the default settings.

Author Field

The Author Field list is designed so that you may enter parts of author names that may be omitted for sorting purposes. For example, prepositions in names such as "von," "van," and "de" can be included as part of the last name, but not considered part of the name for sorting purposes. The entries in the Author Field list are case sensitive; that is, if you enter "von" it applies only to "von" and not "Von."

These settings apply to the Generic fields for Author, Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author. No names are entered by default.

Title Field

When terms are added to the Title Field list, the sorting routine ignores them when they appear at the start of the title. Capitalization does not matter for these words. That is, the word "the" can be entered (lowercase) and still apply to "The."

These settings apply to the Generic fields for Title, Secondary Title (includes the Journal field), Tertiary Title, Short Title, and Alternate Title. The words "a," "an," and "the" are entered as defaults.

Note: When you close the Preference panel and return to your library list, you must manually sort your references to build a new sort that uses your revised list.

Where is this information saved?

The lists of terms entered into the Sorting preferences panel are stored in the Users/[Your Folder]/ Library/ Application Support/EndNote/EndNote Sort Words file. To duplicate the lists for another computer running EndNote, copy this file to the same location on the other computer. For another user account on the same machine, copy the file to the other user's matching EndNote folder.

See also [Sorting the Library](#) and [Special Cases in Sorting](#).

Sync Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Sync* in the list of preferences.

This dialog saves subscription credentials and sync settings to automate the process of synchronizing your EndNote library with your EndNote online library.

Sync Preferences allow you to set your preferences so that:

- You only have to enter your e-mail address and password once in Sync Preferences and not each time you manually synchronize your references between EndNote desktop and EndNote online.
- You can have EndNote automatically begin the Sync process every 15 minutes (background processing) by selecting the Sync Automatically checkbox.

You must first register and have an active EndNote online account to initiate the Sync process. Registration is fast and easy and activates your two-year EndNote online account enhancement. When completed, EndNote automatically proceeds with the Sync process and updates your new EndNote online library to match the groups in your EndNote library.

To access Sync Preferences, go to the *EndNote 20* menu, select *Preferences*, and then click *Sync* in the list of preferences.

Enable Sync Button

Your purchase of EndNote entitles you to a two-year free subscription to EndNote online—our online version of EndNote.

If you have not previously set up EndNote Sync, open the library you want to sync and follow the instructions below. You can only sync one EndNote library and it must be the active library when you begin the sync process.

I Already Have an EndNote Online Account

1. Click the *Enable Sync* button to go to an EndNote online login dialog.
2. Enter your e-mail address.
3. Enter your EndNote online password.

4. Press **OK**.

Since you already have an EndNote online account, EndNote populates the fields on the Sync Preferences page with the e-mail address and password that you entered on the EndNote login dialog. Later you can change the data in these fields if you ever change your e-mail address or password.

I Do Not Have an EndNote Online Account

If you do not have an EndNote online account, then you must create one. Registration is fast and easy and activates your two-year EndNote online account when completed.

1. Click the *Enable Sync* button to go to an EndNote login dialog.
2. Click the *Sign Up* button to go to an EndNote Registration dialog.
3. Enter your email address in the EndNote Registration dialog. Retype your email address, and then click the *Submit* button.
4. Enter your name and a secure password, read the EndNote End User License Agreement, then click the *Agree* button if you wish to create your account.
5. Click the *Sync* button to begin synchronizing your EndNote online library with your EndNote library.
6. Before synchronizing for the first time, you will be prompted to create a compressed library backup. Click the *Yes* button to create the backup.
7. Choose the location for your backup, then click the *Save* button.

Once you create your EndNote online account, EndNote 20 populates the fields on the Sync Preferences page with the e-mail address and password that you entered during registration. Later you can change the data in these fields if you ever change your e-mail address or password.

Note: We recommend that you create a compressed library backup the first time that you initiate the Sync process. See [Saving a Compressed Copy of a Library](#) for more information.

See [The Sync Feature](#) for information on how to initiate the Sync process from the Library.

EndNote Online Account Credentials Panel

Once you register and activate your EndNote online account, you can edit the fields in the EndNote Account Credentials panel.

- Enter your e-mail address. EndNote uses your e-mail address to verify your identification.
- Enter your EndNote online password.

EndNote uses these credentials to access your EndNote online library. Once you save this information, you will not have to enter it again. EndNote saves the information until the next time you access Sync Preferences and decide to make changes.

Note: If you need to change the e-mail address or password for your EndNote online account, sign in to your account using your browser and select the *Options* tab to access the *Password* and *E-mail Address* options. These cannot be changed in EndNote desktop. After changing them online, update the credentials in EndNote 20 to match.

Sync This EndNote Library Panel

This field contains the name of the EndNote desktop library that you have synchronized with your EndNote online library. You cannot edit this field.

If this field is blank when you first access Sync Preferences, EndNote will populate the field with the path and file name of the currently opened EndNote library after you run Sync.

Notes: You can always change the name of the library in this field by opening another library from the EndNote window. Click the *Sync Now* button in the *Sync Status* window to complete the process. The two libraries will be merged and the name of the opened library will appear in this field. See [Merging Libraries through Sync](#).

This field is not active until you register and create an EndNote online account.

Sync Automatically Check Box

The Sync process works automatically in the background (every 15 minutes) when you select this checkbox.

When you close EndNote, the system prompts you to Sync your EndNote desktop library with your EndNote online library.

EndNote Defaults and Revert Panels

See [EndNote Preferences](#) for a description of the EndNote Defaults and Revert Panel buttons.

Temporary Citations Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Temporary Citations* in the list of preferences.

A "temporary citation" is an unformatted citation that EndNote inserts into your word processing document when you use the *Insert Citation(s)* command from Word or when you copy and paste a citation into a document. You can also type temporary citations into your document. The temporary citation is a placeholder that EndNote later changes to a formatted citation, such as (Smith Jones, 2015).

By default a temporary citation includes the first author's last name, the year, and the EndNote record number, enclosed in curly braces:

{Smith, 2015 #24}

If necessary, you can change the temporary citation delimiters, and can set a field other than Record Number, to be used in temporary citations in this preference panel.

Temporary Citation Delimiters

Curly braces are the delimiters used by default to indicate the start and end of each temporary citation. If you commonly use curly braces in your writing, you might want to select a different pair of markers for EndNote to use as Temporary Citation Delimiters.

Enter the desired markers into the appropriate boxes at the top of the Temporary Citations preferences panel.

Note: Be sure to use characters that are not likely to appear in the text of your document. For example, do not use left and right parentheses characters because these are frequently used in writing, and any text in them would be considered a temporary citation by EndNote.

Record Number Marker

The number sign (#) always precedes the record number in an EndNote temporary citation. You may change this by entering another character in the Record Number Marker box.

The EndNote record number is a unique number assigned to each reference as it is added to a library. The number is specific to that reference in that particular library. If you are using the same library on multiple computers through EndNote Sync, or collaborating with other writers who are sharing their libraries through EndNote Sync, you might find it easier to replace the Record Number in the temporary citation with something that uniquely identifies the reference but is not specific to a single EndNote library on a single computer. To do so, select the *Use field instead of record number* option and select from the *Label* field, the *Accession Number* field, or the *Pages* field.

- The Label field can be used to manually enter any unique code that you would like to use for each record.
- The Accession Number field is designed to contain the unique record number assigned to a reference from an online database.
- The Pages field can contain a unique page number or another unique number for each record.

Notes: If you have selected the Label, Accession Number, or Pages field, and that field is empty in a particular reference, the Record Number will appear in the temporary citation.

EndNote record numbers are unique to a library but are not permanent identifiers. They can change through syncing, copying a reference from one library to another, or even cutting the reference from a library and pasting it back into the same library. See [Record Numbers](#) for more information.

Citation Prefix Marker

The Citation Prefix Marker separates prefix text in a citation from the citation itself. For example, if you wanted a citation formatted as:

(see also Smith, 2015)

you would enter the text into the temporary citation as follows, with the "\" indicating the end of the prefix text and the start of the citation:

{see also \Smith, 2015 #24}

If you prefer to use a different character as the Citation Prefix Delimiter, you may enter it in this preferences panel. Semicolons (;), letters, numbers, and characters already used as other delimiters may not be used for the Citation Prefix Delimiter.

Note: When you use Cite While You Write's Edit & Manage Citation(s) command to add prefix text, the Citation Prefix Marker is automatically inserted as part of the temporary citation.

Including Notes in the List of References

Some journal styles permit you to include notes with the list of works cited at the end of the document. In such a system, the notes are numbered just like the citations, and included in the reference list, just like the references. This feature is only available with numbered in-text citation styles.

To identify text to be included as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear (or use the Insert Note command in Word, see [Including Notes in the List of References in Microsoft Word](#)).
2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

```
{NOTE: The authors would like to acknowledge the support of...}
```

When the paper is formatted by EndNote using a numbered style, the text is assigned a number and listed along with the references at the end of the paper.

The way that these notes are identified may be changed in the Temporary Citations preferences. Enter a prefix that you would like to use to signal that the text should be treated as a note.

Restrictions on the Use of the "NOTE" Feature

- This feature requires that a numbered style be used for the formatting; otherwise, the note will be left as it was entered in the body of the text.
- Enter text only. Do not attempt to insert graphics, equations, or symbols as note text.
- Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker and the prefix marker and the multiple citation separator may be used.
- These types of notes cannot be combined with regular temporary citations within the same set of brackets. They should be cited separately—each in its own set of brackets.

Term Lists Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and click on *Term Lists* in the list of preferences.

By default, every new EndNote library has three term lists associated with it: Authors, Journals, and Keywords. The term lists are automatically updated as you enter references into your library. The terms in these lists are also used to facilitate data entry using the Suggest Terms as You Type feature. This feature suggests terms as you type into fields with term lists linked to them. For example, as you type into the

Author field, EndNote suggests author names from your Authors term list to help you with data entry. When you enter a new term that is not currently in the associated term list, it appears in red text to indicate that it is a new term. This can point out typing mistakes or the use of an incorrect keyword if you thought you were entering a name or a term commonly used in your library.

Any of the term list settings described above can be turned off using the settings for the Term Lists preferences.

Suggest Terms as You Type (Auto-Completion)

When selected, EndNote will automatically complete matching terms when you are typing into a field that is linked to a term list (see [Inserting Terms into References](#)).

If you turn this feature off, you may still insert terms into a field by opening the desired term list from the *Library > Open Term List* menu and double-clicking the desired term, or by pressing $\text{⌘}+1$ to open the term list associated with the field you are working in.

Note: When using auto-completion with Author fields, enter the author's last name first, followed by a comma, to get the quickest match.

Update Lists When Importing or Pasting References

When this option is selected, the term lists are automatically updated as you import references (using the *Import* command from the *File* menu), Direct Export, drag-and-drop references, or paste references in to your library. If you turn this option off, you can always manually update your term lists by selecting *Define Term Lists...* from the *Library* menu, highlighting a term list, and clicking *Update List* (see [Manually Updating Term Lists](#)).

Update Lists During Data Entry

When this option is selected, the term lists are automatically updated as you type in new reference data. If you turn this option off, you can always manually update your term lists by selecting *Define Term Lists...* from the *Library* menu, highlighting a term list, and clicking *Update List* (see [Manually Updating Term Lists](#)).

URLs & Links Preferences

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and click on *URLs & Links* in the list of preferences.

Connection Log File

When you use the Online Search command to connect to an online database, EndNote keeps a copy of all of the retrieved references for that session in the connection log file (the file name is "Connection.log"). This happens by default, but you may turn this option off by clearing the *Use Log File* option.

We recommend keeping the option turned on because in the event that the references were not correctly retrieved or filtered into EndNote, you can always adjust the filter in the connection file, and import the Connection.log file instead of redoing the search and download (see [Importing a Log File](#)).

By default, the Connection.log file is stored in the folder: Users/[Your Folder]/Library/Application Support/EndNote.

You may change the name and the location of the Connection.log file by clicking the *Choose* button. In the dialog that appears, enter a new name for the file (if desired), and select the new location for the file.

ISI Base URL

When you export references from the Web of Science™ Core Collection to EndNote, EndNote creates a *Go to ISI* link in the URL field of each reference. These links take you back to the source record where you can find related references, times cited, and other information. If you have upgraded from an earlier version of EndNote, you may need to click *EndNote Defaults* to update the ISI Base URL to the latest setting

OpenURL Arguments

The *URL > OpenURL Link* command on the *References* menu starts your default web browser and displays the full text article (if available) plus a list of links to similar articles. It connects to an OpenURL standard syntax server and uses these OpenURL preferences along with data in your EndNote record to find related online references.

Note: This command has no relation to the URL field found in EndNote references or the *URL > Open Link* command on the *References* menu (which opens the specific URL found in the URL field).

We include a default argument to search for related online records. You can use this argument as a syntax example if you wish to enter your own arguments here.

Note: We suggest checking with your institutional library before changing these settings, as different institutions may have custom settings. Remember, you can revert back to the EndNote defaults at any time by clicking *EndNote Defaults*.

Attached Files

When you attach files to EndNote references, you have two options available to you. You can:

- Insert the file as a relative link.

In this case, EndNote makes a copy of the original file and places it in the .Data/PDF folder that is part of your EndNote library. EndNote will always be able to access the file, even when you share your library with a colleague. However, if you edit the original file on your computer, those changes will not be reflected in EndNote. You would need to make changes in your EndNote library's copy, or clear the file from your EndNote reference and reinsert the file.

- Insert the file with an absolute path.

In this case, EndNote will always look in the original folder for the inserted file. This allows you to easily access the file from outside of EndNote. However, if you ever move the file from the original folder, EndNote will not be able to access it unless you clear the file from your EndNote reference and reinsert it from the new folder location. If you send your library to a colleague, share the library through EndNote Sync, or use EndNote Sync to access your library on multiple computers, the file will not be available.

By default, the checkbox titled *Copy new file attachments to the default file attachment folder and create a relative link* is selected, so that EndNote will copy linked files to the .Data/PDF folder. You can deselect this

box in order to save absolute paths. You can always override this default setting on the file dialog when you are inserting a file.

Find Full Text always saves files to the default attachment folder and creates relative links.

See [Selecting a Relative Path or an Absolute Path for File Attachments](#) for more information on relative versus absolute links.

Cite While You Write Preferences for Microsoft Word

You can access the Cite While You Write preferences in two ways:

- In Word, select *Preferences* from the *EndNote 20* tab.
- In EndNote, select *Cite While You Write [CWYW] > CWYW Preferences* from the *Tools* menu.

Note: Your word processor must be open in order to access CWYW Preferences from the Tools menu in EndNote.

See also:

- [Application Preferences in Microsoft Word](#)
- [EndNote Preferences](#)
- [Figures and Tables Preferences in Microsoft Word](#)
- [General Preferences in Microsoft Word](#)
- [Keyboard Preferences in Microsoft Word](#)
- [Related EndNote Preferences](#)
- [Showing Word Processor Codes](#)

General Preferences in Microsoft Word

General preferences are useful when you always use your EndNote library along with your word processor and you always use your word processor along with your EndNote library.

To access General preferences, select *Preferences* on the *EndNote 20* tab in Word.

- **Open EndNote When Starting Word:** Select this item to always open EndNote when you start Microsoft Word.
- **Close EndNote When Leaving Word:** Select this item to always close EndNote when you leave Microsoft Word. This works only when the EndNote program was launched with one of the Cite While You Write commands from within Word or if the Open EndNote When Starting Word preference is selected.

- **Return to Document After Inserting Citations:** Select this item to always make your document the active window after inserting citations with EndNote's Insert Selected Citation(s) command. If this preference is turned off so that the Word document remains in the background, you will not see the inserted citation in the Word document until the document becomes the active window. This is because the display for the Word document is not updated in the background.
- **Enable Instant Formatting on new Word documents:** This option is available for Cite While You Write. It turns Instant Formatting on or off for new Word documents. When you enable Instant Formatting, you can also determine how often EndNote scans for temporary citations and whether it checks for citation changes.
- To turn instant formatting on or off in an existing Word document, see [Instant Formatting in Microsoft Word](#).
- **Turn off Word's "Show field codes instead of their values option" when opening or updating documents that include citations:** EndNote uses extensive Word field codes in order to identify and format citations. When field codes are displayed, your document can look confusing! See [Field Codes in Microsoft Word](#) for more information and an example.

We recommend that you not view field codes in Word. This option ensures that you will see appropriate text in your document.

Keyboard Preferences in Microsoft Word

Keyboard shortcuts for EndNote's Cite While You Write commands are available in Word.

To add or change a keyboard shortcut:

1. In Word, select *Preferences* on the *EndNote 20* tab.
2. Click the *Keyboard* tab.
3. From the list of commands, select the command for which you would like to add (or change) a shortcut.
4. Under *Press new shortcut key*, enter the new shortcut key combination on the keyboard.
 - Keyboard shortcuts work in both EndNote and Microsoft Word.
 - If you enter a key command that is already assigned to another Word or Cite While You Write command, EndNote will note which command it is currently assigned to.
5. Click *Assign* to assign the new shortcut.

Follow the same steps to remove an assigned shortcut key, except click *Remove* instead of *Assign*.

Click *Reset All* to remove custom key assignments.

See [CWYW Keyboard Commands for Word](#) for a list of the default keyboard shortcuts.

Figures and Tables Preferences in Microsoft Word

Use settings in the output style to determine whether images are placed in-text or at the end of the document, where captions and labels are located, and separation and punctuation around images and captions. See [Figures and Tables](#).

The figures and tables settings in the EndNote preferences in Microsoft Word override settings from the current output style. If your output style is set to print figures and tables in a list at the end of the document, the settings on this tab are ignored. However, if your output style is set to print figures and tables in-text, you can use this tab to override settings when you have moved figures around in your document and want to retain their placement.

To customize the in-text placement of EndNote figures and tables in Word.

1. On the *EndNote 20* tab, select *Preferences*.
2. Select the *Figures and Tables* tab.
3. Select the appropriate radio button to:
 - Place each figure or table directly after the paragraph where it is first referenced, or
 - When regenerating figures, keep each figure or table in its current position. This allows you to move images around in your document and have them stay there when you Update Citations and Bibliography again.

Application Preferences in Microsoft Word

Use the Application tab in the Word Cite While You Write preferences to indicate which version of EndNote to use when you use Cite While You Write.

- EndNote 20 is your desktop version of the EndNote application.
- EndNote is the online version of EndNote.

To select the appropriate application:

1. On the *EndNote* or *EndNote 20* tab in Word, select *Preferences*.
2. Click the *Application* tab.
3. Select the appropriate application: *EndNote* (desktop) or *EndNote online*.

The system adds an EndNote 20 tab to Word's Tabs when you select the EndNote menu option; the system adds an EndNote tab when you select the EndNote online menu option.

Note: Even though selecting EndNote online will show the EndNote tab, to actually use the EndNote online option, you must have created an EndNote online account.

Showing Word Processor Codes

The formatted citations and bibliography in your document are not plain text; they contain hidden data that make it possible for EndNote to unformat and reformat citations and bibliographies.

Microsoft Word's Field Shading

Formatted citations and bibliographies in Word documents are Microsoft Word fields. This gives EndNote the ability to uniquely identify them.

When you click on a field in Word (such as a formatted EndNote citation or the bibliography), it becomes shaded. You can change this behavior so that the fields are always shaded, shaded only when selected, or never shaded. To do so:

1. In Word, select *Preferences* from the *Word* menu.
2. Click the *View* button.
3. From the drop-down *Field shading* menu, select your preferred option. These include:
 - **Never:** This option will always show field codes as though they were plain text, with no shading.
 - **Always:** This option will always shade field codes, making it easy to see them. This can be very helpful when troubleshooting a document because corrupted EndNote citations cannot be unformatted. If you think you have corrupted citations in your paper, make a **copy** of the document (never do this to the original), then in the **copy** unformat the citations and set the Field Codes preference to always show shading. When you scan through your document, you will easily spot any EndNote citations that did not unformat, indicating corruption of the code. You can then go back to the original document to delete those citations and reinsert them from EndNote.
 - **When Selected:** This is the default setting. It will show shading only when you click on (select) a field code, such as an EndNote citation.

Note: Field shading never prints; it only shows on the screen to help you locate field codes in your document. The Word settings of the person viewing the document control the shading, not the document creator. If you send your document to someone and they complain about the shading, they will need to adjust their Word preferences. You can send them these instructions to help them with that.

4. Close the preferences window to save your changes.

Note: If you are seeing detailed field code information, see [Field Codes in Microsoft Word](#) and [General Preferences in Microsoft Word](#) for information on showing and hiding field codes.

Related EndNote Preferences

Several other EndNote preferences directly affect Cite While You Write. To access EndNote preferences, go to the *EndNote 20* menu in EndNote and select *Preferences*.

See these topics for information on changing the related preferences:

- [Temporary Citations Preferences](#)
- [Formatting Preferences](#)

These settings are stored with the EndNote program's preferences because they apply to formatting papers with Cite While You Write for Microsoft Word and Format Paper for RTF files.

Shortcuts to Make Using EndNote Easier

Keyboard commands, shortcut menus, and the EndNote toolbar can streamline your library building and citation processes. See these topics for more information.

- [Menu Keyboard Commands](#)
- [Keyboard Commands](#)
- [CWYW Keyboard Commands for Word](#)
- [Contextual \(Shortcut\) Menus](#)
- [The Library Toolbar](#)

To add or change Cite While You Write keyboard shortcuts in Microsoft Word, see [Keyboard Preferences in Microsoft Word](#).

Contextual (Shortcut) Menus

As a convenience, EndNote provides contextual (shortcut) menus for some of the most commonly used features. Contextual menus appear when you Control+click on something in the EndNote program (such as a reference, a group name, or an Author field).

The contents of the menu depend on where you click and what options are available for that particular item. Only a subset of possible commands are displayed. These are intended to represent the most commonly used functions for the selected target. Choosing a command from a contextual menu has exactly the same result as choosing the command from the main menu or the toolbar.

A contextual menu appears wherever you click. It remains open until you choose a command from the list, click elsewhere, or press the Escape key.

Contextual menus are available in at least the following areas: the Reference window, the Reference List, the Groups panel, term lists, and Managers (styles, filters, and connections).

EndNote Online

Overview of EndNote Online

EndNote online is a feature set that provides a range of bibliographic management tools on the Web. You can import and edit references via a personal EndNote account, and then cite the references in papers and create bibliographies.

EndNote online can search Web of Science™, PubMed, and hundreds of other online library databases to help you build a personal reference collection. It includes unique integration with the Web of Science™ Core Collection, with dynamic links to Times Cited records and Related Records giving you one-click access to the latest information on a reference article.

Each EndNote online library can store thousands of records and create bibliographies in thousands of publishing styles. Our Cite While You Write feature is available to anyone using Microsoft Word to create bibliographies. (See [Cite While You Write in Microsoft Word](#) and [The Application Tab in the Cite While You Write Preferences Dialog](#).)

Registering with EndNote Online and Activating the Sync Process

Your purchase of EndNote entitles you to a two-year free subscription to EndNote online and the option to synchronize the references (including files and figures) in your EndNote library with the references in your EndNote online library without having to export and import files.

You must first register and have an active EndNote account to initiate the Sync process. Registration is fast and easy and activates your two-year EndNote account. When completed, EndNote automatically proceeds with the Sync process and updates your new EndNote online library to match the references and custom groups in your EndNote library.

Note: The Sync process includes groups, group sets, and group associations, but EndNote online can only display custom groups.

I Already Have an EndNote Online Account

1. Click *Sync Configuration* in the *Groups* panel to go to a Sync Configuration dialog. Click the *Sync Now* button to go to an EndNote Login dialog.
2. Enter your EndNote account email address.
3. Enter your EndNote account password.
4. Click *OK*.
5. Read the terms and conditions, then click *Agree* to accept the terms and conditions, and to link your account to your new copy of EndNote.
6. Click *Sync* to begin synchronizing your EndNote online library with your EndNote library.

Since you already have an EndNote account, EndNote populates the fields on the Sync Preferences page with the e-mail address and password that you entered on the EndNote online login dialog. You can change the data in these fields if you ever change your email address or password in EndNote online.

Note: The Sync library that you defined in Sync Preferences must be open and currently active to perform the Sync process.

I Do Not Have an EndNote Online Account

Since you do not have an EndNote account, you must create one. Registration is fast and easy and activates your two-year EndNote account enhancement when completed.

1. Click *Sync Configuration* in the *Groups* panel to go to a Sync Configuration dialog.
2. Click the *Sync Now* button to go to an EndNote Login dialog.
3. Click the *Sign Up* button to go to an EndNote Registration dialog.
4. Enter your email address in the EndNote Registration dialog. Retype your email address, and then click the *Submit* button.
5. Enter your name and a secure password, read the EndNote End User License Agreement, then click the *Agree* button if you wish to create your account.
6. Click the *Sync* button to begin synchronizing your EndNote online library with your EndNote library.
7. Before synchronizing for the first time, you will be prompted to create a compressed library backup. Click the *Yes* button to create the backup.
8. Choose the location for your backup, then click the *Save* button.

EndNote will save the backup and begin synchronizing your library references.

Once you create your EndNote account, EndNote populates the fields on the Sync Preferences page with the email address and password that you entered during registration. Later you can change the data in these fields if you ever change your email address or password in EndNote online.

Note: Although it is possible to synchronize your library without creating a compressed library backup during your first synchronization, we suggest creating the backup. You can also create a compressed backup of your library at any time. See [Saving a Compressed Copy of a Library](#) for more information.

Sync Preferences

Sync Preferences allow you to set your preferences so that:

- You only have to enter your e-mail address and password once in Sync Preferences and not each time you manually synchronize your references between EndNote and EndNote online.
- You can have EndNote automatically begin the Sync process every 15 minutes (background processing) by selecting the Sync Automatically checkbox.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Sync* in the list of preferences. See [Sync Preferences](#).

Accessing EndNote Online

To access your EndNote online account, go to <https://my.endnote.com>, enter your login information, and click *Sign in*.

Overview of the Sync Process

EndNote allows you to synchronize your entire desktop library with EndNote online and the iPad app.

The Sync process automatically synchronizes both sets of references that reside in the desktop and online so that the references in your library in EndNote and EndNote online are an exact match.

The Sync process is always initiated from EndNote. The data in EndNote and EndNote online are synchronized in both applications when you run Sync. You will have identical custom groups and references when Sync completes processing.

The Sync process includes all data changes to references (including file attachments) during the Sync process so that each library matches the other. For example, if you add or remove references and/or PDF files in EndNote, then those changes are updated in EndNote online and vice-versa.

The Sync process includes updates and additions to groups in both libraries. For example, if you create and add references to a new custom group in EndNote, then you will see this group in EndNote online the next time you run the Sync process.

Although the information about group sets, smart groups, and combination groups is included in the Sync process, these groups and group sets are not supported by EndNote online and so are not visible. If you sync your library with another computer, all groups and group sets will be available on the second computer.

Sync Preferences

Sync Preferences allow you to set your preferences so that:

- You only have to enter your e-mail address and password once in Sync Preferences and not each time you manually synchronize your references between EndNote desktop and EndNote online.
- You can have EndNote automatically begin the Sync process every 15 minutes (background processing) by selecting the Sync Automatically checkbox.

To access these settings, go to the *EndNote 20* menu, select *Preferences*, and then click *Sync* in the list of preferences. See [Sync Preferences](#).

Important Points to Know About the Sync Process

- Sync synchronizes the references, groups, and group sets in your library, it does not synchronize the library as a whole. The important difference is that the record numbers will probably not be the same

in both copies of the library. This is because the references will be assigned new record numbers on the new computer. See [Record Numbers](#).

- Sync includes an unlimited number of references in your library and an unlimited amount of storage for file attachments and figures.
- Sync works with only one library and only one EndNote online account.
- Your sync library can be shared with up to 399 other EndNote users on version 20 or later. See [About Shared Libraries](#).
- Sync your references in EndNote (including groups, group sets, smart groups, and combination groups) between one desktop and another desktop on various platforms.
- After the Sync process completes, EndNote identifies each group that has Sharing enabled in EndNote online with a shared group icon. A shared group is a group in which your colleagues can access and see your groups in their Groups Shared by Others section.
- Sync will put groups, when a group set cannot be identified, in an Unfiled Groups set. Drag and drop the group to the appropriate group set in the desktop library.
- You can select any EndNote library that you created with EndNote to synchronize with your EndNote online library, but only one library can be synced. If you try to sync your online account to another desktop library, the libraries will be merged. See [Merging Libraries through Sync](#).
- Sync includes references that have been moved to the Trash group. If you have references that were moved to Trash in the desktop version, those references will be moved to the Trash group in the online version.
- EndNote automatically prompts you to Sync your EndNote library with your EndNote online library when you close your default EndNote library.

Sync Status Dialog

The Sync Status dialog allows you to review information about the EndNote library that you selected to synchronize with your EndNote online library. The dialog provides information about the last Sync operation, including the number of references and file and figure attachments that EndNote updated during process.

Text in the status window can be copied and pasted into a text file using the standard *Edit > Copy* (⌘+C) and *Edit > Paste* (⌘+V) commands.

If there is a conflict during the sync process, a Sync Conflicts temporary group will appear in EndNote. See [Resolve Sync Conflicts Dialog](#) for information on resolving conflicts and their causes.

Note: Although the Sync Status icon appears in the Group panel, it is not really a group as defined in EndNote.

Sync Details

Check the information under this heading if processing errors occur during a Sync operation. EndNote displays error text and codes in the dialog detailing the problem. For example, you might see an error like this if you are not connected to the Internet:

Error message: EndNote could not connect to the online sync service.

An authorization error might show:

Error message: The username/password specified is not valid.

If you experience problems with EndNote Sync which cannot be worked out from the messages in the Sync Details, [contact technical support](#).

Local Library

This section shows information about the local library, including the library name, group sets, and groups.

Online Library

This section shows information about the online library. The Username field displays the e-mail address that you are using to Sync your EndNote library with your EndNote online library. The Serial Number field shows the serial number of your version of EndNote.

Limits

This section shows how many references, groups, and group sets you are allowed in your library, and how much attachment storage is available to you. If you are within your free two-year subscription, the attachment storage will be unlimited. If your subscription has expired, you will be limited to 2 gigabytes of attachment storage.

Resolve Sync Conflicts Dialog

The Resolve Sync Conflicts dialog allows you to resolve conflicts between references in your EndNote library and your EndNote online library.

A conflict occurs for a reference when you edit the reference in both EndNote and in EndNote online between Syncs. With two different sets of changes, EndNote does not know which one(s) you want to keep.

Sync Conflicts Group

This group contains all of the references for which EndNote has identified a conflict between an EndNote reference and EndNote online reference. The group only appears in the Groups panel when there are conflicts.

To resolve Sync conflicts:

- *Control+click* the *Sync Conflicts* group and select the *Resolve Conflicts* option from the contextual menu. EndNote displays the Resolve Sync Conflicts dialog.
- Select the Sync Conflicts group to display a list of references that EndNote has identified as having a conflict. Select one or more references from the list. *Control+click* and select the Resolve Conflicts option from the contextual menu.

Resolving Conflicts

You can keep either the EndNote desktop reference or the EndNote online reference to resolve a conflict. The version of the reference you do not choose to keep is permanently deleted.

- To resolve a conflict between two references, click the *Keep Desktop Reference* button or the *Keep Online Reference* button. Once you select a record to keep, EndNote updates the record in both EndNote desktop and EndNote online.
- To resolve all conflicts in favor of the desktop version or the Web version, select the *Keep All Desktop References* option or the *Keep All Online References* option from the drop-down *Keep All* menu at the bottom of the dialog. Once you select either option, EndNote updates the records in both EndNote desktop and EndNote online.

You can also:

- Copy and paste information between the two records. The record that you keep will include all data copied to the record.
- Skip or Cancel a conflict. All references in conflict remain in the Sync Conflicts auto-group until they are resolved.

Note: When you choose to keep a record, EndNote immediately sends all the data to EndNote online. If your connection to EndNote online fails, the process ends and the dialog closes. However, any data already sent to EndNote online is processed.

Did You Know...?

- When you create a new group in EndNote or EndNote online, the new group is added to the other library when you run Sync.
- When you change a group's name in both libraries, EndNote uses the most recently changed name so no conflict occurs when you run Sync.
- When you delete a group, there is no conflict. EndNote removes the group and moves the references to the Unfiled folder.
- If you delete a group in one application and rename the same group in the other application, EndNote deletes the group when you run Sync. Delete overrules Rename.
- When you move a reference from one group to another group, then a Sync conflict may occur. If you move a reference from Group A to Group B in EndNote desktop and in EndNote online you move the same reference to Group C, then the next time you run Sync the reference will be in conflict.

Unfiled Groups

If, during the Sync process, EndNote receives a group from EndNote online that does not belong to any group set up in EndNote, then the system automatically adds the group to an Unfiled Groups folder.

You should move all groups from the Unfiled Groups folder to an existing group set in EndNote. If an appropriate group set does not currently exist, then you should create one. EndNote removes the Unfiled Groups folder from the Groups panel when you move all unfiled groups to a group set.

Using Cite While You Write with EndNote Online

You can use Cite While You Write with either EndNote or EndNote online.

Important Points about Cite While You Write and EndNote Online

- Cite While You Write support is included for both EndNote and EndNote online. However, you cannot use this feature simultaneously with both applications.
- You can insert references from your personal EndNote online library. You cannot, however, use Cite While You Write to insert references in folders shared by other EndNote online users by default. To use a group shared with you through EndNote online in Word, in EndNote online select *Organize > Others Groups*, then mark the *Use for Cite While You Write* checkbox. You must make this change in the EndNote online interface using your browser.
- Some Cite While You Write functions may not be active for EndNote online.

For general information about how to Cite While You Write, see [Overview of the Cite While You Write Process in Word](#) and [How to Cite While You Write with Microsoft Word](#).

Selecting the EndNote or EndNote Online Application

Use the Application tab in the Cite While You Write preferences to indicate which version of EndNote to use when you use Cite While You Write in Word.

1. On the *EndNote* tab, select *Preferences*.
2. Select the *Application* tab.
3. From the drop-down *Application* menu, select which version of EndNote you want to use with Cite While You Write.
 - EndNote is your desktop version of the EndNote bibliographic application. Select this option if you want to work with your desktop libraries. This option will cause a tab called EndNote 20 to appear.

- EndNote online is the online version of EndNote. Select this option if you want to use references from a group shared with you. See [Sharing Groups](#). This option will cause a tab called EndNote to appear.

OR

Select *Search: Shared Groups* in the *Find & Insert My References* dialog to temporarily search shared groups without changing the tab. Change it back to *Search: Libraries* to search your desktop libraries again.

Web of Science Integration

View Source Records and Related Records

If your reference contains a Web of Science™ identification number, you can access the Web of Science source record or view a list of related records directly from the library reference. A Web of Science subscription is required to access this content.

In the Reference *Summary* panel, select the *Web of Science article record* link or the *Web of Science related records* link. These links will appear even if you do not have a Web of Science subscription, but will only work if you have a valid subscription and are authenticated for access to the Web of Science.

Creating Citation Reports

The Web of Science Citation Report makes it easy to explore the publication trends and citation performance for a set of research. If you have access to both EndNote and Web of Science™, you can create a Web of Science Citation Report starting from a group of references in EndNote 20.

The Citation Report provides aggregate citation statistics for a set of search results. These statistics include:

- The total number of results found (Results Found field).
- The total number of times all records have been cited (Sum of Times Cited field).
- The total number of citations to all results found in the results set minus any citation from articles in the set (Sum of Times Cited without Self-Citations field).
- The total number of citations to any of the items in the set of search results (Citing Articles field).
- The citing articles minus any article that appears in the set of search results (Citing Articles without Self-citations field).
- The average number of times a record has been cited (Average Citations per Item field).
- The total number of times a record has been cited for all years in the results set (Total column).
- The h-index count that is based on the list of publications ranked in descending order by the Times Cited count.

To create a Citation Report, in the Groups menu, *Control+click* on a group and select *Create Citation Report*.

Note: At least one reference in the group must contain either a Web of Science identification number or a PubMed identification number (PMID) for the Citation Report to be generated.

You must have access to the Web of Science to use this feature. If you do not have access to the Web of Science, contact your institution about signing in and registering for an account.

For more information, see our [training portal](#).

Manuscript Matcher

Using complex algorithms and data from the Web of Science™ and Journal Citation Reports, Manuscript Matcher identifies the most relevant and impactful journals to which you may wish to submit your manuscript.

1. You can access Manuscript Matcher in the following ways:
 - a. In EndNote 20, *Control+click* on a Group and select *Manuscript Matcher*, or
 - b. In EndNote 20, select a Group, and then select *Manuscript Matcher* from the *Groups* menu, or
 - c. In Microsoft Word, from within a manuscript click on *Manuscript Matcher* in the *EndNote 20* tab.
2. Once the Manuscript Matcher window opens, copy and paste the article's title and abstract into the appropriate boxes. If accessing Manuscript Matcher via EndNote online, select the group containing the manuscript's references. This step is not needed if launching from EndNote 20 or from Cite While You Write.
3. Click *Find Journals*.

Manuscript Matcher will display up to 10 journal matches for your manuscript as well as detailed information about each journal:

- **Match Score:** An index of how closely your article matches with published content in this journal. Click on the *arrow next to the Match Score* bar to show or hide additional journal detail.
- **JCR Impact Factor:** A measure of a journal's mean citation rate per citable item. The current-year and average 5-year scores are displayed. *Click the arrow next to the Current Year* label to reverse the JCI Impact Factor sort order from descending to ascending, or ascending to descending.
- **Journal Name:** The journal title.
- **Similar articles:** Other articles published in the journal with topics similar to yours.
- **Was this helpful?:** You may optionally click *Yes* or *No*, and optionally add a comment about Manuscript Matcher. This feedback will help Clarivate improve Manuscript Matcher.
- **Submit:** Links to the journal log-in page, where you may log in and submit your manuscript.
- **Journal information:** Links to the journal website.

Clicking on the arrow next to Match Score shows or hides the following detailed journal information:

- **JCR Category:** The Subject Category to which the journal is assigned in Web of Science and Journal Citation Reports (JCR). If a journal belongs to multiple categories, they will be displayed here.
- **Rank in Category:** The Journal rank according to the Journal Impact Factor (JIF) for the journal, for each JCR category to which the journal belongs. It is expressed as the rank-order position of the journal over the total number of journals in the category that have a JIF.
- **Quartile in Category:** Rank expressed in terms of the quartile based on the percentile rank. If a journal is in Q1, it ranks higher than 75% of the journals in the category; Q2 means it ranks among the top half of journals in the category, etc.

- **Publisher address:** The publisher's address of record.
- **ISSN:** The publisher's International Standard Serial Number (ISSN) code, which is used to identify journals and other publications published in any media.
- **eISSN:** The publisher's electronic International Standard Serial Number (eISSN) code, which is used to uniquely identify electronic journals and other publications.

Note: In certain cases, Manuscript Matcher will not be able to identify journal matches for your manuscript. If not all citations have been entered, try again once the citations are complete; or revise your abstract.

Installing EndNote Files

Program Requirements

Both the full EndNote [program](#) and the [EndNote Demo](#) program are available by download.

System Requirements

EndNote 20 runs under the following operating systems:

- macOS 10.14, 10.15,
- macOS 11
- macOS 12

Hardware Requirements

EndNote requires the following hardware:

- Intel-based or Apple Silicon-based Macintosh
- Hard disk with 700 MB available
- Minimum 2GB of available RAM
- In order to use EndNote's Connect command, an Internet connection is required. To use the Open Link command to access a Web site, you also need a web browser installed.

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

Word Processor Compatibility

EndNote for Macintosh is compatible with:

- Microsoft Word [CWYW] for macOS: 2016, 2019, Office 365 (locally installed desktop version only)
- Partner integration for Cite While You Write: Apple® Pages
- Partner CWYW Integration: Wolfram Mathematica 8
- Format Paper: Word processors that save Rich Text Format (RTF) files, including but not limited to:
 - Apple iWork Pages – versions 1, 2.x, 3.x, 4.x

- Scrivener
- TextEdit – for supported macOS versions
- Apache OpenOffice – versions 1, 2.x, 3.x
- Nissus Writer – for supported macOS version
- Mellel – versions 1, 2.x
- Format Paper: Word processors that save .odt files:
 - Apache OpenOffice versions 1, 2.x, 3.x

A Typical Installation

A typical installation of EndNote will install all the essential components of the software, with a limited number of the most popular styles, filters, and connection files (called "content files" as a group). EndNote has thousands of content files, so many that installing all of them can impair program performance. Installing only the most popular content files as a default still allows you to add files at need, while improving performance. See the following for information on installing additional content files.

- [Installing Additional Output Styles](#)
- [Installing Additional Connection Files](#)
- [Installing Additional Filters](#)
- [Custom Installations/Adding Content Files](#)

A Typical Installation for a Single-User License of EndNote

To install EndNote 20:

1. Download the installer. If you do not have a copy of the installer, [check here](#).
2. Place the *EndNote20Installer.dmg* file on your desktop and *double-click* on it to begin the installation.
3. In the EndNote 20 Installer window, double-click on the icon labeled *Install EndNote 20.app*.
4. If warned that "Install EndNote 20.app" is an app downloaded from the Internet, click the *Open* button to continue the installation.
5. Click the *Install* button. It may take a few moments to extract the files.
6. Click *Next* in the Welcome to EndNote 20 dialog.
7. In the Select Installation Type dialog, enter your EndNote product key if you have purchased EndNote, or choose the *I would like a 30-day free trial* radio button to install a 30-day trial version of the program. The trial version has all the features of the paid version to allow you to evaluate the program before buying.

You can also use the Purchase a Product Key button to purchase EndNote from this dialog.

8. Click the *Next* button.
9. Enter your name and organization to personalize your installation in the User Information dialog and click the *Next* button.
10. The Read Me Information dialog will give you updated information on the program. Click *Next* when you have finished viewing it.
11. The End User License Agreement dialog allows you to view the full license agreement for use of the product. To continue the installation, accept the license agreement and click *Next*.
12. In the Select Components dialog, leave the options as marked, then click *Next*. (If you wish to do a custom installation, you can start that here. See [Custom Installations/Adding Content Files.](#))
13. If notified that EndNote wants to make changes, you will need to enter your user password to continue.
14. When the installation completes, click the *Done* button.

You have now completed the installation of EndNote and can begin using the application. Be sure to save a copy of the installer in a safe location, in case you want to install EndNote again or on another computer. A single-user copy of EndNote can be installed on up to three computers, but they must all have the same user.

A Typical Installation for an Institutional License of EndNote

If your institution has provided you with a site license installer for EndNote, you will not need to enter the product key during the installation.

To install EndNote 20:

1. Download the installer from your institution. You cannot use the standard installer from the EndNote website, you will need the one customized for your institution.
2. *Double-click* on the *EndNote20SiteInstaller.dmg* file to begin the installation.
3. In the EndNote 20 Installer window, double-click on the icon labeled *Install EndNote 20.app*.
4. If warned that "Install EndNote 20.app" is an app downloaded from the Internet, click the *Open* button to continue the installation.
5. Click the *Install* button. It may take a few moments to extract the files.
6. Click *Next* in the Welcome to EndNote 20 dialog.
7. The Read Me information dialog will give you updated information on the program. Click *Next* when you have finished viewing it.
8. If notified that EndNote wants to make changes, you will need to enter your user password to continue.

9. When the installation completes, click the *Done* button.

You have now completed the basic installation of EndNote and can begin using the program. Be sure to save a copy of the EndNote20SiteInstaller.dmg file in a safe location. It may be needed when you install updates or upgrades.

To customize your installation of EndNote, use [The Customizer](#).

Custom Installations/Adding Content Files

First, install the full EndNote program as described in [A Typical Installation](#). Next, select *Customizer* from the *EndNote 20* menu.

Installing with the EndNote Customizer

You can use the EndNote Customizer to install, reinstall, or remove specific components after the EndNote program has already been installed. The Customizer gives you full access to all available content files (connection files, import filters, and output styles). See [The Customizer](#) for more detailed information.

- **Cite While You Write:** If you install Microsoft Word after installing EndNote, you will need to install the Cite While You Write files. Close Word before installing the files.
- **Spotlight Indexing:** This option installs support for Spotlight indexing. See for information about enabling Spotlight searching.
- **EndNote Click:** EndNote Click is a free browser plugin that finds the best available PDF of an academic article while you browse.
- **Connection Files, Import Filters, and Output Styles:** For performance speed, EndNote initially installs only the most popular of these files. Use the Customizer to install additional groups of content files or remove those you don't need.

To do a custom installation:

1. Make sure no applications are running — including virus protection software and Microsoft Word.
2. Start the EndNote program.
3. From the *EndNote* menu, select *Customizer*.
4. On the *Component Selection* dialog, select the components you want to install, or keep installed. If a component is unmarked, it will be removed.

You can expand the lists of Connections, Import Filters, and Output Styles to limit your selection to specific groups of files. Any components that are not selected will be removed. The standard popular styles, filters, and connection files will remain.

5. Click *Next*.

Adding Content Files

The EndNote team has developed thousands of content files (output styles, filters, and connection files). Because installing all of these files can slow performance, a typical EndNote installation includes only the most popular of each type of file.

For information specifically about installing additional content files after EndNote is installed, see these topics:

- [Installing Additional Connection Files](#)
- [Installing Additional Filters](#)
- [Installing Additional Output Styles](#)

Removing Extraneous Files

If you want to free up disk space, or want to limit the options available, you can use the Finder to delete individual example files, styles, connection files, filters, term lists, and spell check dictionaries. The Customizer can reinstall these files, if needed.

Updating EndNote Files

EndNote automatically checks for program updates when you open the application.

You can also manually update EndNote with free incremental program enhancements.

To update your copy of EndNote select *Check for Updates...* from the *EndNote* menu..

We continually update output styles, filters, and connection files. The files are included with program updates, but you can also download the latest files at any time from our [EndNote downloads page](#).

Uninstalling EndNote

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

To uninstall EndNote

1. Make sure no applications are running.
2. Start EndNote. Close open files, such as libraries, connections files, filters, or styles.
3. From the *EndNote 20* menu, select *Customizer*.
4. Click *Uninstall* and then confirm with *Yes*.
5. When the uninstall is done, click *Exit*.
6. Drag the EndNote folder (typically found in the Applications folder) to the trash.

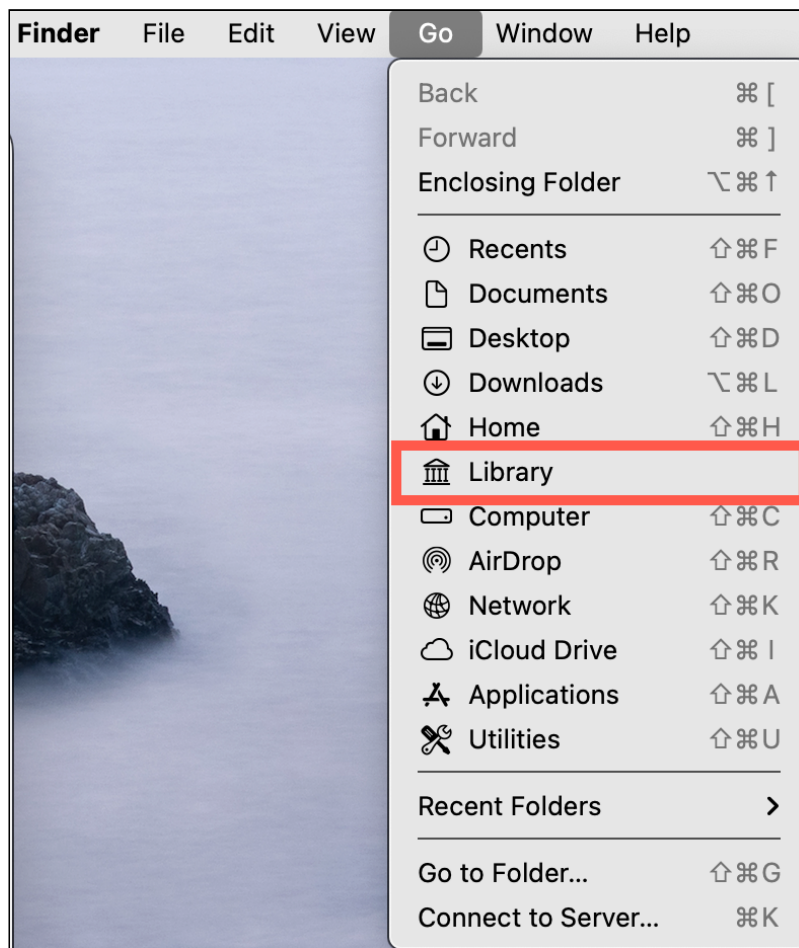
To manually uninstall all EndNote files:

1. Start by dragging the entire EndNote 20 folder in //Applications to the trash.
2. To remove Cite While You Write files, delete the *EndNote CWYW Word xx.bundle* file in Microsoft Word's Startup folder (the "xx" in the file name will show your version of Word instead). The location of the Word startup folder may vary. For example, for Office 365 you can find the folder by opening *Macintosh HD > Library > Application Support > Microsoft > Office365 > User Content > Startup > Word*.

The *Macintosh HD > Library > Application Support > Microsoft* part of this should be the same for all Microsoft Office installations, but there may be differences for the rest depending on your version of Office.
3. For help in removing the Pages plug-in, contact Apple's technical support. Apple created the plug-in for Pages; the plug-in is not a Clarivate product.
4. To remove the EndNote Click browser extension, check your browser's documentation for removing extensions.

Note: The removal options above do not require viewing the contents of any hidden macOS folders. However, the removal options below will require accessing the hidden User Library folder. To select this folder, open a Finder window, select the *Go* menu and hold down the *Option* key at the same time. You should then see *Library* appear on the menu, as shown below. Continue holding down the *Option* key as you click on *Library*; if you stop holding down the key, *Library* will be removed from the list. After the *Library* folder opens, you can let go of the *Option* key.

Take care working in this folder. Much like the Windows registry, mistakes made here could negatively affect your user experience.



5. To remove Reference Type definitions and other preferences, delete the *//Library/Application Support/EndNote* folder (just the EndNote folder).
6. To remove cache files, delete the *com.ThomsonResearchSoft.EndNote* file found in the *//Library/Caches* folder.
7. To remove the EndNote preference files, delete the *com.ThomsonResearchSoft.EndNote.plist* and *com.ThomsonReuters.EndNoteCustomizer.plist* files in the *//Library/Preferences* folder.

Installed Files

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

Application Folder

Applications/EndNote 20

- **EndNote 20.app** is the application file. Double-click this file to start the application.
- **Readme.txt** contains late-breaking news.
- The **Examples** folder contains example files to practice with.

- The **Styles** folder contains bibliographic styles for formatting citations and a bibliography. A typical installation includes only the most popular styles. Use the EndNote Customizer or the EndNote online site to choose from a full collection of over 7,000 bibliographic styles. See [Installing Additional Output Styles](#).
- The **Connections** folder contains connection files to connect to and search online bibliographic databases. A typical installation includes only the most popular files. Use the EndNote Customizer or the EndNote online site to choose from a collection of thousands. See [Installing Additional Connection Files](#).
- The **Filters** folder contains import filters for importing text files downloaded from online bibliographic databases or other bibliographic software programs. A typical installation includes only the most popular files. Use the EndNote Customizer or the EndNote online site to choose from a collection of hundreds. See [Installing Additional Filters](#).
- The **Terms** folder contains several journal abbreviation term lists, including Chemical, Medical, and Humanities. These lists contain thousands of journal names and standard abbreviations. Import a list into your library's Journals term list to use the abbreviations in your bibliographies.
- The **Spell** folder contains a dictionary converter so you can use custom dictionaries created with older versions of EndNote.
- The **Cite While You Write** folder contains the Cite While You Write files for Microsoft Word.

Personal Folder

Your personal folder at //Documents/EndNote contains your personal Styles, Filters, and Connections folders. These folders are created when you create or modify a file:

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

While the application folder contains all of the installed styles, connection files, and filters, your personal EndNote folder contains those files that you have created or modified. This prevents changes to the original files, and assures that you will not inadvertently delete a customized file when you remove or upgrade the EndNote program. EndNote displays a single list of the files found in both locations. If a file of the same name appears in both locations, EndNote will display only the file found in your personal folder.

Installing Additional Output Styles

The EndNote team has developed over 7,000 different output styles. Because installing all of these styles can slow performance, a typical EndNote installation includes only the most popular styles. You can install sets of styles by discipline with the EndNote Customizer, or you can download individual styles from the EndNote online site.

Using the EndNote Customizer to Install Additional Output Styles

Before you begin, make sure no applications are running - including virus protection software, Microsoft Word, and Microsoft Outlook.

To install sets of output styles:

1. Start the EndNote program.
2. From the *EndNote 20* menu, select *Customizer*.
3. On the *Select Components* dialog, select the components you want to install (or keep installed). You can select the checkbox next to Output Styles to install all of the 7,000+ styles, or you can expand the Output Styles category in order to select groups of output styles by discipline. Any previously selected components that are deselected will be removed.
4. Click *Next* to continue with the installation.
5. When the installation finishes, click *Done*.

The styles will be copied to the EndNote Styles folder, which is typically //Applications/EndNote 20/Styles. You will need to Quit from the EndNote program and then restart EndNote to update the output styles list.

Finding Individual Output Styles on the EndNote Online Site

You can use the Style Manager in EndNote to find and download individual output styles.

To download individual output styles:

1. From the *Tools* menu in EndNote, select *Output Styles* and then *Open Style Manager*.
2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote site.

Note: Another way to direct your browser to this web page is to select *EndNote Output Styles* from the *Help* menu.

3. Use the Style Finder to search for a style, or browse through an alphabetical listing of the available output styles. Download those files you want to install.
4. Copy the downloaded files to your Styles folder, which is typically located in the //Applications/EndNote 20/Styles folder or to your personal Styles folder (see [Folder Locations Preferences](#)).
5. If EndNote is still open, Quit the program and then restart EndNote to update the output styles list.

The styles will now be available in EndNote to select for formatting.

Installing Additional Connection Files

The EndNote team has developed thousands of different connection files. Because installing all of these files may slow performance, a typical EndNote installation includes only the most popular connection files. You can install sets of connection files by provider with the EndNote Customizer, or you can download individual connection files from the EndNote Web site.

Using the EndNote Customizer to Install Additional Connection Files

Before you begin, make sure no applications are running — including virus protection software and Microsoft Word.

To install sets of connection files:

1. Start the EndNote program.
2. From the EndNote 20 menu, select Customizer.
3. On the *Component Selection* dialog, select the components you want to install (or keep installed).

You can select the checkbox next to Connections to install all of the connection files, or you can expand the Connections category in order to select groups of connection files by provider. Any previously selected components that are deselected will be removed.

4. Click Next to continue with the installation.

The connection files will be copied to the EndNote Connections folder, which is typically //Applications/EndNote 20/Connections.

You will need to Quit from the EndNote program and then restart EndNote to access the added connection files.

Finding Individual Connection Files on the EndNote Online Site

You can use the Connection Manager in EndNote to find and download individual connection files.

To download individual connection files:

1. From the *Tools* menu in EndNote, select *Connection Files*, and then select *Open Connection Manager*.
2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote site.
3. Browse through an alphabetical listing of the available connection files, and download those files you want to install.
4. Copy the downloaded files to your Connections folder at //Applications/EndNote 20/Connections.

Installing Additional Filters

The EndNote team has developed hundreds of different filter files. A typical EndNote installation includes only the most popular filters. You can install sets of filters by provider with the EndNote Customizer, or you can download individual filters from the EndNote online site.

Using the EndNote Customizer to Install Additional Filters

Before you begin, make sure no applications are running — including virus protection software and Microsoft Word.

To install sets of filters:

1. Start the EndNote application.
2. From the *EndNote 20* menu, select *Customizer*.
3. On the *Component Selection* dialog, select the components you want to install (or keep installed).

You can select the checkbox next to Import Filters to install all of the filters, or you can expand the Import Filters category in order to select groups of filters by provider. Any previously selected components that are deselected will be removed.

4. Click *Next* to continue with the installation.

The import filters will be copied to the EndNote Filters folder, which is //Applications/EndNote 20/Filters. You will need to quit the EndNote program and then restart EndNote to access the added import filters.

Finding Individual Filters on the EndNote Online Site

You can use the Filter Manager in EndNote to find and download individual filter files.

To download individual filters:

1. From the *Tools* menu in EndNote, select *Import Filters*, and then select *Open Filter Manager*.
2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote site.
3. Browse through an alphabetical listing of the available filter files, and download those files you want to install.
4. Copy the downloaded files to your Filters folder, which is located in the //Applications/EndNote 20 folder.

The Customizer

Use the Customizer to add or remove EndNote components. Before you continue, make sure that all other applications are closed, including Microsoft Word.

To use the Customizer, select *Customizer* from the *EndNote 20* menu.

Installing/Uninstalling Components

Most of these components are installed the first time you run EndNote. However, if you upgrade or install Microsoft Word *after* installing EndNote, you would need to reinstall the EndNote Cite While You Write components here. You can also use the Customizer to install additional content files (connection files, import filters, and output styles). Your installation options include:

- **Cite While You Write (Add-in for Microsoft Word)**

Mark this checkbox to install support for Cite While You Write in Microsoft Word. Clear the checkbox to remove support for Cite While You Write. See [Overview of the Cite While You Write Process in Word](#) and [How to Cite While You Write with Microsoft Word](#) if you would like more information about this feature.

- **Spotlight Indexing**

Mark this checkbox to install support for Spotlight indexing. See [Enabling Support for Spotlight](#) for information about enabling Spotlight searching.

- **Additional Connections Files**

Connection files are used in order to connect to and search online databases. EndNote initially installs only the most popular connection files, although thousands are available. While you can mark the checkbox next to Connections to select all available connection files, you likely will want to expand the list so that you can select only connection files from a specific information provider and/or Library Catalogs. See [Installing Additional Connection Files](#).

- **Additional Import Filters**

Import filters are used to import references that have been saved from an outside source to a text file. EndNote initially installs only the most popular import filters, although hundreds are available. Mark the checkbox next to Import Filters to select all available import filters, or expand the list so that you can select import filters that work with files from specific information providers. See [Installing Additional Filters](#).

- **Additional Bibliographic Output Styles**

Output styles are used to format citations and bibliographies. EndNote initially installs only the most popular output styles, although more than 7,000 output styles are available. Mark the checkbox next to Output Styles to select all available styles, or expand the list so that you can select groups of output styles by discipline. See [Installing Additional Output Styles](#).

Note: Installing all content files (connection files, import filters, and output styles), can significantly slow down some processes in EndNote. EndNote will run faster if you install only the files you intend to use.

Uninstalling the Macintosh EndNote Program

In the Customizer, click *Uninstall* to remove all of the above components from your computer, including:

- Cite While You Write
- Connections

- Import Filters
- Output Styles

After running the Customizer to uninstall EndNote, drag the EndNote application folder to the Trash.

EndNote on Networks

Using Libraries on a Network

The volume edition of EndNote is licensed for a particular number of users; you can install EndNote locally for each of the licensed users. Users can access a common library on a server or their own personal library. See [Networks and Volume Installations \(Licensing of Volume Copies\)](#).

Multi-Platform Networks

EndNote libraries (databases) are directly compatible across Windows and macOS platforms and do not require any special conversion procedures (see [Transferring Libraries between Computers or Platforms](#)). Because of this, EndNote can be used in a mixed platform network environment very easily.

Multi-User Library Access

Even though EndNote can be used across a network, it was not designed with specific networking capabilities in mind. EndNote does not perform record locking functions that would allow multiple users to edit one library at the same time. However, multiple users can access one EndNote library simultaneously as long as the library is restricted to **read-only** or **locked** status. This will allow the user to perform searches, copy information to their documents, and format their papers. Use Finder to change the Properties of your EndNote library; select the Read-Only attribute for the .enl file and the .Data folder.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. One or two people should be assigned the responsibility for maintaining and updating the library; these users should be granted full access to the library .enl file and .Data folder. All other users should be granted read-only access. See [Multiple People Opening One Library](#).

Special Issues in Network Environments

EndNote does not perform record locking, but it does require file locking. Some Windows network client programs (for example, NFS clients used to connect to UNIX servers) do not fully support these protocols. File locking is an optional component in some implementations of NFS (LockD). In addition, some network file systems implement a compatibility mode that may prevent file locking from working properly. Network clients other than those provided by Microsoft should be tested to ensure that file locking is enabled.

EndNote assumes a maximum file name length based on the capabilities of the operating system on which it is running; under Windows, errors may occur if EndNote attempts to store a long file name on a server that does not support long file names.

Note: The environment in which EndNote will be used, must support long file names.

Custom Settings

EndNote allows you to customize many areas of the program to suit your needs. Most settings are saved for each user.

General Preferences

Most general preferences are stored in the Users/User Name/Library/Preferences/com.ThomsonResearchSoft.EndNote.plist preference file. This includes many EndNote Preferences, subject bibliography settings, and Cite While You Write settings.

Reference Types

If you plan to share your libraries with other users, you may want to limit use of new and modified reference types.

- Changes made to the reference types table apply to all libraries opened on that computer from the current user account.
- If your library is opened from a different computer, your references will follow the layout of the reference types table for that computer and user.

If you create a custom reference type or modify a reference type for records in your EndNote library, you should make sure the reference type is also created or modified on other computers that will access the library. See [Backing Up or Sharing Your Reference Types Table](#).

Saved Searches

Search strategy files are saved by default in your Searches folder: Users/User Name/Library/Application Support/EndNote/Searches.

You may save them elsewhere if you prefer, but EndNote will open to this Searches folder when you choose to Load a saved search. EndNote search files use “.enq” as the file name extension.

Cite While You Write

Cite While You Write codes are directly compatible between the versions of Word EndNote 20 supports. See [Word Processor Compatibility](#) for information on the versions supported.

Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same library.

About Volume Installations

The volume edition of EndNote is licensed for a particular number of users; you can install EndNote locally for each of the licensed users (see [Networks and Volume Installations \(Licensing of Volume Copies\)](#)). Users

can access a common library on a server or their own personal libraries. See [Using Libraries on a Network](#) for limitations on sharing a library on a server.

For volume installations, you must first unlock the installer as described in [Unlocking the Volume/Site License Installer](#), and then distribute and install the program using one of the methods described in [About Mass Program Installations](#).

Before You Begin Network Installation

For mass installation of the full program, see [About Mass Program Installations](#).

Please make sure that you meet these requirements before installing:

- Make sure EndNote is licensed for the appropriate number of users. See [Networks and Volume Installations \(Licensing of Volume Copies\)](#).
- Make sure the server supports long file names. EndNote 20 includes many files with long file names. If the server (or volume) does not support long file names, EndNote 20 cannot be used on it.
- Make sure file locking is enabled on the server. EndNote requires file locking. See [Special Issues in Network Environments](#).

Networks and Volume Installations (Licensing of Volume Copies)

Clarivate expects that network administrators will take appropriate steps to maintain compliance with the software license. The license agreement (License Agreement.txt) can be found at //Applications/EndNote 20 /License Agreement.txt. You can purchase a single or multi-user license:

Single User License

A single EndNote product purchase is licensed to an individual, and is not to be shared.

Volume/Site License

There are three volume license options available. (Please [contact sales](#) for information on pricing for your group.)

- **Multi-user perpetual license:** Starting at 5 users, this is a perpetual one-time fee for the latest version without new releases.
- **Subscription license:** Starting at 5 users, this is a yearly subscription with a contract which includes future releases within the term of the contract.
- **Sitewide license:** A sitewide license can be customized to your organization. Please [contact sales](#) for information on pricing for your group.

An EndNote volume/site license allows multiple users. EndNote can be installed on individual PCs using mass installation (up to the number of users indicated in the license agreement).

If you have questions about the licensing of EndNote at your institution, consult your institution's software licensing department.

Unlocking the Volume/Site License Installer

Windows

Simple Method

The Volume/Site license installer uses a single product key for multiple users. To automatically include the key for your licensed users, you must unlock the installer. This produces a new installer file, along with a validating License.dat file.

Note: This information applies only to the Volume/Site license installer, and does not apply to any other EndNote licenses.

To unlock the volume/site license installer:

1. Download the .msi installer and the compressed ADMIN.zip file.

[Download EndNote 20.msi installer](#)

[Download ADMIN.zip](#)

2. Extract the ADMIN.zip file. The result will be an ADMIN folder with an ADMIN.BAT file in it.
3. Place the ADMIN.BAT file and the .msi installation file together in the same folder (on the desktop works fine).
4. Double-click the *ADMIN.BAT* file to run it.
5. When prompted, enter the site's EndNote product key and mark the box saying *I hereby acknowledge that I have read and accept all terms of the license agreement*, then click *Next*.
6. Click the *Browse* button and select a location for the new .msi installer and the .dat file. This must not be the same location as the original .msi installer.

Do not select the option titled "Perform Administrative Installation."

7. Click *Next*, and *Next* again.

When the installation is complete, you will find an EN20Inst.msi file and a License.dat file in the target folder. These files must both be present in the same folder to install the EndNote program. See [About Mass Program Installations](#), A Typical Installation for an Institutional License of EndNote.

For Advanced Users

For creating the unlocked site license installer, you need to run the installer in administrative mode. You can also do this by launching Command Prompt, and then running the following command:

msiexec.exe /a EN20Inst.msi

macOS

Because of macOS security requirements, users cannot create a site installer for EndNote. When you purchase a volume/site license, Clarivate will provide a site installer for your institution. If you have any questions, please contact your sales representative.

Note: For updated information and instructions with screenshots, see the knowledge base article [EndNote: Volume License Install Steps](#).

Mass Program Installations

About Mass Program Installations

Windows

With the volume/site license version of EndNote, a network administrator can use mass installation to install EndNote on multiple Windows machines.

Please make sure that you meet these requirements before installing:

- Make sure EndNote is licensed for the appropriate number of users. See [Networks and Volume Installations \(Licensing of Volume Copies\)](#).
- Make sure that each computer is running one of the following Windows operating systems.
 - Windows 10
 - Windows 11

In Administrative Mode, the EndNote installer will prompt for a volume product key, which generates a License.dat file. The License.dat file must accompany the installer for volume license distribution in order to later bypass the product key installation prompt. See [Unlocking the Volume/Site License Installer](#).

Deployment Methods

You can deploy the EndNote installer to multiple machines in one of these ways:

- [Easy Deployment](#)
- [Deploying the EndNote Installer with Group Policy](#)
- [Scripted Program Installations](#)

You can use the provided [MSI Command Line Options](#) for guidance. If you need additional information, refer to Microsoft's mass installation documentation and command line documentation.

Content File Installation

Early versions of EndNote always installed all predefined content files (output styles, import filters, and connection files). These number in the thousands, and when they are all installed they can affect the speed and performance of EndNote. In EndNote, a typical installation includes only the most popular styles, filters, and connection files. If you do not know what subset of files are required by your users, you may want to install all files. You can do this by setting the property "INSTALLALLCONTENTFILES" to "yes." See [Installing All Content Files](#).

macOS

Because of macOS security requirements, users cannot create a site installer for EndNote. When you purchase a volume/site license, Clarivate will provide a site installer for your institution. If you have any questions, please contact your sales representative.

Note: For updated information and instructions with screenshots, see the knowledge base article [EndNote: Volume License Install Steps](#).

Easy Deployment

With the volume/site license version of EndNote, a network administrator can use mass installation to install EndNote on multiple machines.

Recommended easy installation:

1. First, unlock the installer to generate an EN20Inst.msi file and a License.dat file. See [Unlocking the Volume/Site License Installer](#).
2. Deploy the EN20Inst.msi and License.dat files together. You can deploy in any way you want, but make sure the two files are in the same directory when executed. You could zip the two files to distribute them to end users, you could create a Group Policy deployment where both files are delivered to the same location on the target machine, or you could drop the two files in a shared network location from which users execute the installer.

Note: If the files are deployed in a zipped file, the user will need to extract the files before installing EndNote. The installation will not work correctly if run from a zipped file.

Using the volume installer to install on an individual computer:

1. First, unlock the installer to generate an EN20Inst.msi file and a License.dat file. See [Unlocking the Volume/Site License Installer](#).
2. Distribute both the EN20Inst.msi and License.dat files to the user. For example, you can copy them to a shared network drive.
3. The user should then copy the two files, EN20Inst.msi and license.dat to the same folder on his/her individual computer.
4. The user should log on to the computer with administrative rights, and then run EN20Inst.msi to install the EndNote program. See [A Typical Installation](#).

Deploying the EndNote Installer with Group Policy

Before you begin:

- Make sure all workstations are using MSI 3.0 or later. If needed, you can download an update from Microsoft.
- Make sure the share that EndNote is being deployed from is published in Active Directory.
- Make sure the computer account has permission to access the share.

Note: This software has not been tested with the Windows Distributed Filing System (DFS)

Note: By default, only the most popular output styles, import filters, and connection files are installed with EndNote. This speeds up performance. However, if you want to install all of the available content files (thousands), you can create a new Transform and set the INSTALLCONTENTFILES property to "yes". See [Installing All Content Files](#).

New Installations

To deploy across an organization with Group Policy:

1. First, unlock the installer to generate an EN20Inst.msi file and a License.dat file. See [Unlocking the Volume/Site License Installer](#).
2. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
3. Under *Computer Configuration*, expand *Software Settings* and click *Software Installation*.
4. *Right-click Software Installation* and select *New > Package*.
5. Browse for the share from which EN20Inst.msi will be deployed. (Make sure the required license.dat file is in the same folder.)
6. In the *Deploy Software* dialog, you may select either *Assigned* or *Advanced* if you wish to modify the advanced settings. See the appropriate Microsoft help file for help on configuring the advanced options.

Once the Group Policy is updated and the clients are restarted, EndNote is installed upon boot.

7. (Optional) For each user account, you can configure EndNote as the default citation manager in Word.

Upgrade Installations

To upgrade your current installations:

1. First, unlock the installer to generate an EN20Inst.msi file and a License.dat file. See [Unlocking the Volume/Site License Installer](#).
2. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.

3. Under *Computer Configuration*, expand *Software Settings* and click *Software Installation*.
4. *Right-click Software Installation* and select *New > Package*.
5. Browse for the share from which EN20Inst.msi will be deployed. (Make sure the required License.dat file is in the same folder.)
6. In the *Deploy Software* dialog, select *Advanced* and then click on the *Upgrade* tab.

Once the Group Policy is updated and the clients are restarted, EndNote is installed upon boot.

7. (Optional) For each user account, you can configure EndNote as the default citation manager in Word.

Scripted Program Installations

An [EN20Inst.msi file is available for download](#).

To install via a command line:

1. First, run the installer in Admin mode (/a on the command line).
2. Install EN20Inst.msi from the target directory. (Make sure the required License.dat file is in the same directory.)

Use the provided [MSI Command Line Options](#) table for guidance. If you need additional information, refer to Microsoft's mass installation documentation and command line documentation.

MSI Command Line Options

Option	Parameters	Description
/l	Package\ProductCode	Installs or configures a product.
/f	[p o e d c a u m s v] Package\ProductCode	Repairs a product. This option ignores any property values entered on the command line. the default argument list for this option is "pecms. This option shares the same argument list as the REINSTALLMODE property. p — Reinstalls only if file is missing. o — Reinstalls if file is missing or an older version is installed. e — Reinstalls if file is missing or an equal or older version is installed. d — Reinstalls if file is missing or a different version is installed. c — Reinstalls if file is missing or the stored checksum does not match the calculated value. Only repairs files that have msidbFileAttributesChecksum in the Attributes column of the File table. a — Forces all files to be reinstalled. u — Rewrites all required user-specific registry entries. m — Rewrites all required computer -specific registry entries. s — Overwrites all existing shortcuts. v — Runs from source and recaches the local package. Do not use the reinstall option for the first installation of an application or feature.
/a	<i>Package</i>	Administrative installation option. Installs a product on the network.
/x	Package\ProductCode	Uninstalls a product.
/j	[u m]Package or [u m]Package/ or [u m]Package/	Advertises a product. This option ignores any property values entered on the command line. u — Advertises to the current user. m — Advertises to all users of machine. g — Language identifier. t — Applies transform to advertised package.

Option	Parameters	Description
/l	[i w e a r u c m o p v x + !]	<p>Specifies path to log file. Flags indicate which information to log.</p> <ul style="list-style-type: none"> i — Status messages. w — Nonfatal warnings. e — All error messages. a — Start up of actions. r — Action-specific records. u — User requests. c — Initial UI parameters m — Out-of-memory or fatal exit information. o — Out-of-disk-space messages. p — Terminal properties. v — Verbose output. x — Extra debugging information. Only available on Windows Server 2003. + — Append to existing file. ! — Flush each line to the log. "" — Wildcard, log all information except for the v and x options. To include the v and x options, specify "/ l*vx".
/m	<i>filename</i>	<p>Generates an SMS status . mif file. Must be used with either the install (-i), remove (-x), administrative installation (- a_ , or reinstall (- f) options. The ISMIF32.DLL is installed as part of SMS and must be on the path.</p> <p>The fields of the status mif file are filled with the following information:</p> <ul style="list-style-type: none"> Manufacturer — Author Product — Revision Number Version — Subject Locale — Template Serial Number — not set Installation — set by ISMIF32.DLL to "DateTime InstallStatus — Success or Failed Description — Error messages in the following order: <ul style="list-style-type: none"> 1) Error messages generated by installer. 2) Resource from Msi.dll if installation could not commence or user exit. 3) System error message file. 4) Formatted message: "Installer error %i", where %i is error returned from Msi.dll.
/p	PatchPackage[;patchPackage2...]	<p>Applies a patch. To apply a patch to an installed administrative image you must combine options as follows:</p> <p>/p <PatchPackage>[;patchPackage2...] /a <Package></p>

Option	Parameters	Description
/q	n b r f	Sets User interface level. q, qb — Basic qr — Reduced qf — Full qn+ — No qb+ — Basic qb- — Basic Note that the ! option is available with Windows Installer version 2.0 and works only with basic UI. It is not valid with full UI.
/? or /h		Displays copyright information for Windows Installer.
/y	<i>Module</i>	Calls the system API This option is used only for registry information that cannot be added using the registry tables of the .msi file.
/z	<i>Module</i>	Calls the system API This option is used only for registry information that cannot be removed using the registry tables of the .msi file.
/c		Advertises a new instance of the product. Must be used in conjunction with /t.
/n	<i>ProductCode</i>	Specifies a particular instance of the product. Used to identify an instance installed using the multiple instance support through a product code changing transforms.

Changing the Default Content File Location

Content files include output styles, filters, and connection files. These are typically installed in the EndNote program folder. For example

C:\Program Files (x86)\EndNote 20\Styles
C:\Program Files (x86)\EndNote 20\Filters
C:\Program Files (x86)\EndNote 20\Connections

However, you may want to install the default content files in a folder other than the EndNote program folder. You may want to use a common, shared folder for all users in your organization.

Note: Remember that EndNote compiles style, filter, and connection file lists from both the default installation folder and a user's personal content folders. For information about setting a personal folder location, see [Folder Locations Preferences](#).

Below is a method that an administrator could use to run the installer and tell EndNote to relocate the "main" content file locations. If the Styles, Filters, and Connections folders are located at D:\Shared\Content\, then that path should be used for CFDIR.

Method 1: Specify a Custom Folder Path via Command Line

This method will work for most users, who install EndNote by launching the installer. To install EndNote with a custom content file folder setting:

For EXE installations:

```
EN20Inst.exe CFDIR="< path_to_content_folders>"
```

For MSI installations:

```
msiexec.exe /I EN20Inst.msi CFDIR="< path_to_content_folders>"
```

Method 2: Specify a Custom Folder Path via Transform

This method is for site system administrators, who want the end user to install or deploy the application without the user changing settings.

Update the value of the “CFDIR” property in the Property table, save the transform, and create the group policy object to deploy the installer with the transform. (See the transform documentation for the tool you are using, such as Orca).

Installing All Content Files

Content files include output styles, filters, and connection files. Earlier releases of EndNote installed all available content files. The number of predefined content files is now in the thousands, and may adversely affect the speed and performance of EndNote. Your users, however, may prefer to have access to all files.

Note: You can combine this command along with changing the default content file path. See [Changing the Default Content File Location](#).

Method 1: Change the Setting via Command Line

This method will work for most users, who install EndNote by launching the installer. To install all content files with EndNote:

For EXE installations:

```
EN20Inst.exe INSTALLALLCONTENTFILES=yes
```

For MSI installations:

```
msiexec.exe /I EN20Inst.msi INSTALLALLCONTENTFILES=yes
```

Method 2: Change the Setting via Transform

This method is for site system administrators, who want the end user to install or deploy the application without the user changing settings.

Change the value of the "INSTALLALLCONTENTFILES" property to "yes" in the Property table, save the transform, and create the group policy object to deploy the installer with the transform. (See the transform documentation for the tool you are using, such as Orca.)

Setting Local Find Full Text Preferences

You can globally set the values for the Find Full Text panel under EndNote Preferences.

Just as we show under [Changing the Default Content File Location](#) and [Installing All Content Files](#), you can do this via command line or by changing the setting via transform. These options are available:

FFTUSEISILINKS=	Use "T" or "F" to select or deselect the "Web of Science Full Text Links" check box.
FFTUSEDDOI=	Use "T" or "F" to select or deselect the "DOI" check box.
FFTUSEPUBMED=	Use "T" or "F" to select or deselect the "PubMed LinkOut" check box.
FFTUSEOPENURL=	Use "T" or "F" to select or deselect the "OpenURL" check box.
FFTOPENURLRESOLVER=	Enter a URL for the "OpenURL Path" text box.
FFTAUTHENTICATEURL=	Enter a URL for the "Authenticate with URL" text box.

Appendices

About Direct Export and Import Formats

What do we mean by "direct export" and "import formats"?

Direct Export: The information provider includes an option to save directly to EndNote. When you select this option, EndNote automatically looks for the appropriate filter in your EndNote Filters folder. You direct the references to the appropriate EndNote library. How well the information transfers depends on how accurately the information provider has tagged each item of bibliographic information.

Note: UTF-8 (Unicode) is the default character encoding for text, XML, and HTML export from the product. RTF uses ASCII encoding for ASCII characters and "code page escapes" to encode characters beyond ASCII.

Importing: When an information provider does not provide direct export to EndNote, the process of importing references becomes a little more complicated. You must save references from the information provider to a text file in a tagged format. Then, in EndNote, you must use the *File > Import* feature to select the tagged text file for import, choose the appropriate import filter, and then start the import process. See [Importing Text Files](#) for more information.

You also have another option for copying references into your EndNote libraries. See [How to Search an Online Database](#) for information about directly searching and downloading from various online databases.

Copyright Issues and Fair Use of Downloaded Data
<p>EndNote gives you the capability to import references downloaded from online databases into its libraries. Some producers of online reference databases expressly prohibit such use and storage of their data, others charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases may have varying restrictions, even from the same information provider.</p>

Direct Export Providers

Many information providers have websites that include a direct export option, allowing you to send copies of references directly to an EndNote library. The direct export process automatically selects an EndNote import filter to map bibliographic information into the appropriate EndNote fields. All you need to do is select the EndNote library into which the data should be imported.

Start by opening the EndNote library into which the data should be imported. This "direct export" or "direct download" method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate import filter.

In some cases, you may be required to select an appropriate filter. When the direct export process is started, EndNote first checks the file for tags that are specific to a common import type, such as the EndNote desktop, Web of Science™ Core Collection, or RIS format. If no match is found, EndNote searches through all filters for a vendor ID and database ID that match the file. If no match is found, you are prompted

to select a filter. You can also check our Web site at <https://endnote.com/downloads/filters/> for updated import filters.

Contact your data provider if you have questions about whether their database supports direct export. Clarivate makes information on how to set up databases to work with direct export publicly available, so database providers can set their databases to work with direct export without our involvement. This means we cannot keep track of all the providers supporting this feature.

Note: Because of the way some browsers handle MIME types, they may try to save your references to a file on your desktop. You may need to use Mozilla Firefox to access the Web site and export references into EndNote. This application allows you to specify how to handle data when you initiate a direct export, so you can select the EndNote application. See [Enabling Direct Export](#) for information on configuring Firefox to send Direct Export files to EndNote.

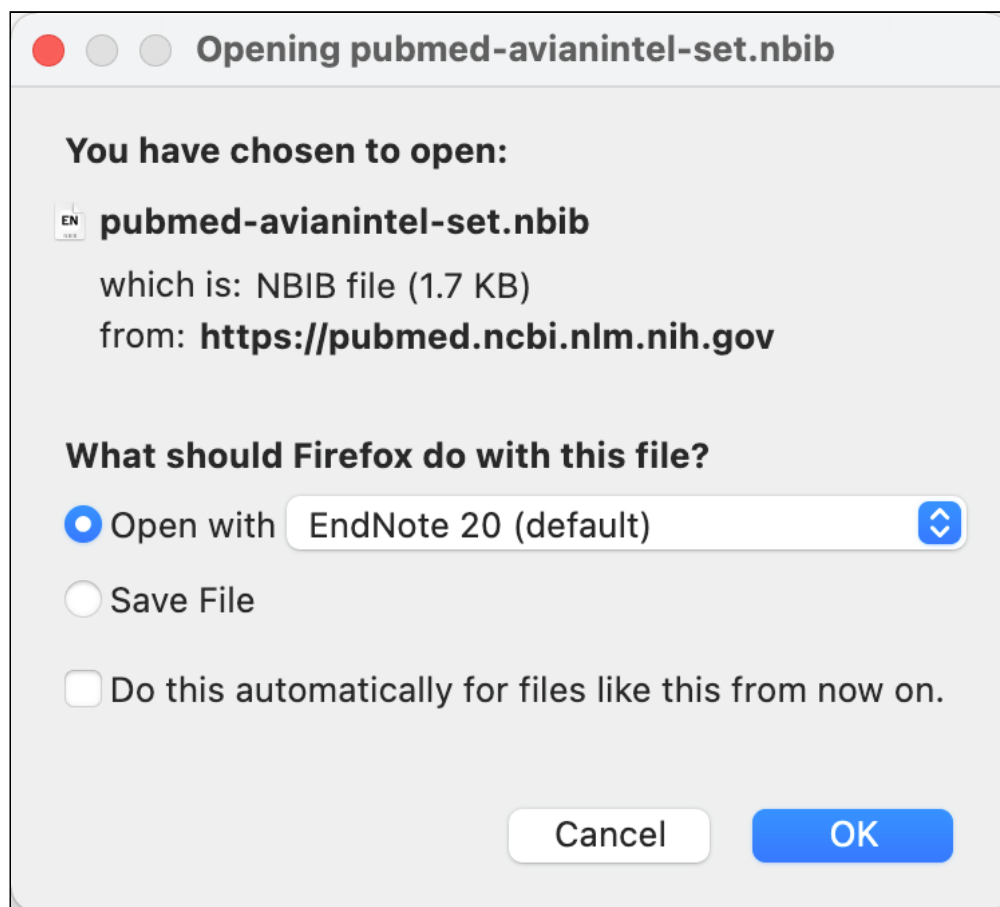
Enabling Direct Export

EndNote's Direct Export feature allows certain file types to be associated with the EndNote application. When a direct export file is sent from a browser to EndNote, EndNote can recognize the filter that should be used to import the references, and import them automatically. In the macOS, this process works best in Firefox because you don't need to double-click on the file to open it in EndNote.

Note: Changing settings to enable Direct Export will only work consistently with file types that were designed for Direct Export. Changing settings for other file types, such as .txt files, can cause problems and is strongly discouraged.

Setting Firefox to Open Direct Export Files in EndNote

Firefox allows you to set the option to send files to EndNote within the program. The first time it downloads a file with a file type it does not recognize, it will show a window similar to the one below, asking what to do with the file. Choose the option to *Open with EndNote* and mark the box to *Do this automatically for files like this from now on*. In the future, Firefox should send files with this extension directly to EndNote.



If, in the past, Firefox was instructed to save this file type instead of sending it to EndNote, you may be able to change that in the settings.

1. In Firefox, navigate to *Settings > General > Applications*.
2. Locate the Direct Export file type by the extension shown in the left column.
3. In the right column for the extension, select *Use other...* and select the *EndNote* application.
4. Close the Firefox settings to save your change.

Note: These instructions worked at the time of this writing, but browsers change over time. You may need to adapt these instructions to your present version of Firefox.

File Extensions Associated with Direct Export

At the time of the EndNote 20 release, these were the file type extensions EndNote will automatically associate with direct export:

- .CIW
- .ENW
- .RIS

- .NBIB
- .OVD

Note: This list does not mean that only these file types will work with direct export, but that these files can be expected to work reliably with direct export.

APIs and Plug-ins

The RSServices API is technology from Clarivate that provides a way to build on the power of EndNote. It exposes programmatic access to the core functionality of the EndNote application, allowing third parties to access database content and integrate EndNote with other tools. With the RSServices API users can create “plug-ins” that work within the EndNote interface to add customized functionality to EndNote and extend connectivity with other programs. Most of the RSServices API functions work with EndNote versions X and later.

The basic functions of the API enable users to:

- Build plug-ins that add new functionality to EndNote.
- Provide better integration with third-party tools and products.
- Create tools that extend the GUI of EndNote.
- Script or batch existing EndNote capabilities and features.
- Directly access records and data in EndNote Libraries (databases).
- Leverage the power of the EndNote formatting engine (Formatter).
- Directly Import or Export into or out of EndNote.

The RSServices API is intended for technical audiences who have knowledge of object-oriented programming languages, particularly C and C++. Users should also be familiar with the tools needed to produce compiled application code or DLLs. The API is available for both the Macintosh and Windows operating systems and behaves identically on each, unless otherwise specified.

Individual customers and third-party partners are encouraged to use the RSServices API to develop tools that closely interact with EndNote. Users are also encouraged to share their code and ideas with others on the EndNote User Forums at:

<https://community.endnote.com>

While individuals are welcome to use and share their work with others, any party developing a component or tool that uses the RSServices API for commercial or wide-spread use must also sign a license agreement with Clarivate to legally employ the API, RDK and any associated tools, documentation, or code.

The RSServices Development Kit (RDK)

Supporting documentation and code samples are provided as part of the RSServices Development Kit (RDK), the RDK is available by request directly from the Clarivate EndNote team. The RDK is designed to work with several compilers and tools, including Apple's XCode and Microsoft's Visual Studio. In all cases,

APIs are published in the C/C++ programming language, as are all samples and example code. It is assumed that the reader has a validly licensed copy of one or more of the aforementioned compilation products, as Clarivate does not supply or warrant such tools as part of the RDK. While it should be possible to port these interfaces to additional compilers or programming languages, readers should consult their license agreement or the Clarivate EndNote team before doing so.

Contact the Clarivate EndNote team at <http://endnote.com/support/contact-support> for more information.

Backing Up Your EndNote Files

We strongly recommend that you keep several backup copies of your critical computer files, especially your EndNote libraries and papers that you are writing. There are many ways that a file can be damaged: hard disks can fail, viruses can erase or corrupt files, and, of course, there is always human error and the possibility of accidentally throwing away your thesis or grant proposal the day before it is due. If you have any kind of disaster, big or little, backup copies can save you hours or days of work.

The simplest way to make a backup is to use Finder to copy your files to a thumb drive or other portable storage device. This will work for your EndNote libraries until they are too large to fit on one of these.

EndNote Sync as a Backup

The [Sync Feature](#) provides a backup of your current library. If you accidentally delete your library files, you can sync your online library to a new empty desktop library and be working again in no time.

However, if you have deleted references from your library and emptied the trash, they will also be deleted from the online copy of the library; if you have accidentally deleted references from the online library and emptied the trash, they would also be deleted from the desktop library at the next sync. Making a backup of your library at regular intervals ensures you have access to older material, if you ever need it.

Backup Suggestions

Keep at least two sets of backup disks, each at a different location. We recommend that you have sets for alternate days, so if you discover that something went wrong yesterday, you will have the day-before-yesterday's version.

Make archival sets of all the files used when you finish an important document. An archival set should include all of the files that are needed to recreate a final formatted paper. Label the backup disks, lock them and keep them in a safe place far away from your computer (preferably off-site). If you ever need to recreate the document, you will have all of the necessary files.

See [Important Files to Backup](#) for more information about this topic.

Note: Although working EndNote libraries should not be kept in cloud folders or drives, a compressed library can safely be stored in the cloud because it is a single file. Be sure to move or copy the compressed library to your hard drive before opening it. See [Saving a Compressed Copy of a Library](#).

Important Files to Back Up

This topic lists the important EndNote files to backup. You may want to start by backing up the EndNote installer.

The library files ([filename].enl and its matching .Data folder) are where all of your references are stored. Note that exporting data from your library is not a backup. An export file is just a text document, whereas an EndNote library is a database.

If you saved your library as a package, the .enl file and .Data folder are part of the library package with the extension .enlp.

Saving and Restoring Compressed Libraries

You can save an EndNote library (the [filename].enl file, its associated .Data folder, and all of its contents) to a single compressed file called [filename].enlx in order to back up your library or send a copy to a colleague. Later, you can restore the compressed library with EndNote. See below or see [Saving a Compressed Copy of a Library](#).

Creating a Compressed Library File

1. Open the library in EndNote.
2. From the *File* menu, select *Compress Library (.enlx)* to display a Compressed Library dialog.
3. Use the radio buttons to determine these options:
 - Specify whether you want to Create a compressed library or to Create & Email the library.
 - Specify whether you want to save file attachments with the library or not.
 - Specify whether you want to save all references to the compressed library, only the selected (highlighted) references, or only the references in a specific group or group set.
 - Click *OK* to display a file dialog.
4. Save the compressed library (the default name is [original_file_name].enlx) to a folder on your hard drive. You can change the file name but you cannot use the following characters.

Invalid Characters for Naming a Compressed Library	
\	back slash
/	forward slash
:	colon
*	asterisk
?	question mark
"	quotation mark
<	less than
>	greater than
	vertical bar

5. If you selected the Create & Email option, EndNote will launch the Mail application, create a new email, and attach the compressed library file to the email.
6. Enter additional information to the email, such as a recipient, subject, and message. Click the *Send* button.

Restoring a Compressed Library File

1. Use EndNote to open the filename.enlx file by selecting *Open Library* from the *File* menu, then selecting the .enlx file. This will extract the .enl file and the .Data folder to the same folder where the .enlx file is located.
2. Use EndNote to open the [filename].enl file as you normally would to use the library.

Note: EndNote libraries larger than 4 gigabytes or 65,535 files cannot be compressed with EndNote's Compressed Library command. See [Saving a Copy of a Library](#) for information on making backup copies of larger libraries.

Custom Reference Types

The current reference types table controls the reference types and fields available to all libraries opened under the current user account. It controls the reference types and fields available to styles, filters, and connection files, so it affects importing data and formatting documents.

If you have customized your reference types, losing your reference types table will lose all your customizations.

Backup a Reference Types Table

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Under *Reference Type Table*, click *Export* to display the Export Reference Types dialog.
4. Name the file, select a folder where you will be able to find it later, and click *Save*. EndNote will append an .xml suffix to the file name.

You now have a backup of your Reference Types Table.

Importing a Reference Types Table

Note: When you import a Reference Type Table, you will overwrite the entire contents of your current Reference Type Table, losing any customizations you have made to your reference types. We suggest creating a backup of your current Reference Type Table before importing a new table, using the instructions above.

1. From the *EndNote* menu, select *Preferences*.
2. Click the *Reference Types* option in the list of preferences.

3. Under *Reference Type Table*, click *Import* to display a file dialog.
4. In the file dialog, locate, highlight, and open the .xml file that was previously exported.

Modified Styles, Filters, and Connection Files

Modified styles are important to backup so that you do not have to recreate the bibliographic format if something happens to your customized style. Similarly, custom filters and connection files should be backed up so that you do not have to redo the work to get your references to import as you want them.

When you display a list of styles, filters, or connection files, the list is compiled from both the default installation folders as well as your personal folders.

The default Styles, Connections, and Filters folders are installed in the EndNote program folder, and are typically found at—

```
//Applications/EndNote 20/Styles  
//Applications/EndNote 20/Filters  
//Applications/EndNote 20/Connections
```

If you have not modified these files, it is not important to make backups of them because you can always reinstall them with the EndNote Installer.

Once you make a change to one of these files, or create a new file, it is saved to your personal Styles, Filters, or Connections folder. These folders are typically found at—

```
//Users/[User Folder]/Documents/EndNote/Styles  
//Users/[User Folder]/Documents/EndNote/Filters  
//Users/[User Folder]/Documents/EndNote/Connections
```

You can change the location of your personal folders with Folder preferences. To locate or change your personal Folder locations, see [Folder Locations Preferences](#).

Word Processing Documents

The papers you have written that include EndNote citations should be kept with your EndNote backup files.

EndNote Preferences

If you have customized your sorting preferences, copy the following file: Users/[Your Folder]/ Library/ Application Support/EndNote/EndNote Sort Words file.

If you have customized your change case preferences, copy the following file: Users/[Your Folder]/Library/ Application Support/EndNote/EndNote Case Words file.

Copy the com.ThomsonResearchSoft.EndNote.plist preference file, which is located in the Users/[Your Folder]/Library/ Preferences folder. Each user account maintains its own EndNote preference file. This file contains the settings for most of the items in the EndNote Preferences, including modifications that you have made to your display fonts, default library settings, online preferences, term list settings, and duplicates criteria.

Menu Keyboard Commands

The EndNote menus display equivalent key commands next to many menu commands, so you can execute commands without taking your hands off the keyboard to use a mouse. You can use the following tables as a quick reference.

All commands are not always available to you. For example, if no references are highlighted in the Library window, the Edit References and Move References to Trash commands are not available from the References menu.

These tables list only those commands with a keyboard equivalent. Not all menu commands have a corresponding keystroke.

EndNote Menu Commands

Menu Command	Key Command
Preferences...	⌘+,
Hide EndNote	⌘+H
Hide Others	Option+⌘+H
Quit EndNote	⌘+Q

File Menu Commands

Menu Command	Key Command
Open Library	⌘+O
Open Shared Library	⌘+Shift+O
Close Library	⌘+W
Save	⌘+S
Save As	⌘+Shift+S
Page Setup...	⌘+Shift+P
Print...	⌘+P

Edit Menu Commands

Menu Command	Key Command
Undo	⌘+Z
Redo	⌘+Shift+Z
Cut	⌘+X
Copy	⌘+C
Paste	⌘+V
Select All	⌘+A
Emoji & Symbols	⌘+Control+Space
Spelling: Show Spelling and Grammar	⌘+;
Spelling: Check Spelling	⌘+;
Spelling: Spell Check Library	⌘+Y
Change Case	⌘+Control+C
Font: Plain Font	⌘+L
Font: Bold	⌘+B
Font: Italic	⌘+I
Font: Underline	⌘+U
Font: Copy Style	⌘+Option+C
Font: Paste Style	⌘+Option+V
Font: Superscript	⌘+Control++
Font: Subscript	⌘+Control+-

References Menu Commands

Menu Command	Key Command
New Reference	⌘+N
Edit References	⌘+E
Copy Formatted	⌘+K
Move References to Trash	⌘+D
File Attachments: Attach File Open with Preview Save As...	Control+Option+A ⌘+Option+P ⌘+Option+S
URL: Open URL	⌘+G

Library Menu Commands

Menu Command	Key Command
Simple/Advanced Search	⌘+Option+F
Define Term Lists...	⌘+4
Link Term Lists...	⌘+3
Spell Check Library...	⌘+Y
Find and Replace...	⌘+R

Tools > Cite While You Write Menu Commands

Menu Command	Key Command
Return to Word	Control+1
Insert Selected Citation	Control+2
Format Bibliography...	Control+3
Import Traveling Library...	Control+8
CWYW Preferences...	Control+9

Window Menu Commands

Menu Command	Key Command
Minimize	⌘+M
Previous Pane	Option+Shift+←
Next Pane	Option+→
Previous Tab	Control+Shift+←
Next Tab	Control+→

Editing Keyboard Commands

A full set of key commands is available so that you can enter references without using the mouse. For example, to create and enter a new reference without touching the mouse, type ⌘+N to add a new reference, type the bibliographic information using Tab or Shift+Tab to move forward or backward between the fields.

Action	Key Command
Create a new reference	⌘+N
Select more than one reference	⌘+Click
Select a range of references	Shift+Click
Go to Reference Edit panel	⌘+E
Close the active library window	⌘+W
Select the next field	Tab
Select the previous field	Shift+Tab
When the cursor is in a field linked to a term list, such as Author, Journal, or Keywords, display the appropriate term list for term selection	⌘+1

Commands When Working with Text

Action When Entering Text	Key Command
Undo the previous command	⌘+Z
Cut selected text and put it on the clipboard	⌘+X
Copy selected text and put it on the clipboard	⌘+C
Paste text from the clipboard at the insertion point	⌘+V
Select all text in a field	⌘+A
Check spelling	⌘+Y
Set the text style to Plain	⌘+L
Turn bold on or off	⌘+B
Turn italic on or off	⌘+I
Turn underline on or off	⌘+U

Use the Arrow keys to navigate within a field.

Troubleshooting EndNote

- For documentation updates and correction notes, refer to the Readme.txt file installed in the EndNote folder.
- For late-breaking news and updates, go to the [EndNote Support](#) page.

Common Issues

See these topics for information on these issues:

- [Special Characters](#).
- [Direct Export doesn't open the file in EndNote](#).
- [The EndNote Library is Corrupted](#).

Other Troubleshooting Help Topics

- For help topics that are specific to Cite While You Write, go to [Troubleshooting Cite While You Write](#).
- For help topics that are specific to online connections, go to [Troubleshooting Connections](#).

A few common issues are discussed below.

The EndNote Library is Corrupted

Any time you feel your library may be corrupted:

1. Back up the library. *Do not* replace any previous backup copies, just in case you need them!
2. From the Library menu, run the *Recover Library* operation to rebuild the library. See [Recovering a Damaged Library](#) for more information about this command.

The two most frequent causes of library corruption are—

1. **Storing a library in a cloud-syncing folder or drive.** Applications like Google Drive, iCloud, OneDrive, Box, Dropbox, etc. do a very good job of synchronizing individual files, but EndNote libraries are not just a single file. They are a combination of files working together. When you make changes in a record, you may affect more than one file, and those files must be updated *in a set sequence*. Synchronization applications do not always update the files in the correct sequence, which causes small errors that can eventually lead to corruption. So, do not store your working EndNote libraries in any syncing folder.

A compressed library can be stored in a cloud-syncing folder or drive for archival purposes because it is a single file. However, it should be moved or copied to a nonsyncing location on your hard drive before opening it or using it.

2. **Storing a library on a network drive.** Read-Write libraries should not be stored on network drives, to avoid corruption. If you need to share a library on a network drive, it should be a read-only copy of the library and the original library should be maintained on a computer hard drive. See [Multiple People Opening One Library](#) for information on using a read-only library on a network.

Commands are Dimmed and Not Available

Commands may be dimmed depending upon which part of the window is active. For example, if no text is selected in an Reference Edit panel, the Font options under the Edit menu would be dimmed because there would be no selected text to apply font changes to.

Opening EndNote 20 Libraries in an Earlier Version of EndNote

EndNote X9.3 introduced a new database engine. Libraries created in EndNote X9.3 or later are not backwardly compatible with older versions of EndNote. If you work in an environment with multiple versions of EndNote, you can convert your libraries to the new database engine using the instructions below.

Forward Compatibility to EndNote X9.3 and Later

To use libraries created with EndNote X9.2 and earlier, convert the library by opening it in EndNote X9.3 or later. To do this, in EndNote X9.3 or later select **File > Open Library**, and then select the old EndNote library file you wish to convert. EndNote X9.3 or later will create a new library and leave the original library unchanged.

Backward Compatibility with Earlier EndNote Versions

If you are not already syncing an EndNote library, using EndNote Sync would be the easiest way to access the library on a machine with an older version of EndNote. (If you are already syncing a library, syncing another library would merge the libraries. See [Merging Libraries through Sync](#).)

If you choose to sync the library, create a new empty library in the older version of EndNote, then enable EndNote Sync with that library open as the active library. See [The Sync Feature](#) for information on syncing a library for the first time. You would be able to use the library on both computers and have your changes sync back and forth between the versions.

Note: When syncing libraries, record numbers will be different on the different computers. See [Record Numbers](#) for more information.

Exporting the Data for Import to an Older Version of EndNote

EndNote X9.3 and later libraries are not backward compatible with previous versions. To use EndNote X9.3 and later libraries with an older version of EndNote without using Sync:

1. Export the EndNote X9.3 or later library to a XML file (.xml) by changing the File Type during export. See [Exporting to EndNote XML](#) for details.
2. In the older version of EndNote, select *Import* from the *File* menu.
3. Locate and select the filename.xml to be imported.
4. Select *EndNote Generated XML* as the *Import Option*. (If you do not see the Import Options, click the *Options* button.)
5. Set the *Duplicates* option to match your preferences.
 - **Import All:** Imports all references, including duplicates.
 - **Discard Duplicates:** Imports all references except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See [Duplicates Preferences](#) if you would like to change the duplicates criteria.

6. Set the *Text Translation* to *No Translation* and then click on *Import*.

Compatibility Issues

The older version of EndNote will not import any groups from the EndNote X9.3 or later version of the library.

In order to have access to the file attachments the PDF subfolder of the EndNote X9.3 or later version of the library would need to be added to the new library created from the imported references.

Sharing Libraries with Users of Older Versions of EndNote

Because Library Sharing works through EndNote Sync, it will allow libraries created with EndNote 20 and EndNote X9 to be shared with users of older versions who have created EndNote online accounts with those older versions.

Troubleshooting Connections

When connecting with an online database, there are at least two computers involved in completing the tasks you wish to perform: yours and the database server. Most often, there are intermediary computers as well, such as Domain Name Servers (DNS), proxy servers, and firewalls. With more than just your computer involved, things can get complicated.

The most basic problem you can encounter with connections is the failure to connect at all. There are four ways you may experience this problem:

- EndNote cannot connect to the Internet (see [Problems Connecting to the Internet](#))
- EndNote cannot find the host (see [Problems Finding the Host](#))
- EndNote cannot connect to the host (see [Problems Connecting](#))
- EndNote cannot communicate with the host (see [Problems Communicating with the Host](#))

Problems Connecting to the Internet

In general, if you are able to use a Web browser or other Internet software, you should also be able to connect with EndNote. Try using your Web browser to make sure your Internet connection is working.

Dial-up Connections

Your computer system includes software to connect to the Internet through a modem connected to your telephone line. You need to set up the dial-up connections software in order to connect with your Internet provider.

In most cases, trying to connect in EndNote will start up your dial up software automatically. Some networking packages require that you establish the dial-up connection manually before trying to connect in EndNote.

Problems Finding the Host

There are a few possibilities for what could be wrong if EndNote cannot find the host server:

- The domain name specified in the connection file is wrong.
- There may be a problem with your network's Domain Name Server.

If the connection file has worked in the past, the problem may lie with the Domain Name Server. If you have just made the connection file yourself and it's never worked before, you probably entered the wrong Server Address.

If you suspect problems with the Domain Name Server, contact your network administrator.

Problems Connecting

Once the host is found, EndNote tries to connect. It sends a connection request to the host and waits for up to two minutes for a reply. It may receive none, or it may receive a refusal immediately. In the first case you will see a time-out error message, and in the second case you will see a "host refused connection" error message.

If you wait for two minutes and receive a time-out message, the online computer is probably down for some reason. Try again later.

If you receive a refusal message, and this happens no matter which connection file you try to use, you are most likely behind a firewall.

Firewalls

Your system may be configured with a firewall to block certain ports. To connect to a database from behind a firewall, you must ask your network administrator to allow communication through the firewall for the port used by the online database you wish to search. You can open the connection file to find the appropriate server address and port number, as described below.

Depending upon the configuration of the firewall, the administrator may allow communication to all computers outside the firewall on the requested port, or communication to a specific server and port.

Proxy Servers

Your organization, or the online database provider, may use a proxy server to allow only valid users access to the organization's network and/or database. Contact a network administrator from the organization to find out whether a proxy server is used.

If you already have access to the remote network with your Web browser, check the configuration of your Web browser. Look for "proxies" or "proxy server." (See your Web Browser documentation to locate proxy server settings, as the location changes depending on which version you are using.) The configuration for a proxy server has two pieces of information: an address and a port.

Note: EndNote will automatically handle the proxy server when accessing http-based connections (PubMed and Web of Science™ Core Collection) if the proxy server settings are configured through the operating system's Internet options.

Finding the Server Address and Port

Before you contact your network administrator, check the appropriate EndNote connection file for the address of the server and the port specified.

To obtain the server address and port:

1. From the *Tools* menu, select *Connection Files*, and then select *Open Connection Manager*.
2. Select the appropriate connection file and click *Edit*.
3. In the Connection File window, click the *Connection Settings* panel for the server address and port.

Depending upon the configuration of the firewall, the administrator may allow communication to all computers outside the firewall on the requested port, or communication to a specific server and port.

Communicating with Local Database Servers or Gateways

Some universities and organizations license Z39.50 databases for use on their own servers, or for access from a local gateway. The company providing the databases will include client software for accessing the databases. Some Z39.50 servers are designed to respond only to requests from this client software. In other cases, the server must be configured to allow requests from software other than the supplied client program.

If your organization maintains Z39.50 databases, but you are unable to connect to them with EndNote, ask your network administrator if the database server supports client software other than that supplied by the database provider.

Problems Communicating with the Host

Once you are connected, the most common problem in communicating with a host server is a password problem. Check your password and user ID. Check the upper or lower case requirements. If a password is rejected, you will see an error message that says something like "Server has rejected initialization." See [Access-Restricted Databases](#).

The password and User ID requested by the host will generally not be your personal password and ID. It is usually the User ID and password assigned to your institution (the rare exception to this might be if your institution has a local copy of the database). These institutional User IDs and passwords are usually not shared with individuals within an institution. However, access may be granted to anyone connecting to the database from an IP address within the institution. If you are off-site and cannot access a database that you could access when onsite, use VPN to connect to your institution's network first, then try the connection file again. If you do not have VPN access to your institution's network, check with your network administrator.

Connection files do not use the same ports that a browser uses, so they will usually not go through proxy servers.

If you are still unable to connect to the database, you may be able to access it through a Web browser, then import the references through direct export or by saving a text file and importing the text file. See [Importing References Downloaded from Online Databases](#)

The Connection Error Dialog

When searching an online database, if there is a problem with the database, the search terms, or the connection file, EndNote presents an error message describing the source of the problem. The connection error dialog displays the original Z39.50 error message, if available, EndNote's translated version of that error, and any other message being sent directly from the server. You can find details of the communication between EndNote and the server in the Connection Status window (select *Show Connection Status* from the *Tools* menu), or in the connection log. See [The Connection Log File](#).

Problems With Retrieved Data

Blank records

If blank records appear in your reference list, it could be due to a number of causes. One thing to check is whether your filter settings in the connection file match the format of the retrieved records. Open the connection file and view the Templates section. Also show the Connection status window (*Show Connection Status* on the *Tools* menu), and set its view to show *Record Data*. The two formats need to match in order for the data to import.

Sometimes, when viewing the record data in the Connection Status window, you will notice that there is no bibliographic information for a reference that was retrieved. This happens sometimes where duplicate or blank entries remain in the online database. These can be ignored.

Asterisks in author names or titles

For some databases, diacritical characters in the author names and titles cannot be interpreted correctly when EndNote retrieves the references. In such cases, the diacritical characters are replaced with an asterisk (*). A "quick fix" for this is to use the [Find and Replace](#) command in the *Library* menu to change the names with the asterisks to the name with the diacritical characters as they should be.

You may be able to permanently fix the problem by changing the Text setting in the connection file to use a text encoding that matches the online database. Whether this will work depends on the database you are connecting to. Older databases may not support special characters. See [The Connection Settings](#).

In exported references, extended characters appear as boxes

You've downloaded references from an online source, and they display correctly in EndNote. But when you export those references to a text file, and open the file with a text reader such as NotePad, all extended characters (for example, umlauts) appear to be corrupted. What happened?

Your online data source likely provided each extended character as two characters – a base letter and a combining character – rather than as a single, precomposed character. For example, an extended character can be composed of an (a) and then the combining umlaut character (") rather than as a single character (ä).

Both character representations are perfectly valid, so initially there is no indication of a problem. Many applications, including EndNote and WordPad, can appropriately display extended characters in either form, but you happen to be using an application that cannot. Windows applications display a box character to indicate that the font or application cannot render the appropriate character.

Even though the characters do not display correctly in the current application, they are still valid. Try opening the file with a different application.

The adoption of Unicode has solved this problem for many modern applications. If the characters do not appear properly in programs you need to work with, you may also need to install a language pack that supports those characters. See [Working with Multiple Languages](#).

Errors Encountered While Retrieving References

For various reasons, some references cause errors during retrieval. If EndNote encounters an error while retrieving references from an online source, it stops the retrieval process. In order to get the rest of the references, it is best to submit the search again, and this time request the references start downloading with the one after the reference which might have caused an error. For example, if the error appeared while the tenth reference out of fifty was being retrieved, submit the search again, and when prompted, ask only for references 11 through 50 to be retrieved.

EndNote typically retrieves references in batches, for speed and memory reasons. However, some servers are too slow, or their record data is too large, to support batch downloads. If you find that your connection with a service provider fails after approximately the same amount of data each time you attempt to download references, you can try turning off batch processing. You will need to open the connection file you are using, as described under [Editing a Connection File](#), and deselect the Batch Download option described under [The Connection Settings](#).

Troubleshooting Cite While You Write

For a more extensive list of issues and updates concerning Cite While You Write, go to: <https://support.clarivate.com/Endnote/>.

See these topics for help with common Cite While You Write issues:

- [Cite While You Write Installation Problems](#)
- [Bibliography Is in the Wrong Font](#)
- [Word Crashes or Gives an Error When Inserting a Large Number of Citations](#)
- [Garbled ADDIN EN.CITE Code](#)
- [Inserted Citations Disappear, but Reference List is Created](#)

Cite While You Write Installation Problems

EndNote commands are available for Microsoft Word 2016, 2019, or Office 365 (locally installed desktop version only). EndNote commands appear in Word on an EndNote 20 tab.

If you do not see these commands, Word support was not correctly installed. If you installed Microsoft Word after installing EndNote 20, you should either reinstall EndNote or use the Customizer to install the Cite While You Write files. Try these three ways to install Cite While You Write (after each attempt, start EndNote and then Word to check for an EndNote 20 tab in Word).

Use the Customizer

1. Make sure no applications are running—including virus protection software and any Microsoft Office applications.

2. Start the EndNote program.
3. From the *EndNote 20* menu, select *Customizer*.
4. On the *Component Selection* dialog, select the components you want to install (or keep installed) and click *Next*. These should include the *Cite While You Write* component.
5. Continue through the installation.

Install the Cite While You Write Files Manually

If you have a custom startup folder for Word, the Customizare may be unable to install the Cite While You Write files to that custom folder. If this is the case, try installing the files manually as described below.

Determining the Microsoft Word Startup Folder

Word normally uses a default startup folder. For example, for a local installation of Office 365, the location would be—

Macintosh HD/Library/Application Support/Microsoft/Office 365/User Content/Startup/Word

However, Word's startup folder location could have been changed. If you are unsure which startup location is being used, or to change the startup location, use these instructions.

To determine the path of Word's Startup Folder:

1. Start Microsoft Word.
2. From the *Word* menu, select *Preferences*.
3. Select *File Locations* and look at the *Startup* line to see the path for the designated startup folder.
4. If the *Startup* line is blank, it should be set to the default location. If you would like to change the startup folder location, select the *Startup* line, click *Modify*, select the desired folder, and save your changes. We recommend using the default folder location.
5. *Quit* Word. This step is important!

Copy the Cite While You Write Bundle to the Startup Folder

You need to copy files as described below.

To install support for Word 2016 (version 16.xx) or 2019, or for Office 365:

1. Navigate to the *//Applications/EndNote 20/Cite While You Write* folder.
2. Select *EndNote CWYW Word 16.bundle*, then type $\text{⌘}+\text{C}$ to copy it to the Clipboard.
3. Navigate to the Word startup folder and paste the *EndNote CWYW Word 16.bundle* there.

To install support for Word 2016 (version 15.xx):

1. Navigate to the *//Applications/EndNote 20/Cite While You Write* folder.

2. Select *EndNote CWYW Word 2016.bundle*, then type ⌘+C to copy it to the Clipboard.
3. Navigate to the Word startup folder and paste the *EndNote CWYW Word 2016.bundle* there.

When word processor support is correctly installed, you will see an EndNote 20 tab in Word.

CWYW Keyboard Commands for Word

These keyboard commands are available when you use Cite While You Write with Microsoft Word. The table below shows the initial settings, but you can change the key command assignments. See [Keyboard Shortcuts in Word](#).

Note that:

- Control+1 is used for both Return to Word and Go to EndNote. The program determines which application is currently active and switches to the other application.
- Some of these commands are available from Word and from EndNote.
- While you can change key assignments, keep in mind that most other key combinations are currently already in use in both EndNote and Word.

Cite While You Write Command	Key Command
Return to Word	Control+1
Go to EndNote	Control+1
Insert Citation(s)	Control+7
Insert Selected Citation(s)	Control+2
Insert Note	Control+0
Insert Figure(s)	None
Update Citations and Bibliography	None
Configure Bibliography	Control+3
Toggle Instant Formatting	None
Configure Instant Formatting	None
Group References by Custom Categories	None
Configure Categories	None
Edit & Manage Citation(s)	Control+6
Edit Library References	Control+5
Convert to Unformatted Citations	Control+4
Convert to Plain Text	None
Export Traveling Library	Control+8
Manuscript Matcher	None
Cite While You Write Preferences	Control+9
Help	None

I Don't See the Correct EndNote Tab in Word

If you see an EndNote tab with a more limited set of commands instead of an Endnote 20 tab in Microsoft Word, your Application preference has been changed to use an EndNote online library instead of your desktop library.

Use the Application tab in the Word Cite While You Write preferences to indicate which version of EndNote to use when you use Cite While You Write.

- The EndNote 20 tab is for desktop version of the EndNote application.
- The EndNote tab is for the online version of EndNote.

To select the appropriate application:

1. On the *EndNote* or *EndNote 20* tab in Word, select *Preferences*.
2. Click the *Application* tab.
3. Select the appropriate application: *EndNote* (desktop) or *EndNote online*.

The system adds an EndNote 20 tab to Word's Tabs when you select the EndNote menu option; the system adds an EndNote tab when you select the EndNote online menu option.

Note: To use the EndNote online option, you must have created an EndNote account.

Bibliography Is in the Wrong Font

When EndNote creates formatted citations and bibliographies, by default it follows the Word Normal style for the document in choosing fonts. However, rarely you may see a bibliography appear with an unexpected font. This will happen if the last paragraph for the document was set to a style other than Normal before the first EndNote citation was inserted.

In a new document, there is no Word style called EndNote Bibliography or EndNote Bibliography Title, and no text or additional styles based on them. These Word styles appear in the document *after* the first EndNote citation is inserted and a bibliography is formatted. The EndNote Bibliography style's font will be based on the font used in the last paragraph mark in the document. So, if I had accidentally set the last paragraph in my document to use the Heading 1 style, then inserted my first EndNote citation and formatted the bibliography, all the references in my bibliography would be formatting with the font used for the Heading 1 style.

One workaround for this problem is to transfer your old document to a new one without the EndNote styles in it.

1. Create a new empty document with only one line/paragraph in it, and be sure that line is set to the Normal style. Use the ¶ button in Word to see the paragraph marks in the document; there should be only one.
2. Go back to the original document and *copy everything above the bibliography* from the old document to the new document. Be very careful not to include any of the bibliography codes when you copy to the new document.

3. *Paste* the old text into the new document.
4. **Save** the new document with a **new name**; do not use the name of the original document. You may still need the original document later.
5. In the new document, on the EndNote tab, click *Update Citations & Bibliography*. EndNote will create a new bibliography at the end of the document and new EndNote styles for Word based on the normal style used for the last paragraph of the new document.
6. Continue working in the new document as a replacement for the original document.

What If Other Formatting Changed?

If you had used custom styles in your original document that did not carry over to the new document, you can copy them to the new document using Word's Organizer.

1. *Close* the original document, if it is still open.
2. Make a backup copy of your new document, just in case you run into problems.
3. In the new document, select *Templates and Add-ins* from the *Tools* menu.
4. Click on the *Organizer* button.
5. Styles used in your open document (the new document) show at the left. Styles for the Normal.dotm template show at the right. Click the *Close File* button under the Normal.dotm list. It will change to Open File.
6. Click the *Open File* button at the right.
7. Locate and open your original document. You should now see the list of styles used in your original document on the right side.
8. Select the styles you want to use from your original document at the right and click the *Copy* button, then confirm the choice to copy the styles. This will copy those styles to the new document, which should be showing at the left. Be careful **not** to copy any style starting with "EndNote."
9. *Close* the *Organizer*.

You should now see the same formatting you had for your original document for any styles you copied.

Garbled ADDIN EN.CITE Code

When you insert a citation into a Word document, the citation is embedded in field codes, such as:

```
{ ADDIN EN.CITE
<EndNote><Cite><Author>Pepperberg</Author><Year>2009</Year><RecNum>2299</RecNum><Pages>32</Pages><DisplayText>(Pepperberg, 2009, p. 32)</DisplayText><record><rec-number>2299</rec-number><foreign-keys><key app="EN" db-id="50wxdpzd9vd5r7e9t5b595djrfpttrw9avp" timestamp="1566392612" guid="c7917588-b354-4ba4-8cdf-3fd39f717fcd">2299</key></foreign-keys><ref-type name="Electronic Book">44</ref-type><contributors><authors><author>Pepperberg, Irene M.</author></authors></contributors><titles><title>Alex & me: How a scientist and a parrot discovered a hidden world of animal intelligence — and formed a deep bond in the process</title></titles><num-vols>Kindle</num-vols><edition>Kindle</edition><keywords><keyword>African gray parrot Behavior.</keyword><keyword>Cognition in animals.</keyword><keyword>Animal communication.</keyword><keyword>Human-animal relationships.</keyword></keywords><dates><year>2009</year><pub-dates><date>March 15, 2013</date></pub-dates></dates><pub-location>New York, NY</pub-location><publisher>Scribe Publications</publisher><isbn>ASIN: B00APOWOXC</isbn><urls><related-urls><url>http://www.amazon.com/Alex-scientist-discovered-intelligence-ebook/dp/B00APOWOXC/ref=sr_1_2?s=digital-text&ie=UTF8&qid=1363823581&sr=1-2&keywords=alex+%26+me</url></related-urls></urls></record></Cite></EndNote>}
```

Field codes hold reference information for your formatted citations, and are typically hidden. See [Field Codes in Microsoft Word](#) for more information on field codes.

To hide field codes in Word:

1. In Word, go to the *Word* menu and select *Preferences*.
2. Click the *View* button.
3. In the *View* window, clear the box titled *Field codes instead of values* under the *Show in Document* heading.
4. Close the window to save your changes.

Your citations will now appear correct in the document. Field codes are still there, and are necessary, but they are hidden from view.

Inserted Citations Disappear, but Reference List is Created

Most likely, you are formatting with a footnote output style that doesn't include a citation definition, such as the Chicago 17th Footnote style. To fix this, format the bibliography with a style that uses in-text citations instead of footnotes.

To reformat with a different output style:

1. On the *EndNote 20* tab in Word, click the *Configure Bibliography* button .
2. In the drop-down output style list, select the output style you would like to use. Click the *Browse* button to choose from the list of installed styles. (To add styles, see [Installing Additional Output Styles](#).)
3. Click *OK* to format the document using the selected style.

If you are using an author/year type of output style, and the reference you are citing does not include an author or a year, there will be nothing to display in the citation. The citation will not show up, although the full form will appear in the reference list at the end of the document.

Word Crashes or Gives an Error When Inserting a Large Number of Citations

EndNote uses Word's hidden field codes when formatting citations, and inserts all the reference information for all of the grouped citations in these codes. However, there is a limit to the amount of text that Microsoft allows in a single set of field codes. You may reach the maximum limit when you attempt to insert 20 or more references into a single grouped citation that have extensive information in them (such as large abstracts).

To avoid this issue, try not to insert a large group of citations all at once. Instead, insert a small group of references, then a space, and then insert another small group of references. This avoids having a single group of formatted citations that would exceed Word's field code limitations. When the document is finished, you can create a copy of the document with field codes removed and manually adjust the reference to remove the spaces. See [Removing Field Codes](#).

Another option is to reduce the amount of text that would be in the field codes by editing the reference(s) to remove unnecessary notes or text. For extremely large abstracts, consider moving the abstract to a Word document or other text file and attaching that file to the reference. Almost any type of file can be attached to an EndNote record, not just PDFs. Attachments are not included in field codes.

When you use Insert Selected Citations, or highlight multiple citations to insert from the Find Citations dialog, EndNote limits you to 250 citations in a single group.