

<sup>®</sup>  
**ENDNOTE**

**X**

FIND. STORE. CREATE. SHARE.  
FROM ANYWHERE.

**MACINTOSH • ONLINE USER GUIDE**



THOMSON REUTERS™

# ONLINE USER GUIDE

## VERSION X7 FOR MACINTOSH

### ABOUT THIS GUIDE

This guide provides a basic overview of using EndNote. It assumes that you know how to use your word processor and the Apple operating system. For help on these topics, consult the documentation that comes with these products.

For additional information about using EndNote, consult EndNote Help. From EndNote's Help menu, select EndNote X7 Help to view help topics. While using EndNote, press the Question Mark ? icon to view a help topic about the current window. You can also access help by holding down the Command+Shift+? Keys.

A printable help guide called **EndNoteX7MacHelp.pdf** is available in the **EndNote X7** folder. It contains all the help topics compiled into a PDF file.

Copyright © 2013 Thomson Reuters

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

#### TRADEMARKS

EndNote is a registered trademark of Thomson Reuters. Cite While You Write is a trademark of Thomson Reuters.

Apple, Macintosh, and Pages are trademarks of Apple Computer, Inc.

Microsoft is a registered trademark of Microsoft Corporation.

SKIM is a PDF Reader and Note-taker for OS x. Copyright (c) 2006-2013. All rights reserved.

PDF technology in EndNote is powered by PDFKit licensed under the MIT license.

All other product and service names cited in this manual may be trademarks or service marks of their respective companies.

#### Notice regarding legal use of downloaded reference data

EndNote gives you the capability to import references from online databases and store them in your personal EndNote libraries. Some producers of online reference databases expressly prohibit such use and storage of their data. Others charge a 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.

# CONTENTS

Contents .....	iii	CHAPTER 4: Creating a New Reference.....	4-1
<b>Chapter 1: Welcome to EndNote X7</b> .....	<b>1-1</b>	CHAPTER 5: Searching an EndNote Library.....	<b>5-1</b>
EndNote—Your Complete Reference Solution!.....	1-1	Searching for a Set of References.....	5-1
What’s New in EndNote X7.....	1-1	Creating a Smart Group.....	5-2
About the Demonstration Version of EndNote.....	1-2	Creating a Combination Group.....	5-3
Customer Services.....	1-2	<b>Chapter 6: Searching an Online Database</b> .....	<b>6-1</b>
Register Your Copy of EndNote.....	1-2	Selecting a Display Mode.....	6-1
EndNote Online Help.....	1-2	Searching a Database.....	6-1
Customer Service.....	1-2	Reviewing References.....	6-2
Technical Support.....	1-3	Finding Full Text for a Reference.....	6-3
Online Support.....	1-3	<b>CHAPTER 7: Importing and Exporting References</b> .....	<b>7-1</b>
International Customer and Technical Support.....	1-3	Searching a Database and Saving the References.....	7-1
ADA VPAT.....	1-3	Selecting an Import Filter.....	7-2
<b>CHAPTER 2: Working in an EndNote Library</b> .....	<b>2-1</b>	Downloading Records from PubMed to EndNote.....	7-3
Starting EndNote and Opening the Examples Library.....	2-1	Exporting Records from Web of Science to EndNote.....	7-4
Navigating the Library Window.....	2-2	Searching for Surnames that Contain Particles and Spaces.....	7-4
Selecting a Library Window Layout.....	2-4	<b>CHAPTER 8: Using EndNote While Writing</b>	
Sorting References.....	2-4	<b>a Paper in Microsoft Word</b> .....	<b>8-1</b>
Selecting and Opening a Reference.....	2-4	Inserting EndNote References.....	8-1
Closing a Reference.....	2-5	Selecting a Bibliographic Style.....	8-3
Working with PDF Files.....	2-5	Editing a Citation.....	8-4
Saving References to a Custom Group.....	2-6	Index.....	vi
Syncing Your Desktop Library with Your Online Account.....	2-7		
<b>CHAPTER 3: Setting EndNote Preferences</b> .....	<b>3-1</b>		
Setting Sync Preferences.....	3-1		
Setting PDF Handling Preferences.....	3-2		
Setting Display Font Preferences.....	3-2		

# CHAPTER 1: WELCOME TO ENDNOTE X7

## EndNote – Your Complete Reference Solution!

### EndNote as an online search tool

Search online bibliographic resources and retrieve references directly into your EndNote library. You can also export references directly to EndNote from your favorite online resource.

### EndNote as a reference and full text organizer with a collaborative Web tool

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

- Synchronize your references, file attachments, and figure attachments with your EndNote online account.
- Group references according to your research projects and attach up to 45 files per record for managing related materials.
- Locate full text PDF documents or create a reference when importing a PDF file.
- Import and rename PDF documents.
- Share groups with other EndNote users easily and manage your ResearcherID publication list.

### EndNote as a bibliography maker

Cite While You Write takes the pain out of citing and formatting references in Apple Pages '09 and Microsoft Word. You can also create bibliographies for other word processors using Format Paper (RTF files).

## What's New in EndNote X7

- Set your preferences to create clear, organized, and easily searchable names for your PDF documents as you import them by defining your settings in PDF Handling preferences.
- Add subheadings to your bibliography in Microsoft Word using your own categories or predefined by reference type in an output style – great for distinguishing primary and secondary sources.

- Better organize your research materials by using new reference types such as Interview, Podcast, Conference Paper, and Press Release.
- Reorder column headings in the Library reference list by using drag-and-drop and customize which columns display with just a control-click.
- Use improved Sync that occurs in the background so that your work is continuously backed up and always available online and on your iPad.
- Quickly identify groups that are shared in your EndNote online account after the Sync process completes in EndNote desktop.
- Use new options to control the ratings and read/unread field display.
- Copy the record number to another field in a reference using the Copy feature from the Change/Move/Copy Fields command.
- Review program updates automatically.
- Use Quick Search to quickly search your entire library by typing a single word or a phrase into the text box. EndNote uses an implied AND Boolean operator when you enter two or more adjacent terms.

### Activation Changes

Macintosh and Windows serial numbers and product keys are now cross-platform compatible. You can use the same key on three computers regardless of platform. Just download the additional installers at <http://endnote.com>.

Reference Manager (versions 8 - 12) can purchase EndNote at the upgrade price and use their original upgrade serial numbers to unlock EndNote.

### Education & Training—View Our What's New Video

Thomson Reuters recommends that you view our What's New video at [www.endnote.com/training](http://www.endnote.com/training) or on our YouTube channel at [www.youtube.com/endnotetraining](http://www.youtube.com/endnotetraining).

## About the Demonstration Version of EndNote

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

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

With the EndNote Viewer you will not be able to:

- Add or edit references in a library that has 10 or more references already in it.
- Format more than 10 citations in a paper.
- Retrieve more than 10 references from a remote database.
- Import more than 10 references.
- Export more than 10 references.
- Synchronize references in an EndNote desktop library with references in your EndNote online library.

To purchase an unrestricted version of the EndNote program, open your trial version, and then click the **Yes** button when the EndNote dialog box appears with the message:

“Would you like to activate the full version of EndNote?”

You will need to purchase a product key in order to activate the unrestricted version of EndNote.

If you are upgrading from a previous version of EndNote, then you need to supply the product key or serial number and provide your name in the Name field.

## Customer Services

### Register Your Copy of EndNote

Register your software by either 1) creating or upgrading your EndNote online account the first time that you start EndNote or 2) by going to <http://www.endnote.com/register>.

Registered users receive:

- Free technical support
- Special upgrade offers
- Notification of new EndNote versions that are compatible with the latest version of your word processor

## EndNote Online Help

### Online Help

From EndNote’s Help menu, select **EndNote X7 Help** to view the various help topics. You can also click the Command+Shift+? keys from anywhere in EndNote to view the various help topics.

### Compiled Help PDF File

The online Help system is available as a compiled, printable PDF document called “**EndNote X7 Help User Guide**”. You can find the file in the online help system in the help topic called Overview of Thomson Reuters EndNote. Go to the Introduction in the table of contents to find the guide.

It is also available at Applications/EndNote X7 and is called **EndNoteX7MacHelp.pdf**

### Release Notes

For documentation updates and correction notes, refer to the **Readme.txt** file installed in the EndNote X7 folder.

## Customer Service

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

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

### Sales Information

**Phone:** 1 800 722 1227 (Toll Free)

**Web/Email:** <http://www.endnote.com/contact>

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

**Phone:** 800 336 4474 (country code is 01) (Press 3 at the prompt)

**Fax:** 215 386 2911 (country code is 01)

**Web/Email:** <http://www.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 Macintosh system, EndNote, and word processor. To find the EndNote version and serial number, start EndNote and select **About EndNote X7** from the EndNote menu.

### For web / e-mail or phone contact:

- <http://www.endnote.com/contact>

### For technical support tips:

- Global Customer Support Center  
<http://science.thomsonreuters.com/support>

## Online Support

### EndNote Marketing Web Site

The EndNote Web site (<http://www.endnote.com>) contains:

- Free training options including online videos and Web classes
- Access to technical support knowledge base
- Information on the latest versions of EndNote
- Downloads for styles, filters, and connections
- And more ...

### EndNote Discussion Forums

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

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

You can also join the EndNote social network at the following Web sites:

- [www.facebook.com/EndNote](http://www.facebook.com/EndNote)
- [www.twitter.com/EndNoteNews](http://www.twitter.com/EndNoteNews)
- [www.youtube.com/endnotetraining](http://www.youtube.com/endnotetraining)

## International Customer and Technical Support

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

Go to <http://www.endnote.com/distributors> to find contact information for your local EndNote support.

## ADA VPAT

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

Visit our Web site at <http://www.endnote.com/vpat> to access the VPAT (Voluntary Product Accessibility Template) document that describes the accessibility features that address the Section 508 Standards.

The VPAT is an informational tool developed by industry and government to help facilitate the understanding of compatibility issues under Section 508.

## CHAPTER 2: WORKING IN AN ENDNOTE LIBRARY

This chapter covers the following topics.

- Starting EndNote and opening the examples library
- Navigating the library window
- Selecting a library window layout
- Sorting references
- Selecting and opening a reference
- Closing a reference
- Working with PDF files
- Saving references to a custom group
- Synchronizing your EndNote desktop library with your EndNote online library

### Starting EndNote and Opening the Examples Library

When you first install EndNote, a video will run explaining the many features of EndNote. After the video is over, you can open an existing examples library or you can create your first library.

#### To open the examples library:

1. From the File menu, select the Open Library command.
2. Select the **Sample\_Library\_X7.entx** file. This opens the **Sample\_Library\_X7.ent** file and opens the sample library in the EndNote application.

#### Or

1. Open Finder and go to the Applications folder.
2. Select the EndNote X7 application.
3. In the next column, select the Examples folder.
4. Select the **Sample\_Library\_X7.entx** file. This opens the **Sample\_Library\_X7.ent** file and opens the sample library in the EndNote application.

#### To create a new library:

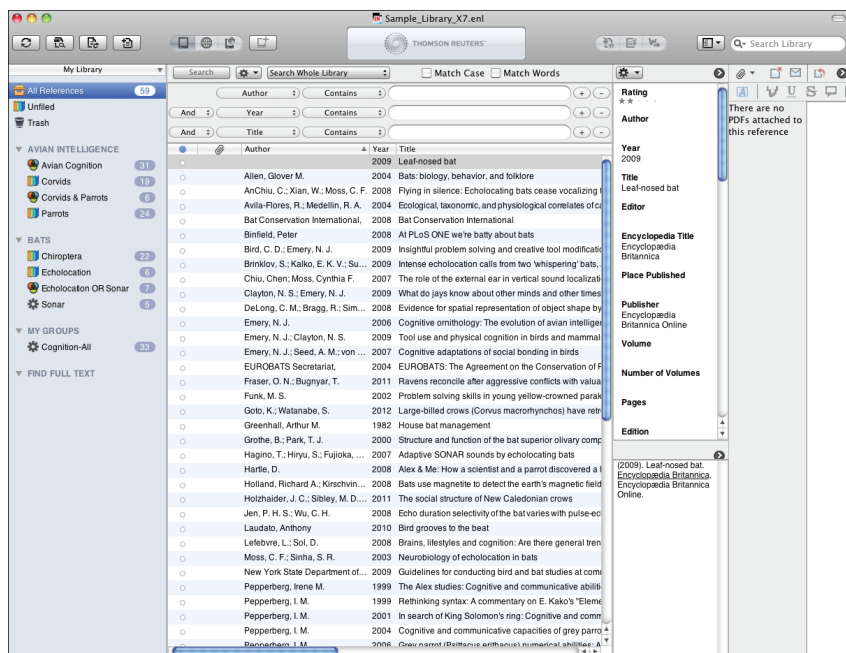
1. From the File menu, select the New command to open the New Reference Library dialog
2. In the Save As field, enter a name to identify your new library.
3. In the Where field, enter the destination on your hard drive where you want to save your new library.
4. Click the Save button to save your new library.

## Navigating the Library Window

When you open the sample library, you will see the library window listing all of the references that the library contains.

The Library window includes six work areas:

- Groups panel
- Reference List panel
- Preview panel
- Reference (Quick Edit) panel
- PDF Viewer panel
- Search panel



## Groups Panel

This panel displays various groups of references for easy retrieval such as:

- Custom groups
- Smart groups
- Combination groups
- Permanent groups
- Temporary groups

## Reference List Panel

This panel displays a multi-column list of references. By default, the first column in the reference list shows a Read / Unread indicator followed by:

- Read / Unread indicator
- Paper clip icon (for references that include an attached file)
- Author's last name, first name, initial (all names are shown)
- Year
- Title
- Rating
- Journal name or secondary title
- Last updated
- Reference type

You can change the order of the fields by using the drag-and-drop method. This is the easiest way to change the order.

You can also change the type of fields and the order of the fields that display in the list by going to Preferences and selecting **Display Fields**. Simply select a specific field for each column position.

## Preview Panel

You can see more details about a reference by highlighting the reference and selecting the **Preview** panel.

The Preview panel uses the current output style to display the selected reference as it is formatted in a bibliography. EndNote's output styles represent the rules for creating bibliographies for a variety of journals and other publications. The styles determine how your references look when you print, export, preview, or create bibliographies.



The Output Style menu displays your “favorite” output styles, but you can choose **Select Another Style** to pick from other installed files. A typical installation installs only the most popular output styles, but more than 5,000 output styles are available in EndNote.

### Reference (Quick Edit) Panel

You can quickly edit your references by clicking inside the **Reference** panel. Most functionality is the same as working in the Reference window. Enter text in a field by clicking on the field. All commands are available via the menus including contextual menus.

The Reference panel displays the contents of the highlighted reference. Each part of the reference is stored in its own field. The reference type is displayed below the title bar.

### PDF Viewer Panel

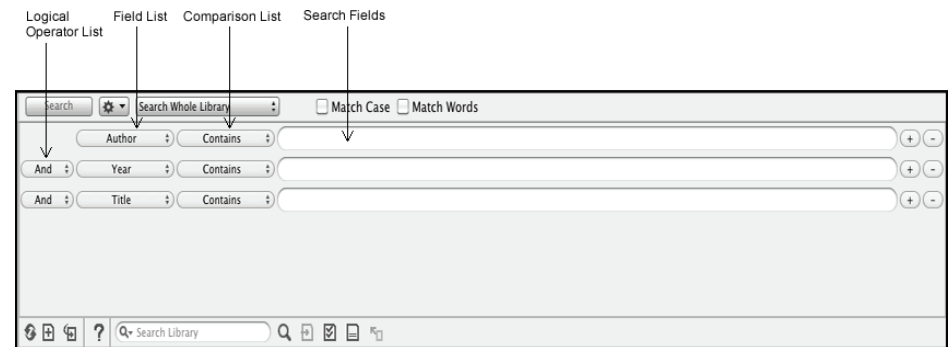
You can open and view PDF files attached to the current reference. See Working with PDF Files for more information.

### Search Panel

You can search for references from a particular EndNote library. By default, the Search panel displays at the top of the EndNote window. Click the **Show Search Panel** and **Hide Search Panel** buttons to toggle between the two views.

The Search panel consists of the following items:

- Logical Operator List
- Field List
- Comparison List
- Search Fields
- Action Menu
- Match Case
- Match Words



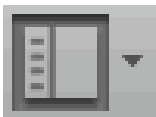
To begin a search of your EndNote library, select the group of references you want to search and then select **Search Library** from the Tools menu.

To begin a search of an online database, go to the Tools menu and select **Online Search**.

## Selecting a Library Window Layout

The view of the library window depends on the layout that you select from the Layout menu located in the upper right-hand corner of the Library window.

There are nine layout positions.



**Show Search / Hide Search:** Either shows the Search panel or hides the Search panel.

**Show Groups / Hide Groups:** Either shows the Groups panel or hides the Group panel.

**Bottom - PDF:** Displays the PDF Viewer panel below the reference list in a split arrangement.

**Bottom - Split:** Display the Preview, Reference, and PDF View panels below the reference list in a split arrangement.

**Bottom - Preview:** Displays the Reference panel below the reference list. The Preview panel is below the reference list.

**Right - PDF:** Displays the PDF Viewer panel to the right of the reference list in a columnar arrangement.

**Right - Split:** Displays the Preview, Reference, and the PDF Viewer panels to the right of the reference list in a columnar arrangement.

**Right - Preview:** Display the Preview and Reference panels to the right of the reference list in a columnar arrangement.

**References Only:** Displays only the Groups panel and the reference list.

## Sorting References

You can sort references by clicking on a column heading such as Author, Year, or Title.

1. Click the Author column heading to change the current Author sort from ascending order to descending order.
2. Click the Year column heading to see the references sorted in descending order based on the year of publication.
3. Click the Read / Unread column heading to sort either your Read or Unread references.
4. Click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

## Selecting and Opening a Reference

You can work with specific references by selecting them in the library window.

There are different ways to select a reference, such as:

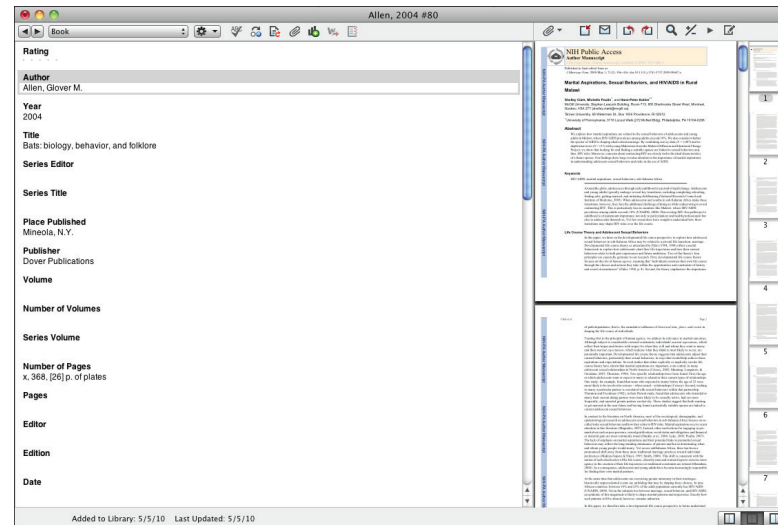
1. Clicking on the reference using the mouse.
2. Using the Up and Down arrow keys to move through the Reference list.
3. Typing the first few letters found in the field by which the library has been sorted.

To find and display a reference:

Open the reference by Glover M. Allen by pressing the Return key or by selecting the Edit Reference command from the References menu.

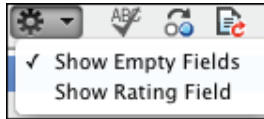
The Reference window opens to display all of the information associated with the reference. This is where you enter or edit information for a reference.

In this instance, let us assume that you have attached a PDF document to the Glover M. Allen reference. We will discuss in Working with PDF Files how to attached a PDF document to a reference.



## To view the rest of the reference:

- Use the mouse to scroll up and down the Reference window.
- Press the **Tab** key to move forward from one field to the next.
- Press **Shift+Tab** to move backward through the fields.
- Click the **Show Empty Fields** button to toggle between showing all fields in the reference or only those fields that contain data.



## Closing a Reference

You can close a reference in one of these ways:

- Click the **red close** button in the upper left-hand corner of the Reference window.
- From the File menu, select **Close Reference**.
- From the keyboard, press **Command+W**. EndNote prompts you to save your changes

## Working with PDF Files

You can open, view, and annotate PDF files attached a reference.

### To attach a PDF file to a reference:

1. Select any reference in the reference list.
2. Double-click the reference to open the Reference window.
3. Click the **paper clip** icon from the toolbar and then select **Attach PDF**.
4. Navigate to the Applications / EndNote X7 folder.
5. Select the file titled **EndNoteX7MacHelp.pdf**.

You can attach up to 45 files.

Note that EndNote automatically opens the first PDF attached to a reference when you select the **PDF Viewer** panel.

## PDF Viewer Toolbar

A toolbar appears within the PDF Viewer panel that displays the following icons:



Move your cursor over an icon on the toolbar to see Title (hover) text to explain its function. For example, Title text for the first three icons displays the message:

- **PDF Attachments:** View and add PDF attachments.
- **Open PDF:** Opens the PDF in a reference window / Close this PDF's reference window.
- **Email PDF:** Attach a copy of this PDF to an e-mail.

Use Control+click within an open PDF file to display a contextual menu that includes many of the options on the toolbar plus other options.

## Adding Sticky Notes

1. Go to a section in the PDF where you want to add a comment.
2. Select the text where you want to insert a comment.
3. Select the Sticky Note icon from the Annotation toolbar. To do this, first select the last icon (called Annotation toolbar) on the PDF Viewer toolbar to open the Annotation toolbar inside a PDF document.
4. Double-click the Sticky Note icon that appears in the PDF file to display a Sticky Note text box.
5. Enter your comments in the Sticky Note text box.
6. Click the X button that appears in the left-hand corner of the dialog to save your changes.

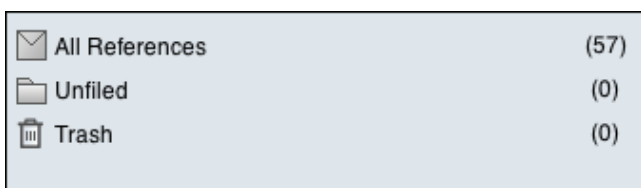
## Highlighting Text

1. Go to a section in the PDF where you want to highlight text.
2. Select the text within the PDF that you want to highlight.
3. Select the Highlight Text icon from the Annotation toolbar. The background color of the selected text changes to yellow.
4. Click the Close PDF button in the toolbar to close and to save your changes.

## Saving References to a Custom Group

The left panel of the library window lists groups of saved references. The first three groups are permanent.

- **All References** displays all of the references in the library.
- **Unfiled** contains references that are not part of a custom group.
- **Trash** contains references that you have deleted from the library. They are not permanently eliminated until you empty Trash.



**Note:** This section of the Groups panel will change after you initiate the Sync process for the first time. See *Syncing Your Desktop Library with Your Online Account* for more information.

Below the permanent groups, you can create group sets to organize up to 5,000 custom groups, smart groups, and combination groups in the library.

- You build a custom group by adding individual references to the group.
- EndNote automatically compiles a smart group based on your search strategy.
- A combination group consists of references derived from a smart group search of the contents of existing custom and/or smart groups.

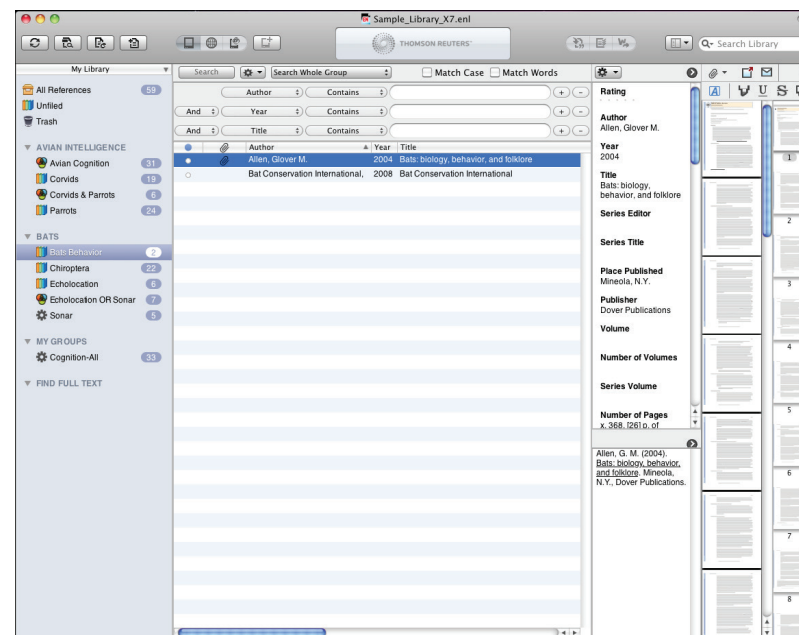
The sample library has several custom groups of references. Click the group names under the Bats group set in the left panel of the library window to view the references in each group.



**Note:** The number of results in the above example may differ from the number of results that your search returns.

To create a custom group and add references to it:

1. Select one of the groups in the Bats group set.
2. From the Groups menu, select **Create Group**. In the Groups panel of the library window, a group titled New Group is now highlighted for editing.
3. Type Bats Behavior as the group name, and then press **Return** or click in the reference list area to save the change.
4. Select the **All References** group to display all references in the library.
5. In the Author column, highlight the reference by Glover M. Allen and the reference by Bat Conservation International.
6. Drag the selected references to the new Bats Behavior group and drop them on the title of the group.
7. Select the **Bats Behavior** group to display the two references now included in the group.



**To move the group to a different group set:**

1. Select the group called Bats Behavior.
2. Drag and drop the group anywhere in the My Groups group set.

**To delete a custom group:**

1. Control-click on the group called Corvids to display a contextual menu, and then select the Delete Group command.
2. Click Yes when you are prompted to delete the group

EndNote deletes only the group. No references are deleted from your library. Many of the commands for managing groups are available from the Groups menu and from the Control-click contextual menu.

**Syncing Your Desktop Library with Your Online Account**

Your purchase of EndNote desktop entitles you to a two-year free subscription to EndNote online.

The Sync feature allows you to synchronize the references in your EndNote desktop library with the references in your EndNote online library. You must register and have an active EndNote online account to initiate the Sync process.

**I Already Have an EndNote Online Account**

1. Click the **Sync** button in the toolbar to go to an EndNote online login dialog.
2. Enter your EndNote online e-mail address.
3. Enter your EndNote online password.
4. Click **OK** to initiate the Sync process.

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 online login dialog. Later you can change the data in these fields if you ever change your e-mail address or password.

The first time you synchronize your EndNote desktop and EndNote online libraries, EndNote copies all references in each library to the other. If you have the same references in both libraries, these references will result in duplicates in the synchronized libraries.

Use the **Find Duplicates** command under the References menu to find and remove duplicates after your first synchronization.

**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 **Sync** button in the toolbar to go to an EndNote online login dialog.
2. Click the **Sign Up** button to go to a User Registration dialog.
3. Enter an e-mail address in the User Registration dialog. Retype your e-mail address, and then click the **Continue** button.
4. Enter your personal information in the required fields on the next User Registration form. For example, enter your name, a password, and a title.
5. Select the appropriate radio button to Opt in or Opt out for e-mail communication.
6. Click the **I Agree** button indicating that you agree to the Terms and Conditions.

Once you create your EndNote online account, EndNote populates the fields on the Sync Preferences page with your e-mail address and password that you entered during registration.

**Sync Status Button**

After the Sync process completes, the Groups panel includes a Sync Status button.

Click the button to open the Sync Stats dialog to review information about the EndNote library that you selected to synchronize with your EndNote online library. The dialog tells you the number of references and the number of file and figure attachments that EndNote updated during the last Sync process.

**Sync Conflicts**

If Sync conflicts occur during the Sync process, a Sync Conflicts group appears in the Groups panel.

A conflict occurs when you edit a reference in both EndNote desktop and in EndNote online between Syncs. As a result, EndNote desktop does not know which one you want to keep.

Select the Sync Conflicts group to open the Resolve Sync Conflicts dialog where you can resolve conflicts between references in your EndNote desktop library and your EndNote online library.

# CHAPTER 3:

## SETTING ENDNOTE PREFERENCES

This chapter covers the following topics.

1. Setting Sync Preferences
2. Setting PDF Handling Preferences
3. Setting Display Font Preferences

### Setting Sync Preferences

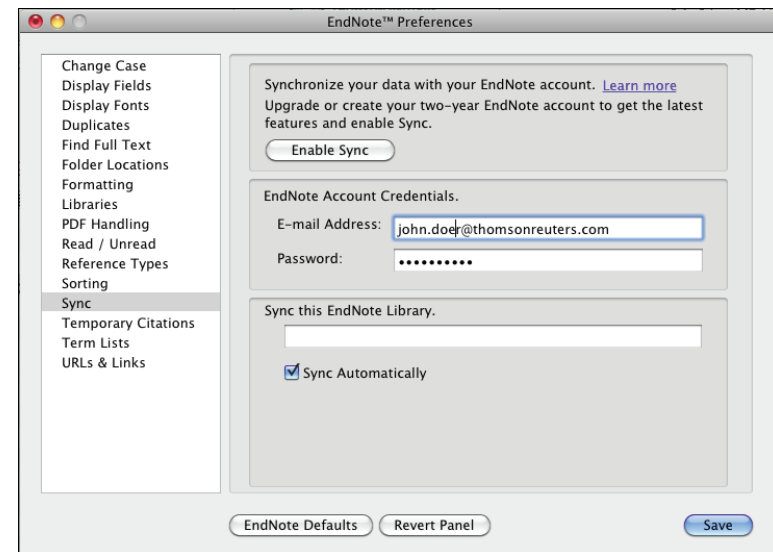
Sync Preferences allow you to set preferences so that:

- 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 check box.

To access Sync Preferences:

1. Go to the EndNote X7 menu, and then select Preferences.
2. Select the Sync option.
3. Click the Enable Sync button to activate your EndNote online account.

See *Syncing Your Desktop Library with Your Online Account* for instructions on how to proceed.

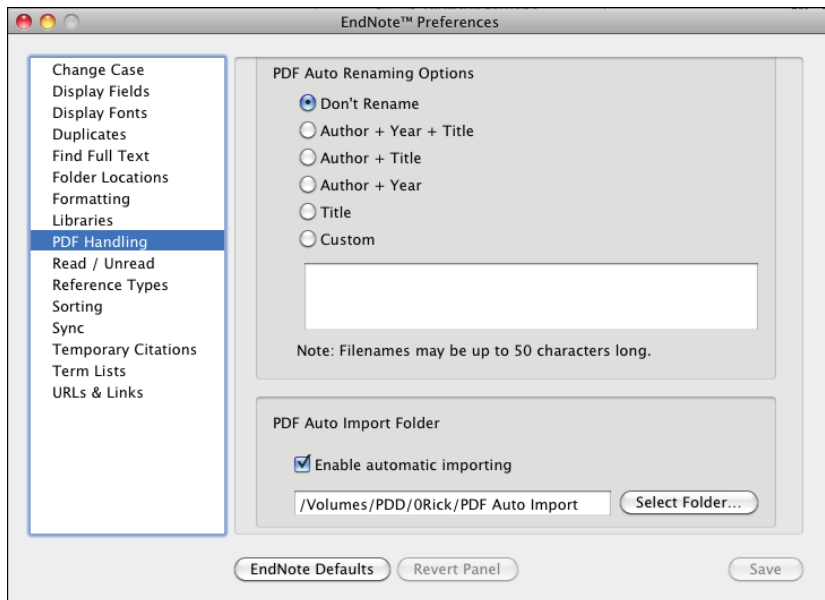


Once you create your EndNote online account, EndNote populates the fields on the Sync Preferences page with your e-mail address and password that you entered during registration. Later you can change the data in these fields if you ever change your e-mail address or password.

## Setting 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. You can create better organized and easily searchable names for your PDF documents as you import them into a library.

1. Go to the EndNote X7 menu and then select Preferences.
2. Select the PDF Handling option.



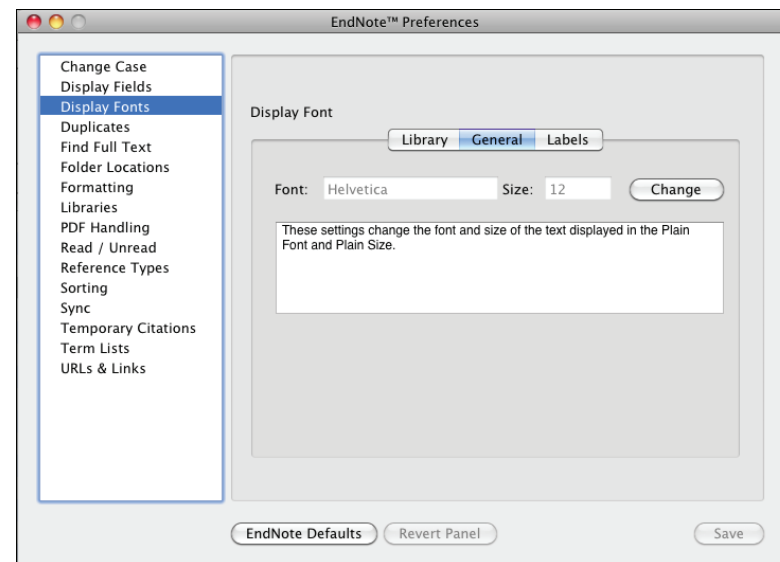
3. Select how you want to rename your PDF documents when EndNote imports them into a library. The default value is Don't Rename.
4. The Custom option allows you to create a personalized method of renaming PDF documents when they are imported into a library
5. In the PDF Auto Import Folder panel, select the Enable automatic importing check box to enable automatic importing of your PDFs into a library.
6. Select a folder on your computer or create a new folder when the Browser for Folder dialog displays.
7. Click OK to save your changes.

The “automatic” renaming process works in the background when you open an EndNote library and while you are working in a library. The product stores all imported PDFs in a group called Imported References in the Groups panel.

## Setting Display Fonts Preferences

You can select a different font to display text in the library window and in the Reference window.

1. Go to the EndNote X7 menu and then select **Preferences**.
2. Select **Display Fonts** to display a dialog with four tabs.
  - The Library tab determines the font and size EndNote applies to the references listed in the library window.
  - The General tab determines the font EndNote applies when you enter text in a field in the Reference, Output Styles, Connection File, and Import Filters windows. It also determines the font EndNote applies to text that you view in the Previews panel or when you print and copy bibliographic information from EndNote.
  - The Labels tab determines the font and size EndNote applies to the Reference window field labels.



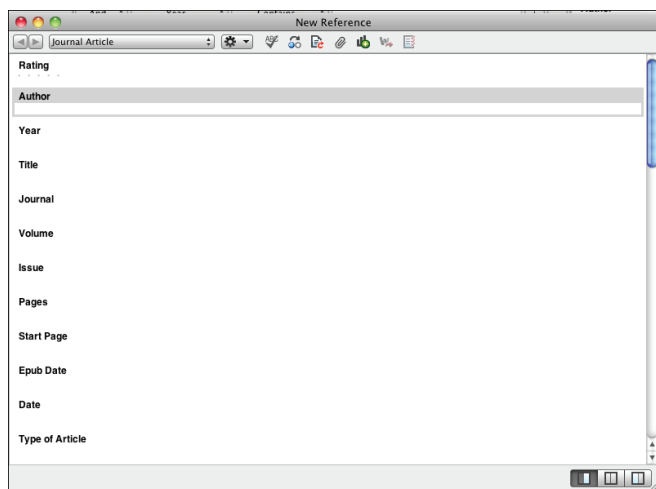
3. On the **Library** tab, click the **Change** button.
4. Select **Tahoma** or another font and font size. Close the Fonts dialog, and then click **OK** to save the change.
5. On the **General** tab, click the **Change** button.
6. In the Font list, select **Tahoma** or another font and font size. Click **Save** to save the change.
7. Click **OK** to leave the Preferences dialog.



## CHAPTER 4: CREATING A NEW REFERENCE

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

1. From the **References** menu, select **New Reference** to display an empty Reference window.



New references appear as Journal Article, the default setting. You can change the reference type to another type using the Reference Type list at the top of the Reference window. You can also change the default reference type from EndNote Preferences.

2. Select the **Book** reference type from the Reference Type menu.

Notice that the Field list changes to reflect the type of bibliographic information you would record for a book. Select other reference types from the list to see how the list of fields changes for each type of source.

Note that three reference types (Figure, Chart or Table, and Equation) are available specifically for cataloging picture files and object files. You can add File

Attachments, Figures, and Captions to any reference type.

Set the reference type back to Journal Article.

3. Enter author names for the reference. Individual author names must be entered one per line.

- a. Enter a personal author name with the first name first. With the cursor in the Author field, type:

**Tiberius Rex**

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

**Note:** You can turn on or off the auto-complete feature with EndNote Term List preferences. It is available for Author fields when you enter author names with the last name first.

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

The name appears in red text to indicate that it is a new name in the Author term list for this library. When you close the reference, EndNote adds the name to the Author term list and the red text will change to black.

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

**Judith S. Beck**

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

Press **Return** to accept EndNote's suggested author name.

- c. For the third author, enter:

**de Young, John Robert, Jr.**

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

Press **Return**.

- d. For the fourth author's name, enter:

**University of California,, Berkeley**

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

- Press **Tab** to accept the author name and move to the Year field. Type "2006" as the search term.
- Continue entering the reference as shown below using the Tab key to move to the next field and **Shift+Tab** to move to the previous field. You can also use the mouse to click in the desired field. If information is not provided for a particular field, leave that field empty.

**Title:** The scale and the feather:  
A suggested evolution

**Journal:** Paleontology

**Volume:** 3

**Issue:** 1

**Pages:** 125-128

**Date:** November 22

**Keywords:** Feathers  
Evolution  
Birds

No extra punctuation (such as parentheses around the year) is entered into the reference. EndNote adds the necessary punctuation to the references when it creates a bibliography.

Note that you can enter up to 64 K of text into the Abstract and Notes fields, which amounts to 10-12 pages of text.

- Attach a PDF file to the reference. You can attach almost any type of file to the File Attachments field of a reference.

From the References menu, select **File Attachments > Attach File** to display a file dialog.

- Navigate to the Applications / EndNote X7 folder.
- Notice the check box titled **Copy this file to the default file attachment folder and create a relative link**. Make sure that you select this box so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.
- Double-click on the file titled **EndNoteX7MacHelp.pdf** to insert the file into the File Attachments field. A file icon will appear in the field.



You can attach up to 45 different files to a single reference. Double-click the file icon to open the file with the default program for the file type.

7. From the File menu, select **Close Reference** to close the Reference window.
8. When prompted to save your changes, click **Yes**. Your new reference will appear in the Library window. A paper clip icon appears next to the reference to indicate an attached file.

**Notes:**

- In the Groups panel, notice that one reference appears in the Unfiled group. Select the **Unfiled** group to display the Tiberius Rex reference.
- You can easily locate those references that contain attached files by clicking the **paper clip** icon in the second column heading. EndNote sorts all records containing attached files to the top of the list.

## CHAPTER 5: SEARCHING AN ENDNOTE LIBRARY

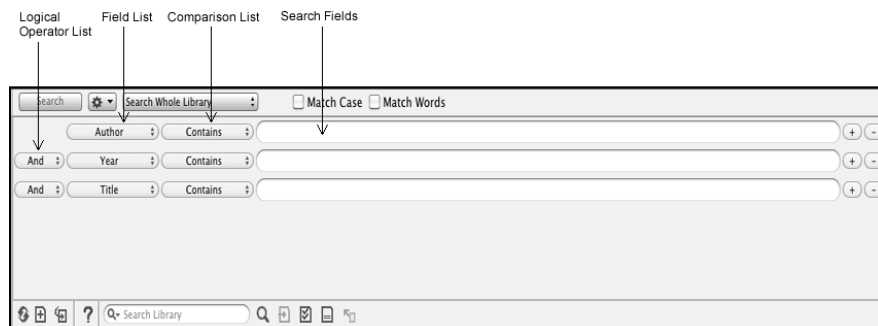
This chapter covers the following topics.

- Searching for a set of references
- Creating a smart group
- Creating a combination group

### Searching for a Set of References

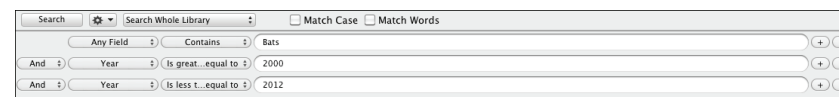
Let us assume that you want to generate a list of all references found in the sample library on Bats that were published from 2000 to 2012.

1. Select the **All References** group to display all references in the library.
2. Click the Show Search button if the Search panel is not already showing from the Layout menu. See *Selecting a Library Window Layout* for more information.



3. On the first search line:
  - a. In the Field list, select **Any Field**. This means that EndNote will search all fields.
  - b. In the Comparison list, the Contains comparison operator means that EndNote will search for the string of text anywhere in a field.
  - c. Type **“bats”** as the first search term in the Search Fields text box.

4. From the Field list in the second search line, select **Year**. From the Comparison list, select **Is greater than or equal to** and then type **“2000”** as the search term.
5. From the Field list in the third search line, select **Year**. From the Comparison list, select **Is less than or equal to** and then type **“2012”** as the search term.
6. Notice the **“And, Or, Not”** logical operator list at the beginning of each search line. Select the **And logical operator** between the three search lines. The Search panel should look like this:



This search will find all references published between 2000 and 2012 that contains the text “bats”.

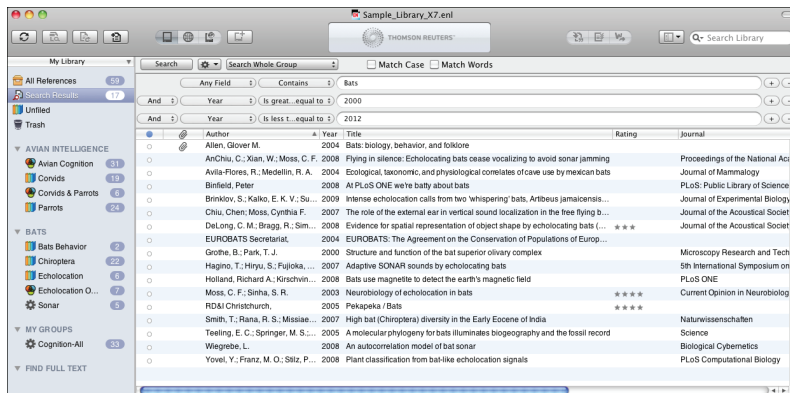
Notice that the following check boxes are not selected for this search:

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

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

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

The Search Results group should show approximately 17 references in the Groups panel.



Notice in the Groups panel that EndNote automatically retains the results in a Search Results group set. This makes it easy to display other sets of references, but still go back and display your most recent search results. EndNote replaces this temporary Search Results group the next time you run a search on the library. When you close the library, EndNote removes the group.

As you enter additional references into your library, you may want to keep track of the references that meet your search criteria. An easy way to do this is with a smart group.

## Creating a Smart Group

You could create a custom group, and then drag your search results to the group, but as you entered new references into your library, you would need to keep updating the custom group. Instead, create a smart group that updates automatically.

The Search panel should still display the search strategy to find “bats” for publication years 2000 to 2012.

### To use the search strategy to create a smart group:

- Select the **Bats** group set.
- Click the **Action** menu on the Search panel, and then select **Convert to Smart Group**.

A Converted Search text box appears under the group set called Bats.

- Type “Bats 2000-2012” to replace the Converted Search title, and then press **Return**.

If you have already clicked away from the editable title, you can Control-click on the title, and then select **Rename Group**.

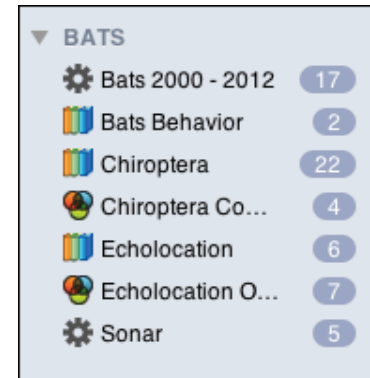
Each time you add a reference to the library, EndNote updates the smart group as needed.

## Creating a Combination Group

Let us assume that you want to combine all your custom groups and smart groups under the Bats group set in order to better organize your EndNote references. You can do this and use AND, OR, and NOT logic to create new, useful combined group sets.

### To create a combination group:

1. Select the **Chiroptera custom group** from the Bats group set.
2. From the Groups menu, select **Create from Groups** to open a dialog.
3. In the Group Name field, type “**Chiroptera Combo Group.**”
4. Go to the “**Include References In**” fields section of the dialog. In the first field, select Chiroptera from the Bats group set menu.
5. In the second field, select **Echolocation** from the Bats group set menu. Select the **OR Boolean** from Logical Operator list.
6. In the third field, select the **Sonar** smart group from the Bats group set menu. Select the **OR Boolean** from the Logical Operator list.
7. Click the **Create** button to save your changes. Your combination group should appear in the Groups panel.



Your combined group should contain 24 references from the following custom groups and smart groups:

- Chiroptera
- Echolocation
- Sonar

## CHAPTER 6: SEARCHING AN ONLINE DATABASE

With the Online Search command, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer. You can download the results of your searches into a temporary EndNote library or directly into your own EndNote library.

This chapter covers the following topics:

- Selecting a display mode
- Searching a database
- Reviewing references
- Deleting references
- Finding full text for a reference

### Selecting a Display Mode

Choose from three different display modes in the library window by selecting one of them from the toolbar.



#### Local Library Mode

This mode displays automatic groups, custom groups, and smart groups, but not Online Groups. This mode keeps you from inadvertently downloading references found during an online search into your currently open library. This is the default mode.

#### Online Search Mode

In this mode, only the online search groups are available. When you download references from an online database, the references are stored in a temporary library until you save them to a permanent library. You can then review the references without affecting your local library.

#### Integrated Library & Online Search Mode

In this mode, all local library commands and groups are available. When you download references from an online database, EndNote saves them to a group under the Online Search group set and to your open library.

If you decide that you do not want to keep the retrieved references, select them, and then move them to the Trash folder.

**Note:** We recommend that you use Online Search Mode if you do not want the references downloaded to the All References group.

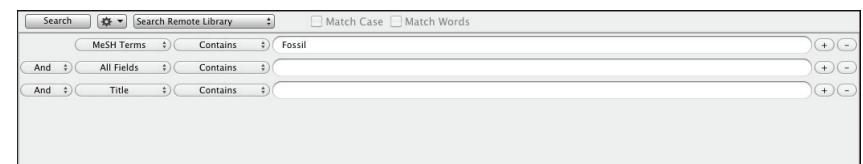
### Searching a Database

The next step is to enter the search terms to find the references you need. Searching an online database is very similar to searching an EndNote library.

1. Select **Online Search Mode** from the EndNote toolbar.
2. In the Groups panel, select **PubMed (NLM)**.

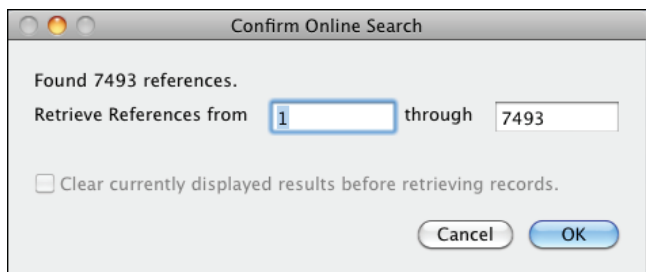
You can also go to the Tools menu and select Online Search to bring up the Choose a Connection dialog. Select PubMed (NLM) from the dialog.

3. Set the Field list for the first line to MeSH Terms, and enter “fossil” in the search field. The Comparison list for online searches is always set to Contains.



4. Click Search.

EndNote sends the search request off to the online database and displays a summary of the search results.



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

If the results seem too many, you can refine the search by clicking the Cancel button.

**Note:** The number of results in the above example may differ from the number of results that your search returns.

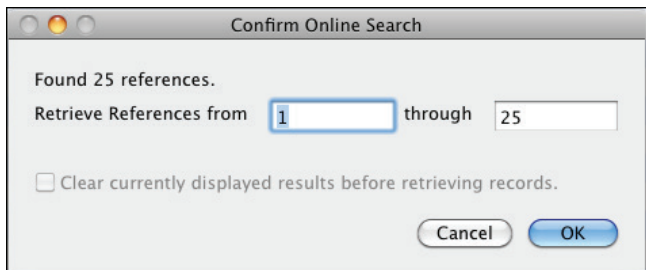
5. Click **Cancel** to return to the Search panel.

6. Set the operator at the beginning of the second search line to And.

7. In the second search line, select All Fields from the Field list and type "trilobite" as the search text.

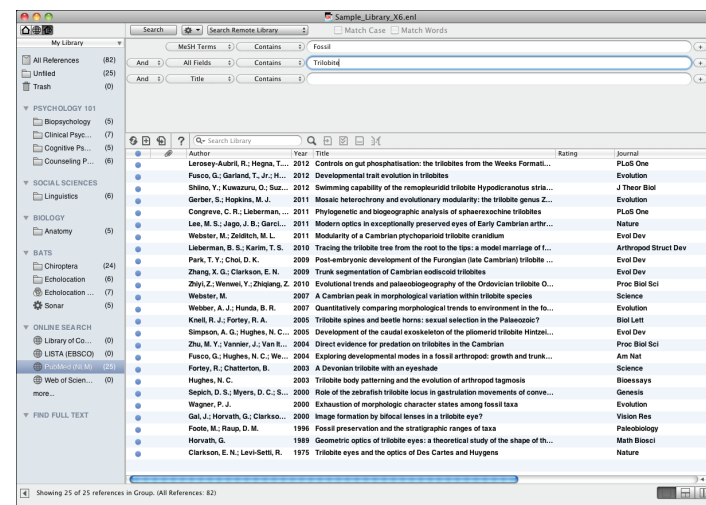
8. Click Search.

This time the system finds fewer references.



9. Click **OK** to retrieve and save the matching references.

EndNote downloads the references to the All References group and to a temporary PubMed (NLM) group.



**Notes:**

- The PubMed Web site is updated regularly, so you may find a different number of references than illustrated here.
- The temporary PubMed (NLM) group will reset back to zero references when you close the library.

### Reviewing References

Select the references that you want to keep and copy them to a permanent library. You may find that some of the references are not helpful for your research.

While you could open each reference individually from scans through the bibliographic data, you can also use the Preview panel or the Reference panel.

**To review the new references:**

1. Select a reference from the reference list.
2. Click in the Preview panel to display the reference.



3. Select the Show All Fields output style from the Output Style list.  
The Show All Fields style is not bibliographic, but represents all of the fields in your references. In the Preview panel, scroll through the data in the selected reference.

**Note:** If Show All Fields is not in the Output Style list, then choose **Select another Style** to go to the Choose a Style dialog. Select **Show All Fields** from the list.

## Finding Full Text for a Reference

Many online sources now supply both bibliographic information and the full text of the document you are referencing. EndNote locates full text files on the Web by using data stored in your references. Once found, EndNote downloads and attaches the files to the references.

Note that you can find the full text for a single reference or up to 250 references.

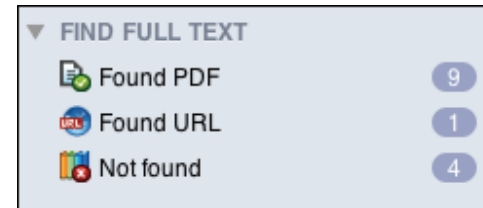
### To find the full text for a reference:

1. Select All References from the Groups panel.
2. Sort your references by author name in ascending order.
3. Select the first 15 references in the reference list.
4. From the References menu, select Find Full Text > Find Full Text.
5. Click **OK** to begin the Find Full Text search.

When the Find Full Text search is completed, EndNote removes the Searching group. Depending on the results, you may see a combination of three different groups under the Find Full Text group set.

- Found PDF
- Found URL
- Not found

In this case, EndNote was able to locate nine PDF documents for nine of the references and one URL for one reference.



In the reference list, you can see that each of the nine references now has a paper clip icon next to it indicating an attached file.

Select one of the references in the library window, and then open the PDF file in the PDF Viewer panel.

# CHAPTER 7:

## IMPORTING AND EXPORTING REFERENCES

Online searching is the easiest way to retrieve references from online databases, but not all information providers offer this option.

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

**This chapter covers the following topics:**

- Searching a database and saving the references
- Selecting an import filter and importing data into EndNote
- Downloading records from PubMed to EndNote
- Exporting records from Web of Science to EndNote

### Searching a Database and Saving the References

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

Science. 1966 Dec 9;154(3754):1333-1339.

Early Eocene Bat from Wyoming.

Jepsen GL.

A fossil skeleton of an early Eocene bat, the oldest known flying mammal, was found in southwest Wyoming. The bat is assigned to the new species *Icaronycteris index* of the suborder Microchiroptera. It was apparently of a young male whose body was buried in varved marls of the Green River Formation, on the bottom of Fossil Lake, about 50 million years

ago. The bones, some as slender as a human hair, show a few "primitive" characteristics such as a clawed index finger and a complete phalangeal formula, but the bat was fully developed - an anatomically precocious contemporary of the dog-sized polydactylous horse.

PMID: 17770307 [PubMed - as supplied by publisher]

To use this information effectively, you must consistently tag each piece of the information so that EndNote can direct it to the correct EndNote field.

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

For this section of the tour, we will use a text file of PubMed references that we previously downloaded in the tagged MEDLINE format. The file [pubmed\\_result.txt](#) is provided in the EndNote Examples folder. A single reference in the file appears like this:

```
PMID- 18198331
OWN - NLM
STAT- MEDLINE
DA - 20080116
DCOM- 20080313
LR - 20081121
IS - 0890-9369 (Print)
VI - 22
IP - 2
DP - 2008 Jan 15
TI - Understanding of bat wing evolution takes flight.
PG - 121-4
AD - Department of Genetics, Harvard Medical School, Boston, MA 02115, USA.
FAU - Cooper, Kimberly L
AU - Cooper KL
FAU - Tabin, Clifford J
```

AU - Tabin CJ  
 LA - eng  
 GR - F32 HD 052349/HD/NICHD NIH HHS/United States  
 GR - R37 HD 32443/HD/NICHD NIH HHS/United States  
 PT - Comment  
 PT - Journal Article  
 PT - Research Support, N.I.H., Extramural  
 PL - United States  
 TA - Genes Dev  
 JT - Genes & development  
 JID - 8711660  
 RN - 0 (Homeodomain Proteins)  
 SB - IM  
 CON - Genes Dev. 2008 Jan 15;22(2):141-51. PMID:  
 18198333  
 MH - Animals  
 MH - Chiroptera/\*genetics  
 MH - \*Evolution  
 MH - Forelimb/anatomy & histology  
 MH - Fossils  
 MH - \*Genetic Variation  
 MH - Homeodomain Proteins/\*genetics  
 MH - Wing/\*growth & development  
 EDAT- 2008/01/17 09:00  
 MHDA- 2008/03/14 09:00  
 CRDT- 2008/01/17 09:00  
 AID - 22/2/121 [pii]  
 AID - 10.1101/gad.1639108 [doi]  
 PST - publish  
 SO - Genes Dev. 2008 Jan 15;22(2):121-4.

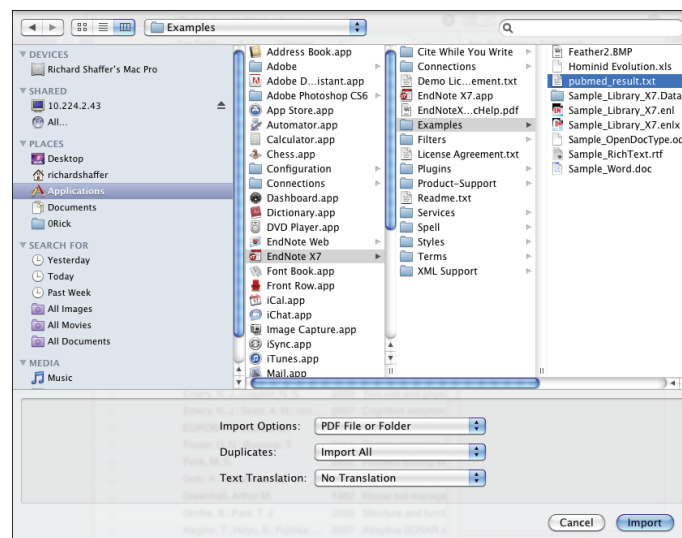
You can map each tag to a corresponding EndNote field. If the data are inconsistently tagged, or poorly delimited, it may not be possible to import all of the data accurately.

## Selecting an Import Filter

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

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

1. Open the sample EndNote library.
2. From the File menu, select Import.
3. Select the Applications folder.
4. Select the EndNote X7 application.
5. Select the Examples folder.
6. Highlight the pubmed\_results.txt file. Do not open the file.



7. From the Import Option menu, select Other Filters to display the list of filters supplied in the EndNote Filters folder.
8. Select the PubMed (NLM) filter.
9. With the PubMed (NLM) filter highlighted, click Choose.
10. Leave the other two options at their default settings.

**Duplicates:** Import All

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

**Text Translation:** No Translation

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

11. Click Import to import the files.

When the process is complete, only newly imported PubMed references display in the reference list in a new group called Imported References.

●	🔗	Author	▲ Year	Title
●	🔗	Cooper, K. L.; Tabin, C. J.	2008	Understanding of bat wing evolution takes flight
●	🔗	Sears, K. E.; Behringer, R. R...	2006	Development of bat flight: morphologic and molecular evolution of bat ...
●	🔗	Springer, M. S.; Teeling, E. C...	2001	Integrated fossil and molecular data reconstruct bat echolocation

**Note:** A Typical installation of EndNote installs the 100 most popular filters, but there are hundreds available with EndNote.

## Downloading Records from PubMed to EndNote

Many information providers have a direct export option that allows 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.

1. Open the sample EndNote library.
2. Go to the PubMed Web site in your Web browser at <http://www.pubmed.gov>.
3. Select PubMed from the drop-down menu to the right of the Advanced search field.
4. In the Search field, enter your search criteria to execute your search. For example, search for Brain Cancer.
5. Click the Search button.
6. Select the needed results from the results list.
7. Select Citation Manager from the Send To menu.
8. Click Create File from the Choose Destination dialog.
9. Open Finder on your machine and select the Downloads folder under your user name.
10. Double-click on the downloaded file from Pub Med to imported the records to your EndNote library.

The downloaded references from PubMed will appear in a folder called Imported References in the Groups panel. The number of references downloaded from the PubMed site will match the number of reference that you selected from the PubMed site.

At this point, you can move the references to the desired folder in your EndNote library.

## Exporting Records from Web of Science to EndNote

Easily export bibliographic records from the Web of Science platform.  
A subscription to Web of Science is required.

Go to the Web of Science search page and perform a search using the Topic, Title, and Author fields.

From the Results page, click the check boxes to select the records that you wish to export to EndNote.

1. From the Results page, click the check boxes to select the records that you wish to export to EndNote.
2. Go to the Output Records section of the page and select the option to output Full Record in step 2.
3. Click the **EndNote** button.
4. On the Processing page, click the **Export** button (Internet Explorer) to export the records to EndNote. If you are using Firefox, select the **Open With** radio button, and then click OK to export the records.
5. If a Choose Destination dialog opens, select **EndNote**, and then click **OK**.
6. At this point, the EndNote program opens, and the system exports the records to a temporary group called Imported References.

## Searching for Surnames that Contain Particles and Spaces

When searching a Web of Science product database (for example, Web of Science Core Collection), always add a connector to author names that contains particles and spaces.

For example, to search for **de Bruyn A** from the Search panel, 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 **de+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**.

## CHAPTER 8: USING ENDNOTE WHILE WRITING A PAPER IN MICROSOFT WORD

Continue with this part of the tour if you use Microsoft Word 2008 or 2011.

EndNote's Cite While You Write feature inserts an EndNote X7 submenu that is accessible from the Tools menu in Word 2008 and 2011. These commands give you direct access to your references while writing in Microsoft Word. The Cite While You Write commands enable EndNote to do bibliographic formatting to the document that is currently open in Word

**This chapter covers the following topics:**

- Inserting EndNote references
- Selecting a bibliographic style
- Editing a citation

### Inserting EndNote References

Open a new document in Microsoft Word.

We are going to start entering some text and citations for this tour. This example assumes that your output style is set for Annotated. If not, we will show you how to select an output style in Selecting a Bibliographic Style.

1. Enter the following text as though you were writing a paper:

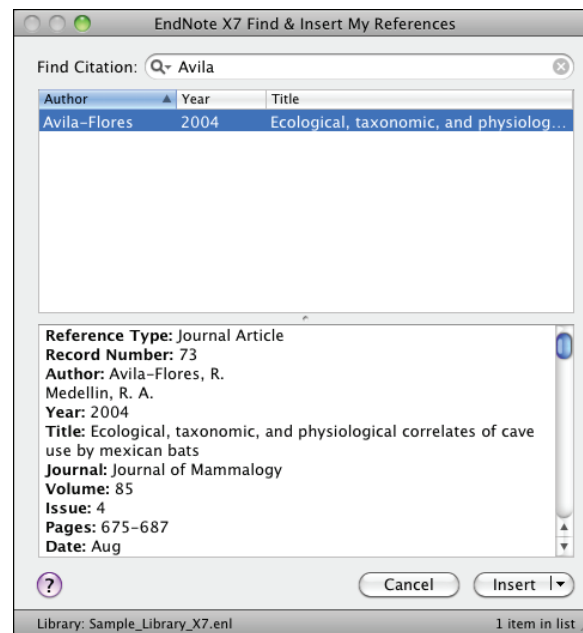
Bats

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight.

Place your cursor at the end of the sentence. That is where you will insert a citation.

2. From the **Tools** menu, go to the EndNote X7 submenu, and then click **Insert Citation(s)**.
3. The **Find & Insert My References** dialog box appears. Type the author name "Avila" in the text box, and then press the **Return** key.

EndNote lists the matching references. The full name Avila-Flores appears in the dialog.



- Click the **Down Arrow** on the Insert button to display a menu. Select the **Insert** option.

EndNote inserts a citation and Instant Formatting formats the citation in the currently selected style and adds it to a formatted bibliography at the end of the paper.

EndNote automatically creates a link from the citation to the bibliography. If you have multiple bibliographies (for example, one at the end of each chapter and one at the end of the document), you can link in-text citations to the reference list at the end of each section and/or chapter. See *Selecting a Bibliographic Style* for information on how to turn this feature on and off.

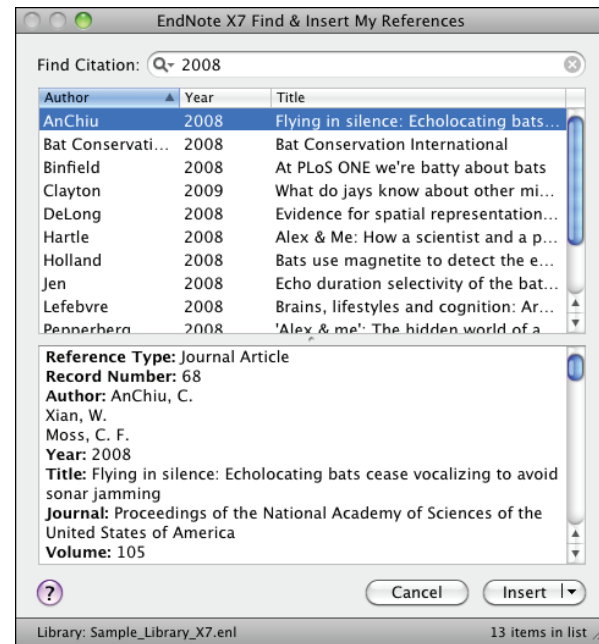
- Add more text to the paper:

Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders.

Place your cursor at the end of the sentence. That is where you will insert another citation.

- From the **Tools** menu, go to the EndNote X7 submenu, and then click **Insert Citation(s)**.

- Type the date "2008" into the text box, and then click the **Return** button. EndNote searches all fields and lists the matching references.



- Highlight the reference by the author Holland.

- Click the **Down Arrow** on the **Insert** button to display a menu. Select the **Insert** option. Your document text should look similar to this example.

### Bats

Bats are mammals of the order Chiroptera from the Greek “hand” and “wing” whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. (Avila-Flores and Medellin 2004) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. (Holland, Kirschvink et al. 2008)

Avila-Flores, R. and R. A. Medellin (2004). “Ecological, taxonomic, and physiological correlates of cave use by mexican bats.” Journal of Mammalogy 85(4): 675-687.

Holland, R. A., et al. (2008). “Bats use magnetite to detect the earth’s magnetic field.” PloS One 3(2): e1676, 1671-1676.

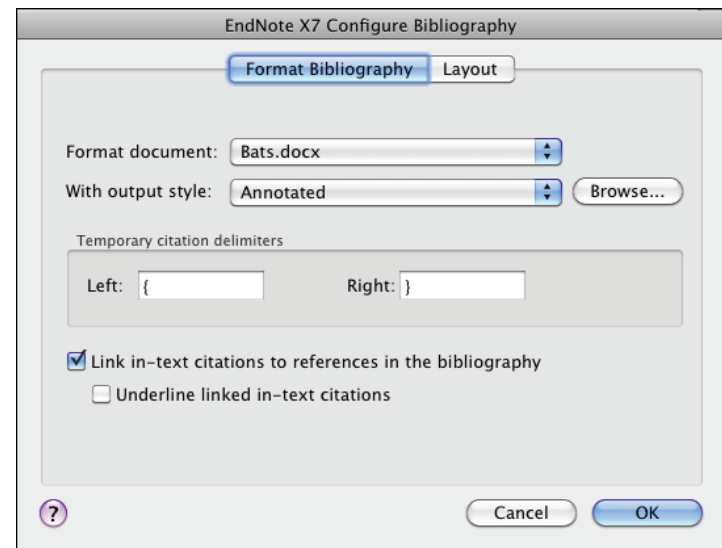
**Note:** You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the EndNote citation in the footnote. Word controls the placement and numbering of the footnote and EndNote formats the citation based on the current style.

## Selecting a Bibliographic Style

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

- From the Tools menu, go to the EndNote X7 submenu, and then click **Configure Bibliography**.

The Configure Bibliography dialog appears where you can select a bibliographic style.



Styles contain instructions for how EndNote will format citations and the bibliography. Some styles sequentially number citations, and then insert a numbered reference list at the end of the paper. Other styles insert Author-Date citations.

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

- The Annotated style should appear in the “With output style” field. If not, click the **Browse** button next to the field, and select the **Annotated** style.



3. Click the **Underline linked in-text citations** check box so that our citations within a document are visible as hyperlinks with underlining and blue text.
4. Click OK to leave the Configure Bibliography dialog.

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

Your document text should look similar to this example.

**Bats**

Bats are mammals of the order Chiroptera from the Greek “hand” and “wing” whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. (Avila-Flores and Medellin 2004) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. (Holland, Kirschvink et al. 2008)

Avila-Flores, R. and R. A. Medellin (2004). “Ecological, taxonomic, and physiological correlates of cave use by mexican bats.” Journal of Mammalogy **85**(4): 675-687.

Holland, R. A., et al. (2008). “Bats use magnetite to detect the earth’s magnetic field.” PloS One **3**(2): e1676, 1671-1676.

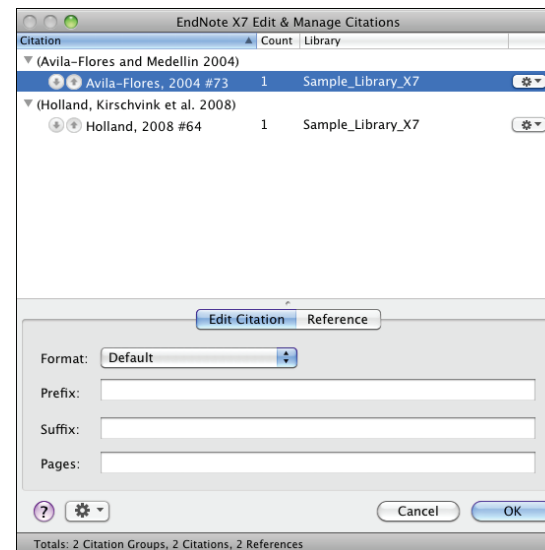
**Note:** In the future, if you need to make changes to the paper such as adding or deleting citations or text, just do the necessary updates in your paper. If you want to change the output style or bibliography layout settings, select the **Configure Bibliography** command again. EndNote will reformat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

## Editing a Citation

To make and retain changes to all citations and/or the bibliography, modify the output style. However, if you want to make a change to an individual citation, select the Edit & Manage Citation(s) option as described below.

For some bibliographic styles, the majority of references are cited in an “Author, Date” format. However, if the author’s name is mentioned within the paragraph text, the style dictates that the name not be repeated in the citation.

1. Click **anywhere** on the Avila-Flores citation.
2. From the **Tools** menu, go to the EndNote X7 submenu, and then click **Edit & Manage Citation(s)**.



3. Select the **Edit Citation** tab.
4. From the Format menu, select the **Exclude Year** option.
5. Leave the **Prefix**, **Suffix**, and **Pages** fields blank.
6. Click **OK** to update the citations in your paper.
7. Click **anywhere** on the Holland citation within Word.

8. **Control-click** to bring up a contextual menu.
9. Select the **Edit Citations > Exclude Year** command.

Your document text should look similar to this example.  
Note that the date is gone from the Avila-Flores citation.

### **Bats**

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. (Avila-Flores and Medellin) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. (Holland, Kirschvink et al.)

Avila-Flores, R. and R. A. Medellin (2004). "Ecological, taxonomic, and physiological correlates of cave use by mexican bats." *Journal of Mammalogy* 85(4): 675-687.

Holland, R. A., et al. (2008). "Bats use magnetite to detect the earth's magnetic field." *PloS One* 3(2): e1676, 1671-1676.

As you are working, remember to save your document. You can continue adding text and bibliographic citations to your paper and EndNote will continue adding to the list of references.

# INDEX

- [About this guide, ii](#)
- [ADA VPAT, 1-3](#)
- [Bibliographic style](#)
  - [Selecting, 8-3](#)
- [Citations](#)
  - [Editing, 8-4](#)
  - [Formatting, 8-3](#)
  - [Inserting, 8-1](#)
- [Combination group](#)
  - [Creating, 5-3](#)
- [Configure Bibliography dialog, 1-2](#)
- [Customer services, 1-2](#)
- [Customer support, 1-2](#)
- [Databases](#)
  - [Searching, 7-1](#)
  - [Searching and saving, 7-1](#)
- [Demo version, 1-2](#)
- [Display modes](#)
  - [Integrated Library & Online Search, 6-1](#)
  - [Local Library, 6-1](#)
  - [Online Search, 6-1](#)
- [Education & Training, 1-1](#)
- [EndNote](#)
  - [ADA VPAT, 1-3](#)
  - [Customer support, 1-2](#)
  - [Demo versions, 1-2](#)
  - [Help, 1-2](#)
  - [International support, 1-3](#)
  - [Online support, 1-3](#)
- [Orders, billing and shipping, 1-3](#)
- [Overview of, 1-1](#)
- [Registration, 1-2](#)
- [Sales information, 1-2](#)
- [Searching a library, 5-1](#)
- [Starting, 2-1](#)
- [Synchronizing your libraries, 2-7](#)
- [Web site, 1-2](#)
- [EndNote discussion forums, 1-3](#)
- [EndNote online](#)
  - [Existing users, 2-7](#)
  - [New users, 2-7](#)
- [EndNote X7 Finds & Insert My References dialog, 8-1](#)
- [Find Full Text, 6-3](#)
- [Format Bibliography dialog, 8-3](#)
- [Groups](#)
  - [Creating a combination group, 5-3](#)
  - [Creating a custom group, 2-6](#)
  - [Creating a smart group, 5-2](#)
  - [Deleting, 2-7](#)
  - [Description of, 2-6](#)
  - [Moving groups, 2-7](#)
- [Groups panel, 2-2](#)
- [Groups panel layout mode, 2-4](#)
- [Help, 1-2](#)
- [Import filters](#)
  - [Importing into EndNote, 7-2](#)
  - [Selecting, 7-2](#)
- [Integrated Library & Online Search Mode, 6-1](#)
- [International support, 1-3](#)
- [Library](#)
  - [Searching, 5-1](#)
- [Library window](#)
  - [Navigating, 2-2](#)
- [Local Library Mode, 6-1](#)
- [Match Case option, 5-1](#)
- [Match Words option, 5-1](#)
- [Online databases](#)
  - [Searching, 6-1](#)
- [Online Search Mode, 6-1](#)
- [Online support, 1-3](#)
- [Overview of EndNote, 1-1](#)
- [PDF files](#)
  - [Adding sticky notes, 2-5](#)
  - [Highlighting text, 2-5](#)
  - [Menu options, 2-4](#)
  - [Toolbar, 2-4](#)
  - [Working with, 2-4](#)
- [PDF Handling Preferences, 3-2](#)
- [PDF Viewer panel, 2-5](#)
- [Preferences](#)
  - [Display Fonts, 3-2](#)
  - [PDF Handling, 3-2](#)
  - [Sync, 3-1](#)
- [Preview panel, 2-3](#)

## PubMed

- [Direct export of records, 7-4](#)
- [Sample text file, 7-3](#)

## Records

- [Direct export from PubMed, 7-4](#)
- [Exporting from Web of Science, 7-4](#)
- [Importing, 7-3](#)

## [Reference List panel, 2-4](#)

## References

- [Closing, 2-5](#)
- [Creating a custom group, 2-6](#)
- [Deleting a group, 6-3](#)
- [Displaying, 2-5](#)
- [Finding full text, 6-3](#)
- [Importing, 7-1](#)
- [Moving a group, 2-7](#)
- [Opening, 2-4](#)
- [Reviewing, 6-3](#)
- [Saving to a custom group, 2-6](#)
- [Searching, 5-1](#)
- [Searching and saving, 5-1](#)
- [Sorting, 2-4](#)

## [Registration, 1-2](#)

## [Release notes, 1-2](#)

## [Sales information, 1-2](#)

## [Search panel, 2-3, 5-1](#)

## Search rules

- [Particles and spaces, 7-4](#)
- [Surnames, 7-4](#)

## [Show All Fields option, 6-3](#)

## Smart groups

- [Creating, 5-2](#)

## [Sort feature, 2-4](#)

## [Sticky notes, 2-5](#)

## [Support, 1-3](#)

## Surnames

- [Searching, 5-2](#)
- [Special conditions, 5-2](#)

## Sync

- [Activating, 2-7](#)
- [Existing users, 2-7](#)
- [New users, 2-7](#)

## [Sync preferences, 3-1](#)

## [Technical support, 1-3](#)

## Web of Science

- [Searching, 5-2](#)

## [What's New in EndNote X7, 1-1](#)

## [Word 2008 X7 tab, 8-1](#)

## [Word 2011 EndNote X7 tab, 8-1](#)