

## ENDNOTE 9\*\*

“Bibliographies Made Easy”

Endnote is a citation organization program that allows you to easily generate and modify your bibliographies and figure/table reference numbers.

\*\*Recently Endnote X1 was released, but this intro will give you the essence of how the program functions. There were no fundamental changes as far as I can tell from the documentation

### 1. Endnote-related file types

- a. **Library** (.enl) – stores citations
- b. **Connection files** (.enz) – allow you to connect directly to various libraries and databases, use Endnote to search them, and directly import the resulting citations into a library of your choice
- c. **Filters** (.enf) – a file that tells Endnote how to “read” an incoming text file so that it properly interprets the field each item should go in
- d. **Styles** (.ens) – defines output format so the bibliography has the format that your specific journal of interest requires (you can create new ones or modify existing ones)

### 2. Three main ways to bring citations into Endnote – from now on you should only actually type in some books, old citations, and extremely recent citations\*

\*Web of Science seems to be the fastest database at updating. (ex. *Science* and *Nature* citations are added within a month or two)

#### a. “Export to reference software” option available from some publishers and databases

- i. Web of Science (via CWU databases <http://www.lib.cwu.edu/databases/>)
  - Check citations of interest → *Add to marked list* (button on far R)
  - When you are done, hit *Marked list* button in middle top of screen
  - I suggest selecting all fields (definitely do *abstract*)
  - *Export to reference software*, select *Open* (not *Save*) and select appropriate library when prompted
- ii. Georef (EBSCO)\* (via CWU databases <http://www.lib.cwu.edu/databases/>)
  - *Add* citations of interest to folder (to right of each citation)
  - *Folder* link in upper right
  - Check the ones you actually want to export → *Export*
  - Select *Direct Export to EndNote, ProCite, or Reference Manager* → *Save*
  - Select *Open* (not *Save*) and select appropriate library when prompted

\*As of press time, the Export option for Georef brought citations in as “generic” rather than “journal article” and messed up the page numbers, so I suggest using Web of Science instead
- iii. Cattrax (<http://library.cwu.edu/>)
  - Add citations of interest to *Saved records* by either checking the appropriate *Mark* box and *Saving* (when you are viewing multiple records) OR by hitting the *Save Records* button (when you are viewing a single record)
  - Click *View Saved Records* button, select *Endnote* and *Local disk*
  - Select *Open with Endnote.exe* (not *Save*) and select appropriate library when prompted

- iv. Summit Catalog (<http://128.223.84.85/>)
  - Add citations of interest to *Export folder* by either checking the appropriate *Mark* box and *Saving* (when you are viewing multiple records) OR by hitting the *Export* button (when you are viewing a single record)
  - Click *Export List* button, select *Endnote* and *Local disk*
  - Select *Open with Endnote.exe* (not *Save*) and select appropriate library when prompted
- v. Elsevier-Science Direct ([www.sciencedirect.com](http://www.sciencedirect.com))
  - Navigate to desired journal issue and check citations of interest
  - Click *Export Citations* button
    - Content: Citations and Abstract
    - Format: RIS format
 then *Export*
  - Select *Open* (not *Save*) and select appropriate library when prompted
- vi. Blackwell ([www.blackwell-synergy.com](http://www.blackwell-synergy.com))
  - Navigate to desired journal issue and check the citations of interest
  - Click *Export citations*, check *Citation and abstract for this article*, then *Download references* button
  - Select *Open* (not *Save*) and select appropriate library when prompted

b. Connection files

In Endnote: *Tools* → *Connect* → *Connect...* → select appropriate connection file  
 Available for CWU Catrax, Summit Catalog, and Georef(EBSCO); though they do not come on the Endnote 9 install so you have to get them from the CWU library and save the files in your C:/Program Files/Endnote 9/Connections folder.

c. Importing using a filter file\*

In a database, save reference list as a text file

In Endnote: *File* → *Import* → select appropriate filter and text file

\*This method may not be necessary much these days, but there is a filter available for Georef(EBSCO) if the direct export or connection file (above) do not work

3. Bringing citations into your papers (Cite While You Write – CWYW)

a. Make sure you install Endnote after you install Office

b. Accessing Endnote tools and options

In Word: *Tools* → *Endnote 9* OR right-click toolbar and select Endnote toolbar  
 OR in Office 2007 look in *Add-Ins*

c. In Word: Place cursor where you want in-text reference

In Endnote: highlight reference/s you want inserted

d. In Word: *Tools* → *Endnote 9* → *Insert selected citations*

e. If you have CWYW selected, bibliography will automatically be started at the end of the document

f. You can modify the in-text reference by removing author or date or adding prefixes & suffixes. Right-click in-text reference → *Edit citation(s)* OR *Tools* → *Endnote 9* → *Edit citation(s)*. **Don't try to modify a citation by typing directly in Word!**

- g. If you modify a citation in Endnote, that modification will be updated in the bibliography. If it doesn't come up quickly try *Tools* → *Endnote 9* → *Format Bibliography*
- h. If you want to change the output Style of the Bibliography (ex. change from *Geology* format to *Geophysical Research Letters* format)  
*Tools* → *Endnote 9* → *Format Bibliography* → select desired style\*  
 \*note: Existing styles can be modified in *Style Manager*.  
*Edit* → *Output Styles* → *Open Style Manager*

4. Useful Endnote shortcuts

- a. *Cntr-F* – Find function
- b. *Cntr-M* – brings up full library list again
- c. *Cntr-N* – Makes a new citation
- d. *Alt-2* – inserts highlighted citation into Word and takes you back to Word\*  
 \*note: can only be used in a given session after you have already inserted one citation into Word using method above in #3d
- e. *Cntr-F4* – takes you back to the main library window if you are within a single citation entry
- f. *Alt-F4* – closes Endnote

5. Figures and Tables – unfortunately Endnote 9's figure-inserting capabilities are a bit clunky, but they are good enough for getting Endnote to track your figure numbers as you move sections of your papers around. Unlike the journal citations, which will update the bibliography when you make changes in Endnote, the figures and captions will not, so you cannot make any changes to them without reinserting them in the document.

- a. In Endnote: *Tools* → *CWYW* → *CWYW preferences* → *Figure and Table*  
 Select the “For custom placement” option
- b. *Edit* → *Output styles* → *Open Style Manger* → select the style of interest  
 Click on “Figures” in the bottom left of the page  
 Select “end of document” option (same with Tables)
- c. Make a new library for the figures from the paper you are preparing (it will always need to be open when you are inserting figures)
- d. *Cntr-N* for new citation → change *Reference Type* to *Figure* or *Table*
- e. Insert a figure (can be an early version of your figure) and give it a useful title
- f. To insert a reference to a figure or table, In Word: *Tools* → *Find figure*
- g. Reference will be inserted in the text and the figure/table will sort of be inserted at the end of the document. To get rid of these useless figures, you can simply not print these end pages, or when the paper is done you can *Remove Field Codes* and save a separate copy. With the field codes gone, you will be able to erase the figures.
- h. Endnote will automatically renumber Figure numbers as you move text around. If it doesn't seem to be automatically renumbering them, click *Generate Figure List*.

} Important setup steps for each Style you want to use for a paper that will include Figures

- i. You can add text before and after the “Figure X”, but if you add it in the middle (in gray area), it will get erased when the figure list is updated by Endnote.
6. Web sites of use
- [www.endnote.com](http://www.endnote.com) – “Support & Services” – good source for connection files, filters, and styles that are more recent than your copy of Endnote; good trouble shooting in general
  - [www.lib.cwu.edu](http://www.lib.cwu.edu) → Databases by title → Georef or Web of Science
  - [www.sciencedirect.com](http://www.sciencedirect.com)
  - [www.springerlink.com](http://www.springerlink.com)
  - [www.blackwell-synergy.com](http://www.blackwell-synergy.com) } Publishers that provide citation export options
7. Some stuff
- a. Main difference with Endnote 9 is figure capability and “traveling library”
  - b. You can remove “field codes” so the Word document is just the text and not the hidden codes. This is a good idea if you are sending it to someone who does not use Endnote or uses an earlier version.
  - c. I recommend keeping track of the articles that you actually have in your paper or electronic files.
  - d. LINKING PDFs – VERY HANDY!  
Right-click on a citation and select *Link to PDF*  
Select the appropriate file on your hard drive.

## RefWorks

**ANOTHER OPTION THAT IS FREE (but tied to the internet rather than a single computer)**

<https://www.refworks.com/Refworks/login.asp?WNCLang=false>

CWU has a license for all faculty and students to use.

It has a tutorial that doesn't take too long and seems to cover the subject.