

# EndNote X3: Bibliographies and Cite While You Write

Instructional Services

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**Abstract:** This document provides instructions on using EndNote X3, a bibliographic database and reference management tool for academic research and writing.

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## **Introduction**

EndNote is reference management application that academic writers use to streamline and simplify the research and writing process.

This handout is designed to get you started using EndNote; it contains step-by-step instructions on how to perform basic tasks. For more detailed instructions, or instructions on more complex tasks, please refer to the EndNote user guide (available in print or as a PDF file in the folder in which EndNote is installed) and EndNote's online help system.

**Note:** Endnote is available free to KU graduate students, faculty, and staff members. See [www.technology.ku.edu/software/endnote](http://www.technology.ku.edu/software/endnote) for download and installation instructions.

## **Objectives**

In this Endnote workshop, attendees will get started using EndNote in their research and writing. Specific topics include:

- Search and Sort references
- Export bibliographies and share references
- Use EndNote's Cite While You Write tools to insert formatted references and lists of works cited in Microsoft Word documents
- Download and use EndNote filters, connection files, and output styles

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To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the [www.lib.ku.edu/instruction](http://www.lib.ku.edu/instruction). You can also check our online schedule at [www.lib.ku.edu/instruction/workshops](http://www.lib.ku.edu/instruction/workshops) for a list of class offerings and their availability. For further workshop related questions, please email [training@ku.edu](mailto:training@ku.edu).

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EndNote: Bibliographies & CWYW

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### Definitions

Term	Definition
CWYW	Cite While You Write. A set of tools included with EndNote that work with Microsoft Word, and allow you to insert properly formatted citations and lists of works cited automatically.
EndNote Library (.enl)	A database file, containing references that are imported, hand-entered, or downloaded through a direct connection to a data source. An EndNote Library can contain an unlimited number of references, as well as images and other data (images are stored in a separate data file that is created when the library is created). EndNote Libraries have an .ENL file extension.
Data folder (.data)	This folder is considered part of the library; it includes images and other files necessary for the library.
Field codes (used for citations and bibliographies)	Endnote inserts a citation in Word by using a field code. A field code is an imbedded command for Word to look back to EndNote for specific information. Field codes are also used when creating form letters or when using formulas in Excel. A field code is denoted by a grey field when you select it. <b>Convert to Unformatted Citations will turn the field codes off and on.</b>
EndNote Compressed Library (filename.enlx).	A complete EndNote library (the filename.enl file as well as its associated .DATA folder and all of its contents) saved to a single compressed filename.enlx file in order to easily back up the library or send a copy to a colleague. <b>This file can only be restored by EndNote version 10 or later.</b>
EndNote Style (.ens)	A set of instructions used by EndNote to create bibliography entries formatted for a specific style (such as APA or Chicago) or publication (such as the New England Journal of Medicine). EndNote Styles have an .ENS file extension.

## Your tool set:



Most of the tools found in the menu items (i.e. File, Edit, Reference, Tools, Window, Help) are duplicated as icons as well. Hovering your mouse over an icon will bring up a pop-up box to tell you about its intended use.

## Getting Started

Your EndNote Library (or .ENL file) contains all the references you have collected. EndNote will create a second item, a folder (.DATA). This folder will hold your library attachments.

### *Opening an EndNote Library*

1. Open EndNote. You may be prompted to create a new library, or select an existing library.
2. Choose **Open an existing EndNote library** and click **OK**.
3. In the **Select a Reference Library** box, navigate to the folder in which you have saved your library.
4. Select your library and click **Open**.

### *Working with Output Styles*

Output Styles (or .ENS files) are sets of instructions that tell EndNote how to format the bibliographic entries and citations it creates from references in a library.

Several hundred styles are included with EndNote; however, when new versions of the styles you use are released, you will need to download them from the EndNote website.

### **Downloading an Output Style**

To download an output style from the web:

1. Many styles are available on EndNote's web site at <http://www.endnote.com/support/enstyles.asp>.
2. Find the hyperlink for the style you wish to download. Right-click the hyperlink, and choose **Save Target as**. (Mac users: Ctrl-click and choose **Download Link to Disk**.)
3. In the **Save In** drop-down box, navigate to **C:\Program Files\EndNoteX3\Styles** and click **Save**.

## Checking the Output Style

To get information on a style,

1. Click the **Edit** menu, select **Output Styles**, and then click **Open Style Manager**.
2. Scroll to the style you wish to use, and click the **name** of the style to show the information associated with it. In the example shown below, the information for Chicago style is shown. (If you can't see the information for a highlighted style, click the **Show Info** button.)



3. Check to see whether the style is the version you need, and whether there are any limitations to the style you selected.
4. Click the X in the upper left corner of the EndNote Styles dialog box to close it.

## Applying an Output Style

To apply a style,

1. Click the Current Style dropdown box located at the top of the library window.



Figure 1: Select this option to find your bibliographic style

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2. If the style you want to use appears in the dropdown list, choose it; otherwise, click **Select Another Style** (as shown above).
3. In the Choose a Style dialog box, either scroll or use the Quick Search box find the style you want, then click the **Choose** button.

To see what a bibliography entry formatted in this style will look, click a reference in the library window to select it, then click on the **Preview** tab in the under the library window.

The formatted entry for the selected reference will appear in the lower window, as shown:

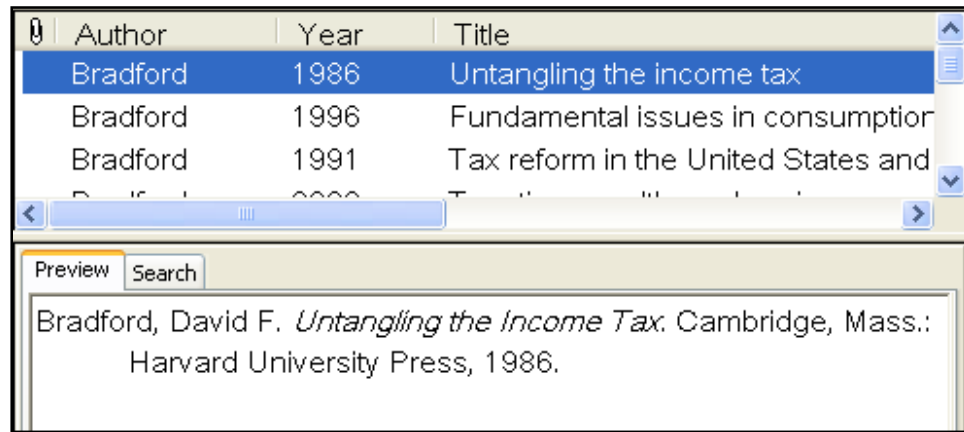


Figure 2: Preview of reference using Chicago 15<sup>th</sup> A

### ***Output styles that use Journal abbreviations***

If you are using a style that required the use of journal abbreviations you will want to import a Journal Terms list into your library. This will match full Journal names with their approved abbreviations. Most journals will be included but you may find a few that are not. You will need to manually add any missing journal abbreviations.

1. From the Tools menu, select **Open Term Lists** and then **Journals Term List**.
2. Delete all existing terms from the list (you can click and drag to highlight all terms, and then click **Delete Term**).
3. Click on the **Lists** tab and highlight the Journals list.
4. Click **Import List**.
5. In the File dialog, navigate to the EndNote X3 \Term 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.

## *Exporting Bibliographies*

### **To export a formatted bibliography:**

Note: EndNote will export from **only** those references listed in the current library window.

- If any references in the Library window are selected, the EndNote export dialog gives you the option of exporting just those selected references. If you don't choose the option to "Export Selected References," then all of the references that are showing in the Library window will be exported.
  - *To export all of the references in the Library*, choose Show All References from the References menu. If any references are selected, be sure to uncheck the "Export Selected References" check box in the export dialog.
  - *To export a subset of references* use the Search References, Hide Selected References, or Show Selected References commands to show the subset of references you want to include.
1. From within the EndNote windows you can select the output style you wish to use to format your bibliography.
  2. If you select specific references to export, use the *Show Selected* command from the *References* menu to display only those references.
  3. Click the **File** menu, and then click **Export**.
  4. In the **Save In** dropdown box, browse to the folder in which you'd like to save the exported bibliography. In the **File Name** text box, type the file name you'd like to give the bibliography, and in the **Save as Type** dropdown box, choose the file type you want for the exported bibliography. Choices include: Text, Rich Text (RTF), HTML, and XML. **Select Rich Text (RTF) for a standalone bibliography suitable to print.**
  5. In the **Output Style** drop down box, if you have not already done so, select the output style you wish to use to format your bibliography.
  6. Click **Save** to export the bibliography.

## Using Cite While You Write in MS Word

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**Note:** CWYW is now compatible with Open Office Writer.

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One very useful feature of EndNote is **Cite While You Write (CWYW)**, which enables you to insert formatted citations and build formatted lists of works cited within your documents with a click of a button. Once EndNote is installed, the CWYW tools appear in a toolbar at the top of the MS Word window, like this:



Figure 3: CWYW in Word 2003

Or as a ribbon in MS Word 2007:



Figure 4: CWYW in Word 2007

### For Word 2003:

**If you don't see these tools** at the top of the Word window, right-click on the toolbar area and click "EndNote" on the right-click menu.

The simplest way to get the tools to appear in Word 2000/XP/2003 is to run the **Configure EndNote Utility** from the EndNote Start Menu or the EndNote X3 Program Files folder. Once you run the utility, make sure "Configure EndNote components for me" is selected and click **Next**. Select the "Unified Cite While you Write for the Microsoft Word" option and click **Next**. Click **Finish** when you are done.

### *Inserting citations*

To use CWYW tools, you must open your Word document, start EndNote and open your EndNote Library (.ENL file).

### **Citing a Single-Reference Intext Citation**


To insert a single-reference citation in your Word document,

1. Add a "Works Cited" heading (or use whatever wording you like) at the very end of your Word document. (CWYW will add a list of works cited at the end of the document automatically when you insert citations.)

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2. Switch to EndNote and choose the Output Style you wish to use from the dropdown list in the EndNote toolbar.
3. Click on the specific reference you want to cite to highlight it. **Leave EndNote open, with this reference selected.** (You can minimize the EndNote window or click the Word button in the toolbar at the bottom of the screen to return to Word without closing EndNote.)
4. Switch back to Word, and click the **Insert Selected Citation(s)** button (). CWYW will add the citation in the text, and will add a bibliographic entry at the end of the document.

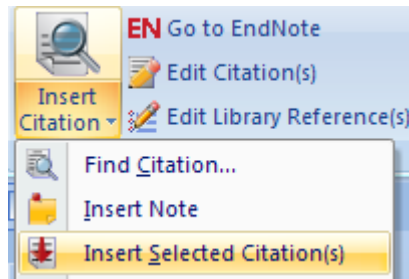



Figure 3: CWYW in Word 2007

## Editing a Single-Reference Intext Citation

1. To edit a citation such as adding a page reference or removing the author's name, click on the inline citation and click the **Edit Citation(s)** button ().

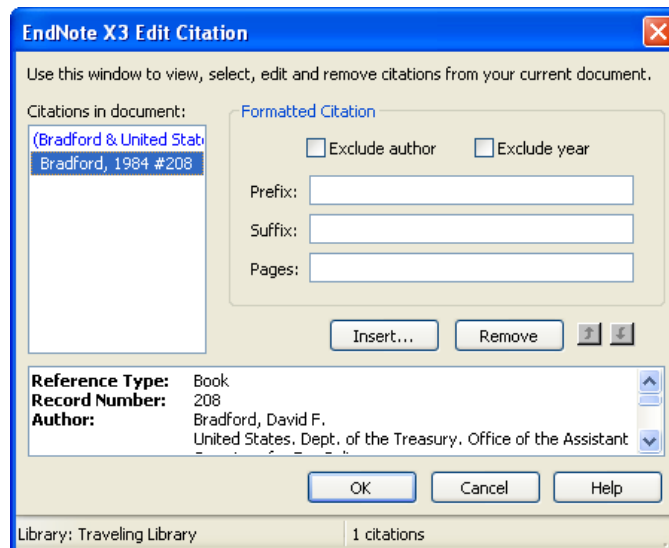

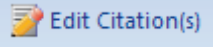


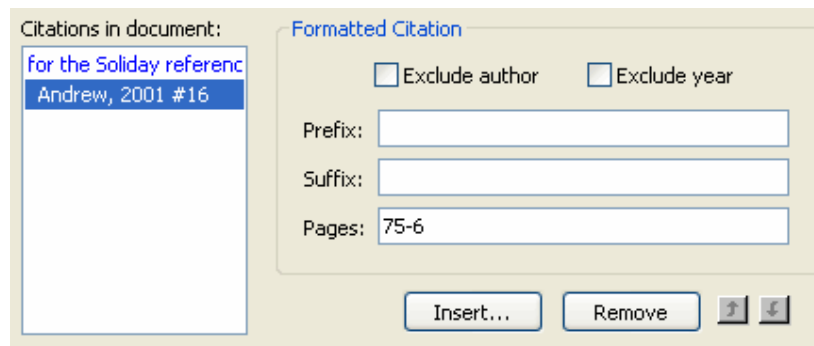
Figure 4: Edit Citation

2. In the EndNote Edit Citation dialog box, to add page numbers type the page number(s) in the “Pages” text box, and click **OK**.

## Citing Multiple References for Inline Citation

To insert a multiple-reference citation in your Word document,

1. Add a “Works Cited” heading (or use whatever wording you like) at the very end of your document. (CWYW will add a list of works cited at the end of the document automatically when you insert citations.)
2. Switch to EndNote and choose the Output Style you wish to use from the dropdown list in the EndNote toolbar.
3. Click on one of the references you want to cite to highlight it. To select additional references, hold down the Ctrl key and click them. **Leave EndNote open, with these references selected.** (You can minimize the EndNote window or click the Word button in the toolbar at the bottom of the screen to return to Word without closing EndNote.)
4. Switch back to Word, and click the **Insert Selected Citation(s)** button ().
5. To add page references to the citation, click on the inline citation and click the **Edit Citation(s)** button ().




6. In the dialog box, click the first reference to select it, and then type the page number(s) for that reference in the “Pages” text box. Click the second reference and repeat the process as needed. Click **OK** to save the changes to the reference. (The example above shows pages 75-6 cited for the Andrew reference.)

## *(Re)formatting Citations in Word*

To change the formatting of CWYW references and the list of works cited in

Word, click the **Format Bibliographies** button () on the CWYW toolbar or



 **Update Citations and Bibliography** on the EndNote Tab in Word 2007. Choose the formatting style you wish to use from the Output Style dropdown list, and click **OK**.

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**Note:** If the Output Style you wish to use doesn't appear in the dropdown list, click **Select Another Style** click the style you wish to use, and click **Choose**. You can also change this from within EndNote.

Within Word, click the **Format Bibliographies** button () or  **Update Citations and Bibliography**. The style you chose will appear in the Output Style dropdown list.


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## *Citing References in Footnotes or Endnotes*

*Footnoting styles such as MLA and Chicago B will use these instructions.*

You must first create the footnote or endnote using the tools provided within Word. Once you have created a note in Word, you can cite references in that note 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 in the document, but is used to insert and format citations into the note.)
2. Click on the specific reference you want to cite to highlight it. **Leave EndNote open, with this reference selected.** (You can minimize the EndNote window or click the Word button in the toolbar at the bottom of the screen to return to Word without closing EndNote.)
3. Position the cursor in the footnote or endnote where you would like the citation(s) to appear.
4. Switch back to Word, and click the **Insert Selected Citation(s)** button (). CWYW will add the citation in the text, and will add a bibliographic entry at the end of the document.

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**Note:** If you do not want an accompanying bibliography at the end of your document you may need to edit your output style.

To do this go to **Edit – Output Style** and select your output style. Click on **Footnotes – Templates** uncheck the option to **Include citations in bibliography**

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## *Citing References as Endnotes (i.e. ACS)*

In certain situations, such as ACS and ACS no title, EndNote is set up to create numbered endnotes without the use of the Word Reference tools. If you use endnotes it is worth testing to see if your style is one of these. To test, insert your citation using the same technique as or inserting an Inline Citation. If EndNote inserts a number and starts a bibliography then you do not need to use the Word Reference tools. However, in cases such as MLA or Chicago B, if EndNote does not insert a superscript number but only

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starts a bibliography then you will either have to use the Word Reference tool or you will need to edit the EndNote output style.

## Bibliographies

### *Moving Bibliographies*

Cite While You Write always creates the initial bibliography at the end of the Word document that it has formatted. 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.

### *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.

To make this adjustment, see the Sections panel in the output style you are using. 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.

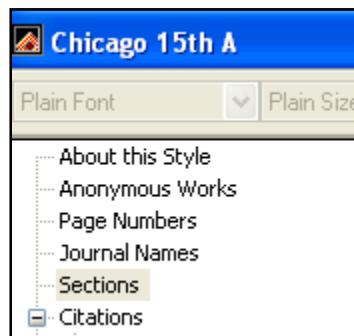


Figure 5: Edit Output style, look for Sections to set up multiple bibliographies.

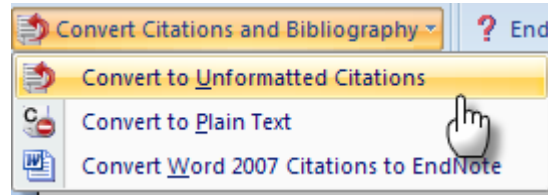
For more information on this see page 343 in the EndNote users manual included in your applications folder (EndNote.pdf )

## Publishing, submitting and collaborating

### *Working in groups*

#### Tracking Changes

Many writers use some sort of “tracking changes” program when working with multiple editors. The easiest and most stable method for combining EndNote and MSWord’s Track Changes is to work with “un-formatted” citations within your document.




or



Figure 6: click here to un-format your citations

EndNote keeps track of citation in your document in one of two ways: as a formatted citation (represented by the grey shading around the citation when you click on it) and as an unformatted citation (represented by the citation information surrounded by brackets {Yu-Mei, 2002 #12}).

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**Note:** When you view your citations as un-formatted, you will not see your final bibliography. Return to Word, click the **Update Citations and Bibliography** button (  ) to see your final bibliography.

**Do not un-format 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.

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Provided you have the correct EndNote library for the paper, you can reformat you paper at any time to see how it looks. Just remember to return it to its original un-formatted condition before sending it out again for editing.



Figure 7: click here to re-format your citations

## Emailing a draft

It is a good idea to un-format your citations before emailing a draft of your paper to another person to edit.

## Using the traveling library

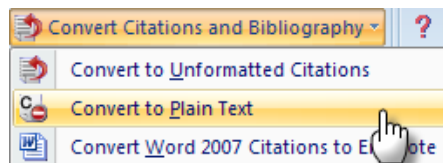
A traveling library is a mini-EndNote library that contains only the citations you have used in a particular paper. When you send a traveling library with your document you will send your document with **formatted citations**. Because reference data is kept with each **formatted** citation, you can collaborate 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, Abstract, and Figure. The library is saved as a separate **.enl** file from the document.

## Final work

### Submitting an electronic final copy

Before you submit the final version of your paper, you must disconnect the paper from your EndNote library by removing the field codes.

1. Save your final draft.
2. Click on the Remove Field Codes icon on the EndNote toolbar or ribbon.



OR



Figure 8: click here to remove field codes

3. EndNote will give you a warning message that it is about to create a separate copy of your paper. You will want to save both files: the final draft that you created (with field codes) and the second draft (without field codes). Name them so you know which one is which.

## What about last minute additions after you have removed your field codes?

When you find that you have last minute edits to make after you have removed your field codes you should make those edits in your draft that still has the field codes in it. (Now, aren't you glad that you saved it?). Once you make those edits, save it and remove the field codes just as you did before.

## Printing a final copy

Provided your citations are formatted, you can print a paper created with EndNote just as you would any word processed document. The field codes will not show up but the citations and bibliography will.

## Archiving

### *Backing up and Sharing References*

There are several ways to share EndNote Library references with other researchers. If they also use EndNote, you can give them the EndNote Library (.ENL file) itself, which can be imported into a library of their own, or opened to drag and drop individual records into a different library.

You can save your complete library (the filename.enl file as well as its associated .DATA folder and all of its contents) to a single compressed file in order to easily back up your library or send a copy to a colleague.

### *Saving to a Compressed Library File*

1. Open the library in EndNote.
2. From the File menu, select **Compressed Library**.
3. Use the file dialog to save to an EndNote Compressed Library (filename.enlx).

### *Archival Copies: Best Practices*

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**Truism:** There are two types of computer users: those who have lost data and those who are going to lose data.

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Keep at least two sets of backup files, each at a different location. EndNote recommends 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 the files listed above whenever 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 files and store them separately from your computer. Burning them to CD/DVD is recommended.

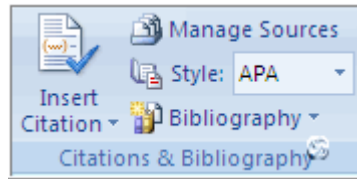
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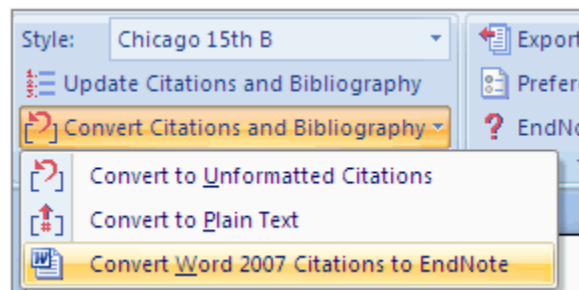
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That way, if you ever need to recreate the document, you will have all of the necessary files.

## FYI: EndNote and MS Word 2007



Microsoft Word 2007 has its own Citation and Bibliography tools found on the Reference ribbon. This instrument has limited usability with EndNote. From the EndNote toolbar you can convert items from Word 2007 Citation Manager to EndNote CWYW. For more information about MS Words Citation tool see the Word2007 Help menu.



## For More Information

Here are some additional sources of information about EndNote:

The **EndNote print user's guide** is a well-written resource that provides a great deal of information for both beginning and advanced users of EndNote.

The **EndNote web site**, [www.endnote.com](http://www.endnote.com), is the place to find updated versions of connection files, import filters, output styles, and the EndNote program itself. Tip sheets, a technical support database, and utility programs for repairing damaged EndNote Libraries and converting from other bibliography management tools to EndNote are also available from the **Support & Services** area of this site.

## Getting Additional Help

EndNote has excellent Tutorials, Webinars and technical support:

<http://www.endnote.com/training/>

Information Services provides consulting and Q&A help in a variety of ways:

785/864-8080

[question@ku.edu](mailto:question@ku.edu)

[www.ku.edu/~helpdesk](http://www.ku.edu/~helpdesk)