

EndNote Class Outline

Using EndNote in Microsoft Word

1 Using EndNote in Microsoft Word

1.1 Installing the Cite While You Write Files

When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW) in EndNote. You should then see an EndNote menu under Word's Tools menu; you may also see an EndNote toolbar in Word. If you do not see the tools, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

1.2 Using the Cite While You Write Tools

1.2.1 **Go to EndNote**

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document. _____

1.2.2 **Find Citation(s)**

This command will provide a search window where you can enter text that is in any field. You can then select references from a list of those that contain your search terms and insert them into your paper. _____

1.2.3 **Format Bibliography**

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing. _____

1.2.4 **Insert Selected Citation(s)**

This command will insert the references you selected in EndNote into your document at the location of the Word cursor. _____

1.2.5 **Edit Citation(s)**

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations. _____

1.2.6 **Insert Note**

Use this command to insert explanatory notes to be numbered as though they were bibliography entries, and then placed in the bibliography. _____

1.2.7 **Edit Library Reference(s)**

This command allows you to quickly access the specific record for any selected citation. _____

1.2.8 **Unformat Citation(s)**

This command will remove the formatted bibliography and citations and replace all citations with plain-text placeholders that EndNote can match to library records to create formatted citations. This command is commonly used when moving documents between word-processing programs. _____

1.2.9 **Remove Field Codes**

This command will create a second copy of the document with all EndNote field coding removed (you can generally recognize field codes such as formatted EndNote citations by their turning grey when you select them in Word). It is used when sending documents to a publisher because the field coding used for EndNote citations can sometimes cause problems for publishers' page layout programs. _____

1.2.10 **Export Traveling Library**

EndNote creates a hidden "traveling" library containing only the references used in each paper. This traveling library is part of the coded information contained in each citation. Use this command to export the references in this traveling library to a regular EndNote library. _____

1.2.11 **Find Figure(s)**

This command will provide a search window much like the Find Citation window where you can enter text that is in any field in the record you want to find. You can then select references from a list of those records with figures attached that contain your search terms. A reference to the figure will be inserted at the location of your cursor. The image will be inserted either below the cursor location or in a list at the end of the document, depending on the selected EndNote style.

1.2.12 **Generate Figure List**

If you insert a new figure reference, all of the figures in the document will automatically be updated, but if you delete or move a figure reference you will need to force an update of the figure numbering and placement. Use the Generate Figure List command to do this. _____

1.2.13 **Cite While You Write Preferences**

Use this command to set preferences for EndNote's cite while you write settings for future documents. (Note: If you use Word as your e-mail editor in Microsoft Outlook, you should leave the *Open EndNote when Starting Word* option in the CWYW preferences unchecked.) _____

1.2.14 **Help**

This command will let you access contextual help for EndNote. _____

2 **Searching an EndNote Library**

2.1 **Building a Search Query**

Select the **Search** tab in the **Tab** pane. Note that EndNote “reads” search commands from top-to-bottom, so you want to start with commands that broaden your search (the OR command), then narrow your search using the AND and NOT commands.

2.2 Saving Search Queries to Use Again Later

Click on the **Options** button in the search window and select **Save Search** to save search queries. Later you will be able to use the **Load Search** command to recall saved searches. _____

2.3 Creating Smart Groups from a Search

Click on the **Options** button in the search window and select **Convert to Smart Group**. This will create a smart group showing references from your search. The smart group will dynamically update itself as you add/remove references to your library that match that search.

3 Final Questions