Using Endnote With MS Word

In MS Word go to: View → Toolbars → Endnote X1

Select citations from an Endnote Library as you are typing your document by using the **Find Citations** feature on the Word Endnote Toolbar. By clicking on **Insert Selected Citations** icon, you can insert the selected citation into your document. The in-text citation will appear and an entry in your bibliography will automatically be created in the Output Style of your choice.

You may reformat your citations and bibliography into different Output Styles. These citations comprise a *traveling library* and can be shared with others, even if they do not have Endnote on their computers.

Remove the field codes (shown as highlighted citations and bibliography) when you wish to create a static document:
Endnote X1 Word Toolbar → Remove Field Codes

Endnote Web

Endnote Web, though less robust than Endnote on the hard drive, is Web based and allows you to easily share your Endnote Web references with others on different computers.

You can access Endnote Web through the Electronic Resources Gateway by typing in *Endnote Web* or you can access through the link in Web of Science.

Create an Endnote Web Account by using the Sign Up form. Your E-mail address and chosen password will be your login.

Endnote Web & Endnote Library

You can transfer references between your desktop Endnote Library and your Endnote Web.
From your Endnote Library:
Tools → Endnote Web → Transfer
From Endnote Web use the Export function, exporting as a **Refer** text file. Import into your Endnote Library using the **Refer** Import Filter.

Guide based on Endnote X1 Fall 2007 v. 2

Where to Go for Help

UH Mānoa Librarians

Eileen Herring *eherring@hawaii.edu* 956-2543
Sara Rutter *srutter@hawaii.edu* 956-2540

Endnote Help

Click on the **?** for in-context help or go to **Help** in your Endnote Toolbar for an index of help topics to access information for your version of Endnote and platform (Mac or PC).

Comprehensive Endnote X1 Manuals

- Endnote X1 Manual for Windows:
  http://endnote.com/support/helpdocs/EndNoteX1 WinManual.pdf
- Endnote X1 Manual for Mac:
  http://endnote.com/support/helpdocs/EndNoteX1 MacManual.pdf

Updating Import Filters & Output Styles

From the Endnote Website at http://www.endnote.com Go to *Support & Services* then click on **Import Filter** or **Output Styles**. Then download the Filter or Output Style you need into your Endnote application Filters folder or Styles folder

Where to Get Endnote

ITS: Download the site license agreement at http://www.hawaii.edu/sitelic/endnote.html

The signed agreement and $25 check to *University of Hawaii ITS* goes to 109 Keller Hall, Site License Administrator.

Endnote is also for sale for $100 for students, $180 for all others from the Endnote Website at http://www.endnote.com.

Science & Technology Wing: The Fishbowl Scholar Workstations have Endnote and MS Word; save to your USB drive.

Introduction to Endnote
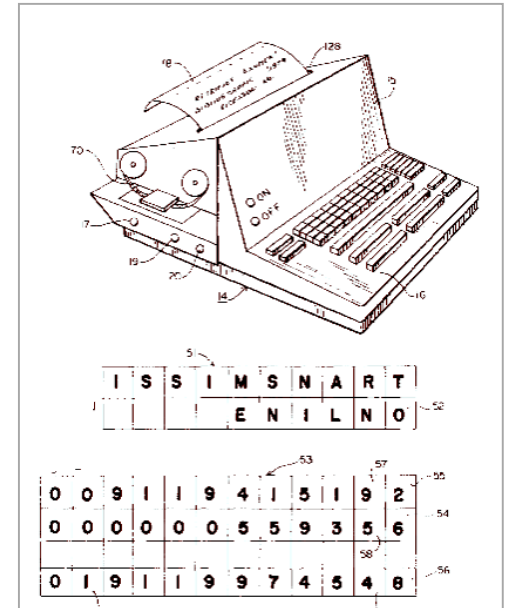
Loewenthal A.L. et al. inventors. 1971, Feb. 16. Storage and Retrieval System [Internet]. United States patent US 3,564,508. [Cited 2007 Sep 25]. Available from: http://www.uspto.gov/.

CREATING AN ENDNOTE LIBRARY

File → New → Give your Library a file name

This will create a **.enl** file and a **.Data** folder
Every Endnote Library can hold an infinite
number of records.

Tools → Customize Toolbar

Add icons of functions to your Toolbars by
dragging icons to the Toolbar.

IMPORTING JOURNAL TERM LIST

Tools → Define Term Lists → Journals → Import
List

- To select the journal lists in the disciplines that
  you are interested in, find your Endnote
  application folder.
- Open up the Terms folder
- Select the file for the discipline you wish to
  import, e.g. anthropology, astronomy, bioscience,
  chemical, economics, humanities, Korean
  medical terms, law, medical, philosophy, religion,
  or Zoological Record.

Importing a **Journals Term** list stores different
forms of journal names, such as abbreviations.
Creating a Terms list is specific to an Endnote
Library. As you add references, your terms list
will be updated with new journal names.

CREATING A REFERENCE MANUALLY

References → New Reference

- Select the type of reference (journal article, film,
  etc.)
- Enter author names, one author name per line:
  Example: Einstein, Albert OR Albert Einstein
  Example: Einstein, A.
  Lorentz, H.
  Minkowski, H.

- Enter the bibliographic data you have into the
  other fields.
- Endnote Library records can be edited as
  needed.

IMPORTING REFERENCES FROM ONLINE JOURNAL ARTICLE DATABASES

To import references into an Endnote Library
from online journal article databases (e.g. CAB,
Biological Abstracts, etc.) use an **Import Filter**
OR **Direct Export**:

- **Import Filters** are used to import references
  saved in a text file into an Endnote Library. A
  specific Endnote Import Filter works with the
  index from which the references were retrieved.

- **Direct Export** is faster than importing using an
  Import Filter; saved references are directly
  exported from the index to a selected Endnote
  Library. This function is not available for all of the
  indexes and may not work on a Mac.

EXAMPLES OF IMPORTING

CSA Indexes: Importing Using an Import Filter
1. In the index, mark the records you want to
   save.
2. Click on the link to **Save, Print, Email**
3. **Save** the references
4. Open an Endnote Library
5. In Endnote: **File → Import → Choose file**
6. Select the text file of your saved references
7. In Endnote: **Import options → Other filters**
8. Select the **Import Filter** for the database
   and vendor you used, e.g. ASFA via CSA
9. Leave as the default **No Translation** in the
   Text Translation box
10. Click on Import

EbscoHost: Importing Using Direct Export
1. In the index, mark the records you want to
   save by adding those records to a Folder.
2. Click on the link to the Folder, and select the
   records you want to import into an Endnote
   Library
3. Click on **Export**
4. Select **Direct Export to Endnote**
5. You will select the **Endnote Library** in which
   to save the references (if the references do
   not import directly, use the Reference
   Manager Import Filter to import the saved
   references)

IMPORTING USING CONNECTION FILES

Note: At UH Mānoa, Connection Files only work
for non-licensed (no login) resources, such as
library catalogs.

From your Endnote Library:
1. Click on Online Search icon in Toolbar OR
   Tools → Online Search → New Search
2. Perform your search in the selected catalog
3. Import references by using the **Copy References** function in the Toolbar

INSERTING A FILE INTO A RECORD

A PDF of a full-text journal article, scanned book
chapter, chart, image, or other file can be
inserted into a record in your Endnote Library:
From an Endnote Library record:
- Click on **Attach Figure** in the Toolbar, file
  will go into *Figure* field of record.
- References → Insert File
  File will go into *Attached File* field of record.

The attached files will be saved in your
Endnote Library **.Data** folder.