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

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GETTING STARTED GUIDE
FOR WINDOWS

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 Windows 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 Contents to view help topics. While using EndNote, press F1 to view a help topic about the current window.

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Continue with this part of the tour if you use Microsoft Word 2003, 2007, or 2010.

EndNote’s Cite While You Write feature inserts EndNote commands into Word’s Tools menu in Word 2003 or on an EndNote tab in Word 2007 and 2010 to 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. **Word 2003:** From the Tools menu, go to the EndNote X6 submenu, and then click Find Citation(s).

   **Word 2007 and 2010:** On the EndNote X6 tab, click the Insert Citation icon.

3. The Find & Insert My References dialog box appears. Type the author name “Avila” in the text box, and then click **Find.**

   EndNote lists the matching references. The full name Avila-Flores appears in the dialog.
4. 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.

5. 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.

6. **Word 2003:** From the Tools menu, go to the *EndNote X6* submenu, and then click Find Citation(s).

**Word 2007 and 2010:** On the *EndNote X6* tab, click the Insert Citation icon.

7. Type the date “2008” into the text box, and then click Find. *EndNote* searches all fields and lists the matching references.

8. Highlight the reference by the author Holland.

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

*EndNote* inserts the citation, and *Cite While You Write* technology formats it and adds it to the bibliography at the end of the 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. 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)


Selecting a Bibliographic Style
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

1. **Word 2003**: From Word’s Tools menu, go to the EndNote X6 submenu, and then click Format Bibliography.

2. **Word 2007 and 2010**: On the EndNote X6 tab, in the Bibliography group, click the bottom corner arrow.

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

   ![Format Bibliography](image)

   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.
2. 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 Format Bibliography dialog.

5. 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)


**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 Format Bibliography command again. EndNote will reformat the in-text citations and generate a new bibliography based on your changes.

### Editing a Citation

If you directly edit a citation or the bibliography, the changes will be lost when you Format Bibliography again because EndNote reformats according to the rules of the selected output style. 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; but 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. **Word 2003:** From the Tools menu, go to the EndNote X6 submenu, and then click Edit & Manage Citation(s).

   **Word 2007 and 2010:** On the EndNote X6 tab, click Edit & Manage Citation(s).

3. Select the Edit Citation tab.

4. From the Formatting 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. From the Formatting menu, select the Exclude Year option.

9. Click OK to update the citations in your paper.

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.)


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.