



EndNote X8 and CiteWhileYouWrite in Word: Concise Manual

Introduction

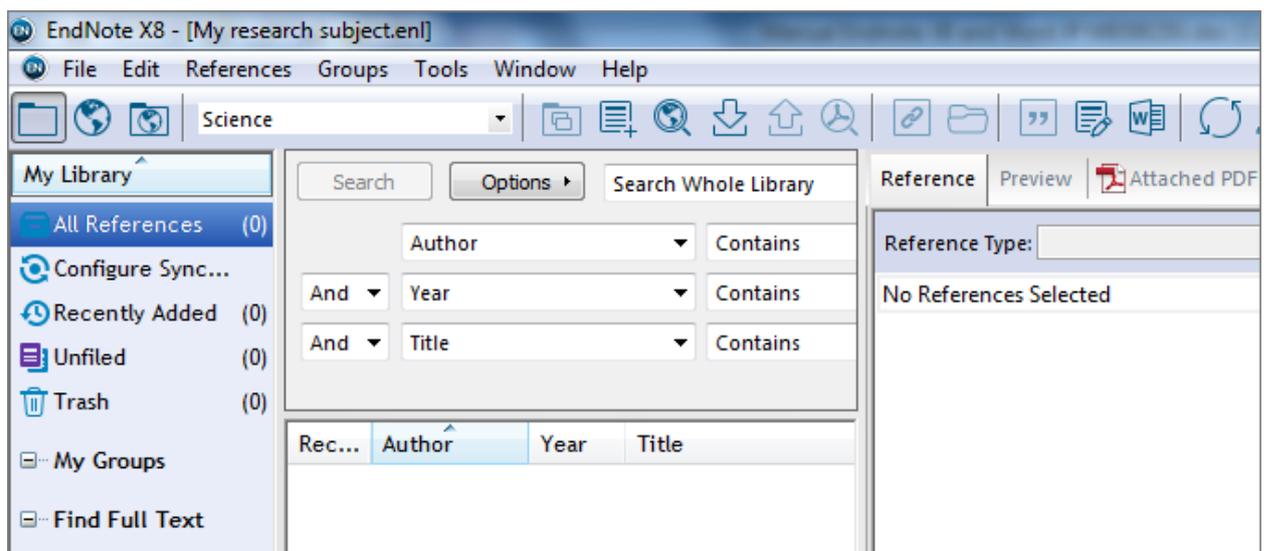
EndNote is a software tool to collect and manage your personal selection of references in a so called Library. Within the Library, groups can be created with selections for specific purposes and reference lists can be produced.

An EndNote Library is also used to insert citations in a Word document and create a corresponding List of References. This allows for selecting a specific format or Output Style.

1. Creating a library

Start the program EndNote.
Select *File > New...*

The window *New Reference Library* is presented. Select the location of your preference and enter your Library's name as file name.
Click *Save*. The new, empty library is shown. The sample library shown here is titled *My research subject*.



There are several ways to import references into the library. In most bibliographic databases an export feature is present. For example in PubMed, up to 200 references can be exported to EndNote via *Send to ... Citation manager*. In Web of Science this feature is named *Save to ... EndNote Desktop* and it can export up to 500 references in one action.

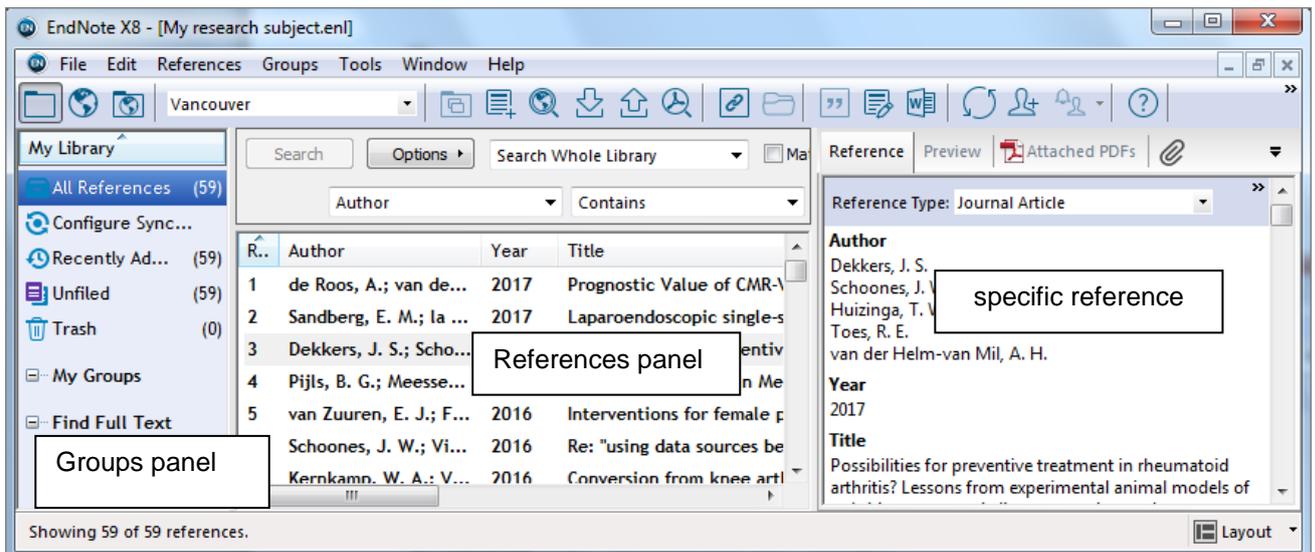
More information about exporting and importing is available on the Walaeus Library website: lumc.nl/org/walaeus/endnote/importeren

Please note:

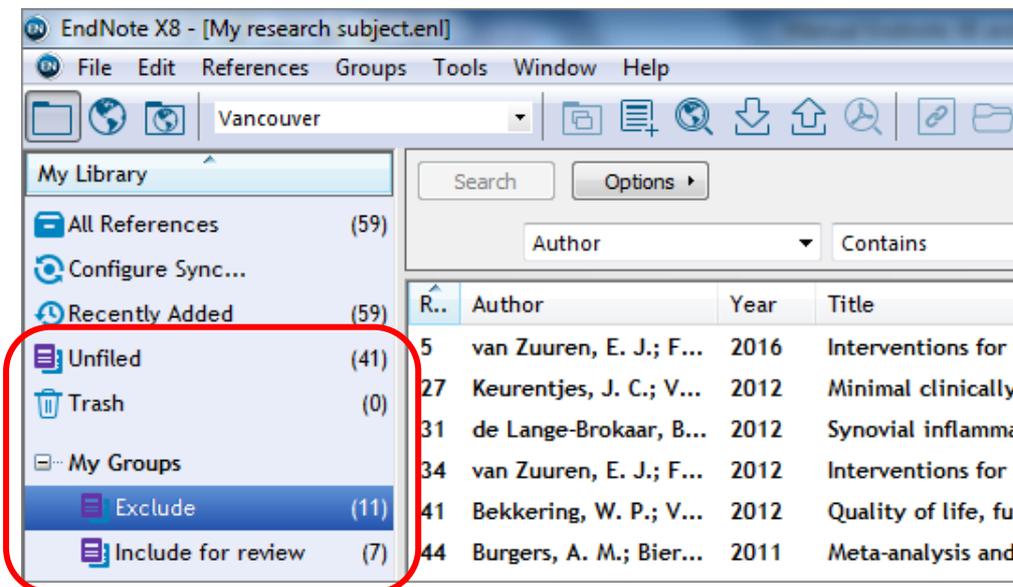
When creating a library, two files are generated which both are necessary for EndNote to function properly. These are the EndNote Library file .enl and the file folder .Data with the same name. For instance:  *My research subject* and  *My research subject.Data*. Do not remove either of the files.



The sample library *My research subject* now contains 59 references.



Via *My Groups* > (right mouse button) > *Create Group* two sample groups were made: *Exclude* and *Include for Review*. From the *All References* set records have been dragged to the preferred groups. These 18 records are still part of the total set. 41 records of the total set are still *Unfiled*, that means: not assigned to a Group.



2. Creating a list of references

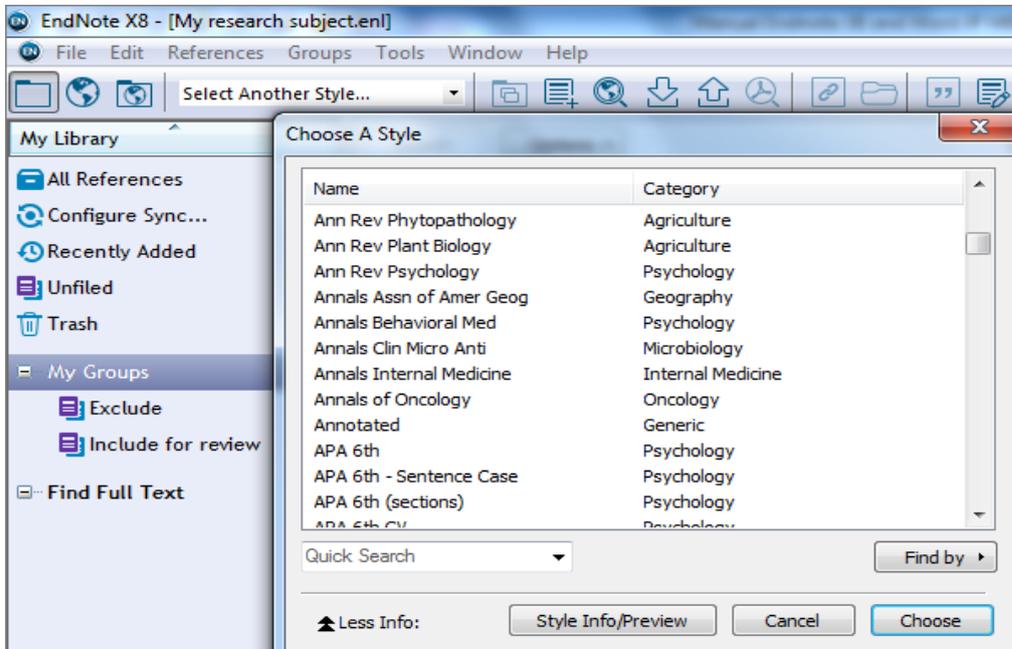
The library can be used as a source for a "stand alone" reference list. More frequently however, it is linked to Word to insert citations in a text and generate the corresponding Reference List. See paragraph 3.

For a "stand alone" list, sort the selected set of references in the preferred order by clicking the column header. Selecting can be done by Control-clicking separate records or creating a Group for the preferred selection. Without a selection, records of the entire library will be included in the list.



The format of the Reference List or Bibliography is defined by the Output Style. The most frequently used Styles are presented in a basic list. This includes generic styles such as Vancouver, APA, and numbered, as well as journal specific styles.

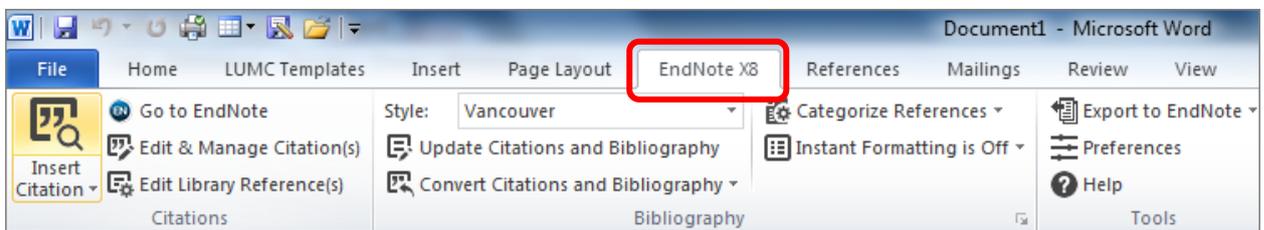
Clicking *Select Another Style ...* in the shortlist shows the default list of nearly 500 styles to select from. Click the preferred style > *Choose*.



Then click *File > Print Preview* to create a bibliography in the layout of preference. Click *Print ...* to specify print options. See paragraph 5 on how to use one of the circa 6000 extra available styles.

3. Inserting citations in Word (*CiteWhileYouWrite, CWYW*)

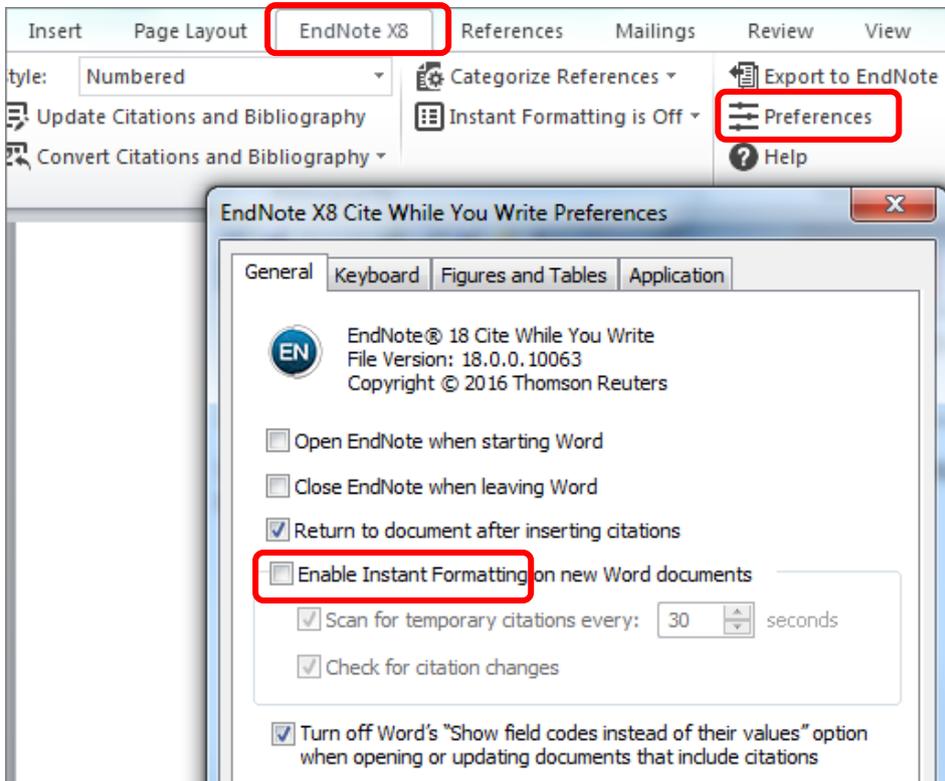
While writing a text in Word, citations from EndNote may be inserted without leaving Word. This feature is called CiteWhileYouWrite (CWYW). The link with EndNote operates via the EndNote tab in Word.



When this tab is missing, get it in the Word ribbon by using the options available on the Walaeus Library website lumc.nl/walaeus > EndNote > install Word CWYW toolbar.



In *Preferences > EndNote Cite While You Write Preferences > General*: deselect *Enable instant formatting*.
Instant Formatting may cause errors in the linking between EndNote and Word. The formatting can easily be executed whenever needed.

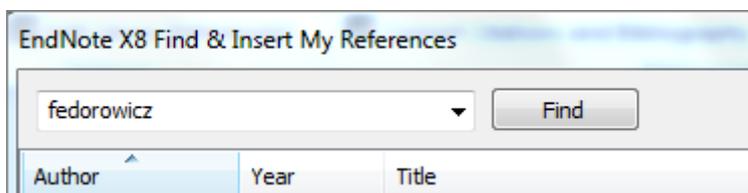


Check if the appropriate EndNote library is open and use *File > close library* to close any other libraries that are not relevant for your document.

In the text, place the cursor in the position where a reference is needed. Click the icon



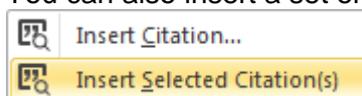
Insert Citation > *insert citation*. Type a discriminating feature of the desired citation to trace it and click *Find*.



One or more references meeting the criterium are shown; select the appropriate and click *Insert*.

In the text the unformatted citation is shown, for example {Fedorowicz, 2013 #24}

You can also insert a set of previously selected references in your text:



Highlight the selected records in EndNote.
In Word, use *Insert Citation > Insert selected citation(s)* to insert the set in the appropriate location.

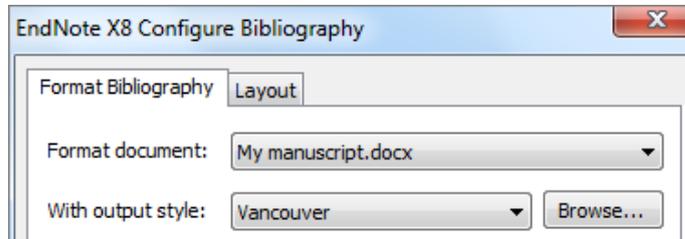


4. Final lay out

Use the option *Bibliography* for the final layout. The unformatted citations will be transformed to formatted citations and the corresponding Bibliography will be generated.

Click the arrow at Bibliography

Bibliography



In the dialog screen *Configure Bibliography > Format Bibliography*, check the document name and select an Output Style. Use *Browse* to show more options than the shortlist.

The tab *Layout* offers extra features for the Bibliography. Click OK to apply the style.

The unformatted citations (see example below)

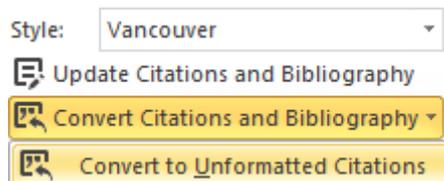
My article text with citations{de Roos, 2017 #1;Fedorowicz, 2013 #24}

are converted to the preferred layout including a bibliography:

My article text with citations^{1,2}.

1. de Roos, A., van den Berg-Huysmans, A. & Schoones, J. W. Prognostic Value of CMR-Verified Myocardial Scarring in Cardiac Sarcoidosis. *JACC Cardiovasc Imaging* **10**, 421-423 (2017).
2. Fedorowicz, Z., van Zuuren, E. J. & Schoones, J. Botulinum toxin for masseter hypertrophy. *Cochrane Database Syst Rev*, CD007510, (2013).

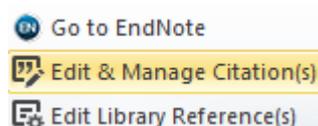
In order to change the position of a reference or to delete it, it is advised to first revert the formatted citations back to unformatted, before generating the adapted bibliography. This will give the best insight in the changes.



Position the cursor at the top of the text and open *Convert Citations and Bibliography > Convert to Unformatted citations*.

In-text citations are unformatted and the List of References is removed. Delete the undesired reference from the text. In a citation string, also delete the separator symbol ; the semicolon.

Click the arrow at *Bibliography* and follow the steps to execute the changes. All references are renumbered in the text and in the Bibliography.



Deleting references without "converting to unformatted" is done by the option *Edit & Manage Citation(s) > Edit reference > remove citation > OK*.

Tip:

Citations can be highlighted in the text. This is a setting in Word: Choose *File > Options > Advanced > Show document content > Field shading > Always*.

**Note:**

When exchanging a document for reviewing, the links between Word and EndNote may be damaged. Change the document into a Plain Text version to prevent this. Use *Convert Citations and Bibliography > Convert to Plain Text* and retain your own copy with active links.

5: Adding a Style to the basic list

Check the default folder location for output styles in EndNote > *Edit > Preferences > Folder locations > Style Folder*.

Default, the basic list of styles is located in the Styles Folder on C:\ProgramFiles(x86)\EndNote X8\Styles. On the LUMC Follow You Desktop this is H:\Roaming\Downloads. When you added a personal folder as additional location for Styles, the list as presented in EndNote is compiled from the two locations.

Open the Styles Downloadportal at <http://endnote.com/downloads/styles>.

Insert the desired style name > *Apply > Download*

OR:

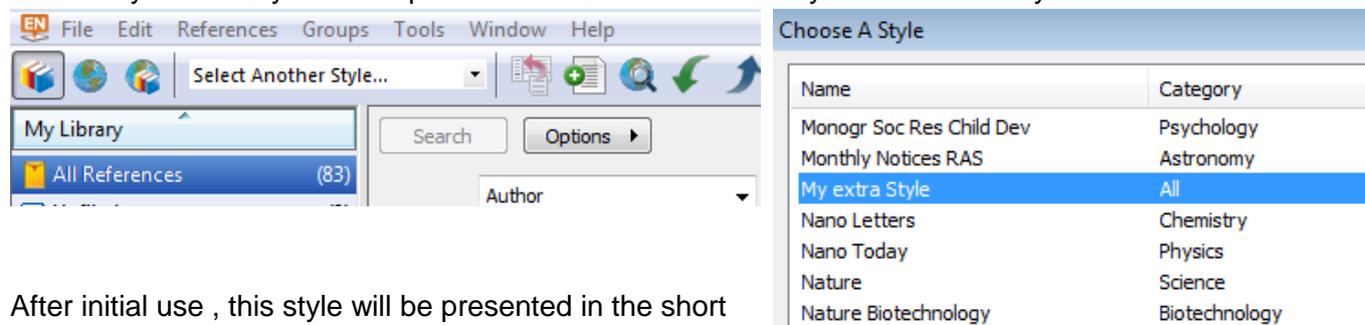
Click on the link provided in the Instructions for Authors of a specific journal.

Download the desired style.

Select the .ens file (= EndNote Style) in the designated folder and double-click. It should open in EndNote. In EndNote, go to *File > Save As*. Replace the style's name with one of your own preference e.g. "My extra Style" and click Save.

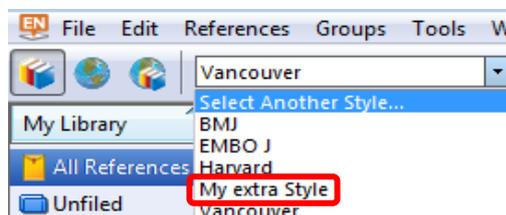
Click *File > Close Style*.

The newly added Style is now presented in Select Another Style.. Choose a Style



Name	Category
Monogr Soc Res Child Dev	Psychology
Monthly Notices RAS	Astronomy
My extra Style	All
Nano Letters	Chemistry
Nano Today	Physics
Nature	Science
Nature Biotechnology	Biotechnology

After initial use, this style will be presented in the short list of Styles.



Vancouver

Select Another Style...

My Library

All References (83)

Unfiled

BMJ

EMBO J

Harvard

My extra Style

vancouver

6: More information

Manuals on how to import references and recommendations for deduplication are available at Walaeus Library website www.lumc.nl/walaeus/endnote, or contact the Walaeus Library information desk: walaeus@lumc.nl
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