

Fiji School of Medicine

"A Commitment to Excellence in
Training and Education of Health
Professionals"



EndNote 9 Training Manual

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1. Introduction

EndNote is one of a number of Personal Reference Database programs that are in use around the world today. The main functions of such programs are:

- Maintenance of a database of references;
- Downloading references from other databases;
- Using the database to link to references in word-processed documents;
- Generating a bibliography in the correct style for publication.

This course aims to teach you the basic skills required to get started using version 9 of EndNote. It does not cover everything you will ever need to know.

The *help screens* in EndNote are very useful and they can be accessed by clicking on the **Help** option on the menu bar at the top of the screen or the Help button  on the main toolbar. There is also a very detailed *manual* for EndNote 9. This should have been installed on the computer you are using along with the other EndNote software. It is a .pdf file, so you will need software such as Adobe Reader to read it. The manual is clearly written and well indexed. For more complex problems, you can email the support staff at *ISI ResearchSoft*. endnote@isiresearchsoft.com

2. Loading EndNote

To load EndNote in Windows, double-click on the **EndNote Program** icon. You should see the dialogue box in **Figure 1**:



Figure 1: Initial Dialogue Box

EndNote is asking you to create or open a *Library*. The term, "Library" is used by EndNote to describe a file where you store a database of references. At this stage I suggest you select **Cancel** – you can always create a new library or navigate to an existing one once you have opened Endnote.


3.0 Displaying the Toolbars

EndNote provides toolbars, which give you quick access to the most common commands. To display the toolbars, click on **Tools** on the menu bar and then on **Show Toolbar**. Click on **Main** to display the main toolbar. This is the most important toolbar, and we shall use it frequently during this course.

Later in the course, when we use EndNote in conjunction with the word-processor, we shall see some additional buttons added at the end of this toolbar, which are the **Cite While You Write/Add-in Toolbar (CWW)**.

The **Text Style Toolbar** is not used very frequently. It can be displayed in the same way.

4. Setting Up a New Reference Library

It is necessary to establish a reference library before you can enter any records. For the purposes of this tutorial we are going to save our work on the Desk Top (feel free to save to a USB stick, if you wish). To do this, click on the **New Library** button  on the main toolbar. This brings up the following dialogue box (**Figure 2**), with **Untitled.enl** as the name of the new library.

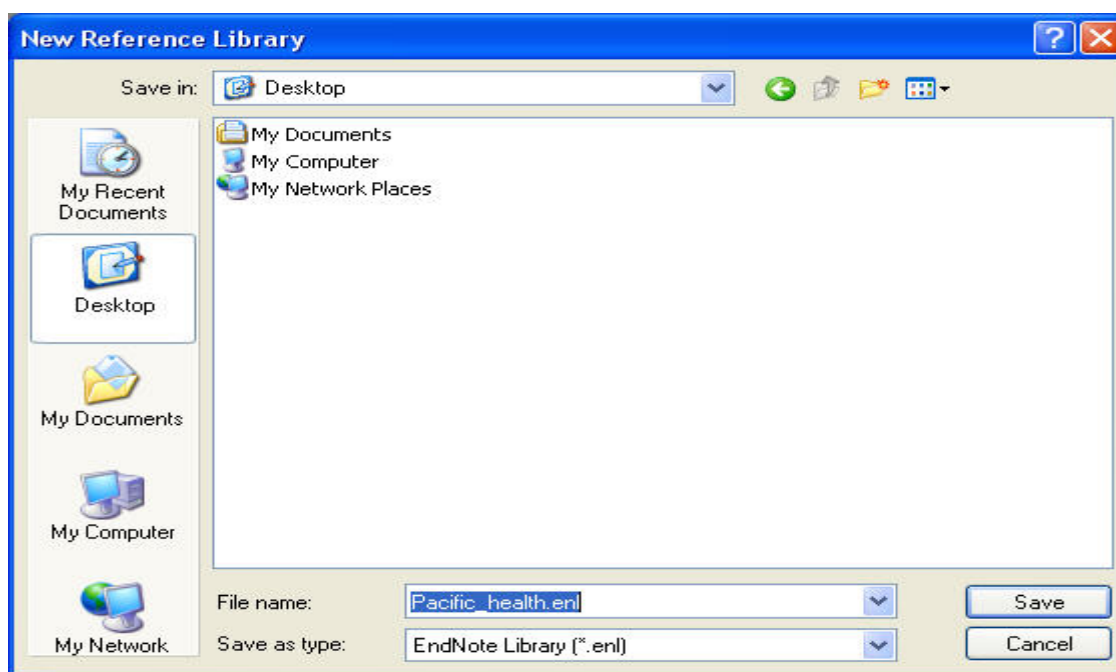


Figure 2: New Library window

In the **Save in** box, select the **Desk Top** (if you are working on an FSM Library computer, otherwise create/ select a folder on your C drive or USB stick). In the **File name** box, give your new library a name **[name].enl**, and click on **Save**.

You should see **Figure 3**:

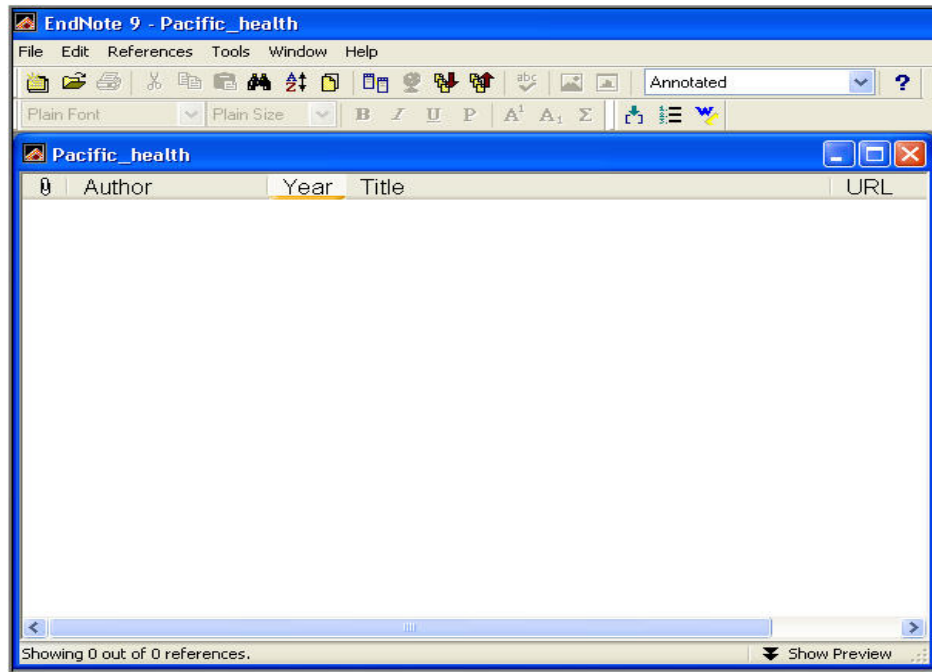



Figure 3: New Library Window

This is your new EndNote reference library, ready for new references to be added. A library is just a file on your computer (or on your USB stick), like any other file. It can be copied, renamed, deleted, moved to another folder or compressed. It is very important to make back-up copies of your library regularly and store them on another drive.

5. Entering References Manually

EndNote has the ability to automatically import records which you have downloaded from a database. It also allows you to connect directly to some databases via the Internet and import references straight into your library. However there will always be times when it is necessary to enter references manually.

To enter references manually into your reference library, click on the New Reference

button  on the main toolbar. You should now see **Figure 4** :

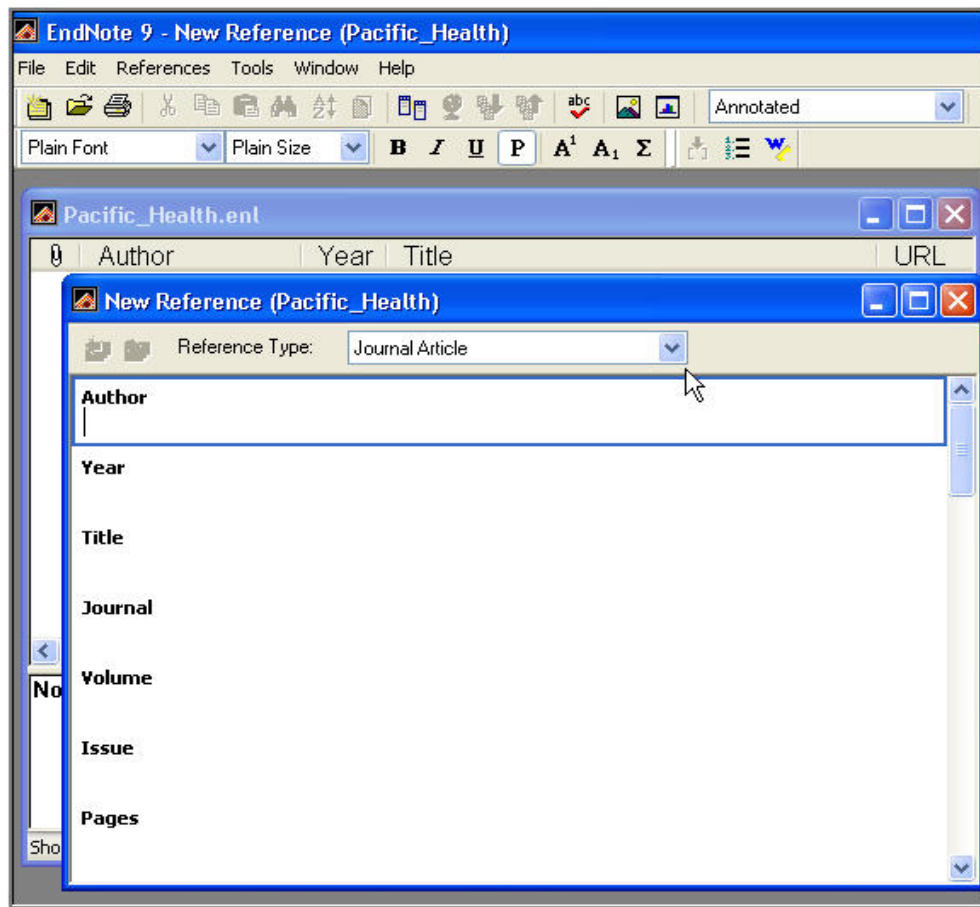


Figure 4: New Reference Window

Note that **Journal Article** is the default **Reference Type**. If you click on the arrow at the right of the Reference Type box, you will see many more reference types to choose from (eg. Book, Computer Program, Electronic Source, Artwork, etc.)

Click on any one of these reference types, and you will see that it replaces Journal Article in the reference type box, and, at the same time, the field options such as author, title, journal, volume, etc. change to the headings appropriate for the reference type chosen.

Practice entering references into your EndNote Library

The first example I have given you to practice with is a journal article. Ensure that **Journal Article** is the option in the Reference Type box, and then enter the details for the article. Start with the author names. Author names can be entered in a number of different ways. This tutorial will cover only one of these.

With the cursor in the Author field, type:

Surname, followed by first name or initial(s) eg. Jacobson, Carol or Jacobson, C J
Make sure you type the **comma (,)** after the surname. Press **Enter** key. The name will appear in red text to indicate it is a new name in your library. Now type the second author's name.

You can use the **Tab** key to go from one field to the next, or click in the next field with the mouse.

It is best to enter titles in **sentence case**, where only the **first letter** of the first word and proper pronouns are **capitalized**. When you have finished typing the data for this particular reference, it should look like **Figure 5**:

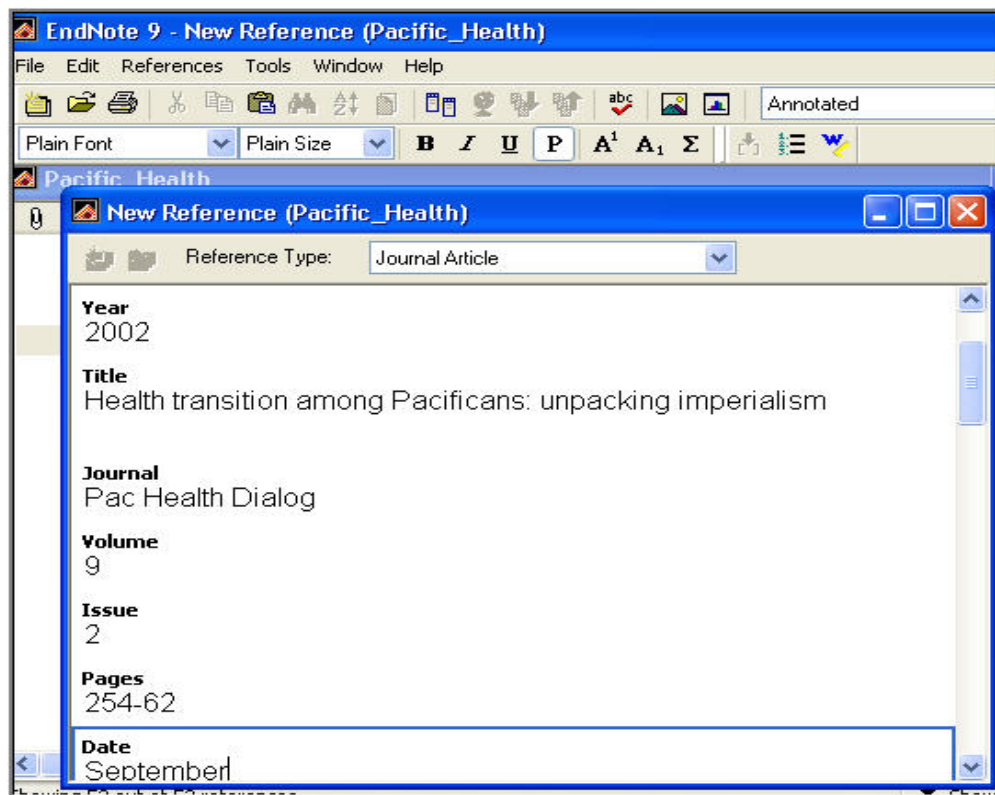


Figure 5: Journal Article Reference

Close the reference by clicking on the **X** button in the top right-hand corner of the New Reference window. **Closing also saves the reference.**

Decide what **Reference Type** example 2 is, and then enter the data for it. Your Second reference should look like Figure 6.

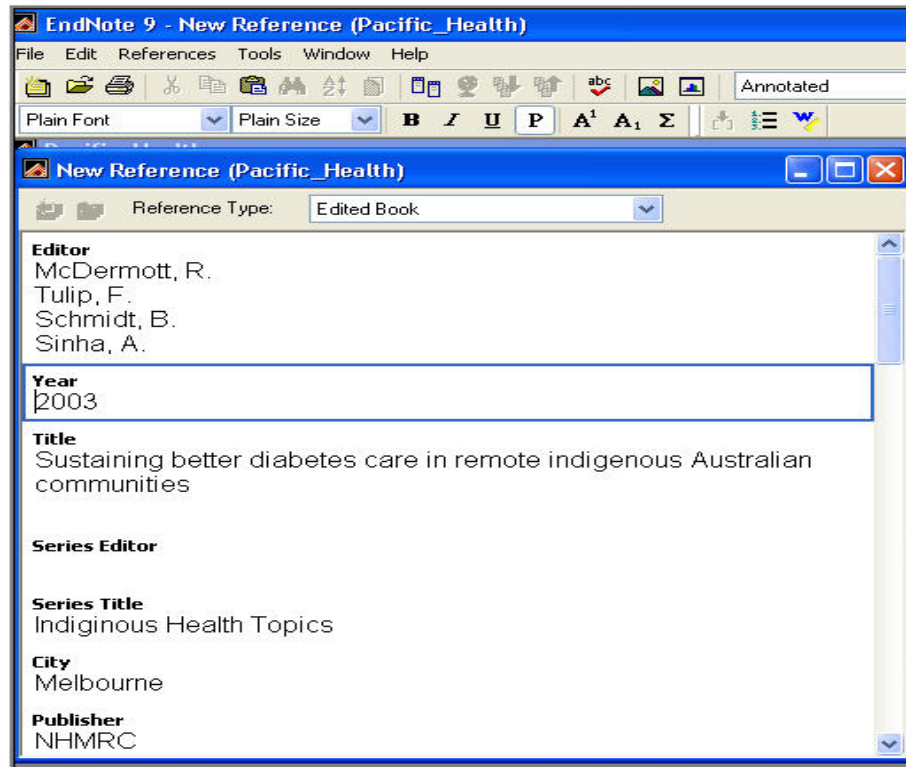


Figure 6: Edited Book Reference

Close the reference.

Entering a Reference that contains an image file or add an image to a Reference:



Click on the New Reference button in the tool bar. An empty reference window appears. Select the Reference type from the drop down menu. Now complete all fields until you come to **Image** and **Caption** fields.

To insert an image or object, place your cursor in the **Image** field and from the References menu in the Tool bar, select **Insert Picture** or **Insert Object** and a file dialogue box will appear. Navigate to the folder (or USB stick) you have your Picture or Object in, highlight the picture or object file you want to use and click **Open** to insert the

file into your EndNote Reference. An image will appear as a thumbnail and an object will appear as an attachment.

In the **Caption field** enter a caption or title as this will become your label in your MS Word document.

The difference between an **image** and an **object** is the way Word interprets the file extension. The following file extensions are pictures: .bmp, .gif, .jpeg, .png and .tiff. An object may be for example, an excel file, .xls EndNote stores the image/ object file in a **.data folder** with your library.

6. Editing References in EndNote

To view a reference in your library, just double-click on it in the library window to open it. Once you have opened the reference, you can change any of the details. Close the reference when you have finished editing and this will save the changes to the reference.

If you want to delete a reference from your library, click on it once in the library window to select it, and then go to the **References** option on the menu bar, and select **Delete References**.


Whenever you make changes to your library, you should amend your back- up copy. An easy way to back-up your library is to go to the **File** option on the menu bar, and select **Save a Copy**.

7a. Importing Downloaded References with a Filter

The first step in this process is to download a group of records from a database. It is important to note which database you are using as well as the supplier of the database, because EndNote needs to know not only that you are using (for example) **PubMed**, (sometimes called Medline) but also whether it is **PubMed (NLM)**, or **Ovid Medline**. This

is because the structure of the database can vary even though the actual data is the same.

For the purpose of this exercise I have provided a file called **obesity.txt**, containing several references downloaded from the **PubMed (NLM) database** on the Desk Top. The library into which you wish to import the references must be open before you begin the import procedure. Open the library you created earlier in this tutorial, if it is not already open.

Click on the Import Button  on the main toolbar. You should see a dialogue box that looks like **Figure 7**:

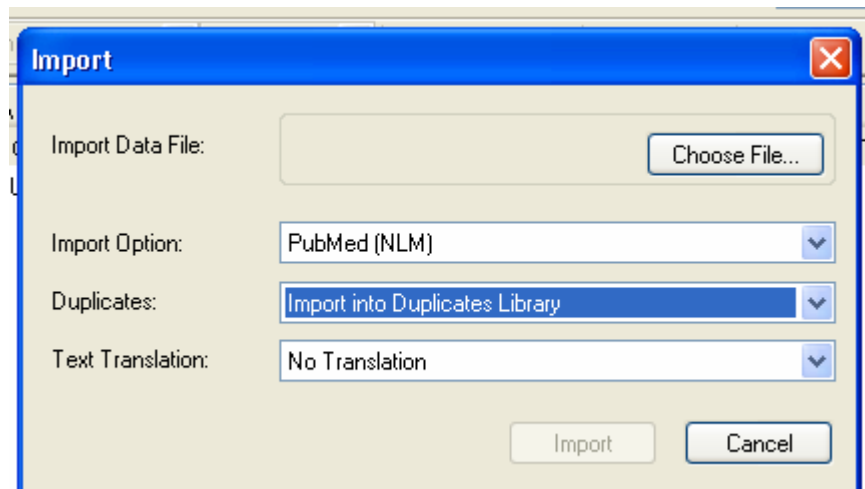


Figure 7: Import Dialogue Box

Now click on the **Choose File** button and navigate to the Desk Top where you will find the file called **obesity.txt**. Alternatively, you can use a [name].txt file you have saved from a previous PubMed search, which will be on your Removable Disk, if you wish.

We now need to find the correct filter to use to import these records. In the box labeled, **Import Option**, click on the down arrow to see some of the standard import options. Then click on **Other Filters** to open the list of filters (**Figure 8**):

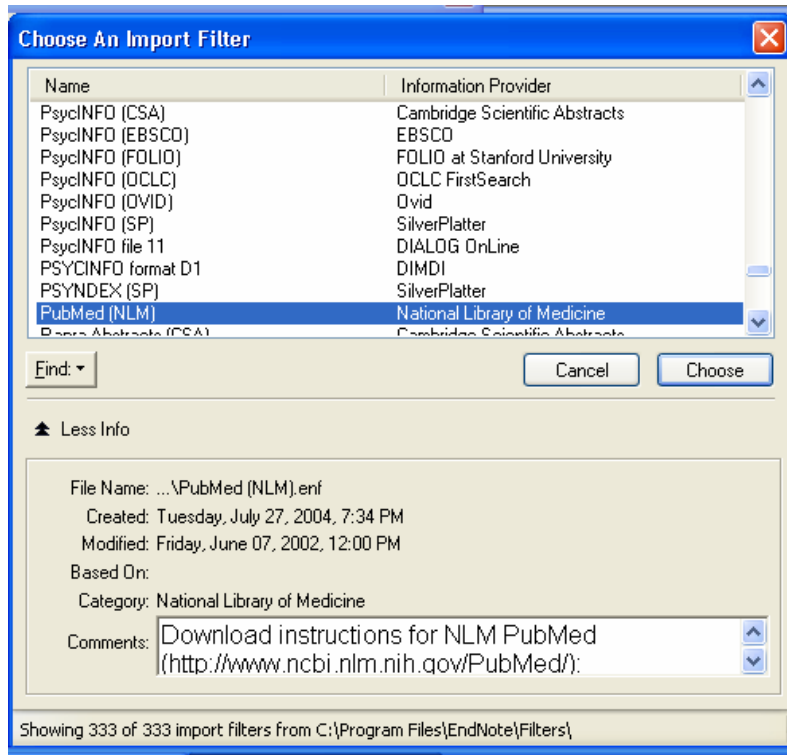


Figure 8: Filters List

Browse down the list of databases until you find Pubmed (NLM) and click on the **Choose** button. This will return you to the previous dialogue box.

Next, in the **Duplicates** box, select *Imports into duplicates library*. You have a choice to discard duplicates, import all records even if they are duplicates, or to import them into a duplicates library. The last method allows you to examine the records later and keep them or discard them as you choose.

In the **Text Translation** box, the default option *No Translation* is appropriate in most cases. The dialogue box should now look like **Figure 9**:

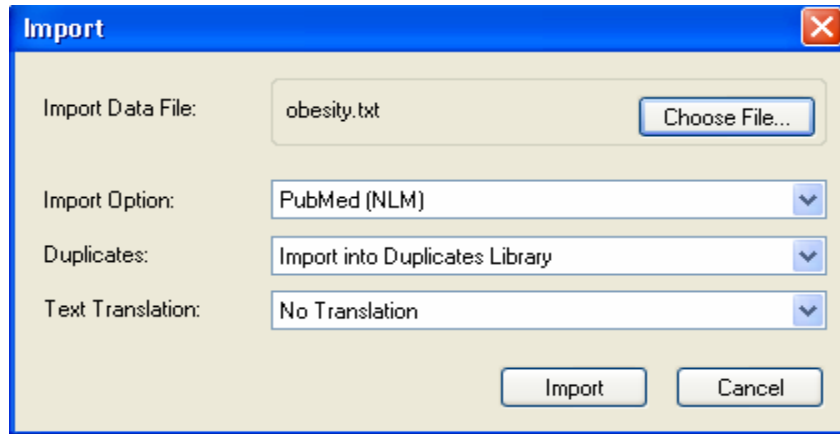


Figure 9: Import Dialogue Box

Click on the **Import** button and the references should be imported. You will see a Progress report, telling you how many references have been imported, after which your screen should look like **Figure 10**:

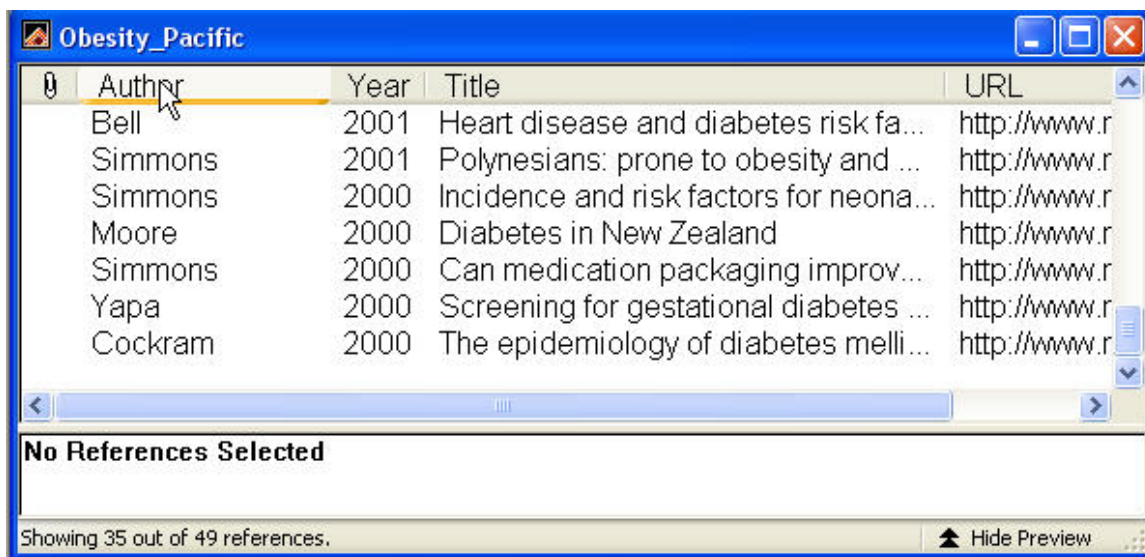


Figure 10: Newly Imported References

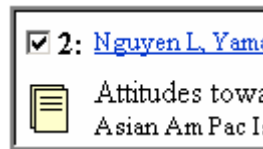
Note that only the references which you have just imported are visible, and the bar at the bottom of the library window says *Showing 35 out of 49 references*. To see all the references in the EndNote library click on **References** on the menu bar, then on **Show All References**.

7b. Saving a PubMed Search to Import into EndNote later

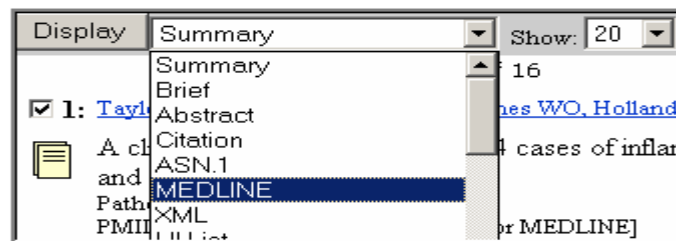
In order to successfully import your PubMed search results into your EndNote Library, you **must** follow the steps outlined below:

Step 1.

- Conduct a PubMed search,
- When your search results appear on the PubMed screen in front of you, make sure they all appear on one page,
- Use the pull-down button beside **Show** to select the nearest next number to show all your results on the same page,
- Select the ones you wish to save, by placing your cursor in the box beside each entry and clicking the left button on your mouse. A tick will appear in the box.



- Change the display from **Summary** to **Medline** by selecting **MEDLINE** from the pull-down menu beside the **Display** button



- Your records will re-format automatically

Step 2.

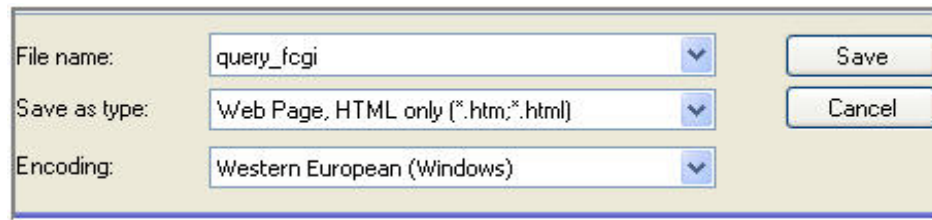
When your results appear in **MEDLINE** format on the screen, click the **Send To** button

for **Text** format 

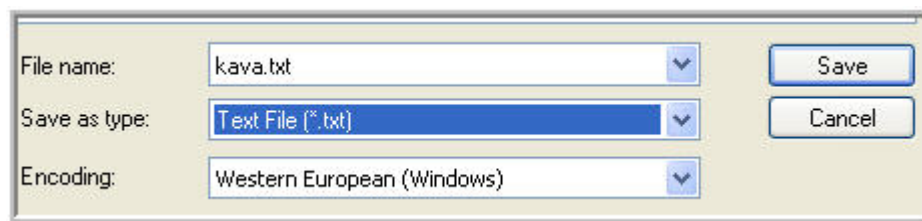
Your results will re-appear in the form of a text (.txt) document on the screen.

Step 4. To save this file:

- Select **Save As** from the pull-down **File Menu** in your Tool Bar and the **Save As** dialogue box will appear
- You will see that your file it is called **query.fcgi**



- Change *File name*: **query.fcgi** to **[Name]. txt** for example, **kava.txt**
- Change *Save as type*: **Web Page, HTML only (*.htm, *.html)** to **Text File (.txt)**



- Select the **Desk Top** or **Removable Disk (E:)** for saving to your USB stick



- Click **Save** to save the file


This file is now ready to import into your EndNote Library at a later time.

8. Connecting Directly to Databases via the Internet

It is possible to access some databases via the Internet using the EndNote software, and then download references directly from the database into your EndNote library. This is only possible if the database supports the *Z39.50 search protocol*. Many library catalogues have Z39.50 servers. The National Library of Medicine's database *PubMed* is also accessible in this way.

The EndNote software comes with a large number of connection files for databases. Many of these databases are available only to subscribers, although most of the library catalogues are freely accessible.

Click on the EndNote program icon to open it. When you see the initial dialogue box, check the option to *Open an existing EndNote library* and open the library you created for this tutorial, *Pacific_health.enl* or one of your own libraries. Now you are ready to use

the connection file for PubMed. Click on the Connect button  on the main toolbar. A list of available connection files will appear in a new dialogue box.

Browse through the list of connection files until you reach **PubMed (NLM)**, which is the connection file for the *PubMed Medline* database (**Figure 11**):

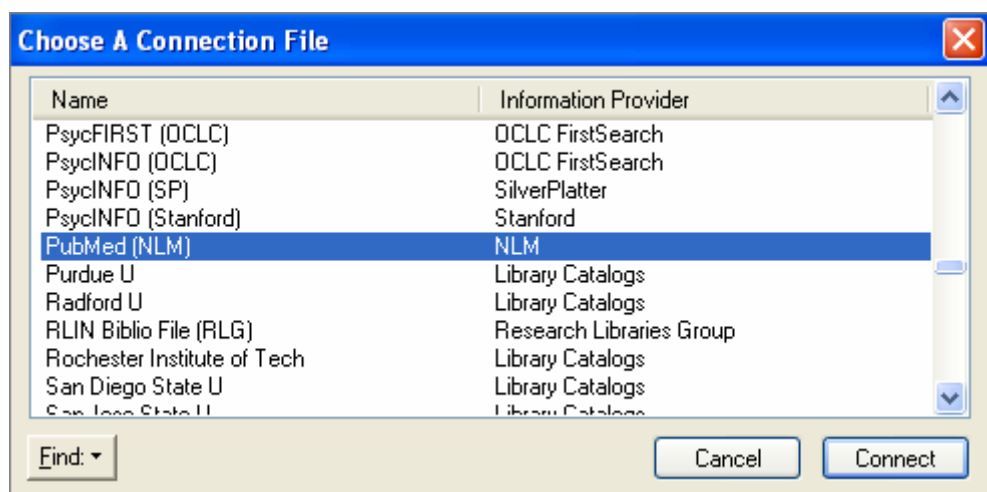


Figure 11: Locate the Required Connection File

Click on the **PubMed (NLM)** file, then click the **Connect** button, and EndNote will use your Internet connection to access the database. You must have a connection to the Internet currently open in order to use the EndNote Connect function.

When the connection to PubMed is successfully established, EndNote opens a **Search** window and (in the background) a **Retrieved References** window (**Figure 12**).

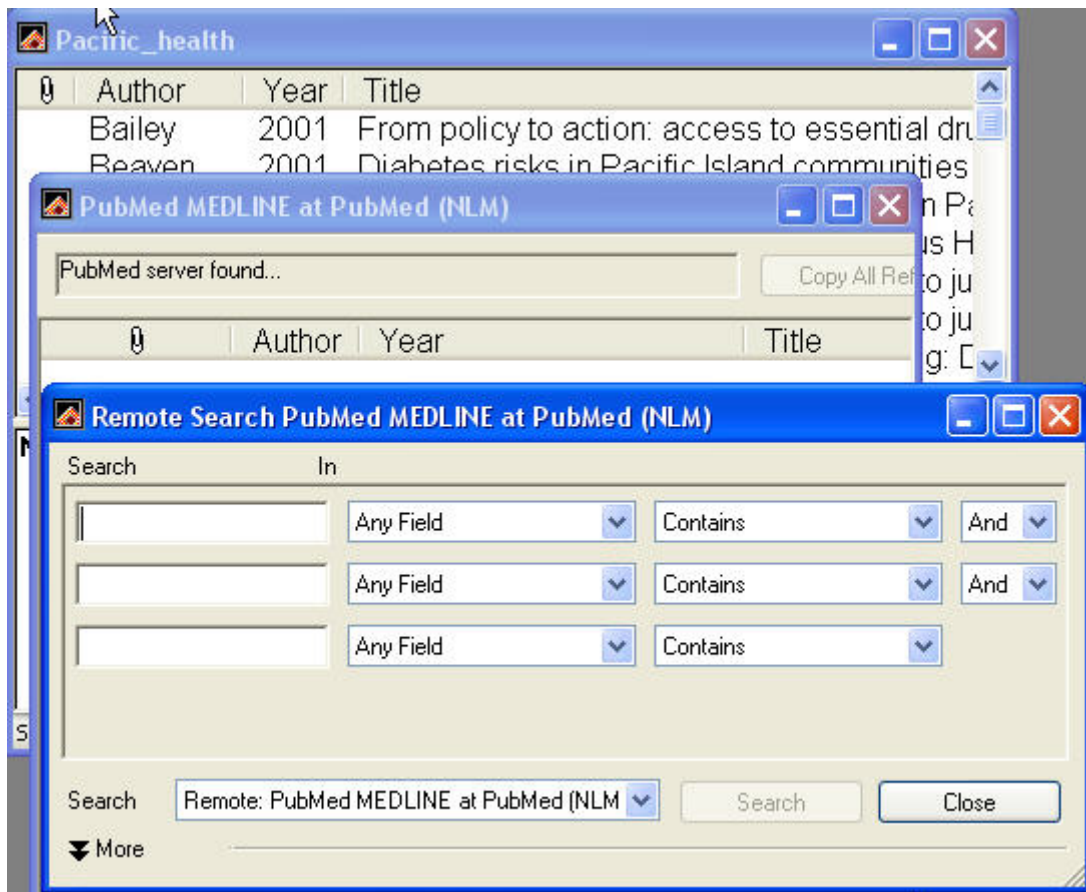


Figure 12: The Connection File Search Window

Assume you are researching the question: *What is the prevalence of diabetes in the Pacific Islands?* In the first search box, enter the search term, *diabetes* and limit your search to the abstract field by selecting **Abstract** from the pull-down menu, **Any Field**. Underneath that box, check the connector *And*, then in the second search box, enter the search term, *Pacific Islands*. Limit your search to the abstract field again by selecting **Abstract** from the pull-down menu. Now enter *2000* colon (:) **2005** in the next search

box and select, **Entered between [date1]:[date2]** from the Any Field pull-down menu. The screen should look like this (**Figure 13**):

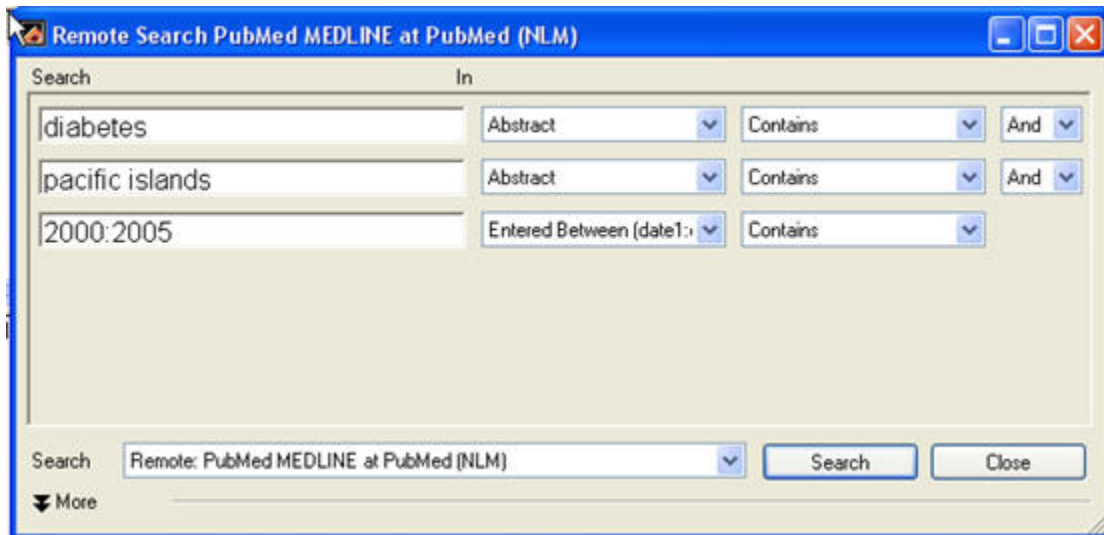


Figure 13: Constructing a Search with a Connection File

Now click on the **Search** button, and you will see a dialogue box stating the number of references which match your search (**Figure 14**):

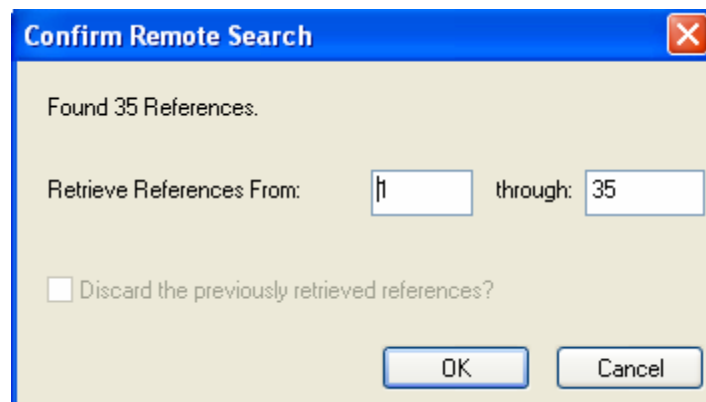


Figure 14: "Confirm Remote Search" Dialogue Box

If the result set seems too big or too small, you can refine the search by clicking **Cancel** and this will return you to the **Search** window where you can expand or limit your search by selecting other fields from the **Any Field** pull-down menu.

To retrieve the references, click the **OK** button and the references will appear in the **Retrieved References** window. You can stop and start the retrieval progress by clicking on the **Pause** or **Resume** buttons.

Alternatively, you can retrieve a small number of references at a time e.g. the first 10 references. Do this by changing the figure in the second box to 10. Then click on the **OK** button and the references will be displayed in the **Retrieved References** window, which is like a temporary EndNote library (**Figure 15**).

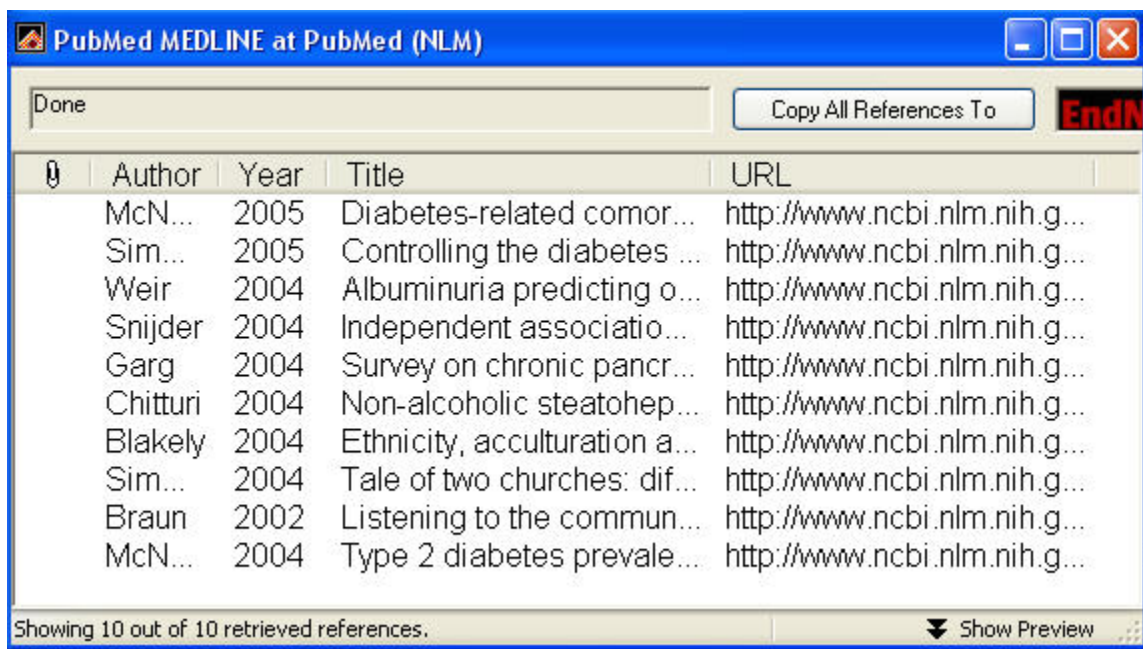



Figure 15: The Retrieved References Window

You can double-click on any of these references to open them and view the full details. Select the references that you would like to transfer to your library by **holding down** the **Ctrl** key and clicking on the required references one at a time. Alternatively you can Shift-click to select a range of references.


Then click on the **Copy # References To** button to determine where the references will be saved. EndNote will ask you which Library you want to save the references to (eg. **New Library**, **Choose Library** or any library which is already open). Select the name of the library that you opened earlier, and the references will be added to that library.

If you wish to search the database again, click on **Window** on the top menu bar, and when the drop-down menu appears, click on **Connected to: PubMed**. This will display the retrieved references window again. Click on the Search button  on the main toolbar to display the search window.

When you have finished searching, close the **Search** window by clicking on the **X** button in the top right-hand corner. Close the **Retrieved References** window in the same way. You will be asked to confirm that you wish to discard the retrieved references. Click on the **OK** button, because you have already transferred the references which you want into your EndNote library.

9. Copying References between Libraries

If you have more than one library, moving references from one library to another is easy. **Pacific_health.enl** library should already be open. Now create another library and call it

Kava.enl. To create a new library, click on the New Library button  on the main toolbar. This will bring up the New Reference Library window with **untitled.enl** in the File name box. Give your new library the name, **Kava.enl** and save it to the Desk Top (**Figure 16**):

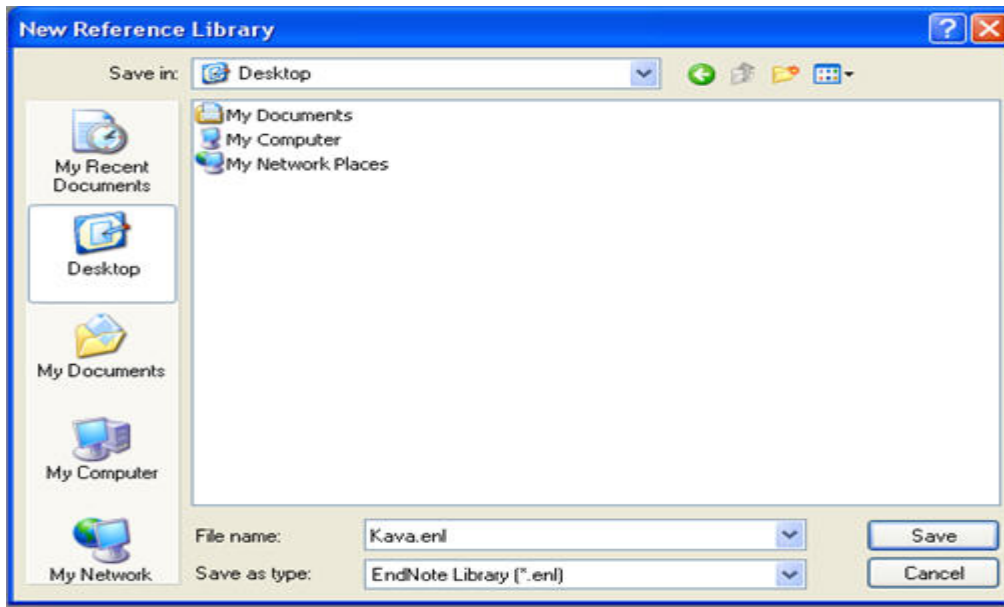


Figure 16: New Reference Library window

You now have two libraries open; one on top of the other (Kava.enl on top of Pacific_health.enl). The easiest way to copy references is to **Cascade** the libraries, so that they appear side by side. To do this, click on **Window** on the menu bar, and then click on **Cascade**. You may need to re-size the windows, so that they fit on your screen side by side. Your screen should look like **Figure 17**:

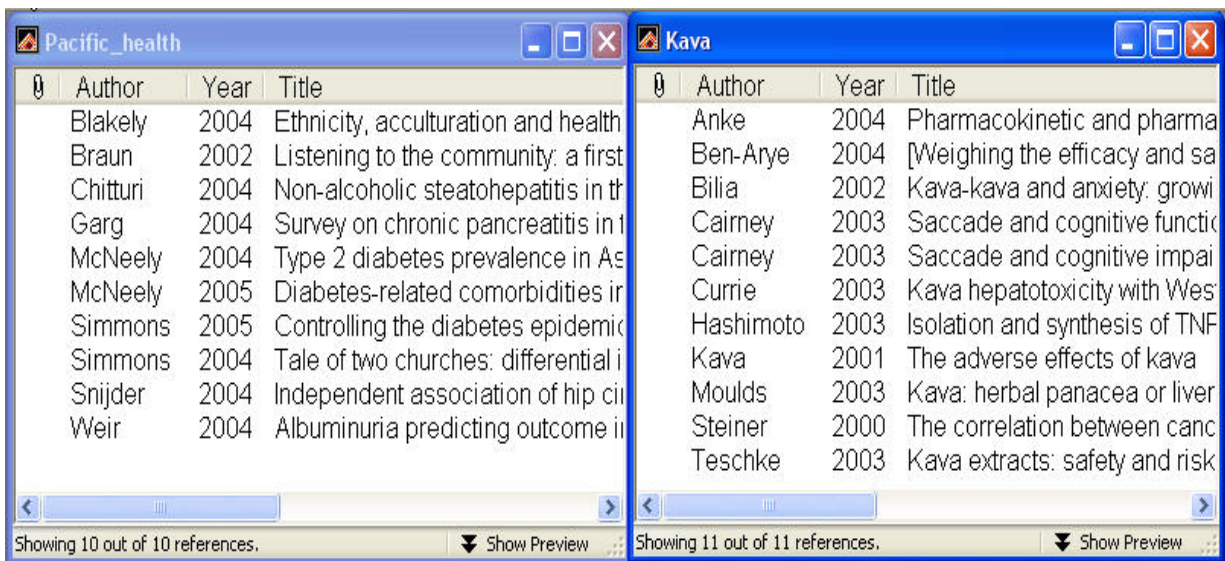


Figure 17: Two Libraries in Cascade Format


To copy the reference by *Moulds* from the **Kava** library into the **Pacific_health** library, click on the *Moulds* reference to highlight it. Then click on it again and drag and drop it into the **Pacific_health** library.

Alternatively, you can use **cut and paste** or **copy and paste** to move references between libraries. Place your cursor on the reference by Simmons in **Pacific_health** library, right click on your mouse and select **copy**, move your mouse to **Kava**, right click on your mouse and select **paste**. The Simmons reference will be added to **Pacific_health**.

We shall not be using the **kava** library again, so you can close it by clicking on the **X** button in the top right-hand corner of the library window.

10. Searching an EndNote Library

EndNote provides a sophisticated search function, which allows you to locate specific references or groups of references in your library. We will practice this, using the **Pacific_health** library.

To begin a search, click on the Search button  on the main toolbar, and you will see the search dialogue box that we have already used when we connected to the *PubMed* database. Now we are using it to search an EndNote library.

Type the term, *screen* in the first search box. Notice the word *Contains* in the box after the **Any Field** box. This signifies that EndNote will search for words that contain the word screen. This means EndNote will pick up screen, screened and screening. Select the *And* connector and then type the stem word, *diabet* in the second search box. Endnote will pick up diabetes and diabetic see **Figure 18**. Click on the **Search** button.

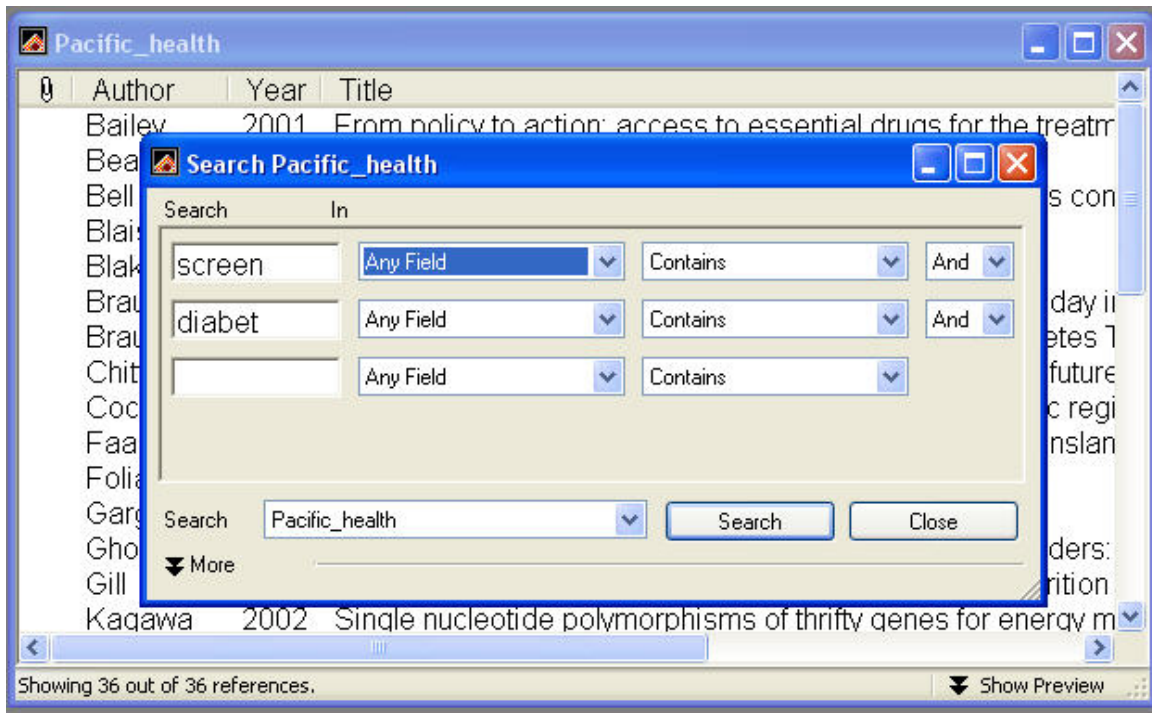



Figure 18: Searching an EndNote Library

Let's do a slightly more complicated search. Assume we wish to find all references by the author *Simmons* published on or after the year 2001. This means that we wish to find references which have *Simmons* in the Author field and a date greater than or equal to 2000 in the **Contains** pull-down menu.

Click on the **Search** button  again to display the Search window. In the Any Field pull-down menu select the **Author** field, and then type *Simmons* in the search box. Select the connector, **And**. Then select the **Year** field from the **Any Field** pull-down menu. In the **Contains** pull-down menu select, **Is greater than or equal to**. Type 2001 as the search term. The screen should look like **Figure 19**:

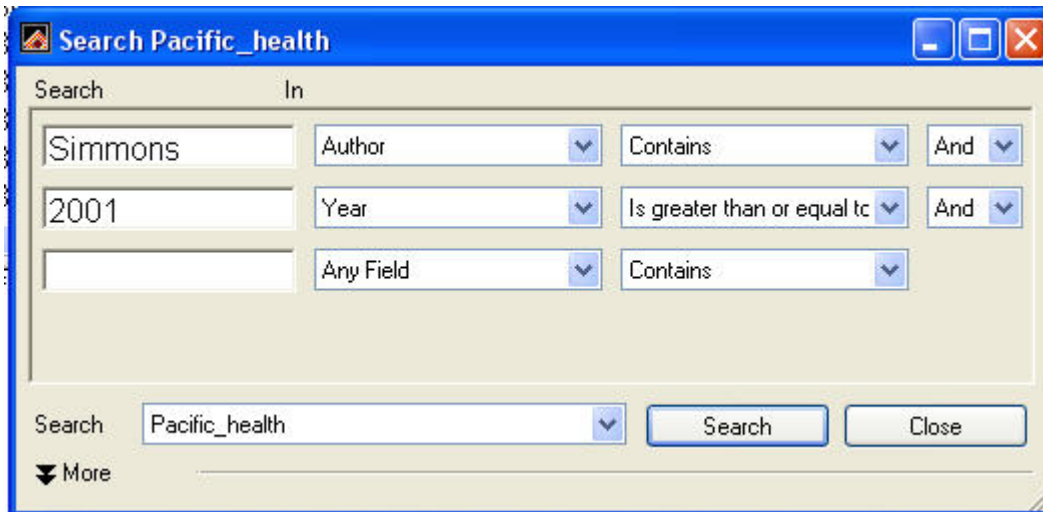


Figure 19: Constructing a Connector (Boolean) Search in an EndNote Library

Click on the **Search** button and some of the references retrieved will have *Simmons* as the first author. If you open the other references (those listed with different author names) you will find *Simmons* is a subsidiary author.



Click on the **Search** button on the main toolbar to display the Search window. Close the dialogue box by clicking on the **X** button in the top right-hand corner.

11. Sorting an EndNote Library

When you open a library, it automatically sorts itself alphabetically by author. However you can sort your references on any of the fields in the record, e.g. author, title, year, label. We will sort the **Public_health** library by year of publication, with the most recent references appearing first.



Click on the Sort Library button on the main toolbar. The following screen (**Figure 20**) will appear:

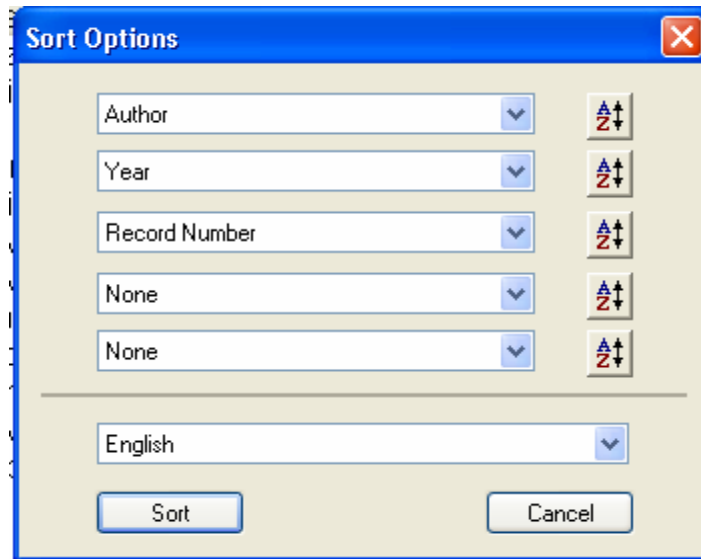





Figure 20: The "Sort Options" Dialogue Box

In the first box, click on the pull-down arrow to change the selection to **Year**.

Beside the pull-down arrow is a **Sort Options** button  which you can use to sort items *from*

smallest to largest  or *from largest to smallest* . Click on the **Sort Options** button to change it to sort from largest to smallest, i.e. from most recent year to earliest year.

In the second box, click on the pull-down arrow to change the selection to **Author** and leave the default setting to sort from smallest to largest, i.e. from A to Z. This means that after EndNote has sorted the references by year, it will sort them within each year alphabetically by author.

The box should now look like **Figure 21**:

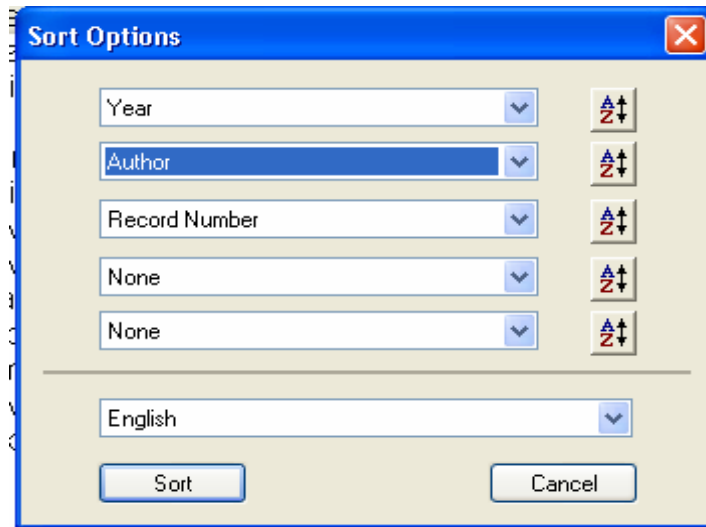


Figure 21: Specifying the Sort Options

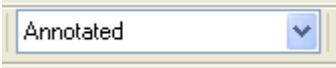
Click on the **Sort Options** button and the references in the library will now be sorted chronologically, with the most recent references first.

12. Producing a Bibliography or Reading List

We will now look at using EndNote to produce bibliographies. To begin, we consider the procedure for using the references in your library to generate a reading list for students, or perhaps a list of your own publications for your CV.

Open your EndNote Pacific_health library. While holding down the **Ctrl** key, select about five references in the **Pacific_health** library window. Now click on **References** in the menu bar and then click on **Show Selected References**. You should now be able to see only those references, which you selected. At this point, you could sort the references if you wished them to appear in your bibliography in a different order.

The next step is to decide on the bibliographic style that you wish to use for your

references. Go to the style menu  on the main toolbar and click on the pull-down arrow. You will see a list of the four basic EndNote styles. Click on **Select Another Style** to open the complete list of output styles which are supplied with the EndNote software (**Figure 22**):

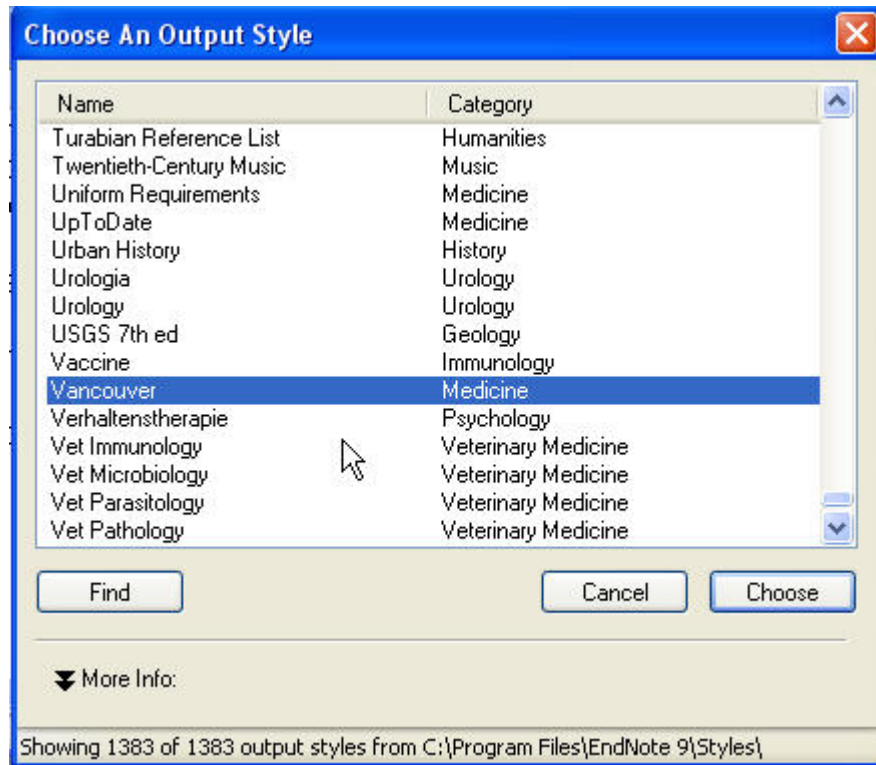


Figure 22: Output Styles List

Find a style that would be useful in your subject area, and then click on it to highlight it. Click on the **Choose** button to select that style.

This will return you to the library window, with only your selected references showing. To generate a bibliography from these references, using the style that you have just

selected, click on the Export button  on the main toolbar.

You will now see the **Export file name** window. You should save the exported references to the **Desk Top**. Name the file, **readings.rtf**. In the **Save as type** box, click on the arrow to select **Rich Text Format** (**Figure 23**):

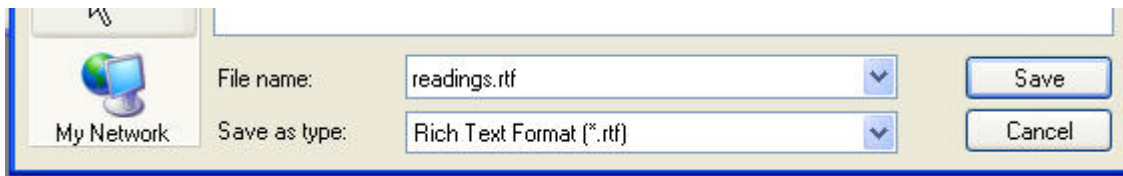


Figure 23: "Export File" Dialogue Box

Click on the **Save** button. The references have now been exported to the Desk Top in the bibliographical style that you selected. To view the bibliography, open your word processor and then open the file **readings** on your Desk Top.

13. Using EndNote with a Word Processor

We have just seen how to use EndNote to create an independent bibliography, but EndNote can also work in conjunction with your word processor, so that you can insert references as you type a document, and automatically generate the bibliography.

If you have a recent version of Microsoft Word installed on your computer, when you install the EndNote software an extra file will be inserted into your word processing software. This is the **Cite While You Write (CWYW)** tool. To see what it looks like, open Word and then click on **Tools** on the menu bar. Click on the **EndNote 9** submenu, and you should see some additional commands relating to EndNote (**Figure 24**)

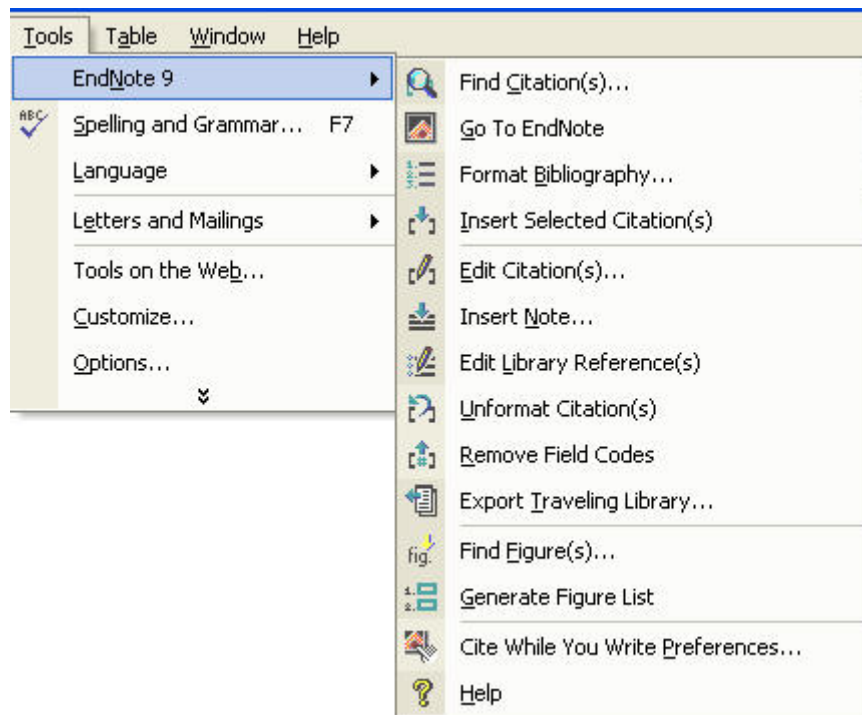


Figure 24: The EndNote Tools Menu in Microsoft Word

These commands can also be accessed using a special EndNote 9 toolbar. To display the toolbar, click on **View** on the menu bar, then select **Toolbars**, and click on **EndNote 9** to add the EndNote toolbar above the Word toolbar. It should look like **Figure 25**:

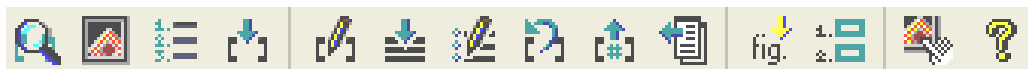


Figure 25: The EndNote Toolbar in Microsoft Word

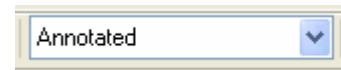
In this training course, we shall be using the toolbar, but you can use the commands on the **Tools** menu, if you prefer.

We will now practice using **Cite While You Write (CWYW)** by adding some references to a sample paper. We will insert references from the **Pacific_health** library, which should still be open. Open the Word document entitled **manuscript** which is already on your Desk Top or a document of your own on your USB stick. For the purposes of this tutorial, we will refer to your document as manuscript as well.

First, we need to decide which style we wish to use. Click on the **Go to EndNote** button



on the toolbar. In EndNote, go to the style menu



on

the main EndNote toolbar and click on the arrow. Click on **Select Another Style** to open the complete list of styles. Browse through the list to find the *Vancouver* style and choose it. This is the output style.

At the end of the main toolbar in EndNote, you should now see three extra buttons



These are the **CWYW toolbar**, and they become visible once you are using EndNote in conjunction with Word. Click on the **Return to Word Processor** button



and you will be returned to your Word document.

Go to the end of the first sentence, where we will insert our first reference, and insert a

space before the full stop. Then click on the **Find Citations** button  on the toolbar.

This opens a search window. We will look for a reference by the author *Ghosh* in the **Pacific_health** library. Enter the author's name in the search box, and click on the **Search** button. One reference is retrieved from the **Pacific_health** library (**Figure 26**):

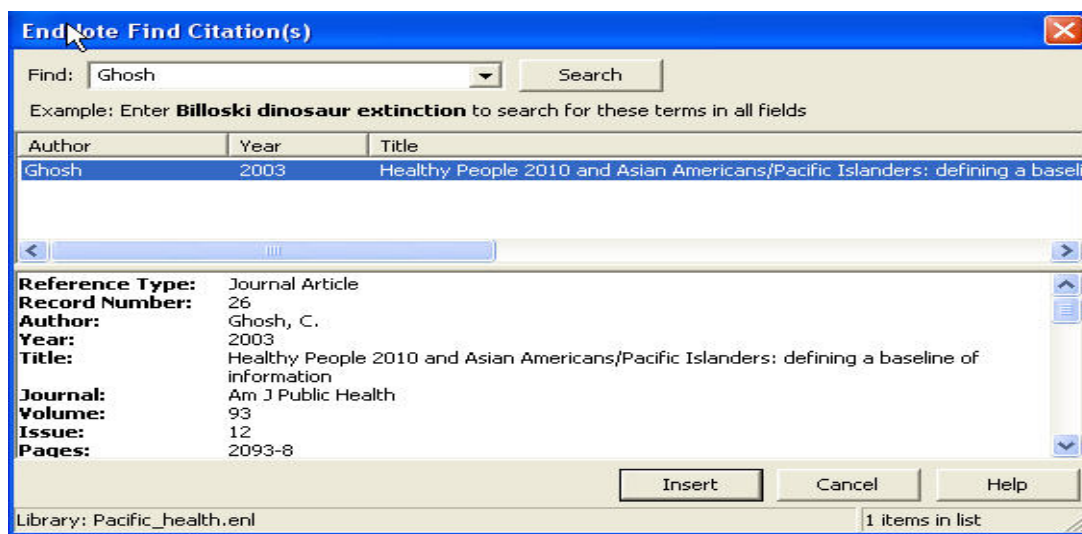


Figure 26: The "Insert Citations Search Window"

Click on the **Insert** button, and this reference will be inserted into the **manuscript** document. Your document should now look something like this (**Figure 27**):

Recent Developments in Personal Bibliographic Software: a Critical Review

By J.W. Bloggs

Since the 1980s, there have been a variety of software products on the market which can be classified under the general heading of Personal Bibliographic Software (1).

All of these products perform the same two basic functions: they allow the user to maintain a database of bibliographic references and they permit the generation of a bibliography containing some or all of those references.

Substantial developments have taken place in the functionality of personal bibliographic software. Today it is not difficult to find a product that can automatically import references from a CD-ROM or web database and format both in-text citations and a list of references in a wide variety of styles.


References

1. Ghosh C. Healthy People 2010 and Asian Americans/Pacific Islanders: defining a baseline of information. *Am J Public Health*. 2003 Dec;93(12):2093-8.


Figure 27: Manuscript with Reference in Vancouver Style

Notice that EndNote automatically formats the in-text citation and creates a list of references at the end of the document, according to the *Vancouver* style. We shall now add some more references to this paper.

At the end of the first paragraph, insert a space before the full stop and again click on

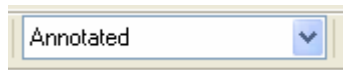
the **Find Citations** button . Search for papers by the author, *Simmons*. There are 7 matching references in the **Pacific_health** library. Highlight the 2000 reference and then hold down the **Ctrl** button and highlight the 2005 reference. Click on the **Insert** button. Once again, place your cursor at the end of the first sentence in the second


paragraph, insert a space before the full stop, click on the **Find Citations** button, search for the reference by *Yapa* and insert it. Finally, go to the end of the second paragraph, insert a space before the full stop, and


click on the **Find Citations** button  again. Search for references in the library by the author, *Bell* and click on the **Insert** button. Your document should now be fully referenced, with a list of five references at the end. **Save** the changes that you have made to your paper.

If you decide to change the style (e.g. to submit the article to a different journal), click on

the **Go to EndNote** button  on the toolbar. In the style menu



on the main toolbar in EndNote, select another style. Choose the *Nature Medicine*. Click on the **Return to Word Processor** button  and you will be returned to your Word document.

Now click on the **Format Bibliography** button  on the toolbar, and you should see this **EndNote Format Bibliography** window (**Figure 28**). Make sure that the box labelled **With output style** is showing *Nature-Medine*:

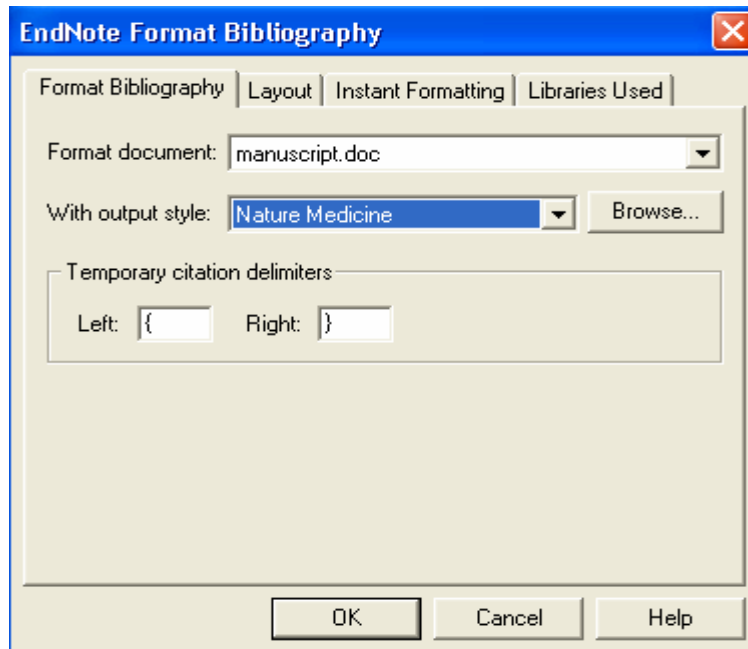


Figure 28: The EndNote Format Bibliography window

Click on the **OK** button, and EndNote will reformat your document with the new style (**Figure 32**):

Recent Developments in Personal Bibliographic Software: a Critical Review

By J.W. Bloggs

Since the 1980s, there have been a variety of software products on the market which can be classified under the general heading of Personal Bibliographic Software (1).

All of these products perform the same two basic functions: they allow the user to maintain a database of bibliographic references and they permit the generation of a bibliography containing some or all of those references (2, 3).

Substantial developments have taken place in the functionality of personal bibliographic software (4). Today it is not difficult to find a product that can automatically import references from a CD-ROM or web database and format both in-text citations and a list of references in a wide variety of styles (5).

References

1. Ghosh, C. Healthy People 2010 and Asian Americans/Pacific Islanders: defining a baseline of information. *Am J Public Health* **93**, 2093-8 (2003).
2. Simmons, D., Thompson, C.F. & Conroy, C. Incidence and risk factors for neonatal hypoglycaemia among women with gestational diabetes mellitus in South Auckland. *Diabet Med* **17**, 830-4 (2000).
3. Simmons, D., Thompson, C.F. & Engelgau, M.M. Controlling the diabetes epidemic: how should we screen for undiagnosed diabetes and dysglycaemia? *Diabet Med* **22**, 207-12 (2005).
4. Yapa, M. & Simmons, D. Screening for gestational diabetes mellitus in a multiethnic population in New Zealand. *Diabetes Res Clin Pract* **48**, 217-23 (2000).
5. Bell, A.C. et al. Heart disease and diabetes risk factors in Pacific Islands communities and associations with measures of body fat. *N Z Med J* **114**, 208-13 (2001).

Figure 29: Manuscript with References in *Nature-Medicine* Style

14. More on Formatting Documents

We will now look at some special situations which may arise when formatting a paper with EndNote.

a. Including Notes in the List of References

Some journals (such as *Science*) use a numbered reference style but permit you to include notes with the list of works cited at the end of the paper. In such a system, the notes are incorporated into the numbered list of references.


To insert such a note in your **manuscript** document, first use the **Go to EndNote** button




and then select the *Science* style. Click on the **Return to Word Processor** button



and you will be returned to your **manuscript** document. Click on the **Format**

Bibliography button  and format the paper with the *Science* style.

Now position the cursor at the end of the first sentence in the second paragraph and

insert a space before the full stop. Then click on the **Insert Note** button  on the EndNote toolbar. You will now see a dialogue box, in which you can type your note. Enter the following text: These results are only preliminary. Then click on the **OK** button. EndNote inserts the note into the list of references. **Save** this change. Your document should look like **Figure 30**:

Recent Developments in Personal Bibliographic Software: a Critical Review

By J.W. Bloggs

Since the 1980s, there have been a variety of software products on the market which can be classified under the general heading of Personal Bibliographic Software (1).

All of these products perform the same two basic functions: they allow the user to maintain a database of bibliographic references and they permit the generation of a bibliography containing some or all of those references (2, 3).

Substantial developments have taken place in the functionality of personal bibliographic software (4) (5) These results are only preliminary. Today it is not difficult to find a product that can automatically import references from a CD-ROM or web database and format both in-text citations and a list of references in a wide variety of styles (6).

References

1. C. Ghosh, *Am J Public Health* **93**, 2093 (Dec, 2003).
2. D. Simmons, C. F. Thompson, C. Conroy, *Diabet Med* **17**, 830 (Dec, 2000).
3. D. Simmons, C. F. Thompson, M. M. Engelgau, *Diabet Med* **22**, 207 (Feb, 2005).
4. M. Yapa, D. Simmons, *Diabetes Res Clin Pract* **48**, 217 (Jun, 2000).
5. These results are only preliminary
6. A. C. Bell *et al.*, *N Z Med J* **114**, 208 (May 11, 2001).


Figure 30: Numbered Style with Note in List of References

To delete this note, position your cursor immediately after the number (5) in the text, then press the Backspace key *twice*. Now click on the Format Bibliography button




and reformat the paper with the *Science* style. Check that the note has disappeared from the list of references, to confirm that you have deleted it successfully.

b. Deleting a Citation

To delete a citation, use the **Edit Citation(s)** button  on the EndNote toolbar. Don't use the Delete or Backspace keys on the keyboard.

To delete the citation to the paper by Ghosh, highlight the in-text citation

(1). Now click on the **Edit Citation(s)** button  and you will see the citation appear in the Edit Citation dialogue Box:

Highlight the temporary citation **Ghosh, 2004 #1** and click on the **Remove** button. Then click on the **OK** button. EndNote will remove the citation and reformat the list of references. **Save** the changes to your document.

15. Removing the Field Codes


Removing the Field Codes

Although your document looks like a normal Word document, it is not. It contains field codes which include most of the data from your EndNote library relating to each of the references which you have cited. This stored data is called the **Traveling Library** .

If you are collaborating with colleagues who also use EndNote and who also use a recent version of Word which is compatible with EndNote's Cite While You Write function, you can send them your formatted Word document and they can add text and references to it from their own EndNote libraries. They can format the completed

document because all data relating to your references are stored in the Traveling Library.

However, if you wish to submit your paper for publication, you must first **remove all field codes**, as they could interfere with the software used by the publisher. To do this,

click on the **Remove Field Codes** button . You will see a warning message, explaining that this will preserve your original document (with EndNote field codes) and create a new, unsaved document (without EndNote field codes). Click on the **OK** button to continue.

Save the new document under a new name, and send that version for publication.

Keep the original document, as that is the master copy which you will have to use if you wish to add or remove any references using EndNote.

15. Useful Web Addresses

EndNote Homepage

[Http://www.endnote.com/](http://www.endnote.com/)

- Updates and patches for the EndNote software
- Extra filters, connection files and styles
- Style Finder
- Join the EndNote discussion list