



# Cite While You Write

EndNote Training

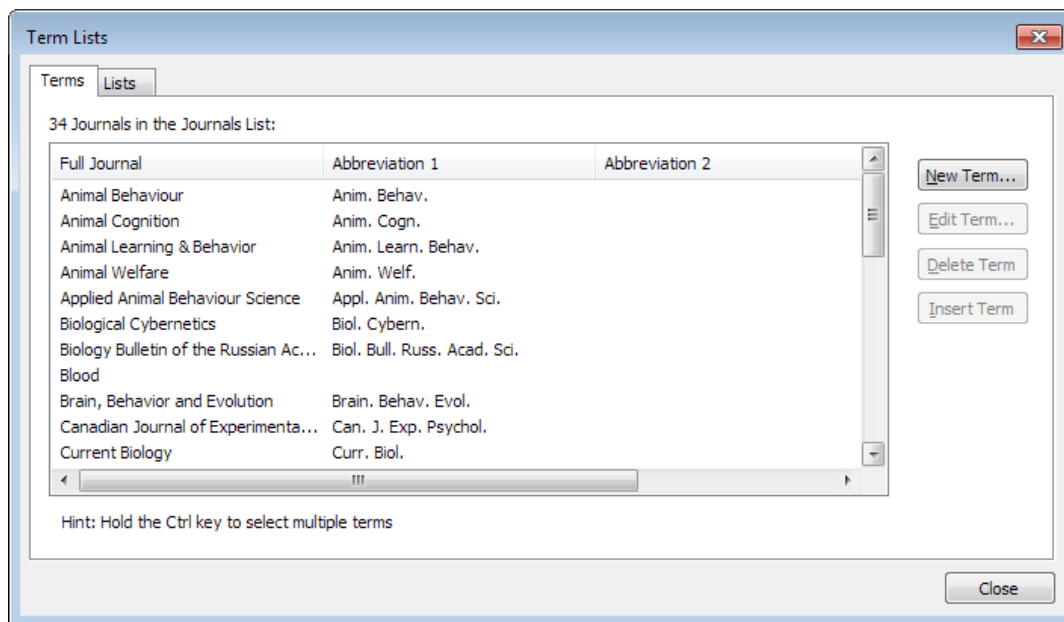
Your EndNote data, both on the desktop and online, can be used in Microsoft Word on either Windows or Macintosh. The EndNote buttons can be different for different operating systems and different versions of Word. Below you will see the toolbars and buttons for these different versions, so you can recognize the command for your version of Word.

## 1 Journal Names

Some journals require the journal's name to be spelled out in full while others require a standardized abbreviation. Some disciplines may even have multiple versions of the standardized abbreviation, such as one with periods after abbreviated words and one without periods. EndNote can substitute one version of a journal's name for another in the formatted bibliography without having to edit each record, to match the journal's style.

You must set up a journals term list for your EndNote library to use this feature.

- In EndNote, select **Tools**→**Open Term Lists**→**Journals Term List**. Resize the window so that you can see the columns as in the example below.



As references are entered into EndNote, the contents of the *Journal* field are added to the *Full Journal* column in the term list while the contents of the *Alternate Journal* field are added to the *Abbreviation 1* column. If there is only one version of the standardized abbreviation and the full journal, everything you need in this table will be filled in so long as each record entered in the EndNote library contains the full journal name in the *Journal* field and the standardized abbreviation in the *Alternate Journal* field. In reality, this is seldom the case. However, it is possible to manually enter the information in the term list or, better yet, to import a list of the full names and abbreviation(s) from a tab-delimited file.

EndNote ships with several predefined tab-delimited files containing full names and standardized abbreviations, including those for the humanities, chemistry, law, biosciences, and medicine. These lists can be imported into EndNote to create a working journals term list. To do this—

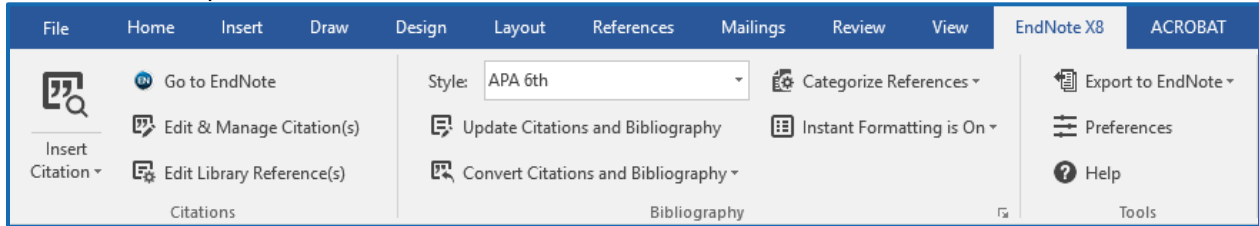
- If you have not already done so, open the Journals term list (*Tools* → *Open Term List* → *Journals Term List*).
- If there are journals already present, delete them by selecting all the journals present, then clicking the *Delete Term* button. This will ensure that you have no “orphan” journals without complete information or with abbreviations in the *Full Journal* column.
- Click the *Lists* tab.
- Click *Import List*.
- Locate and double-click on the tab-delimited file you wish to import. The predefined lists that ship with EndNote will be found in the *Terms Lists* folder within the *EndNote* folder (\\Program Files (x86)\EndNote X9\Terms Lists). The complete list will be imported. (Note that the journal term lists are simply tab-delimited files and updated ones may be available on our web site. It is also possible to create your own custom term lists.)
- Close the *Term Lists* dialog. EndNote will now be able to substitute the version of the name set in the style in the formatted bibliography.

## 2 Installing the Cite While You Write Tools for Word

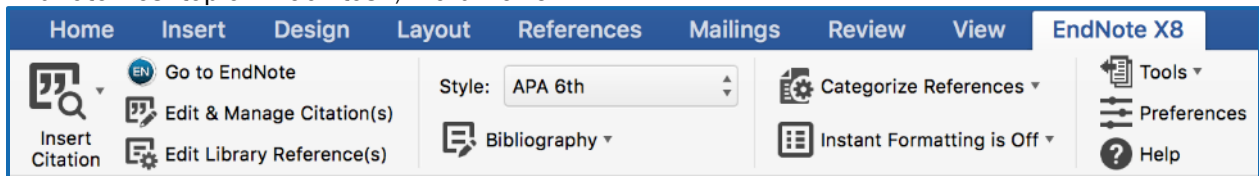
When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling *Cite While You Write* (CWYW) in Word.

In Word on Windows or Word 2016 on Macintosh you will see a tab on the ribbon, similar to those shown below. In Word 2011 on Macintosh you will see a toolbar and EndNote commands under the *Tools* menu.

### EndNote Desktop on Windows



### Endnote Desktop on Macintosh, Word 2016



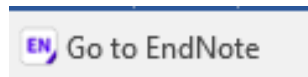
## 3 Using the Cite While You Write Tools in Word

Below is information about the most-used *Cite While You Write* tools. These are the tools you would use daily. See the EndNote *Help* files for information on the remaining *Cite While You Write* tools.

### 3.1 Go to EndNote / Go to EndNote Online

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document. With EndNote basic/online, it will take you to the logon screen if you are not logged in, or to your EndNote basic/online library if you are logged in.

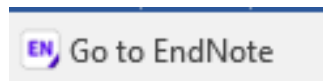
Desktop on Windows:



Basic/Online on Windows:  
(Note you cannot select citations and insert them)



Desktop on Macintosh:  
(Word 2016)



Basic/Online on Macintosh:  
(Word 2016)  
(Note you cannot select citations and insert them)



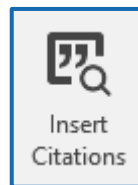
### 3.2 Insert Citation(s)

This command will provide a search window where you can enter text that is in a field of the EndNote record you want to find. You can then select references from a list of those that contain your search terms and insert them into your paper. (Note: For Windows, click on the magnifying glass icon in the top part of the button to activate it.)

Desktop on Windows:



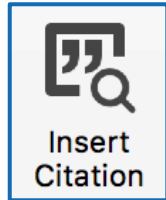
Basic/Online on Windows:



Desktop on Macintosh:  
(Word 2016)



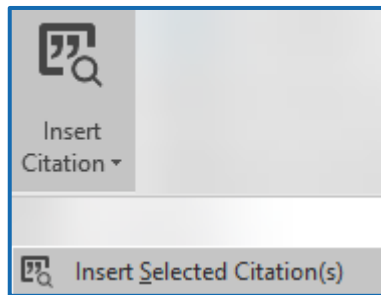
Basic/Online on Macintosh:  
(Word 2016)



### 3.3 Insert Selected Citation(s)

This command will insert the references that are selected (highlighted) in EndNote on the desktop into your document at the location of the Word cursor. This command is not available for EndNote basic/online. (Note: For Windows, click on the bottom part of the Insert Citation button to activate the list of commands available, for Word 2016 on Macintosh, click the down arrow at the right of the button.)

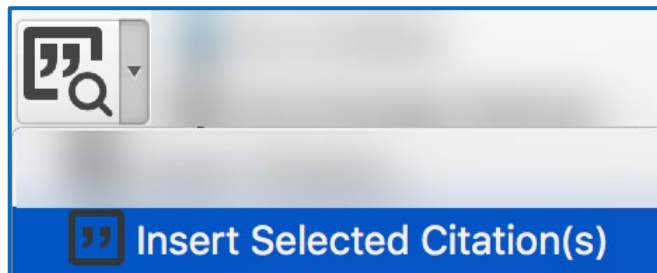
Desktop on Windows:



Basic/Online on Windows:

Not Available

Desktop on Macintosh:  
(Word 2016)



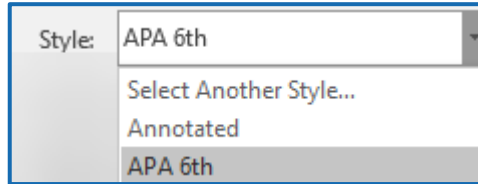
Basic/Online on Macintosh:  
(Word 2016)

Not Available

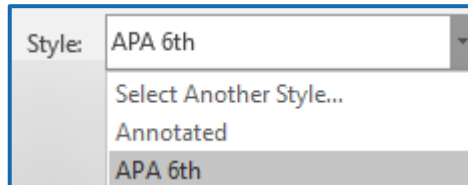
### 3.4 Style

If you just want to change the style without changing any of the other bibliography formatting options (such as font or line spacing), the *Style* drop-down list will allow you to do so.

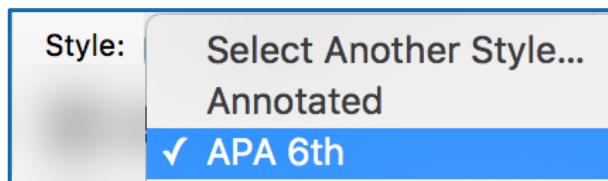
Desktop on Windows:



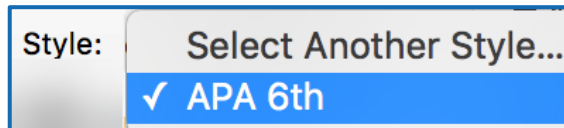
Basic/Online on Windows:



Desktop on Macintosh:  
(Word 2016)



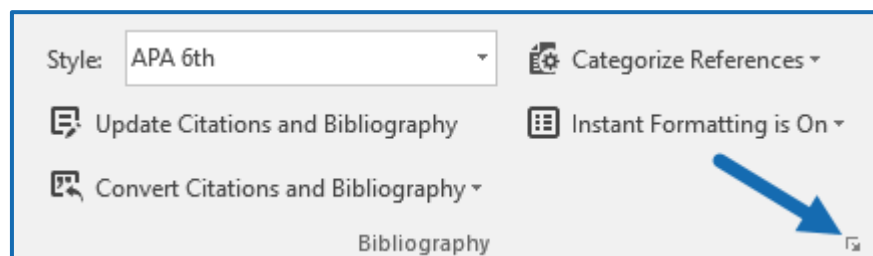
Basic/Online on Macintosh:  
(Word 2016)



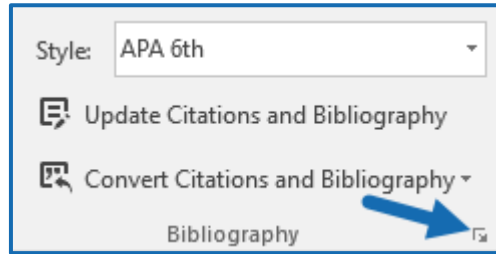
### 3.5 Configure Bibliography

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 a heading above the bibliography or changing the line spacing. When using EndNote on the desktop, it also includes an option to hyperlink the citations to their matching references in the bibliography. (Note: It is best not to link the citations and bibliography on the Macintosh until you are finished with the paper. If linking is turned on for the Mac, whenever you click on a citation it will jump to the bibliography.)

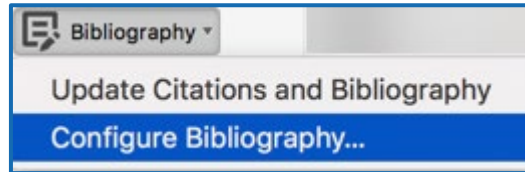
Desktop on Windows:



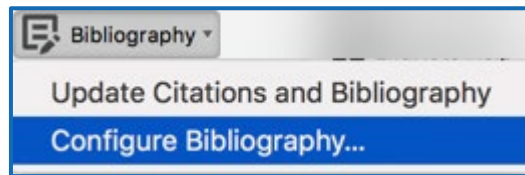
Basic/Online on Windows:



Desktop on Macintosh:  
(Word 2016)



Basic/Online on Macintosh:  
(Word 2016)



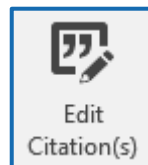
### 3.6 Edit & Manage Citation(s)

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations. Changes made on the screen will not be permanent because they will not change the code controlling the citation, but changes made through this command will change the code and will be permanent.

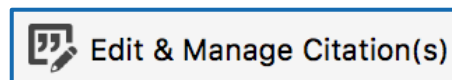
Desktop on Windows:



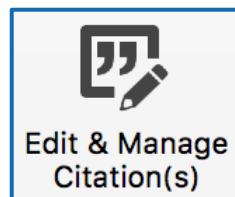
Basic/Online on Windows:



Desktop on Macintosh:  
(Word 2016)



Basic/Online on Macintosh:  
(Word 2016)



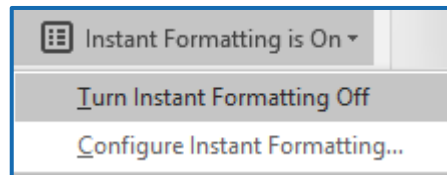


## 3.7 Instant Formatting

Instant formatting provides a constant updating of all citations and the bibliography. However, there may be times when it is helpful to turn off this constant updating, such as when you are moving large amounts of text in the document and want EndNote to wait until all the text is in its final location before formatting. This command turns instant formatting on or off for the current document. (Note: Turning instant formatting off for future new documents can be done in the *Cite While You Write Preferences*.)

Desktop on Windows:

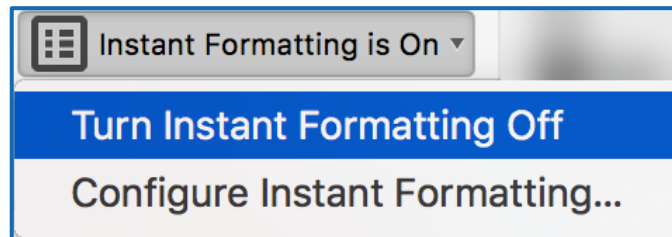
Basic/Online on Windows:



Located in *Configure Bibliography* window

Desktop on Macintosh:  
(Word 2016)

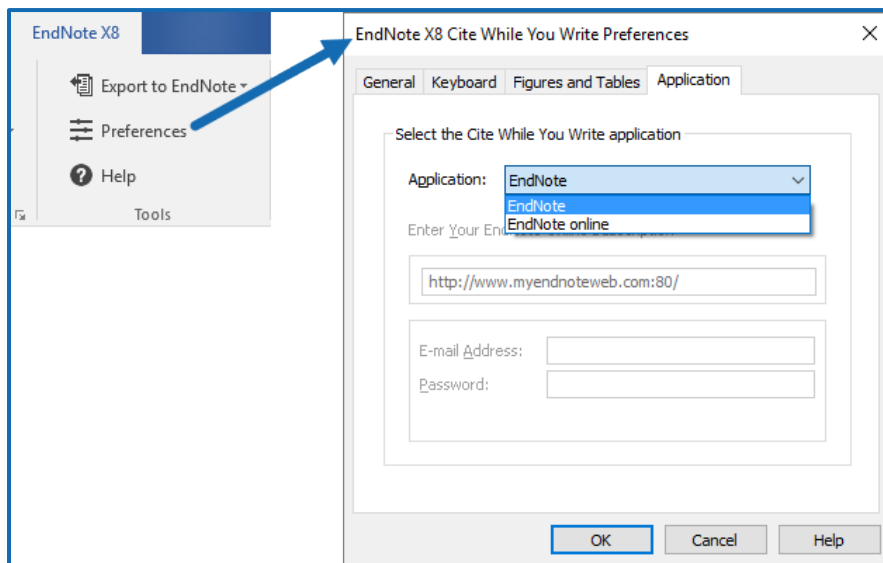
Basic/Online on Macintosh:  
(Word 2016)



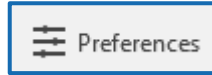
Located in *Configure Bibliography* window

## 3.8 Cite While You Write Preferences

The *Application* tab for this command will let you toggle between using your EndNote desktop or online libraries for *Cite While You Write*. When using your online library, you will have access to groups that have been shared with you through EndNote basic/online. Note that the window immediately below is for the Windows interface, but it is similar for all interfaces.



Desktop on Windows:



Desktop on Macintosh:  
(Word 2016)

