

## EndNote<sup>®</sup> 8 Scripted Demo

The steps below are performed with EndNote<sup>®</sup> 8 and Microsoft<sup>®</sup> Word. Please use the sample EndNote database, Paleo, to receive the same results as noted below.

### The Paleo Library

1. Open EndNote.
2. A dialogue box appears prompting you to open a reference library. Select *Open an existing EndNote library*.
3. Select *Paleo.enl* in the drop-down list, and click *OK*.
4. You will now see the sample Paleo Library window listing all the references that the library contains.

### Setting Display Fonts

Because different computers will have different Unicode fonts available, EndNote 8 ships with the Arial font set as the default display font. If you wish to view data entered using Unicode you will need to reset your display font preferences.

1. Select *Preferences* from the EndNote Edit menu.
2. Select *Display Fonts* from the menu items at the left side of the dialog.
3. Click on the *Change Font* button under Library Display Font and select a Unicode font.

**Note:** Which Unicode fonts you have available will vary depending on your operating system and word processors, but possibilities include Arial Unicode and Lucida Sans Unicode.

4. Click on the *Change Font* button under General Display Font and select a Unicode font.
5. Click on the *OK* button to save your new display font preferences.
6. Scroll to the last references in the Paleo database. You should see two references in Japanese characters.

**Note:** To enter Unicode data you will need to install the language using the language settings in your operating system.

### Enter a New Reference

1. From the *References* menu, choose *New Reference*. An empty reference window opens. The Reference Type appears as Journal Article. Change this to Electronic Journal by scrolling down until *Electronic Journal* appears. Electronic Journal is one of the new reference types included in EndNote.

**NOTE:** Journal Article is the default setting, but can be changed to any other type of reference using the Reference Type list at the top of the Reference Window.

2. Enter the reference text as shown below.  
**Author:** Tiberius Rex  
**Year:** 2003  
**Title:** The scale and the feather: a suggested evolution  
**Journal:** Paleontology  
**Issue:** 23  
**Pages:** 23-45  
**Date Accessed:** May 22, 2004  
**Electronic Resource Number:** 10.1000/182  
**Keywords:** Feathers  
Evolution  
Birds  
**URL:** [www.endnote.com](http://www.endnote.com)  
**Last Modified Date:** June 13, 2004  
**Language:** English
3. Close and save the reference by clicking on the “X” in the upper right corner to return to the library window.

### Construct a Manuscript with Built-in Templates

1. From EndNote’s *Tools* menu, choose *Manuscript Templates*.  
**Note:** You must have macros enabled to use the manuscript templates wizard.
2. From the list of Word templates, select the *Nature.dot* file and click *Open* to start the manuscript template wizard.  
**Note:** If you have Windows set to hide file extensions for known file types, you will not see the “.dot” extension on the file name.
3. In the Open dialog window, click *Next*.
4. Enter the full title for this paper, “Theories About Evolution,” then click *Next*.
5. To add an author, select the *Add Author* button and click *New*.
6. Enter your personal contact information and click *OK*.
7. Select the author just entered (yourself) and click *OK*. The Author dialog will appear, click *Next*.  
**Note:** If you wish to include contact information for this author, check the box to the left of the name.
8. Select all sections and click *Next*.
9. Click *Finish*. A new Word document is displayed. Scroll through the paper to see how the template wizard formatted your paper to Nature’s specifications.

### Instant Document Formatting (Cite While You Write)

EndNote’s Cite While You Write feature is compatible with Microsoft Word 2000, XP (2002), and 2003.

1. In your new Microsoft Word document, scroll down to the area that says “Insert Text here,” and click on it. The entire phrase will be highlighted.
2. Type “Creating bibliographies and figure and table lists is easy with EndNote’s Instant Formatting.”
3. From the *Tools* menu select *EndNote 8*, then *Find Citation(s)*.

**NOTE:** An alternate method is to use the EndNote 8 toolbar. The first button on the toolbar is *Find Citation(s)*. If you do not see the EndNote toolbar in Word, from the Word *View* menu select *Toolbars*, then *EndNote 8*.

4. In the upper left corner next to *Find* type the author name “Morehouse,” then click the *Search* button or press *Enter*.
5. EndNote lists the matching references. In this case a single reference matches the search. Select the record and click *Insert* or press *Enter*.
6. The citation is inserted and a bibliography is created automatically in the currently-selected output style.
7. Type “Select the references you want and EndNote does the rest.”
8. This time, type “{paleo, 1998}” followed by a space, and watch the instant retrieval results appear on your screen.
9. Highlight the record “Bearce, 1998” and click *Insert* or press *Enter*.
10. Again, the selected citation is inserted and formatted in the currently-selected output style. Scroll down to the end of the document to see the formatted bibliography.
11. To change the output style, from the Word *Tools* menu, select *EndNote 8*, then *Format Bibliography*.
12. On the *Format Bibliography* tab, select the new output style *Author-Date* from the drop-down list next to *With Output Style:* then click *OK*. You will now see the bibliography resorted alphabetically. If you scroll back up to your citations in the text, you will see your formerly numbered citations now contain author names and dates.

**NOTE:** Instant Formatting can be disabled. From the *Tools* menu in Word, select *EndNote 8* then *Format Bibliography*. Click on the *Instant Formatting* tab and click the *Disable* button, then *OK*.

13. Repeat steps 11 and 12 above, selecting “Nature” as the output style to return to your previous numbered format.

### **Manage and Cite Images with EndNote and Microsoft Word**

1. In your Word document, type “EndNote can handle more than just text.”
2. From the *Tools* menu select *EndNote 8*, then *Find Figure(s)*.
3. In the upper left corner next to *Find*, type the keyword “arthropod” then click the *Search* button or press *Enter*.
4. Select the record with the title “*Marrella splendens*” and click *Insert* or press *Enter*.
5. The selected figure is inserted into your Word document.

### **Create a Subject Bibliography**

1. Normally, the first step would be to determine which references you would include in the subject bibliography. For this example we will include all references in the library. From the *References* menu in EndNote, select *Show All References*. If that command is not available, all references are already included in the list.
2. Go to the *Edit* menu and choose *Select All* to highlight all of the references in the library.
3. From the *Tools* menu, select *Subject Bibliography* to display a list of the EndNote fields by default field name.

4. Select the *Keywords* field.  
NOTE: You can click on individual fields to select any combination and number of fields.
5. Click *OK* to display the terms found in the *Keywords* field of the selected references.
6. You can select specific terms as headings or all terms. For this example select “Evolution,” “Excavation,” and “Extinction” by clicking on each of the terms.
7. Click *OK* to format the subject bibliography on the screen.  
NOTE: You can change the layout of your subject bibliography. For example, you can change the output style, enter a different reference list title, or remove the term counts.

### **Mobilizing your EndNote Library on a Palm Handheld**

In order to use EndNote with a Palm device, you must have the Palm desktop software installed on your computer and your Palm device must be using Palm OS 4.1–5.x. You will also need to have the HotSync manager running during the EndNote installation.

1. EndNote 8 offers a new connectivity feature with Palm OS. In EndNote 8, select the *Tools* menu and click on *Configure Handheld Sync*. You will be asked to select an EndNote library to synchronize. You can only have one EndNote library on your Palm device at a time. Click on the *Browse* button and select the Paleo library in your EndNote\Examples folder.  
NOTE: You must have your Palm Desktop Program installed on your machine for the *Configure Handheld Sync* option to appear and you must have chosen to install the Palm conduit during the EndNote installation. The first time you perform a Hot Sync after installing the EndNote Palm conduit the EndNote application for the Palm OS will be installed on your Palm device.
2. Click on *OK* to choose the Paleo library to synchronize, then *OK* again to confirm it.
3. Perform a Hot Sync to transfer the Paleo library to your Palm device. You can now edit the Paleo library either on your desktop or on your Palm and the changes will be synchronized during your next Hot Sync.