



Printer-Friendly View | Normal View

## Using EndNote with Microsoft Word


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- Inserting notes
- Inserting figures or tables from EndNote
- Changing the appearance of a citation or note
- Changing referencing style
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- Deleting figures and tables
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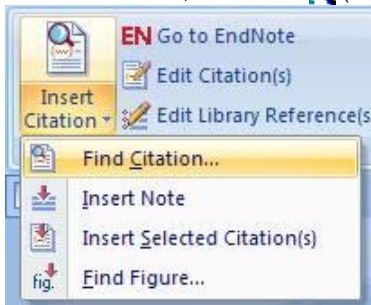
EndNote has the ability to work in conjunction with Microsoft Word so that you can insert references in your chosen format, as you type a document. At the same time, EndNote will automatically place these references in a formatted bibliography at the end of your document. This function is called **Cite While You Write**.

If you have Microsoft Word 2000 or later installed on your computer, when you install EndNote a relationship is automatically set up with Word. The next time you open Word, you will find that there is an extra option in the **Tools** section and/or a new **toolbar or ribbon tab** on your screen, either labelled **EndNote** or **Add-Ins**.

It is important to remember that when working with Word, EndNote puts hidden codes into your document. For this reason, you must use the  or  (Edit Citation) icon to make any changes to your references and not simply add new text or use the backspace key to delete unwanted text in citations.

## Inserting citations

- Run **EndNote** and load your **library**.
- Run **Word** and start typing the text of your paper as usual.
- To insert a citation, click on the  (**Find Citation**) icon. In Office 2007, click on **Insert Citation | Find Citation**.



- Type in the **author** and/or **keyword(s)** for the reference you require, e.g. Hall.
- Click on **Search**.
- Highlight the appropriate reference and click on **Insert**.


The **intext citation** appears, together with an entry in the **bibliography** at the end of the paper.

(Billoski, 1988)

Billoski, T. V. (1988). A stochastic model of the predator-prey ratio in late jurassic Asia. *Paleontology*, 8, 19-20.

- Continue typing your paper and adding citations. Each reference that you add will automatically be placed in the **bibliography**.

If you are using a bibliographic style where references should appear in footnotes or endnotes, you will need to make a footnote in Word before you insert a citation from EndNote. To do this:


- Place your cursor in the document at the position the footnote should refer to, eg. at the end of the first paragraph.
- Click on **Insert | Footnote**. (On newer versions of Word, use **Insert | Reference | Footnote** instead.)
- Click on **OK** to insert the footnote into the document.
- To insert a citation, click on the  (**Find Citation**) icon. In Office 2007, click on **Insert Citation | Find Citation**.
- Type in the **author** and/or **keyword(s)** for the reference you require, e.g. Hall.
- Click on **Search**.
- Highlight the appropriate reference and click on **Insert**.

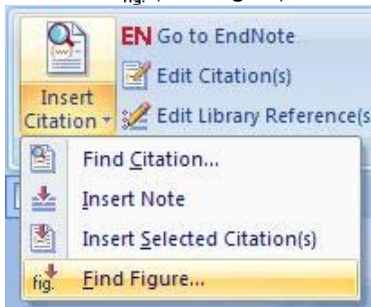
## Inserting notes

If you are using a style that permits notes to be included in the list of footnoted references (e.g. the **Science** style), use EndNote's **Insert Note** feature to do so. Do not use normal Word footnotes.

## Inserting figures or tables from EndNote

To insert an Image, chart or table stored in your EndNote library:.

- Run **EndNote** and load your **library**.
- Run **Word** and load your document.
- Click on the  (**Find Figure**) icon to search for the figure (or table) you wish to insert. In Office 2007, click on **Insert Citation | Find Figure...**





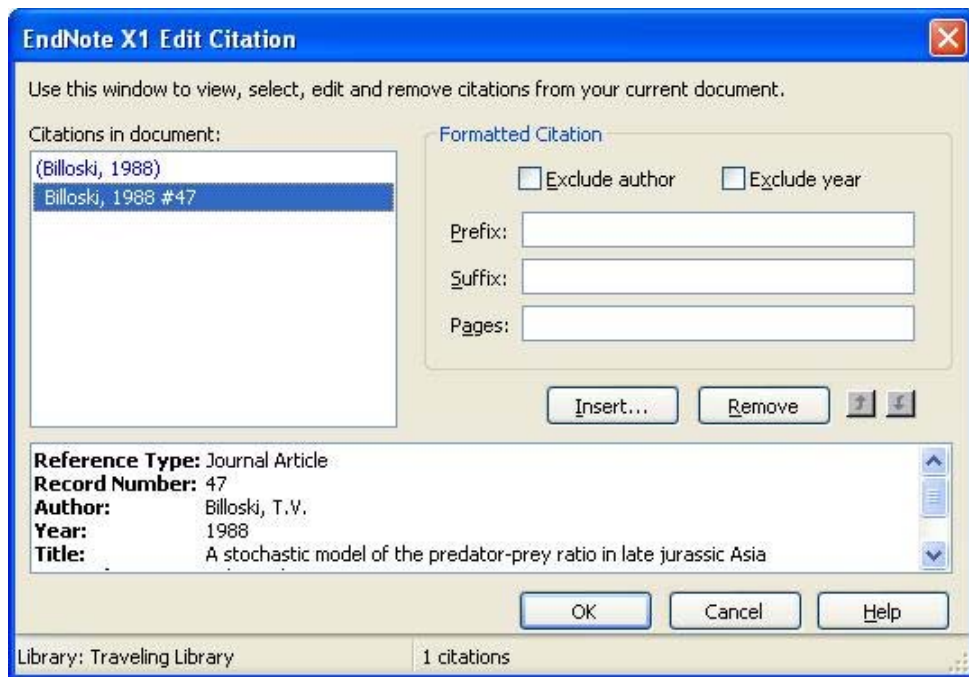
- Type in the **author** and/or **keyword(s)** for the reference you require, e.g. Hall.
- Click on **Search**.
- Highlight the appropriate reference and click on **Insert**.

The figure or table citation appears in the text of your document. A **List of Tables** is automatically inserted at the end of the document.

## Changing the appearance of a citation or note

Sometimes you will need to change how a citation is displayed in Word. For example, if you mention the author's name before the citation, you should not repeat it in the citation itself.


- Click on the citation or note to **highlight** it, then click on the  or  (**Edit Citation**) icon.



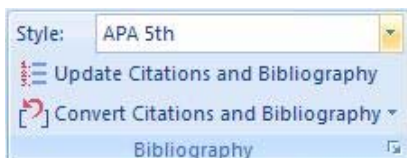
- To hide the **author names**, click on **Exclude author**.  
In the APA 5th style, this will make the citation **(1988)**.
- To hide the **year of publication**, click on **Exclude year**.  
In the APA 5th style, this will make the citation **(Billoski)**.
- To add text before the author's name, enter the text in the **Prefix** box following by a **space**, e.g. **see also**  
In the APA 5th style, this will make the citation **(see also Billoski, 1988)**.
- To add **page numbers**, enter the relevant numbers in the **Suffix** box with the necessary punctuation, e.g. **, p. 19**  
In the APA 5th style, this will make the citation **(Billoski, 1988, p. 19)**.
- When you have finished making changes to the citation's appearance, click on **OK**.

## Changing referencing style

There may be times when you want to **re-format** a document, for instance when you want to submit the same article to different publishers, each of whom have different referencing requirements.

- Click on the  (**Format Bibliography**) icon.
- Click on **Browse...** and select the bibliographic style to change to.
- Click on **OK**.



In Office 2007, choose the new style from the **Style** box, and click on **Update Citations and Bibliography**.



EndNote **automatically changes** the citations, notes and bibliography to the new style.


## Deleting citations, notes, figures or tables

- Click on the citation, note, figure or table to **highlight** it, then click on the  or  (**Edit Citation**) icon.
- Click on **Remove**, then **OK**.

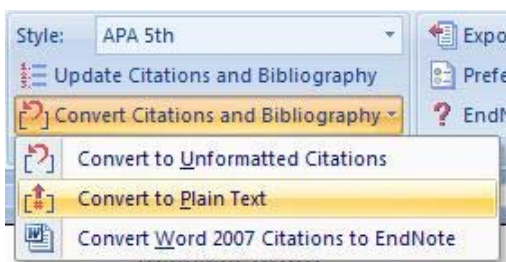
To delete a citation, note, figure or table, always use the  or  (Edit Citation) icon. EndNote inserts hidden codes into your document which can cause problems with formatting if they are not removed correctly.

## Removing field codes

If you wish to **submit** a document written with EndNote for **publication**, you need to **remove the field codes**, as they could interfere with typesetting software used by the publisher.

- **Open** the Word document.
- Click on the  (**Remove Field Codes**) icon.

In Office 2007, click on **Convert Citations and Bibliography | Convert to Plain Text**.



You will see a warning message, explaining that this will preserve your original document (including all field codes) and create a new, unsaved document (without field codes).

- Click on **OK**.

A new document appears.

- Use **File | Save As** to save this new document with another name.

It is this new document, without field codes, that should be submitted to a publisher for publication.

## Other common questions and problems

**Q. I have installed EndNote on my computer, but the EndNote toolbar doesn't appear when I open Word.**

A. The relevant EndNote files have not installed properly. To fix this on EndNote X, you can copy these manually:

- Double-click on **My Computer**.
- Find the directory **C:\Program Files\EndNote X** (double-click on **Hard Disk (C:)**, then on **Program Files**, then on **EndNote X**).
- Select the files **EN10Cwyw.wll** and **EN10Cwyw.WordXP.wll**
- Click on **Edit | Copy**.
- Find the directory **C:\Program Files\Microsoft Office\OFFICE11\STARTUP** (this will be slightly different depending on your version of Word).
- Click on **Edit | Paste**.

When you next run Word, the toolbar should appear.

EndNote X1 offers a new **Configure EndNote** option in the Start Menu which should fix similar problems.

**Q. The toolbar appears, but when I click on its buttons or menu items, nothing happens.**

A. Some other software that provides toolbars for Word is incompatible with EndNote (e.g. SnagIt). Try disabling the other toolbar, and if that doesn't work, please e-mail us and we will look in the problem further.

**Q. I get the error "Invalid class string".**


A. Some files may not have been removed when you uninstalled a previous version of EndNote. To remove them manually:

- Find the directory **C:\Program Files\Microsoft Office\OFFICE11\STARTUP** (this will be slightly different depending on your version of Word).
- If they are present, delete the files **EN7Cwyw.wll** and **EN7Cwyw.WordXP.wll**

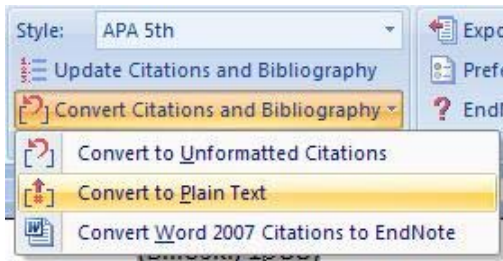
This should fix the problem.

**Q. All my citations have curly brackets around them. What's happened?**

A. The citations got unformatted somehow. To fix this:

- Click on the  (**Format Bibliography**) icon.
- Click on **Browse...** and select the bibliographic style to change to.
- Click on **OK**.

In Office 2007, click on **Convert Citations and Bibliography | Convert to Plain Text**.

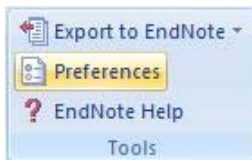


**Q. When I add a citation, my bibliography doesn't change to include it.**

A. The Instant Formatting feature is turned off. To turn it back on:

- In Word, click on **Tools | EndNote | Cite While You Write Preferences...**
- Click on **Enable Instant Formatting on new Word documents**.
- Click on **OK**.

In Office 2007, click on **Tools | Preferences** and alter the same settings.




**Q. How can I drag and drop a citation into my Word document?**

A. To drag and drop citations into Word:

- Make sure you have **Word** and **EndNote** running, with your **EndNote library** and **Word document** loaded.
- Click once on the **citation** you wish to drag into Word.
- **Drag** the citation down to the bottom of the screen and hold your mouse pointer over the **Word tab**. Keep the mouse button held down.
- When Word opens on your screen, **drag** the citation to the right spot in the Word document and release the mouse button.

Your highlighted reference will appear in the Word document.



**Q. My figures and tables are in the wrong order at the end of my document. How do I fix this.**

A. Click on the  (**Generate Figure List**) icon. This will put the figures and tables in the same order as they are in the text.

In Office 2007, click on **Update Citations and Bibliography**.

**Q. I have saved each chapter of my thesis as an individual file. Can I use EndNote to create one bibliography for the whole document?**

A. Yes, you can:

- Load the first chapter in Word.
- Click on the  (**Unformat Citations**) icon. In Office 2007, click on **Convert Citations and Bibliography | Convert to Unformatted Citations**.
- Cut and paste all the text into a new document.
- Repeat these steps for each chapter until you have the whole thesis in one document.
- Click on the  (**Format Bibliography**) icon.
- Click on **Browse...** and select the bibliographic style to change to. In Office 2007, choose the style from the Style box and click on **Update Citations and Bibliography**.
- Click on **OK**.
- Save the new document.

This will leave you with all the chapters in one document, and only one bibliography at the end.

Alternatively, you can use EndNote's **RTF Document Scan** function. Using RTF Document Scan you can combine a number of separate documents and create a single bibliography at the end of the final document. See the instructions on Scanning and formatting multiple RTF documents for more information.

Please contact your [local EndNote support person](#) or contact Peter Blake via [libraryadmin@mcauley.acu.edu.au](mailto:libraryadmin@mcauley.acu.edu.au) with any questions about using Word and EndNote together.