EndNote CWYW in Word 2011 (Mac)

This is the EndNote tool bar in Word 2011. You can activate this toolbar by going to View>Toolbars>EndNote.

You can also access the EndNote tools from the Word 2011 Tools menu directly.
A. Adding citations in Word:
   1. Use the “Find Citations” tool to search for and insert a reference from your library.
      a. Put the cursor where you would like to insert the citation in the text.
      b. Click on the magnifying glass icon
         or go to Tools>EndNote>Find Citation
      c. In the window that opens, type the author name or other search term or year into the search box at the top and click Enter.
      d. Highlight the article of interest
      e. Click the Insert button at the bottom
   2. Use the “Insert Selected Citation(s)” tool to insert one or more references from your library.
      a. Go to EndNote
      b. Locate the article and highlight it (click on it)
      c. Use the Insert Citation button in EndNote on the library bar
         OR, go to Word
      d. Put the cursor in the location to add the references
      e. Click on Insert Citation icon
         or go to Tools>EndNote>Insert Selected Citation(s)

B. “Format Bibliography” with the Output style
   1. If the Output style is already selected, click the “Format Bibliography” icon
   2. If you wish to select another style, you can use the pull down menu next to the CWYW Tools button to select the correct Output style and automatically reformat your document.
3. Or click on the CWYW Tools pull down and choose “Bibliography Settings”

![Bibliography Settings](image)

or go to **Tools>EndNote>Bibliography Settings**

4. From the “With output style” pull down menu, choose the style.
   a. If the style is not listed, click on **Browse**, select the style and click **Choose/OK**

5. Click **OK**

C. To add or remove a reference within a current citation:
   1. Click on the **citation within the paragraph**
   2. Click on **Edit & Manage Citation(s) icon**

   ![Edit & Manage Citation(s)](image)

   Or go to **Tools>EndNote> Edit & Manage Citation(s)**

   3. In the box that opens, click **Edit Reference pull down.**
   4. Select **Insert Citation**

   ![Insert Citation](image)

   5. In the next box, type in the author, keyword, or year, etc.
   6. Then **ENTER**
   7. Highlight the citation
   8. Click the **Insert button**
   9. Click **OK**

**Tip:** If you want to replace one citation with another, **Insert** the new citation first, then **Remove** the existing citation, otherwise you will lose your spot in the text.
D. To change an error in a reference (spelling, year, volume number, etc)

   Note: You cannot correct errors in records or formatting directly in Word.

1. Click in the in-text citation for the reference.
2. Click on the CWYW Tools pull down and choose “Edit Library Reference(s)"

   ![Edit Library Reference(s)](image)

   Or go to Tools>EndNote>Edit Library References
3. This will take you to EndNote and open all references in that group.
4. Make the edit to the reference(s).
5. Close the record in EndNote (all of them if more than one opened).
6. Return to Word.
7. Click the Format Bibliography button.

   ![Format Bibliography](image)

   Note if you change 1st Author or year, this procedure may not run smoothly.  
   (Older versions of EndNote had this issue)

   You may need to Convert to Unformatted Citations (see below),
   Then change the spelling or year in the temporary citation:  
   for example change {Billoski, 1987 #46} to {Biloski, 1987 #46} 
   Then click the Format Bibliography icon.

   If the Find Citation window opens:
   Type the correct spelling into the “Find it” box.
   Click Search.
   Then highlight the record and click Insert.
E. You are submitting the paper as part of a grant and all of the text must be in Arial 11 pt.
Use the Word font tools to change the content of the paper.
   1. In Word go to Edit>Select All
   2. Change the Font and Size as you normally would.
   3. This does not change the EndNote references permanently.
Use the procedure below to format the EndNote reference list.
   4. Click on the CWYW Tools pull down and choose “Bibliography Settings”
      Or go to Tools>EndNote>Bibliography Settings
   5. Select the Layout tab

   6. Change the Font and Size here
   7. If there is a Bibliography title, click on Text Format
   8. Then change the format of the bibliography title

F. You need to send to a colleague who is not using EndNote and you do not need the reference list at the end, or you want to be sure the Reference List is not edited. You can unformat the citations, make changes and then reformat the paper. (note: this will disable Instant Formatting.)
   1. Click on the CWYW Tools pull down menu and choose “Convert to Unformatted Citations”

   Or go to Tools>EndNote> Convert to Unformatted Citations
   2. The references will “disappear” and the citations will revert to the temporary citation
      {Author, year #record number} format.
      Note: Only do this if ALL citations come from the same EndNote library. If several authors have been adding references from different libraries, performing this function will lose all the data for the records not in YOUR library.

G. “Enable” the Instant Formatting.
   1. Whenever you “Convert to Unformatted Citations” this turns the automatic formatting off
   2. Go to Tools>EndNote>Format Bibliography
   3. Go to the Instant Formatting tab
   4. Click on the Turn On button
H. Turning ON/OFF instant formatting for NEW Word documents
   1. To turn CWYW ON (or OFF if you do not want documents formatting as you go) click on “Cite While You Write Preferences” in the EndNote menu.
   2. Mark the box next to “Enable Instant Formatting on new Word Documents” to set CWYW ON or OFF for new Word documents.

I. Finally, the paper is done. You want to send it as seen, WITHOUT the EndNote encoding.
   Use **Convert to Plain Text** to leave the document as seen, but remove the EndNote encoding. This step creates a new copy of the document that is **no longer linked** to EndNote. You will still have the original document that can be reformatted.

   1. Click on the CWYW Tools pull down and choose “Convert to Plain Text”

   Or go to **Tools>EndNote>Convert to Plain Text**

   2. If you have not saved the original document, it will prompt you to save it.
   3. Then it will open **another copy** of the document.
   4. **Save this document with a different name**.

      You will notice if you click in the References in the new copy, the section does not turn grey. At this point you can make any edits to the References you like and the changes will stick (you can add special characters to references, for example)

      **Note:** If changes need to be made to the document, and you need to reformat the bibliography, you will need to **manually make all changes to the original document** and then reformat, as this new copy of the document cannot be reformatted with EndNote.