EndNote X7 CWYW in Word 2008/2011 (Mac)

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 X7 > Insert Citations…

   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 back 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 an Output style

1. If the Output style is already selected, click the **Format Bibliography** icon

Or click on the Toolbar “Bibliography” pull down and choose **Update Bibliography and Citations**.

2. If you wish to select another style, you can use the pull down menu to select the correct Output style and automatically reformat your document.

3. From the “With output style” pull down menu, choose the style.
   a. If the style is not listed, click on **Select Another Style** (or **Browse**) select the style and click **Choose**.
   b. Click **OK**

4. For convenience, you can preselect Output Styles in EndNote.
   a. Go to **Edit > Output Styles > Open Style Manager**...
   b. In the window that opens, **mark** the box next to any styles you might use.
   c. Close the window after you have selected your styles. Do not click **Edit**.
   d. These will appear now in the **Edit > Output Styles** drop down list.
   e. If you would like to download additional Styles, go to [http://endnote.com/downloads/styles](http://endnote.com/downloads/styles)
C. To Add or Remove a reference within a current citation:
1. Click on the in-text citation (within the text of the document)  
2. Click on Citations then Edit & Manage Citation(s) in the tool bar

3. In the box that opens, click Gear icon. 
4. Select Insert Citation
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. Edit Library References
You cannot correct errors in the bibliography directly in Word. To change an error in a reference (spelling, year, volume number, etc) you must use the “Edit Library References”.

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

Or go to Tools > EndNote X7 > 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.

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. Changing the Bibliography Font
E.g., you are submitting the paper as part of a grant and all of the text must be in Arial 11pt.
1. Use the Word font tools to change the content of the paper.
   a. In Word go to Edit>Select All
   b. Change the Font and Size as you normally would.
   c. This does not change the EndNote references permanently.
2. Use the procedure below to format the EndNote reference list.
   a. Click on the CWYW Tools pull down and choose Configure Bibliography
Or go to **Tools > EndNote X7 > Configure Bibliography**

b. Select the **Layout** tab
c. Change the Font and Size here.
d. If there is a Bibliography title, click on **Text Format**
e. Then change the format of the bibliography title.
f. Click **OK**.

**F. Using Temporary Citations/Unformatted Citations**

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 “Tools” pull down menu and choose **Convert to Unformatted Citations**

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Or go to Tools > EndNote > Convert to Unformatted Citations
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2. The references will “disappear” and the citations will revert to the temporary citation format:

   `{Author, year #record number}`  
   `{Diab, 2009 #117}`

   **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. Turn Instant Formatting ON/OFF**

1. Whenever you “Convert to Unformatted Citations” this turns the automatic formatting off
2. Go to **Tools > EndNote X7 > Turn Instant Formatting On**
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. Convert to Plain Text

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 “Tools” pull down and choose Convert to Plain Text

Or go to Tools > EndNote X7 > 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.