EndNote CWYW in Word 2007 (PC)

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
      c. In the window that opens, type the author name or other search term or year into the search box at the top
      d. Click search
      e. Highlight the article of interest
      f. Click the Insert button at the bottom
      g. Close the Search window
   2. Use the “Insert Selected Citation(s)” tool to insert one or more references from your library.
      a. Go to EndNote
      b. Locate the first article and highlight it (click on it)
      c. Find the second article
      d. Hold down the CONTROL key and highlight it (click on it)
      e. Go back to Word
      f. Put the cursor in the location to add the references
      g. Click on Insert Citation
      h. And select Insert Selected Citations from the drop down menu.

B. Format the Bibliography
   1. From the “Style” pull down menu, choose a Style.
   2. If the style you want is not listed,
      a. Click on Select Another Style
      b. Select the style
      c. Click Choose/OK
   3. Click OK
To add or remove a reference in a current citation:

1. Click on the in-text citation (within the text of the document)
2. Click on Edit & Manage Citation(s)

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

5. In the next box, type in the author, or title word, or record number, etc.

6. Click Search
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, and then Remove the existing citation, otherwise you will lose your spot in the text.
D. Edit Library Reference(s)

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 you wish to correct
2. Click on Edit Library Reference(s)
3. This will take you to EndNote and open ALL references in that citation group
4. Make the edit(s) to the reference(s)
5. Close the record(s) in EndNote (all of them if more than one opened)
6. Return to Word
7. Click Update Citations and Bibliography

E. Changing the Bibliography Font

E.g., you are submitting this 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 as you normally would.
2. Use the procedure below to format the EndNote reference list.
3. Click on the small arrow next to “Bibliography”.
4. Select the Layout tab.
5. Change the Font and Size here.
6. If there is a Bibliography title, click on Text Format to change its font/size.
7. Click OK.
F. Using Temporary Citations/Unformatted Citations

You need to send the paper to a colleague who is not using EndNote and you don’t 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 Convert Citations and Bibliography
2. Then choose Convert to Unformatted Citations

3. The references will “disappear” and the citations will revert to the temporary citation format: {Author, year #record number} \rightarrow {Diab, 2009 #117}

G. Turning CWYW ON/OFF

1. Once you have converted the paper to “Unformatted Citations”, EndNote we turn off the automatic updating of citations. To turn this feature back on (or OFF if you do not want the document formatting as you go) click on the small arrow in the lower right corner of the “Bibliography” box on the ribbon.

2. Then click on the “Instant Formatting” tab.

3. Click the button “Turn On”.
4. If the button says “Turn Off” then instant formatting is ON. Clicking the button will turn instant formatting off.
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 “Preferences” in the EndNote ribbon.

   ![EndNote X5 Cite While You Write Preferences](image)

   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 EndNote affecting it any more. You need to remove the field codes. OR if you need to send it to a colleague for editing but they do not use EndNote or do not use Word.

   1. This step creates a new copy of the document that is no longer linked to EndNote.
   2. You will still have the original document that can be reformatted.
   3. Click on Convert Citations and Bibliography, then choose Convert to Plain Text

   ![Convert Citations and Bibliography](image)

   4. If you have not saved the original document, it will prompt you to save the original.

   Note: If changes will need to be made to the document in the future that will affect the in-text numbering, references or reformatting the bibliography, you will need to return to the original document, and make the changes to that copy. Then reformat.

   5. Then it will open another copy of the document.
   6. Save this document with a different name.
   7. You will notice if you click in the References, the section does not turn grey.
   8. 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). However you will not be able to use CWYW or instant formatting on this copy.