EndNote CWYW in Word 2010/2013 (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. Hold down the CONTROL key and highlight additional articles
   d. Go back to Word
   e. Put the cursor in the location to add the references
   f. Click on Insert Citation
   g. And then select Insert Selected Citations from the drop down menu.
B. Format the Bibliography with an Output Style

1. If the Output style is already selected, click Update Citations and Bibliography

2. If you wish to select another style, from the “Style” pull down menu, choose a Style.

3. If the style you want is not listed,
   a. Click on Select Another Style
   b. Select the style
   c. Click Choose/OK
   d. Click OK

4. For your convenience, you can select 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
C. 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)**

   ![Image](image.png)

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

   ![Image](image.png)

   5. If inserting a citation, in the next box, type in the author, or title word, or record number, etc.

   ![Image](image.png)

   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, 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

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 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.
   a. Click on the small arrow next to “Bibliography”.

   ![EndNote interface](image-url)
b. Select the **Layout** tab.
c. Change the Font and Size here.
d. If there is a Bibliography title, click on **Text Format** to change its font/size.
e. Click **OK**.

F. Using Temporary Citations/Unformatted Citations

You need to send the paper 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 **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}
   {Diab, 2009 #117}

*Note:* Only do this is 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. Turning CWYW ON/OFF

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)
H. Turning ON/OFF instant formatting for NEW Word documents
   To turn CWYW ON (or OFF if you do not want documents formatting as you go)
   1. Click on “Preferences” in the EndNote ribbon.
   2. Mark “Enable Instant Formatting on new Word Documents” to set CWYW ON or OFF for new Word documents.

   ![EndNote CWYW preferences][1]

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. Click on **Convert Citations and Bibliography**, then choose **Convert to Plain Text**

   ![Convert Citations and Bibliography][2]

   2. If you have not saved the original document, it will prompt you to **save the original**.
   3. Then it will open another copy of the document.
   4. **Save** this document with a **different name**.
   5. You will notice if you click in the References, the section **does not turn grey**.
   6. 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.

   *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.*