



MOUNT SINAI
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MEDICINE

EndNote® X3: Advanced Features

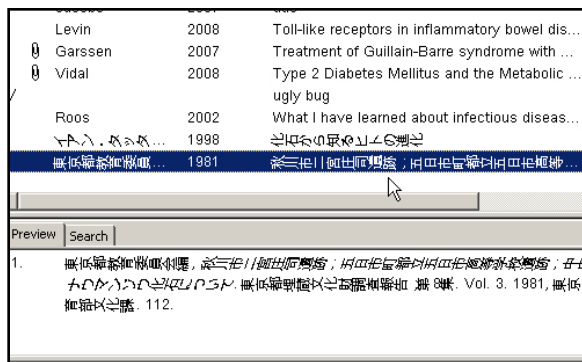
Levy Library Reference Department: 212 241-7793 | refdesk@mssm.edu | http://www.mssm.edu/library

In this class we will review customizing EndNote X3's settings and preferences, add images and figures to a library and MS Word document, edit and customize reference types and output style, as well as cover helpful tips and tricks to get the most out of EndNote X3.

The following settings can be found in EndNote X3's Preferences by clicking Edit and then Preferences.

Libraries

EndNote X3 will open by default the library or libraries selected in the "Open the following libraries when EndNote starts" box.



Display Font

EndNote X3 includes many different fonts that can customize the look and feel of your library.

To view citations imported into your EndNote X3 library for languages that require Non-Roman character sets, select the font @Arial Unicode MS. This font includes character sets such as Chinese, Japanese and Korean, Cyrillic, Greek, and many others.

Reference types

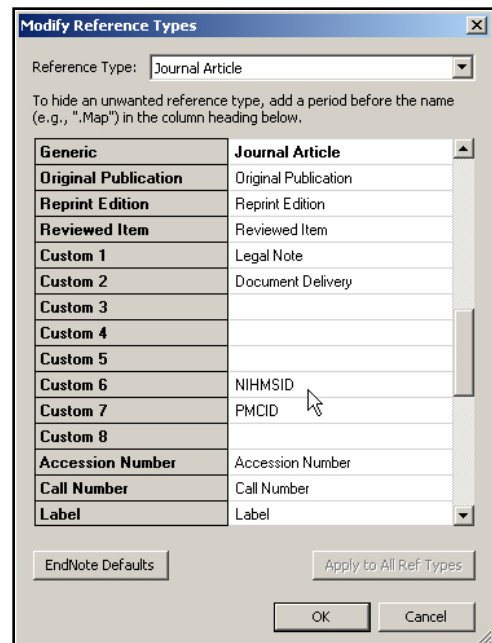
Reference types can be modified, default type set, and changes to reference types can be exported and imported to different libraries with XML.

To modify, click the **Modify Reference Types** button, and then scroll through the available fields.

EndNote X3 includes 8 custom fields that can be used to track user-defined data such as NIH grant tracking numbers (NIHMSID) and PubMed Central ID Numbers (PMCID).

The NLM standard established for EndNote places the **NIHMSID** in **Custom 6** and the **PMCID** in **Custom 7**.

Select **Apply to All Ref Types** to add the changes to all material types in EndNote X3.



Sorting

Enter stop words to ignore from both the Author and Title fields when sorting references. These stop words will be ignored when sorting citations in the EndNote X3 Library.

Display Fields

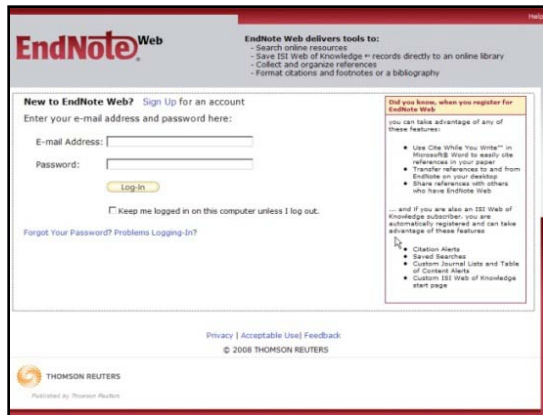
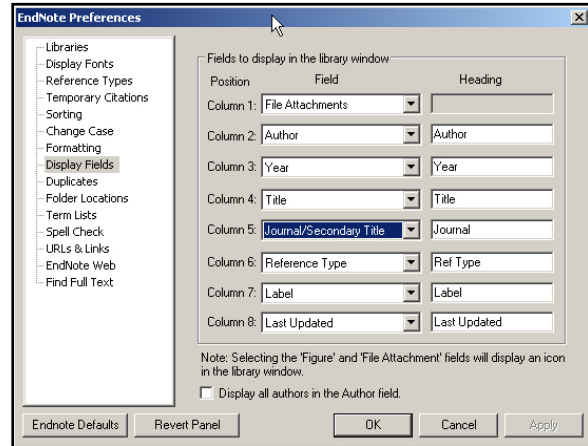
Rearrange, hide, or display fields in the EndNote X3 library reference display window. Reference fields can be chosen here to display different fields.

Duplicates

Compare and match on selected fields when importing citations. A choice of **Exact Match** or **Ignore spacing and punctuation** is available.

Folder Locations

Set locations for styles, filters, and connections. When sharing a library with colleagues in a networked environment, be sure to change the folder location to the networked directory.



EndNote Web

The web version of EndNote is available free of charge for Mount Sinai staff, students, and faculty from the Thomson Reuters website. The web version is packaged with convenient tools and links to all the ISI products.

EndNote X3 libraries can be synchronized with the web version to provide access to your library on the web. The web version of EndNote also provides an easy way to share your EndNote libraries with colleagues.

<http://www.myendnoteweb.com>

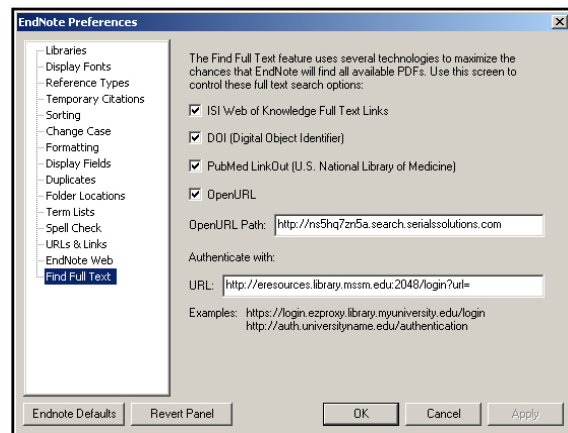
Find Full Text

EndNote X3's new improved Find Full Text feature utilizes several standardized search formats to find full text library holdings. To improve the search results check all boxes including **OpenURL Path**.

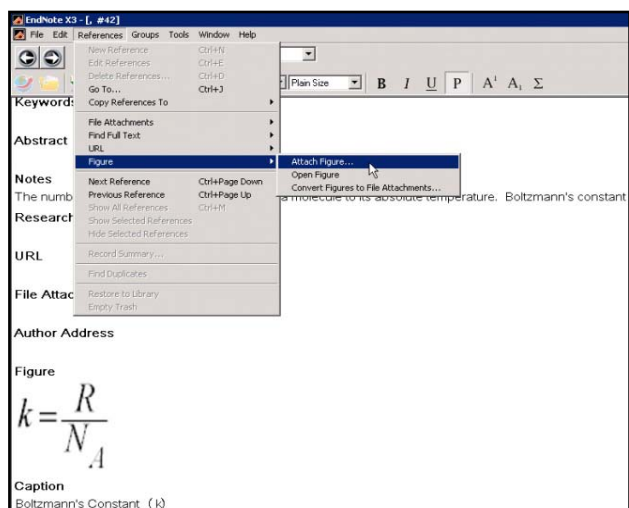
In the **OpenURL Path** box, enter the library's OpenURL link as follows.

<http://ns5hq7zn5a.search.serialssolutions.com>

To access full text off-campus through the library's proxy server, enter the following line in the URL field.
<http://eresources.library.mssm.edu:2048/login?url=>



Attaching Figures to an EndNote X3 Library



Images and tables can be inserted into MS Word documents using the Cite While You Write plug-in.

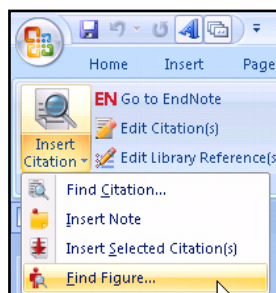
To insert an image or table, first add it to your library. Create a new reference, or add it to an existing reference by selecting the **References** menu, **Figure**, and then **Attach Figure**, or by right clicking in an open reference. Files can also be dragged into the open record from the desktop and dropped into the figure field.

Only one image or table can be added to any one reference record.

Add text in the Caption field below the Image field to display a caption with the image or table when inserting with the Cite While You Write plug-in.

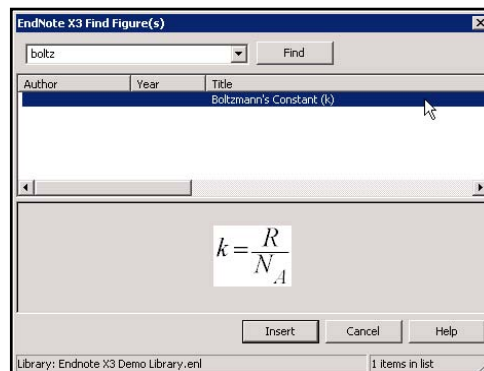
Inserting Figures in MS Word

In MS Word, images and tables can be inserted with the Cite While You Write plug-in by selecting **Find Figure** from the EndNote X3 toolbar.



Search for the title of the figure, or its caption, and select **Insert** to add the figure to the MS Word document.

The figure and its caption will appear in the text of your document where the output style specifies, and can be moved by selecting a different output style.



Saving a Compressed Copy of a Library

You can save your complete library including its associated .DATA folder and all of its contents to a single compressed file in order to easily back up your library or send a copy to a colleague. Later, you can restore the compressed library with EndNote X3.

To create a compressed file, click **Compressed Library (.enlx)** from the **File** menu, select **Create ...** to save the file, or **Create & Email ...** to attach the compressed file to an email message. Selecting "Without File Attachments" will result in a smaller compressed file.

Opening the compressed file will restore the library, its .DATA folder, and all of its contents. When moving the library to a different location, be sure to move the .DATA folder and any other items created by the compressed file to retain functionality of the links in your library.

Edit an Existing Output Style

EndNote X3 has many output styles that control how the citation looks when formatted in an MS Word document. Most of the major publisher styles are available, but you may find that you require a different output format for a special publication or project. It is often easier to modify an existing bibliographic style that closely resembles a needed style than it is to create a new style from scratch.

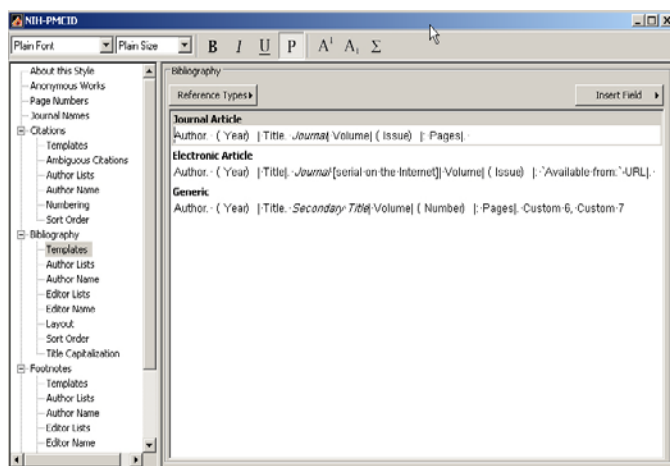
From the **Edit** menu, select **Output Styles**, and then **Open Style Manager ...** to edit an existing style. After choosing the option to edit an existing style, EndNote opens the Style window.

All of the different options for editing a style are listed on the left side of the Style window. The first four items (About This Style, Anonymous Works, Page Numbers, and Journal Names) apply to citations, bibliographies, and citations in footnotes. The rest of the options in the Style window are grouped under one of four headings:

Citations: Panels listed under the Citations heading apply only to citations in the body of the text.

Bibliographies: The items listed under the Bibliography heading apply to the bibliography that EndNote creates when you format a paper. These settings are also used with the Export, Print, Copy Formatted, and Preview options.

Footnotes: The items under the Footnote heading apply to citations that have been inserted into the footnotes or endnotes in a word processing document. (You must first create the footnotes in your word processor, and then insert EndNote citations into them.)



Figures and Tables: The items under Figures and Tables apply to EndNote figures and tables that have been inserted into a Microsoft Word document.

Click on the plus next to one of the headings to expand or collapse the view to show or hide the related options. Click on an item under the headings to view the associated panel. You may switch between panels as needed while editing the file. No changes are saved in any of the panels, however, until you choose **Save** or **Save As** from the **File** menu.