

# **Guided Tour to the EndNote Plus and EndLink Demonstration Disk\***

\*Please note: this manual was intended for distribution with a disk; please interpret instructions accordingly.



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Font/DA Mover is a copyrighted program of Apple Computer, Inc. licensed to Niles & Associates, and may only be used for the installation of the EndNote Plus Desk Accessory.

## **Introducing EndNote Plus**

Welcome to EndNote Plus, an Enhanced Reference Database and Bibliography Maker. As the subtitle suggests, EndNote Plus is a program with a dual purpose.

First, EndNote Plus is a database manager—specialized in storing, managing, and searching for bibliographic references in your private reference library.

Second, EndNote Plus is a bibliography maker—it builds lists of cited works automatically, and can format references and footnotes as well. EndNote scans your word processor paper for in-text citations. It then compiles a bibliography using the references in your database. Finally, it will produce a copy of your paper, reformatting the in-text citations and placing the bibliography at the end. You select the style to use and EndNote does the rest! EndNote can reformat documents created by Microsoft Word, WordPerfect 1.0 - 2.1, MacWrite 5.0, MacWrite II and WriteNow 1.0-2.2. It can also reformat documents in RTF (Rich Text Format) and plain text documents.

EndLink is the online database import facility for EndNote. It is an add-on module to EndNote which enables you to import references from online databases into your EndNote libraries. EndLink is not a program itself, rather it is a resource file present in the same folder as the EndNote program, endows EndNote with a new import capability.

To use EndLink, you log on to your database service, and capture the results of your search as they are listed to the screen. Then start EndNote, Import the resulting text file using EndLink, and the references are imported directly into an EndNote library. For instructions on begin on page 28.

## What You Have

This guided tour is a brief introduction to EndNote Plus and EndLink. It will show you the major features of EndNote Plus and EndLink:

- How to use EndNote Plus as a desk accessory.
- How EndNote Plus creates bibliographies automatically, placing them directly into your word processor document.
- How to import database capture files using EndLink.

When you've finished with the Guided Tour, we suggest that you explore on your own. EndNote Plus has many features not covered in the tour. In particular, you may want to create a new library and add several references to it, to see how EndNote's Edit Window works.

The EndNote Plus/EndLink demonstration package consists of this Guided Tour, and the demonstration diskette. The demonstration diskette contains:

- EndNote Plus demonstration program
- EndNote Plus desk accessory demo
- EndLink demonstration resource file
- Styles folder
- Claris folder
- Font/DA Mover
- Examples folder
- Examples Download file

The **EndNote Plus** program is used for formatting references in word processor documents, accessing reference libraries, changing formatting styles, and importing and exporting files. This demo allows you to add only 10 new references.

The **EndNote Plus Desk Accessory** can be used as a companion to your word processor to access your reference libraries while you are writing. You can perform searches, add references, and sort your libraries with the desk accessory.

The **Styles folder** contains the bibliographic styles EndNote Plus uses to create bibliographies. Styles contain the details required to properly format bibliographic references and in-text citations, and can be modified with the EndNote program.

The **Claris Folder** is for use with MacWrite II only. You may ignore the Claris folder if you are using a different word processor.

**Font/DA Mover** is the program you'll use to install the EndNote Plus Desk Accessory into your System file.

The **Examples folder** contains the sample files you'll use in this guided tour.

The **Example Download file** is an example of a capture file from an online database, which you can Import using EndLink.

## Limitations of the Demonstration Package

The demonstration version of EndNote and EndLink are intended for evaluation purposes only and as a result they have several limitations.

- New references cannot be added to a library that already has over ten references in it.
- A paper cannot be formatted that has over ten citations in it.
- EndLink will only import four references.

## System Compatibility

EndNote Plus requires Macintosh System 4.2 or higher. The way to determine which system you are using is to choose *About the Finder* from the *Apple* menu. You will see a small window with the number of the System in the upper left corner. If you are using a System with a lower number, contact your Apple dealer or User Group for a set of new System disks. Then be sure to run the Installer program to install the new System.

EndNote Plus is compatible with A/UX version 2.0.

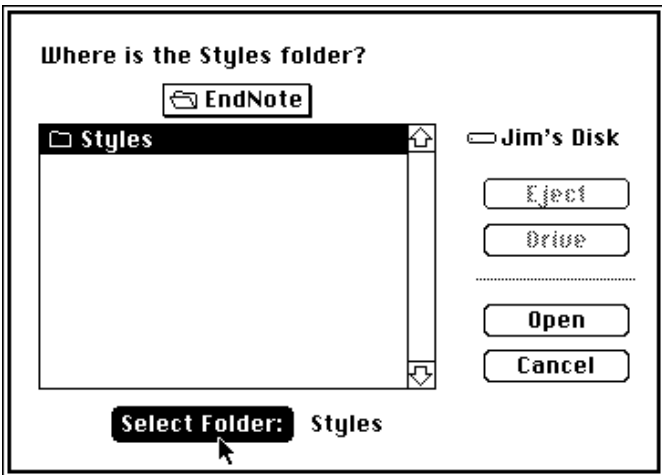
**EndNote Plus is compatible with System 7.0. However, EndNote Plus does not take advantage of a new features. Installing the EndNote Plus Demonstration program**

To use this demonstration program you'll need to install the program and desk accessory in a way that will make them available while working in your word processor.

Installing the EndNote Plus Demonstration program is easy. If you are using a hard disk, turn on your computer, make a folder called “EndNote,” insert the EndNote Plus Demonstration disk, and drag the EndNote Plus icon, the Styles folder icon, the Examples folder icon, and the EndLink icon to your hard disk. There’s no need to copy the EndNote Plus Desk Accessory or Font/DA Mover icons at this time.

If you are using MacWrite II, you will also need to use the Claris folder. If you don’t currently have a Claris folder in your System Folder, put the Claris folder that came with this demo into your System Folder. If you do already have a Claris folder, **do not** replace it. Instead, open both the Claris folder that came with this demo, and the one in your System Folder. Compare the dates of the **Claris XTND System** and the **MacWrite II** translators in the two folders. If the files in the EndNote Claris folder are newer than the ones in your System Folder, then copy those files to your Claris folder in your System Folder.

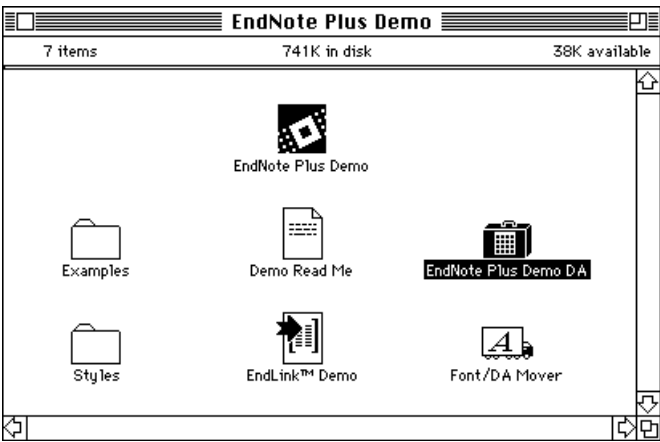
The first time you start the program, EndNote Plus may ask you for the location of your Styles folder. We recommend that you keep the styles folder in your EndNote folder.



Select the folder and click on *Select Folder*.

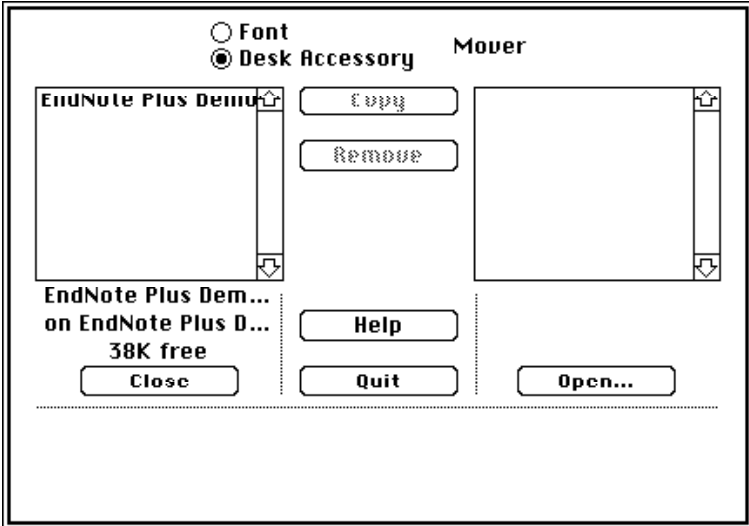
**Installing the EndNote Plus Desk Accessory**

The EndNote Plus Desk Accessory must be installed in the System file using the Font/DA Mover utility available on the EndNote Plus Demonstration disk. Start by double-clicking on the EndNote Plus desk accessory icon.



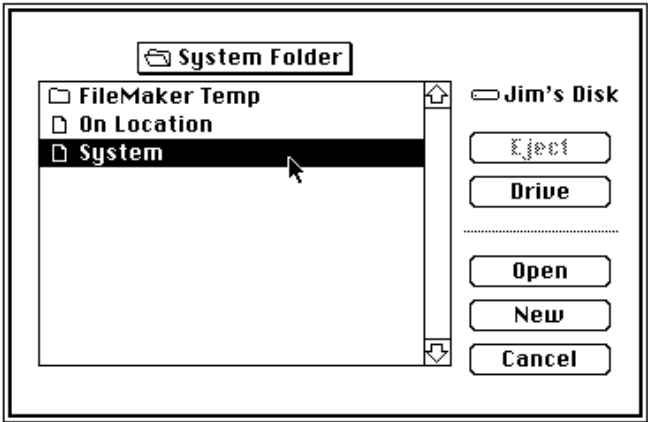
**If you are running System 7**, the suitcase will open just like a folder, and you will see the EndNote Plus Demo DA file. Drag that file to your closed System Folder. You will then be asked if it is alright to place it in the Apple Menu Items folder. Click OK.

**If you are using System 6** (or earlier), clicking on the EndNote Plus DA will start the Font/DA Mover program automatically and you will see the following window:

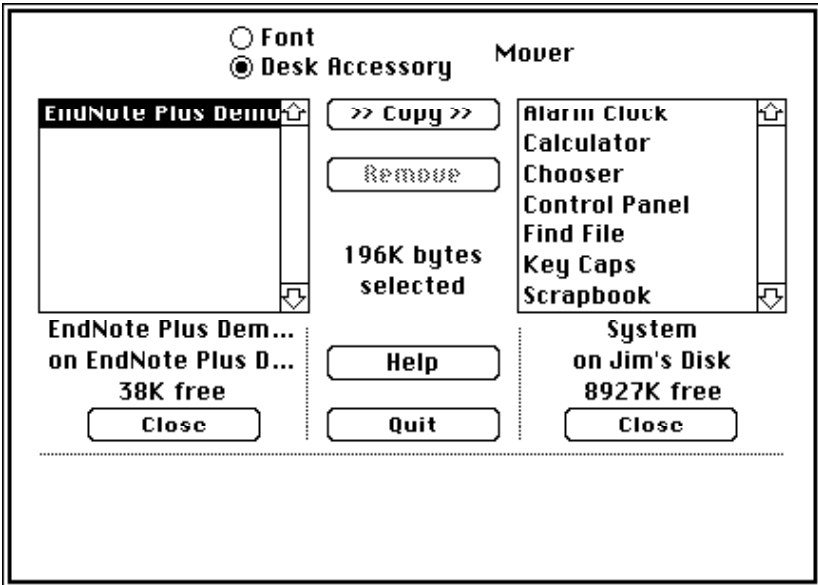


In the left list you'll see *EndNote Plus*. The right list will be empty. Click on the *Open* button underneath the right-hand window.

You'll see the familiar Open File window. Next you'll need to find your System file. Normally the System file will reside in a folder called System folder. Double-click on System folder, and then find System in the list displayed. Finally, select the System file and choose *Open*.



Now the right-hand window should be showing a list of desk accessories already installed in your system.



Click on EndNote Plus in the left window. The >>Copy>> button between the windows will activate. Click on the >>Copy>> button to copy the EndNote Plus Desk Accessory into your System file. When the copy operation is done, click the Quit button to return to the Finder desktop.

Check that you've installed the EndNote Plus Desk Accessory by pulling down the Apple menu. EndNote Plus should be available now. If not, repeat these instructions carefully.

**Start the Guided tour to EndNote Plus**

This section will introduce you to the way you'll use EndNote Plus together with your word processor to create in-text citations and bibliographies.

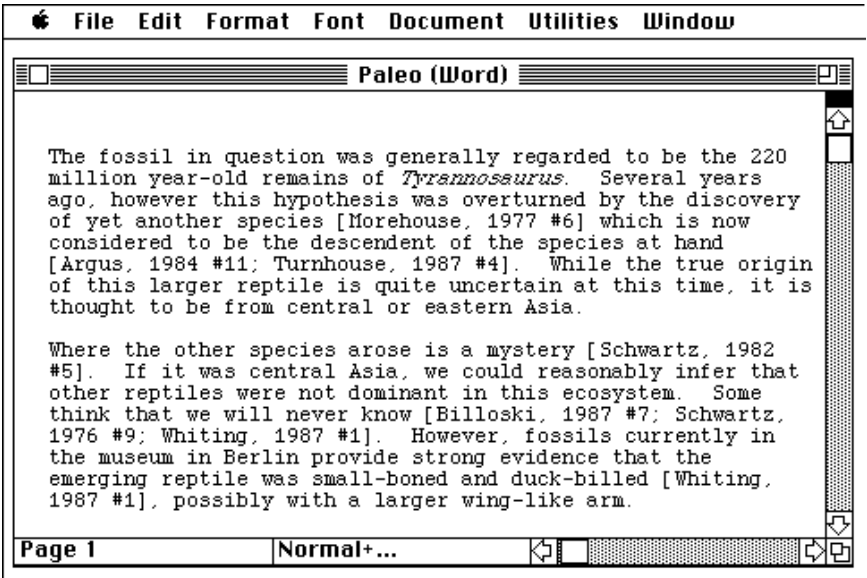
We have provided an Examples folder on your EndNote Plus Demonstration disk. This folder contains a sample EndNote reference library called Paleo Library, and four versions of a paper that could have been written by someone researching dinosaurs. Each version is in the format of a word processor that EndNote supports: Microsoft Word, WordPerfect, WriteNow and MacWrite. Use the one appropriate to your word processor.

The procedures for creating a bibliography are described under the assumption that you are not using MultiFinder. However, it is important to note that anything done from the EndNote Plus DA can be done from the EndNote Plus application under MultiFinder.



1. Open the Sample Paper in Your Word Processor

Start by opening the paper in your word processor. If you’re using Microsoft Word, you’ll see a screen like the following (of course, if you don’t use Word, the screen will be different).

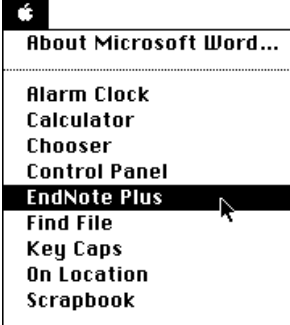


Now pretend, if you will, that you are writing this paper, and you’ve just typed in the sentence at the end of the first paragraph. You would like to cite the work responsible for this idea, so, with your mouse, position the cursor at the end of the sentence, just before the period.

While the true origin of this  
larger reptile is quite uncertain  
at this time, it is thought to be  
from central or eastern Asia.

Add an extra space before the period so that your citation will be separated from your text. To retrieve the proper citation, call up the Paleo Library.

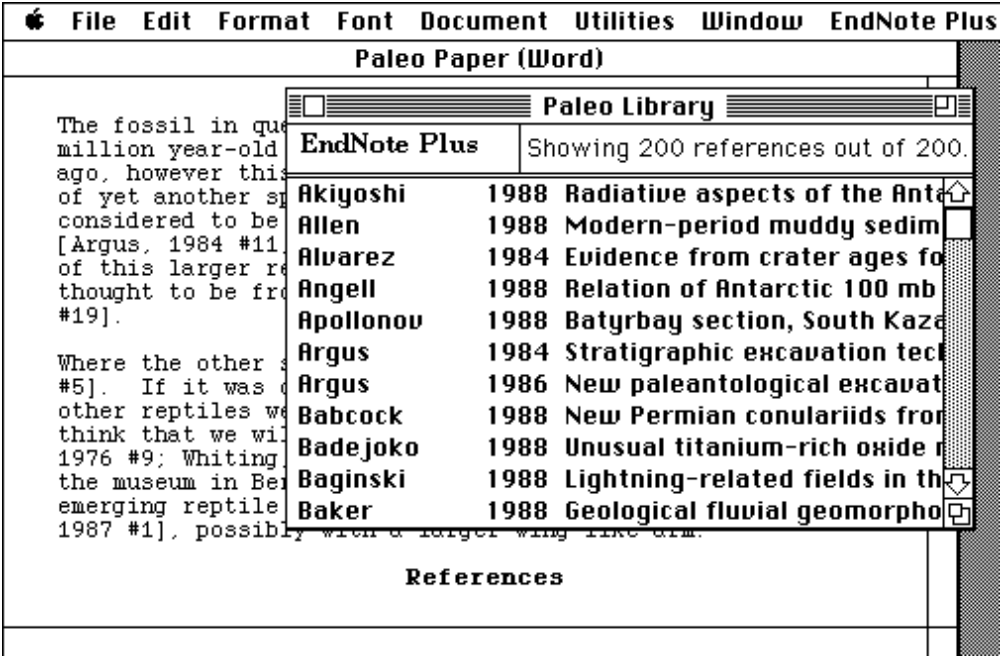
2. Open an EndNote Library



Pull down the *Apple* menu in the upper left corner of your Macintosh screen, and choose *EndNote Plus*. If you don't see it there, you'll need to follow the instructions in at the beginning of this guide for installing the EndNote Plus Desk Accessory. When you have selected EndNote Plus, it will ask you to open a library. Find the Paleo Library inside the Examples folder and open it.

An *EndNote Plus* menu will be added to the right side of the menu bar at the top of your screen. This menu will appear whenever the EndNote Plus Desk Accessory is active. You'll use it to access the many features of the DA.

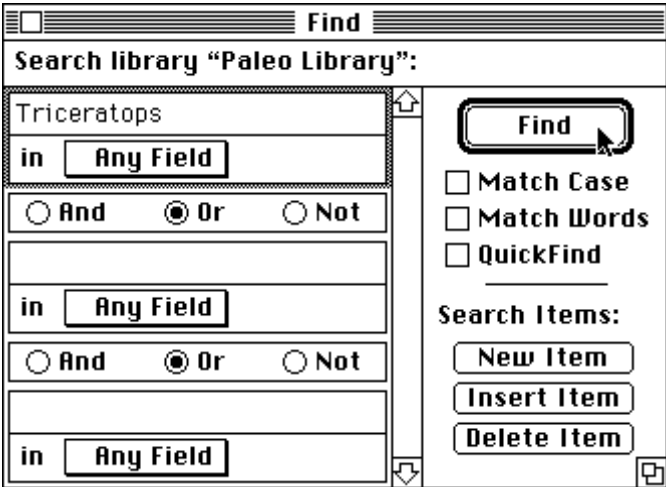
You should see an EndNote library window:



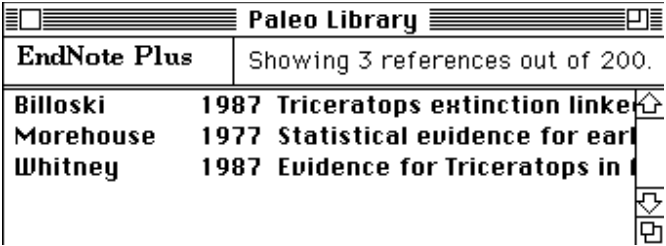
Now that the library is open, you'll want to find a specific reference to cite.

3. Find a Reference to Cite

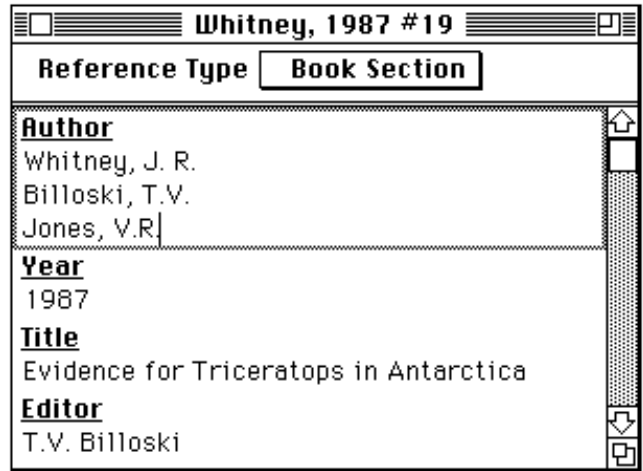
Pull down the *EndNote Plus* menu, and choose the *Find...* option.



In the first search item, enter the word that will identify the reference you want to cite. In this example, you'll be searching for the word "Triceratops." Click *Find* and EndNote will instantly perform a search for any references in the Paleo Library containing the word "Triceratops." The three matching references will appear in the library window. Notice the label "Showing 3 references out of 200" at the top of the library window:



The reference you want to cite is by Whitney. To look at the details of this entry, double-click on that line in the library. You will see the following window:



This is the **edit** window, which you will use to add and change references in your EndNote library. Notice how the authors are entered: **one author per line**. Click on the close box in the upper left of this window to return to the library window.

4. Copy a Citation from EndNote and Paste it into the Example Paper

Notice that the Whitney reference is highlighted in the library window. You are going to *Copy* the temporary citation for the Whitney reference to the paper by way of the Clipboard. Either choose

*Copy* from the *Edit* menu, or else press ⌘-C. Next, return to your word processor by clicking back on the Paleo Paper window. Choose *Paste* from the *Edit* menu or press ⌘-V. You'll see a temporary citation in the paper appearing like this:

...origin of this larger reptile is quite uncertain at this time, it is thought to be  
from central or eastern Asia [Whitney, 1987 #19].

This pasted citation is only a temporary marker. Later, when you're finished with your paper, you'll use EndNote Plus to format the temporary citations and to build a bibliography automatically.

5. Open the Library in EndNote Plus

Now pretend that you are done typing your paper and that all the temporary citations have been placed. *Save* your paper in your word processor.

Quit from the EndNote Plus Desk Accessory by closing the open reference library window. Quit your word processor. Then find your EndNote folder, and double-click on the EndNote Plus icon. Choose *Open* from the *File* menu. EndNote will ask you to locate your library. Find the Paleo Library you were just working with and click on the *Open* button. You’ll see the library window.

6. Open the Paper in EndNote



The next step is to open your Paleo Paper in EndNote Plus for formatting. Choose *Open Paper...* from the *Paper* menu. EndNote will ask you to locate your paper. Find and open the Paleo Paper you just worked on, the one appropriate to your word processor. EndNote will show you the **paper** window, listing the citations it found in the paper.

Paleo Paper (Word)	
Matches	9 Citations
1	Morehouse, 1977 #6
1	Argus, 1984 #11
1	Turnhouse, 1987 #4
1	Whitney, 1987 #19
1	Schwartz, 1982 #5
1	Billoski, 1987 #7
1	Schwartz, 1976 #9
1	Whiting, 1987 #1
1	Whiting, 1987 #1

To produce this information, EndNote scanned your paper for temporary citations, compiled a list of them, and looked each one up in the reference library. The numbers in the left-hand column show how many matches EndNote found for each citation. A “1” indicates that all the citations matched exactly one reference in the library, and there were no ambiguities.

7. Choose a Style

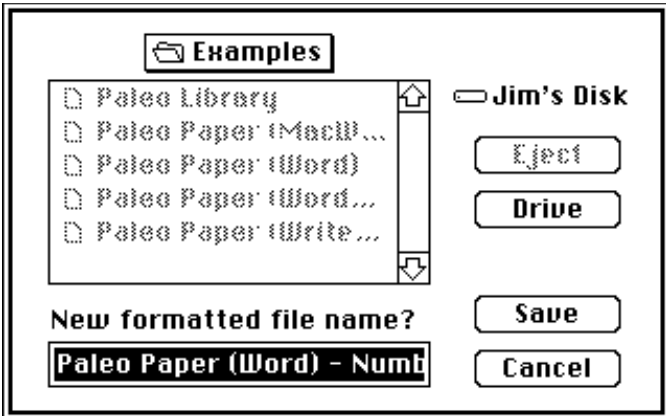


Before formatting, choose the bibliographic style you want to use in your paper. Pull down the *Styles* menu and notice the different styles available. Choose the *Numbered* style. The Numbered style will tell EndNote to replace in-text citations with numbers and also to number the bibliography that appears at the end of the paper. Now you’re ready to format the paper. This means that EndNote is going to make a copy of the paper with properly formatted in-text citations, and with a bibliography at the end.

8. Format the Paper in EndNote

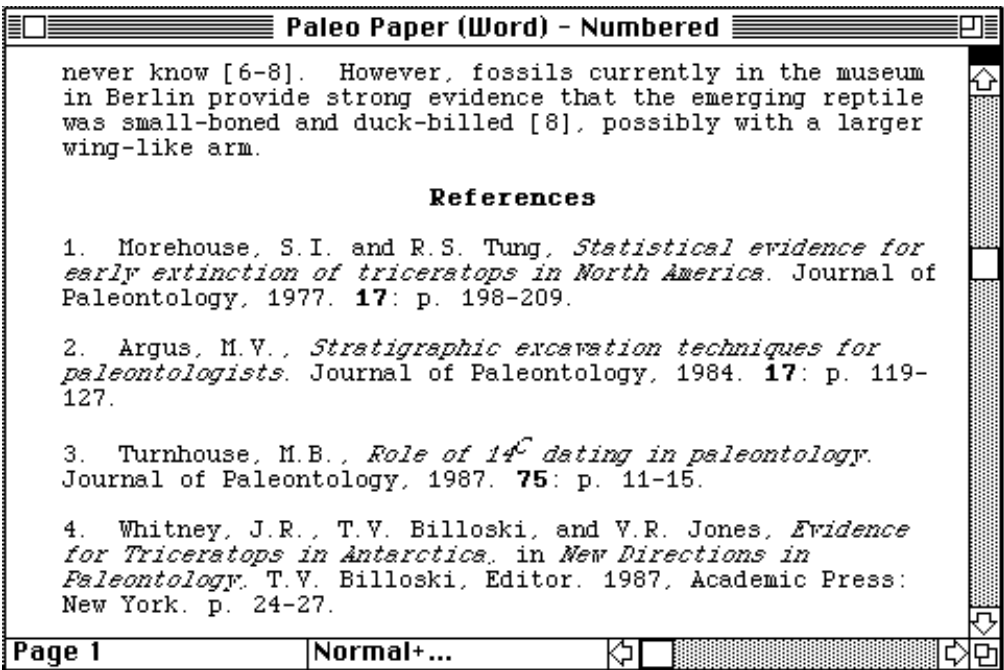


After selecting the Numbered style, choose *Format* from the *Paper* menu. EndNote will ask you to name the file that will contain the formatted copy of the paper, with the default being the name of the original paper plus the name of your bibliographic style, as shown below. Your original paper won't be replaced; the new name insures that EndNote only makes a copy.



9. Open the Formatted Paper in the Word Processor

When the formatting is done, you’re ready to look at the formatted paper. Quit EndNote by choosing *Quit* from the *File* menu. Then open the formatted copy of the paper in your word processor. You’ll see that EndNote Plus has performed its magic!



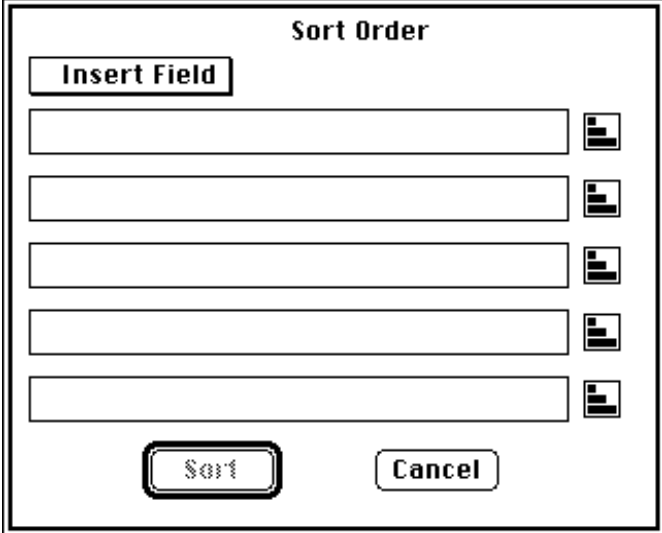
So, you see, using EndNote Plus is really quite simple. You use the EndNote Plus DA (or the application if you’re using MultiFinder) to look up and Copy/Paste citations into your paper. When you’re finished writing, you add the final bibliographic touches to your paper with the EndNote Plus application. You’ll have to choose the formatting style, and EndNote Plus does the rest—instantly!

Enhanced Features of EndNote Plus

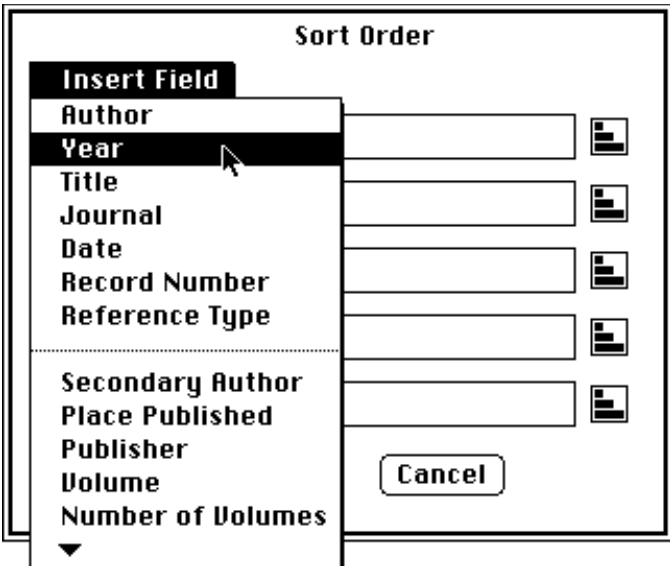
Sorting

Sorting a reference library can help you organize information for printing, copying or just browsing. You can sort any library window, whether it shows a complete library or a partial listing of references resulting from a successful search.

Choosing *Sort Library...* from the *References* menu brings up the sort order window.

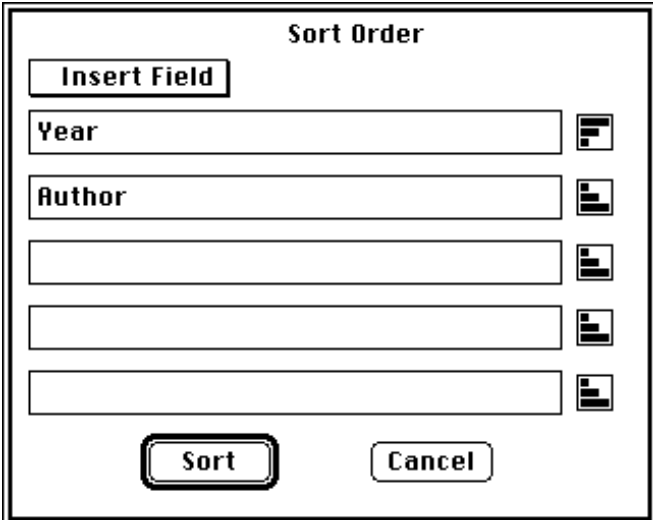


Each of the five boxes can contain one field name, but you don’t have to use all five boxes to sort a library. Enter field names by clicking on *Insert Field* and releasing the mouse button on the name you want.



You can also enter field names by typing the name directly, using the mouse or the Tab key to move from field to field. The button at the right of each box indicates ascending or descending order.

The following sort instructions will sort the library by year, in decreasing order, and then by author, in increasing order.



With the field names entered, click on *Sort*. EndNote will sort the reference library according to your instructions.

Here are the results of the descending year and ascending author sort on Paleo Library:

Paleo Library		
EndNote Plus	Showing 200 references out of 200.	
Carter	1990	Dynamic deformation of quar
French	1990	Twenty-five years of the imp
Melosh	1990	Ignition of global wildfires at
Wolfe	1990	Palaeobotanical evidence for
Muller	1989	Geomagnetic reversals driven
Officer	1989	Cretaceous/Tertiary extinctio
Akiyoshi	1988	Radiative aspects of the Anta
Allen	1988	Modern-period muddy sedime
Angell	1988	Relation of Antarctic 100 mb
Apollonov	1988	Batyrbay section, South Kaza
Babcock	1988	New Permian conulariids from

Before the *Sort Library* command is used, your EndNote library will be sorted by author and year, both in ascending order. New and edited references are automatically sorted according to this system. After the *Sort Library* command is used, this automatic sorting process is disabled. New references will simply be added to the end of your sorted library. Editing a reference will have no effect on its position.

Choosing *Show All* (⌘-H) from the *References* menu restores the original author/year order and the automatic filing process.

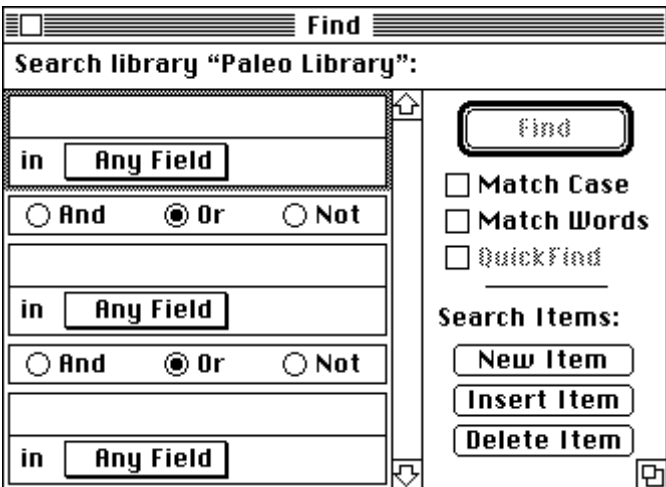
You can also sort your final bibliography in the same or different manner by specifying this in the bibliographic style.



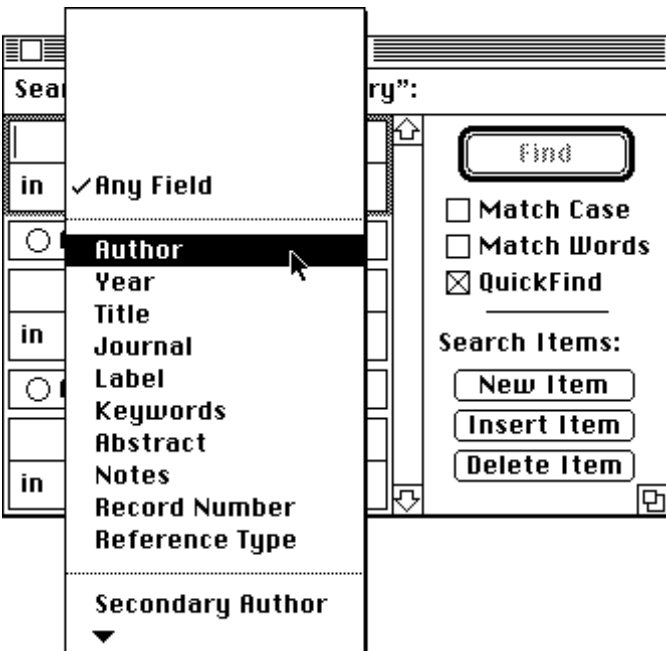
**Searching**

To start a search, choose *Find...* (⌘-F) from the *References* menu (*EndNote Plus* menu in the DA).

You will be presented with a window, containing three empty fields, called **search items**, where you will enter your search specifications.



The fields menu allows you to specify the reference field to search in. You can limit your search to Author, Year, Title, Keywords, or any other field.



Once you have entered the search instructions, click on the *Find* button. If EndNote can’t find any references using your instructions, you’ll hear a beep to indicate that there are no matches. If references that match your instructions exist, the library window will show only the matching references.

**Additional Search Features**

The Boolean **And**, **Or**, and **Not** radio buttons between the search terms indicate how they are to be combined. Combining with **And** means that EndNote will only find references with both term, whereas combining with **Or** will return references which have either the first term or the second term. Combining the terms with a **Not** will only show references which have the first term but not the second term.

The **Match Case** allows you to specify that the references must contain terms in the same combination of upper and lower case as the search term. For example: Searching for Hall or Robin will not find hall or robin if the Match Case is selected.

**Match Words** specifies that only whole-word matches will be found, not partial word matches. For example: Searching for fossil will not find fossils or fossilize if the Match Words option is chosen.

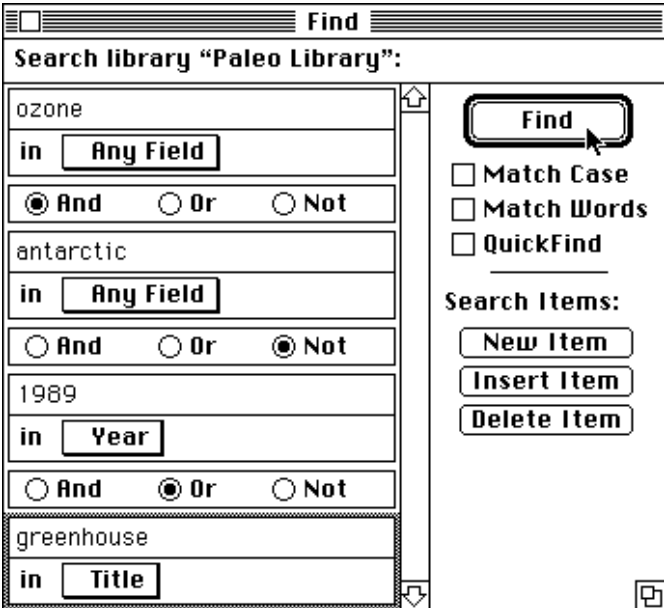
**QuickFind** is a special high-speed search feature that works in conjunction with EndNote’s special indexes. It will only be enabled if you have already indexed your library by selecting QuickFind Index from the Edit menu. Creating a QuickFind index will increase the size of your database but will make searching on it much faster. QuickFind indexes are intended for databases of over one thousand records. Performance will not be greatly improved for smaller databases.

Extra search items can be added or deleted using the **New Item**, **Insert Item**, and **Delete Item** buttons on the lower right-hand side of the window. **New** adds a new search item to the bottom of the list, **Insert** adds a search item above the current item, and **Delete** removes the current search item.

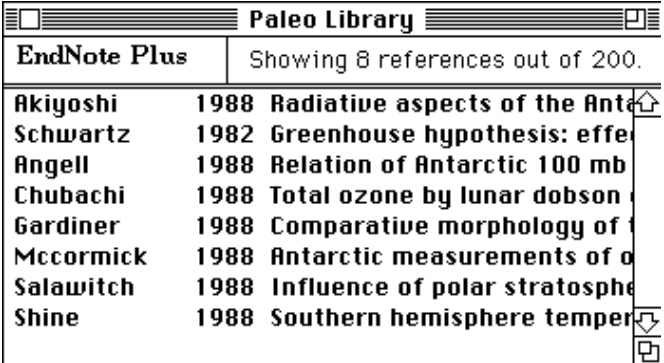
Every EndNote search looks through the entire reference library. If you do not choose **Show All** after a successful search, but instead begin another search, EndNote will still bypass the current search results and look through the entire reference library.

**Example. Find the references pertaining to both ozone and antarctic that were not written in 1989, plus any references that use the word “greenhouse” in the title.** Enter ozone and antarctic as the first two search items and connect them using the *And* option. Leave the field menu for these first two items at *Any Field*. Enter 1989 as the third search item and change the field menu to *Year*. Combine 1989 with the previous grouping by using the *Not* option.

Now that the first three slots are taken up, you will need to press the *New Item* button to add a new search item. Enter greenhouse as the fourth item and change the field menu option to *Title*. Connect this fourth item to the previous grouping by checking the *Or* option.



Click *Find*, and EndNote will locate the references matching these instructions.



Items in complex Boolean searches are connected from top to bottom, EndNote interprets the search like this:

(((ozone **and** antarctic) **not** 1989) **or** greenhouse)

Keep this grouping in mind when setting up your searches.

**Find Duplicates**

EndNote Plus also offers a feature to find duplicate references in your database. This is helpful to people who download a lot of information from online services and usually end up duplicating some of the references. Find Duplicates will find all entries with identical author, year and title fields. It will also allow you to inspect them before deleting anything.

**Printing**

EndNote now offers Printing directly from within the program. To print you choose *Print...* from the *File* Menu. EndNote will print all of the references currently showing in the library window (This may be either the entire library or

the results of a search). The references will be printed in the style that is currently selected.

Journals

EndNote Plus can create a journals table which is used to store information regarding journal abbreviations. The journal table can be used to store a Full Journal name and up to three abbreviations. To create a journal table choose *Journal Abbreviations...* from the *Edit* menu. If an EndNote Journals file does not already exist EndNote will ask you to create a new one. Click *New...* in the dialogue box. You will then see an empty journals table. You can begin entering your journal names. Use the tab key to move horizontally across the table to type your various abbreviations. After entering a number of journal names your journal table may look something like this:

Full Journal	Abbreviation 1	Abbreviation 2	Abbreviation 3
American Journal of Me	American J. of Medicin	Am. J. Med.	AJM
American Journal of Su	American J. of Surgery	Am. J. Surg.	AJS
Biochemical Journal	Biochemical J.	Biochem. J.	BJ
British Journal of Psyc	British J. of Psychiatry		
European Molecular Bio	European Molecular Bio	Eur. Mol. Bio. Org. J.	EMBO J.
Geophysical Research L		Geophys. Res. Letters	GRL
Journal of Geophysical	J. of Geophysical Resea	J. of Geophys. Res.	
Journal of Organic Cher	J. of Organic Chemistr	J. Organic Chem.	JOC
Journal of Sedimentary	J. of Sedimentary Petr	J. Sed. Petr.	JSP
Journal of the America	J. of the American Cher	J. Am. Chem. Soc.	JACS
Journal of the America	J. Americian Medical As	J. Am. Med. Assoc.	JAMA
New England Journal of	New England J. of Medik	N. Engl. J. Med.	NEJM
Proceedings of the Nati	Proceedings of the Nati	Proc. Natl. Acad. Sci. U	P.N.A.S. USA
Science			

14 Journals

European Molecular Biology  
Organization Journal

New Journal

Delete Journal

OK

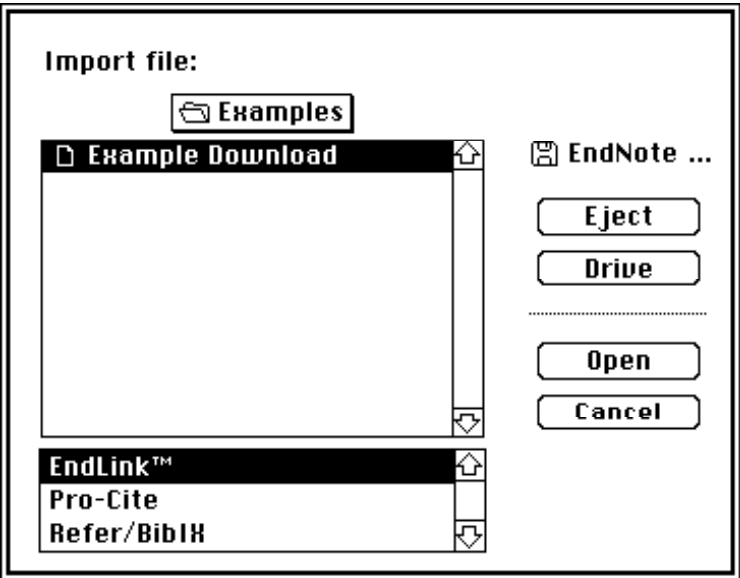
Cancel

The journal names listed above are not included with this demonstration but you can create your own.

You will also be able to use the journal table during data entry as you will be able to automatically insert a journal name or abbreviation into a reference without having to retype it by selecting *Journal Names...* from the *References* menu and selecting the journal name that you wish to insert. You will also be able to specify which abbreviation you would like to be placed in your bibliography by specifying the abbreviation format when editing or creating a new bibliographic style.

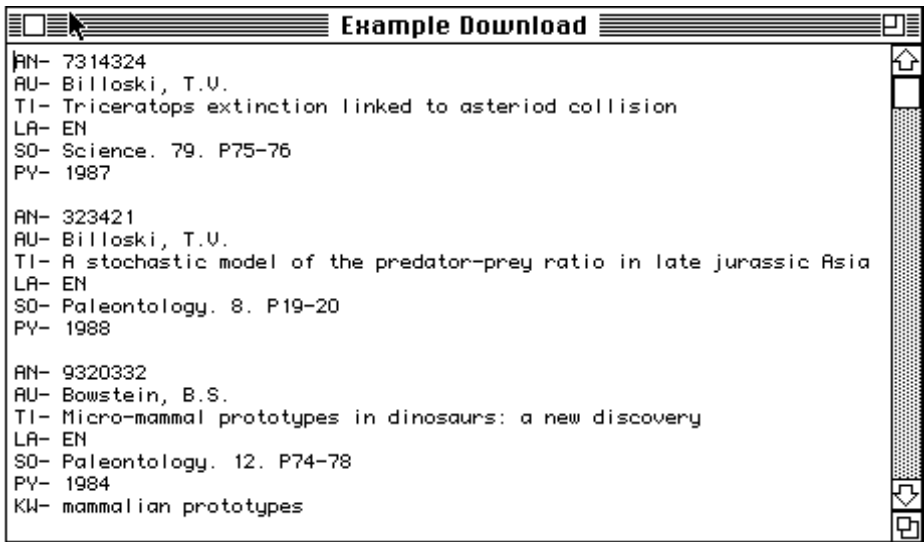
Starting the Guided tour to EndLink

EndLink is a resource file, which must be in the same folder as EndNote. You can check that the installation was successful by running EndNote, opening a library, and then selecting *Import...* from the *File* menu. If EndLink™ appears as an option in the window at the bottom of the import window, then EndLink has been installed.



The EndLink option may not appear if the EndLink™ file is not in the same folder as the EndNote application program. Make sure that you copied the EndLink file into the same folder containing EndNote.

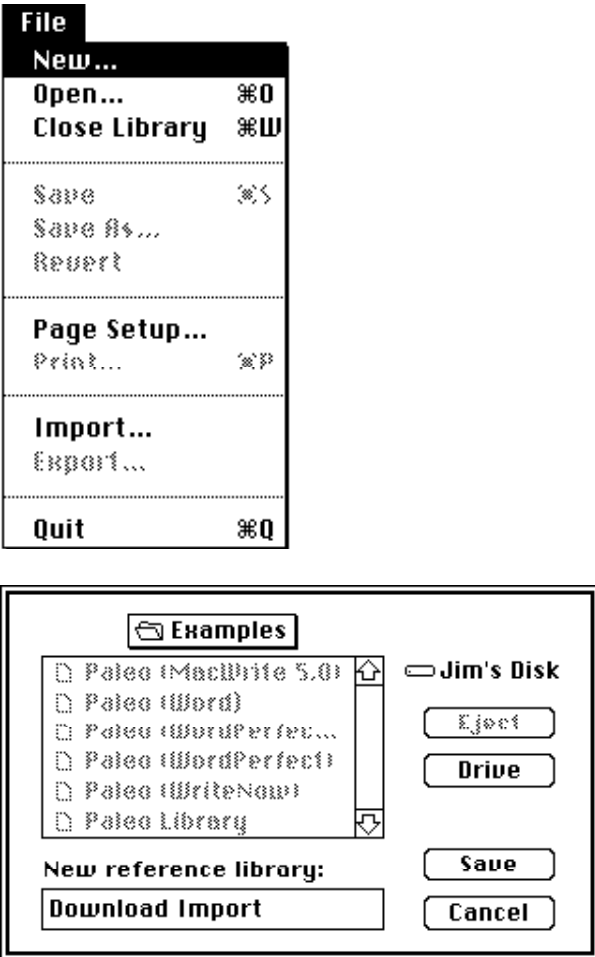
**Using the Example Download**  
To get you started using EndLink, we will provide you with an example of its use. We will use our Example Download file located in the Examples folder, which is assumed to be captured from an online database.



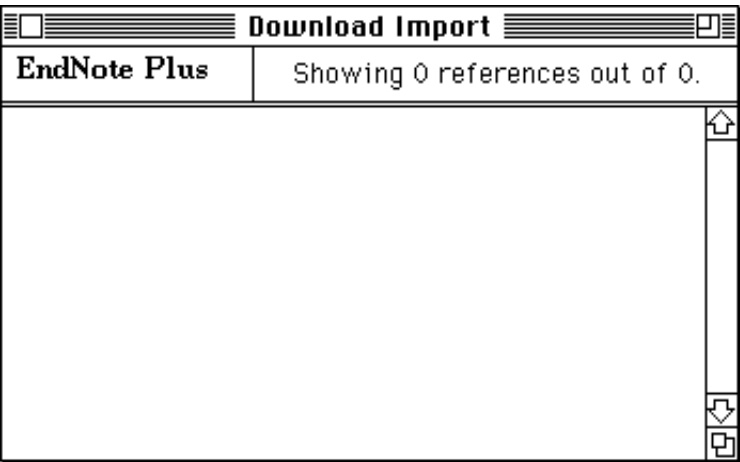
The two-letter codes you see above are required for EndLink to identify the fields. When using DIALOG, you should display in format 4 to show these tags.

**Run EndNote and Create a New Library**  
When importing references you must first create a new empty database. The demonstration program only allows you to import four references at a time to a database with less than ten references.

Select New... from EndNote's File menu, and create a new library, called "Download Import".



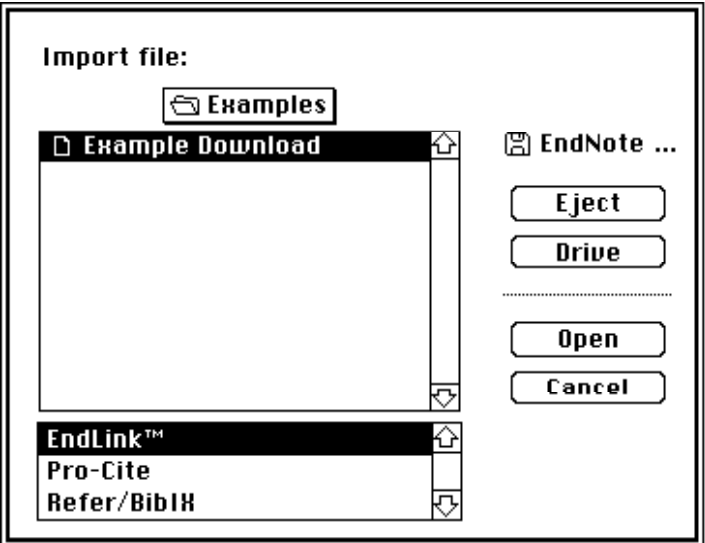
An empty library window appears:





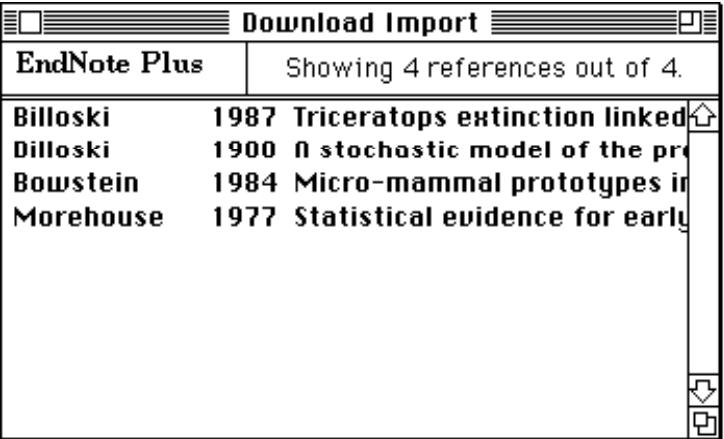
**Import References from a Capture File**

Next, choose Import... from EndNote's File menu, check that the EndLink™ option is selected, click on the capture file, and then click on Open:



While the importing progresses, a counter shows how many references have been imported. THIS DEMO VERSION WILL ONLY IMPORT FOUR REFERENCES.

And here is the result:



That's really all there is to it. Four mouse clicks to import from a capture file.

**Seven Steps From Online to EndNote**

Transferring references from your online service into EndNote requires the following steps:

- Log on to your online database service,
- Search the online database for the desired references,
- Log on to an online database service, using a terminal emulation program,
- Search for your topics,
- Turn on the terminal program's "capture", and list the search results, with tags,
- Log off and quit from your terminal program,
- Run EndNote and create a new library to receive the imported references,
- Import the references from the capture file.
- Copy your references from the new library to your old library

EndLink Imports Journal Articles from Many Databases:

EndLink has successfully imported journal articles from the following databases:

Medline, CAS (Chemical Abstracts), BIOSIS, PaperChase, Inspec, PsycInfo, SciSearch

EndLink also imports from many other databases on BRS Colleague and Dialog, including Dialog OnDisk (CD-ROM).

NOTE: EndLink only imports journal articles.

Patents, books, reports and other kinds of references will be partially brought in: the author, title, year, keywords and abstract will be imported into EndNote, but other fields may not import correctly.

**Final Note**

Although we have tried to provide you with a thorough demonstration, you may still have some questions. If so, please feel free to call us at (510) 649-8176.