

EndNote X5 Advanced For PC and Mac users

University of Otago Library

www.library.otago.ac.nz/endnote



November 2011

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About this Guide

This guide is intended to follow the “EndNote X5 Introduction for PC and Mac Users” guide. If you have not used EndNote X5, or another recent version of EndNote, it is suggested that you start with the introduction guide.

You do not need to be an expert in EndNote X5 to take advantage of the features discussed in this guide; these features should be understood by anyone who has a few hours experience using EndNote X5.

If this guide does not answer your query please contact a University of Otago Liaison Librarian for help.

Introduction to EndNote

This is the Advanced EndNote X5 user guide. Please refer to the Introduction user guide if this guide does not contain the information you want, or approach your Liaison Librarian for help.

What is EndNote?

Endnote X5 is a reference management tool which helps you to save and manage bibliographic references.

EndNote enables you to organise references into separate libraries, and into smaller groups within each library. It can store copies of files with your references (e.g. PDF, DOCX, TIFF, HTML, XLSX, MP3 documents), so you can take all of your research with you in one easy package.

EndNote will display your references in the citation style of your choice (e.g. APA 6th), and will format your research papers for you, placing references and footnotes where necessary, compiling a bibliography as you reference.

Where can I use it?

EndNote X5 will be loaded onto all student desktop computers from early 2012, so you can access it on campus at any time. Save your EndNote X5 Library to the S: drive or bring it in with you on an external memory drive.

You can also purchase a copy of EndNote X5 for your computer / laptop (PC and Mac). Print a copy of the [ITS Student EndNote Licence Request Form](#), fill in your details and return it to the ITS office. A user licence costs \$25 including GST per computer for the Student’s time at University of Otago. This entitles the Student to any upgrades released during their time here.

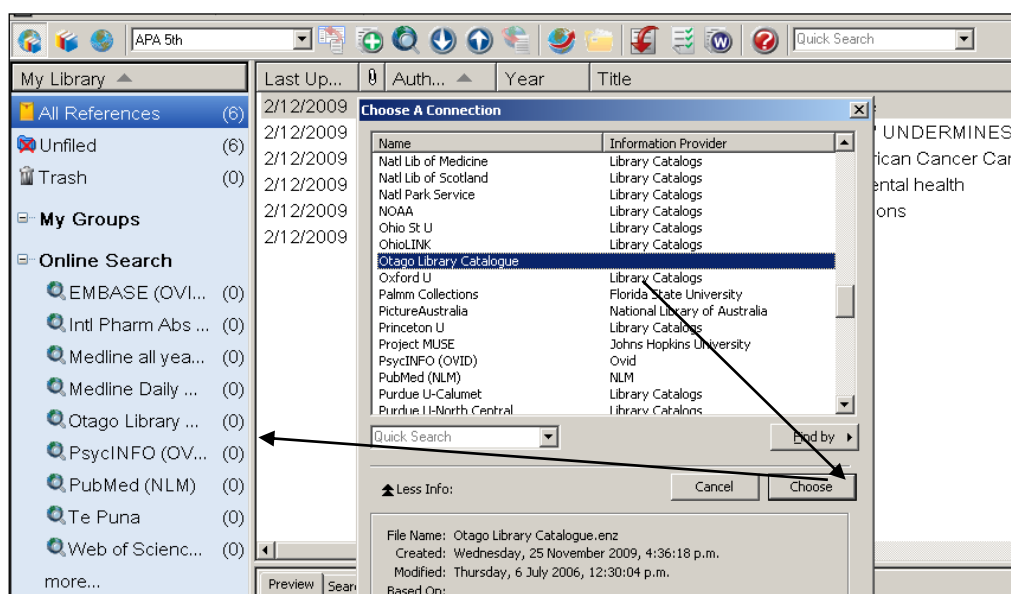
All university staff should refer to the appropriate department personnel for information on EndNote licence purchases and upgrades. Refer to the [ITS EndNote Software webpage](#) for pricing and conditions.

Direct Searching using Connection Files

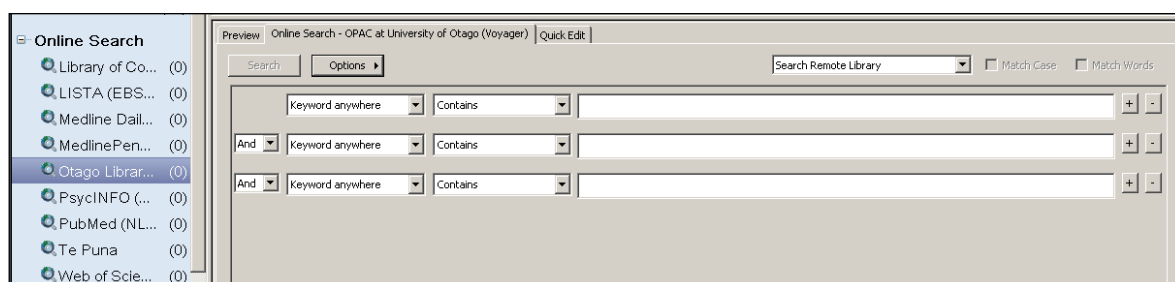
You can connect directly to catalogues and databases from within EndNote X5 to search for references, by using Connection Files. Only the Library Catalogue and PubMed work on the Student desktop, or on your home computer.

Load the Library Catalogue Connection File following the instructions at <http://www.library.otago.ac.nz/EndNote/connection.html>. This method can be used to add other Connection Files to your EndNote X5 software.

1. Go to **Tools > Online Search** and the **Choose a Connection** window appears. <Choose> **Otago Library Catalogue** then it will appear permanently listed in your side menu bar under **Online Search**



2. Click <**Otago Library Catalogue**> and complete a specific search in the lower screen section.



3. Click <**Search**> to retrieve your results and they are added automatically to your EndNote X5 Library. They are filed under All References, and in a temporary folder called Imported References where you can check them, until you import more references.

Note: Call numbers do not map to your Library as there are often many locations per title. Other bibliographic fields map successfully.

Organising Your Library

Grouping References

EndNote X5 allows you to group references into customised Smart Group sections, or Groups from Groups. For details on Groups and Group Sets consult the EndNote X5 Introduction Guide.

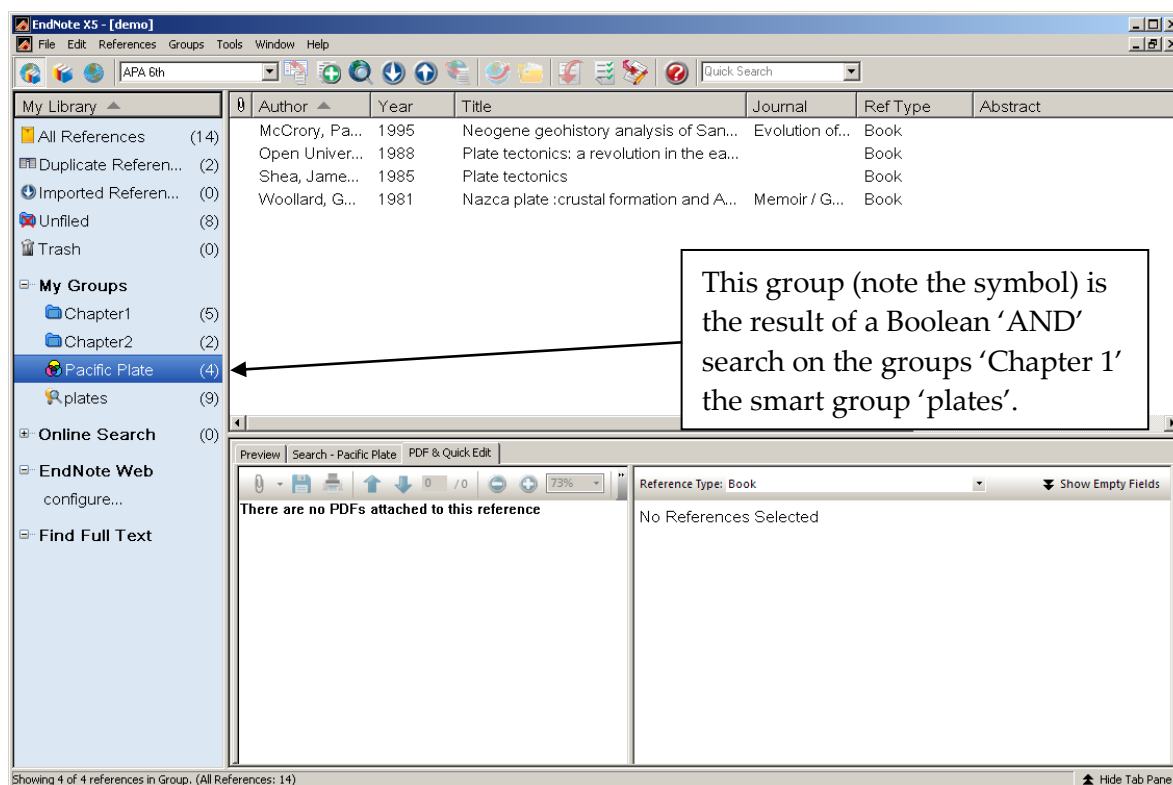
Smart Groups

Smart groups are created to build subsets of references dynamically. The set is updated based on the search criteria you set up. Any reference added to your library will be added to the appropriate smart group if it satisfies the criteria you used to establish the group.

1. Select All References. Go to **Groups > Create Smart Group**.
2. Name the new Smart Group then enter search terms – click on **<Create>**
3. The results are automatically updated whenever you add a reference with the stipulated term(s) into your Library.

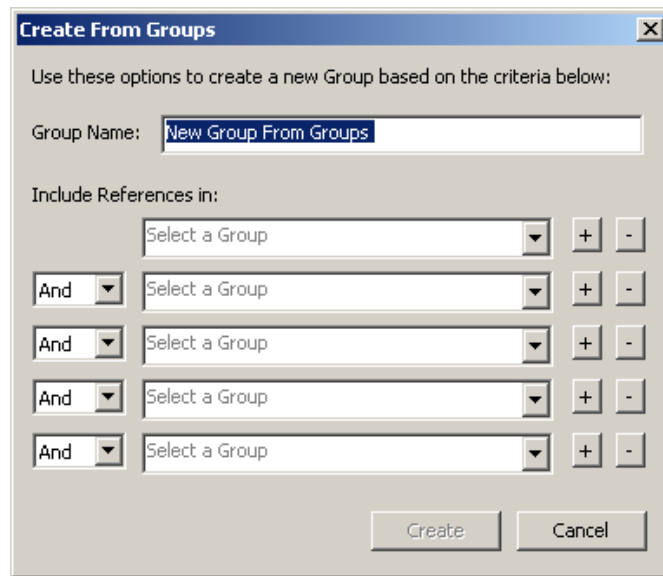
Creating Groups from Groups

A new function to EndNote X5 adds another dimension to sorting your references into groups. The **Groups from Groups** function allows you to select several groups and create a new set of results from them. The image below shows a new 'Group from Groups' called 'Pacific Plate' formed from the intersection of the Groups 'Chapter 1' and 'plates'.



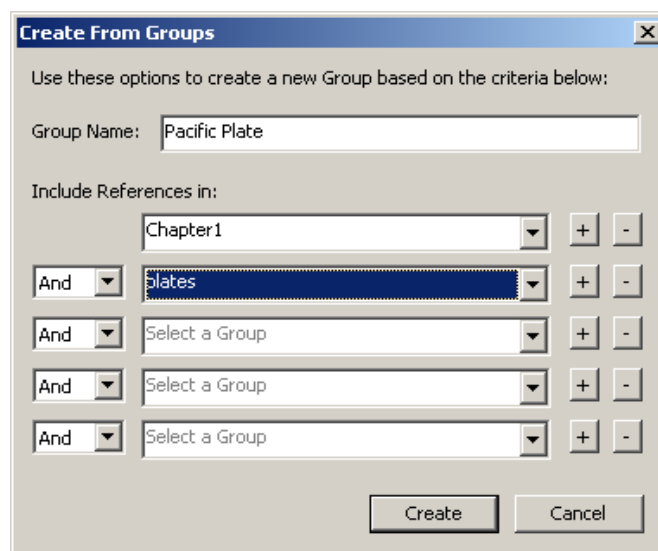
To create a Group from Groups, do the following:

1. Click **Groups > Create From Groups**. The following screen will appear:



2. Give the new group a name
3. Select the first group you wish to include in the new group from the drop-down box
4. Select the logical connector you wish to use (AND, OR or NOT are the options)
5. Repeat steps 3 and 4 until you have the group content you want and click <Create>.

For the group of 'Pacific Plate', the 'Create From Groups' dialog box looked like this:



Citation Style Management

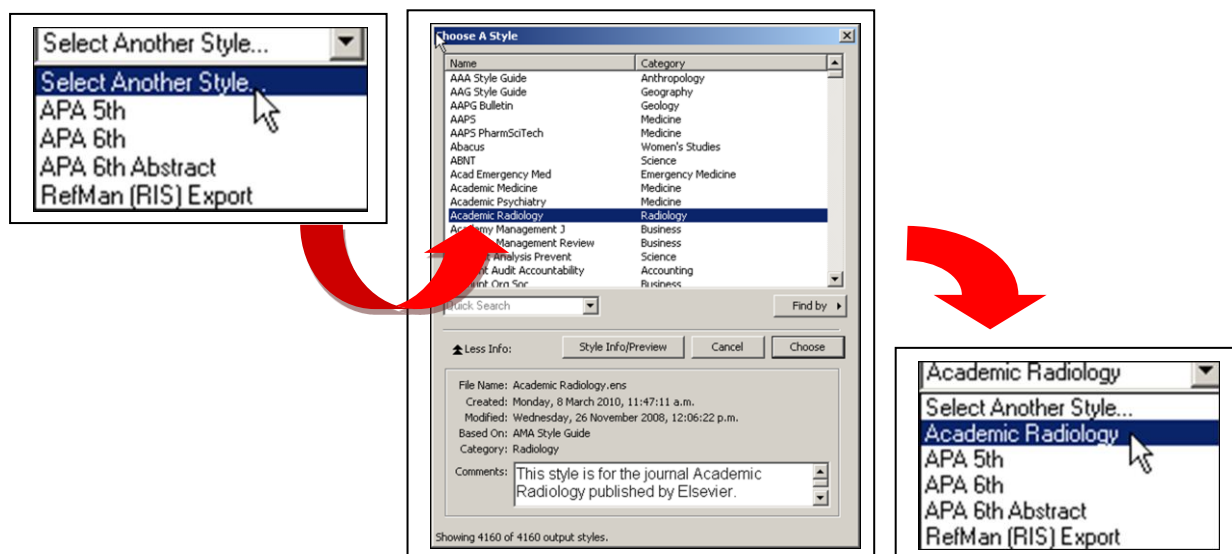
You can Edit a citation style so that it displays non-standard fields in your thesis or essay when you cite a reference. You can also create a new style to use. Any style selected in your Output Style library can be used to format your Library when exporting.

Selecting more Styles for Output

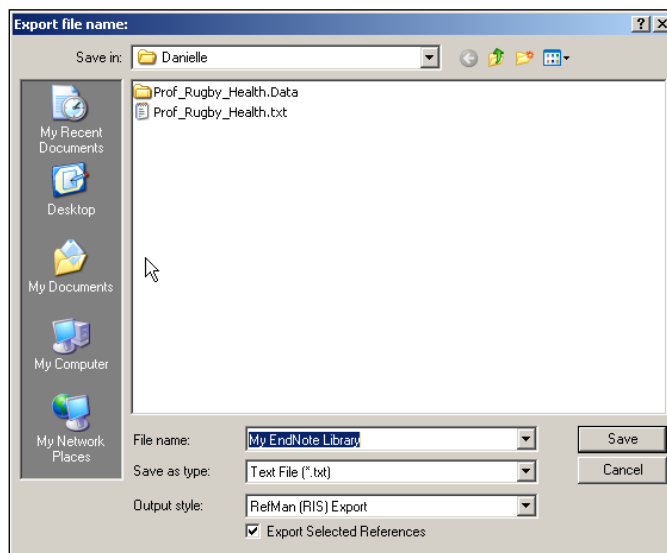
Selecting a style will make it available to you as a member of your style library on the dropdown list in the main EndNote screen. It will also make it available as an **Export** option if you wish to save your Library in a particular format.

To select multiple styles click on **Edit > Output Styles > Output Style Manager...** and select the style or styles you wish to add to your dropdown list. You can select as many as you want. Once you have selected all the styles you want, simply close the Styles Library by clicking on the **X**. If you now look at the style library on the main EndNote screen you will see the styles you have added in the list.

You can also select a single style to add by clicking on the style list and clicking on **Select Another Style...**. Select the style you want to use and **<Choose>** it for your list.



To export your Library and save it in a text file that can be imported into a Library by another EndNote user or another bibliographic software package it should be saved in RIS format, as a .txt file. To do this, ensure you have selected RefMan (RIS) Export from your style list. Go to **File > Export**. Name the file and save it as type text (.txt). Select the output format as RefMan (RIS) Export. (See over). This is also useful if you wish to import your EndNote Library into the Web of Science database Researcher ID function.



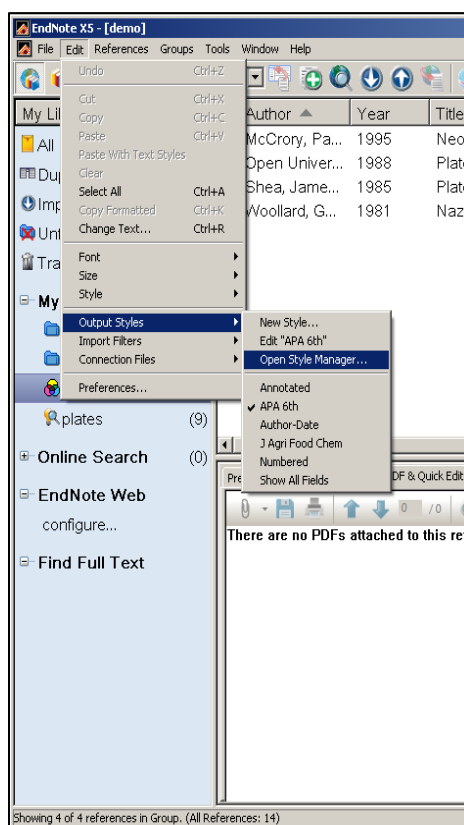
Editing/Creating a New Citation Style

You may want to create a new citation style to suit your own reference keeping, to display fields you most like to see at a glance. You may want to modify a citation style to include additional fields, e.g. an article abstract field, in the bibliography so that your lecturer/supervisor has a little more information about the article you have been reading.

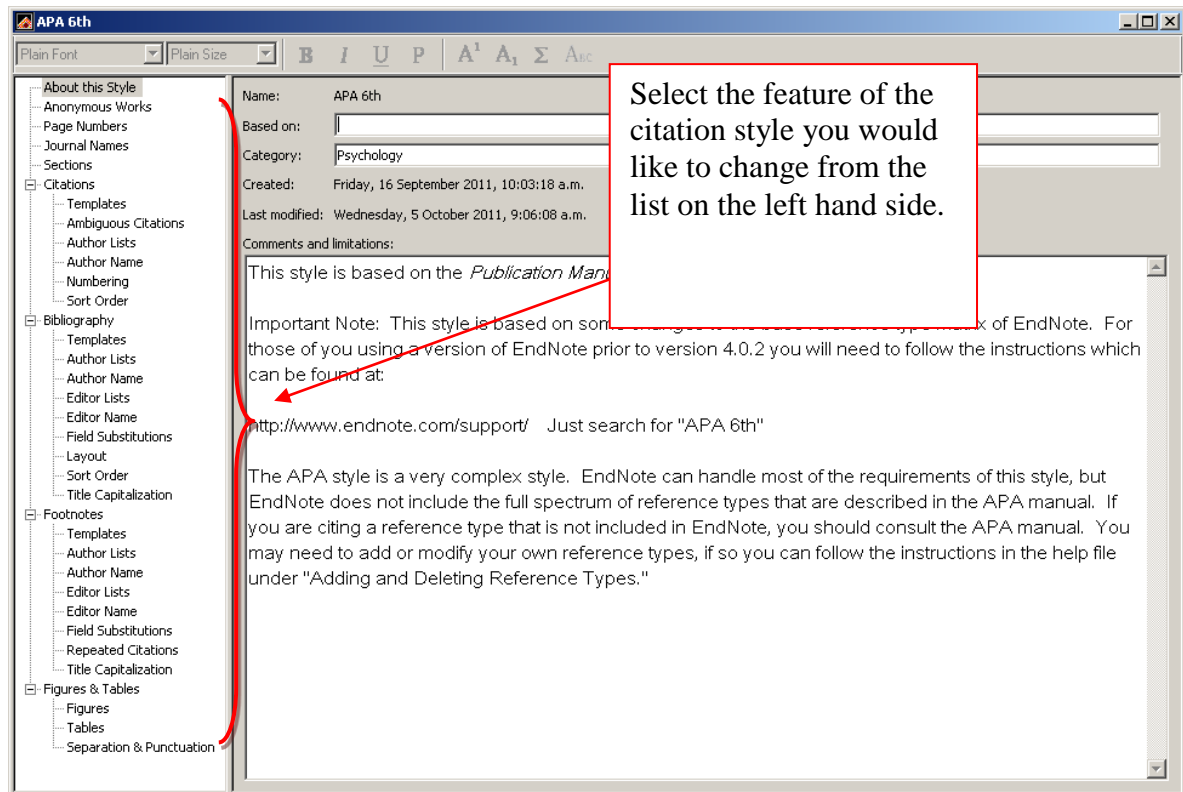
Note: Any changes you make to the output styles on your own computer, or your Student Desktop access to EndNote, will be saved.

Editing a Citation Style

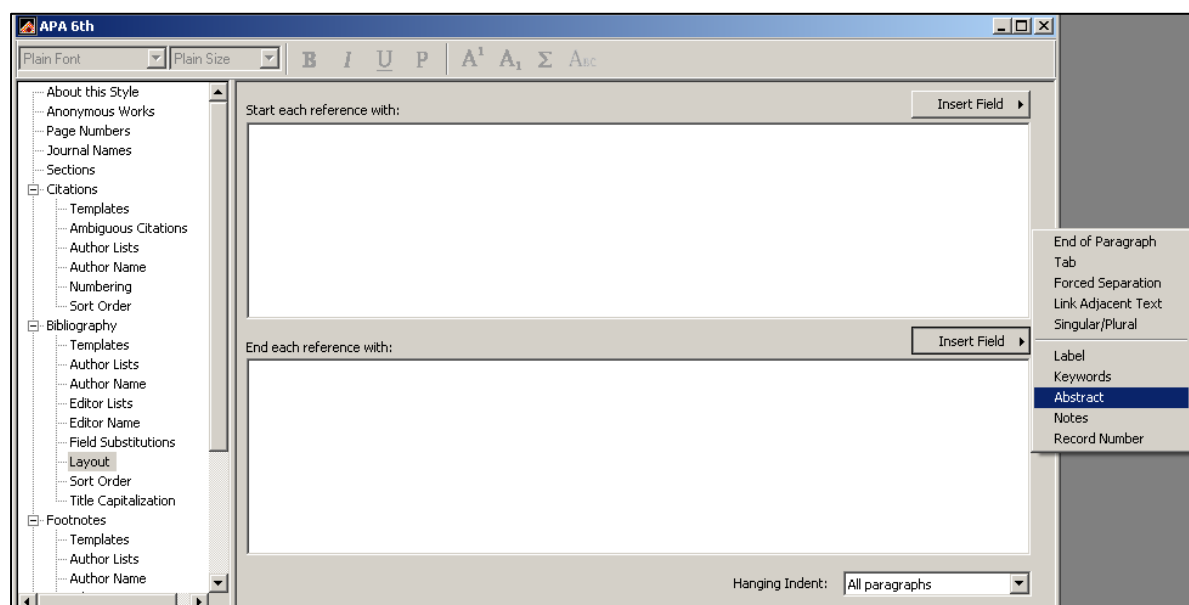
Click on **Edit > Output Styles > Output Style Manager...**



Select the style you wish to edit, and click **<Edit>**. The following screen will appear:



The citation style you have selected for editing will become the basis for your new style. Select the feature of the style you would like to change. For example, to add an abstract field to the references in your bibliography select **Layout**, click **<Insert Field>** in the 'End each reference with' section and select **Abstract**.



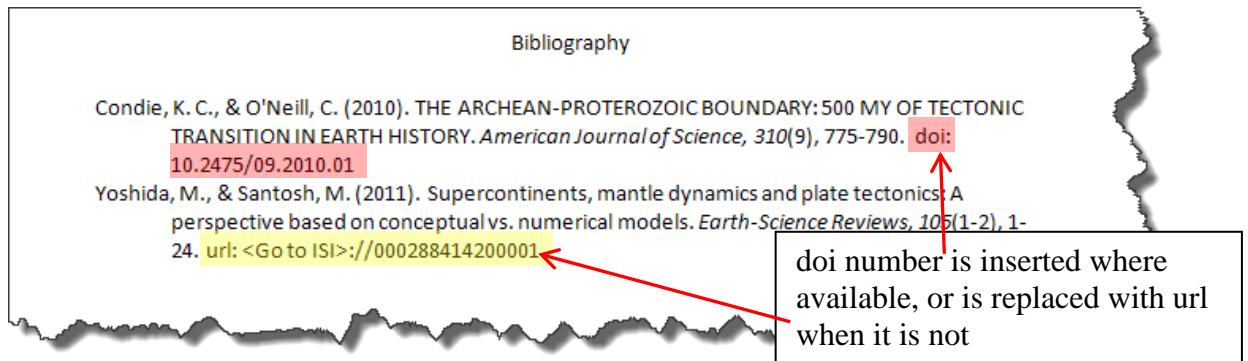
As a special case in style modification, EndNote X5 makes it possible for you to substitute one field in a reference for another if the field in the record is empty. For example, in APA 6th style, if a document is only available electronically the reference must have a DOI number field where a DOI number is available. If there is no DOI available for an electronic reference (that is, the DOI field in the reference is *empty*), you must substitute the DOI field for a URL (web address) field. This is easy to do using EndNote X5.

Simply select **Field Substitutions**, and tick the box at the top of the right hand pane. Click on the **<Insert Field>** drop down list and select 'URL'. Overtyping the 'doi:' field descriptor with 'url', so that the field is correctly labelled in the reference.

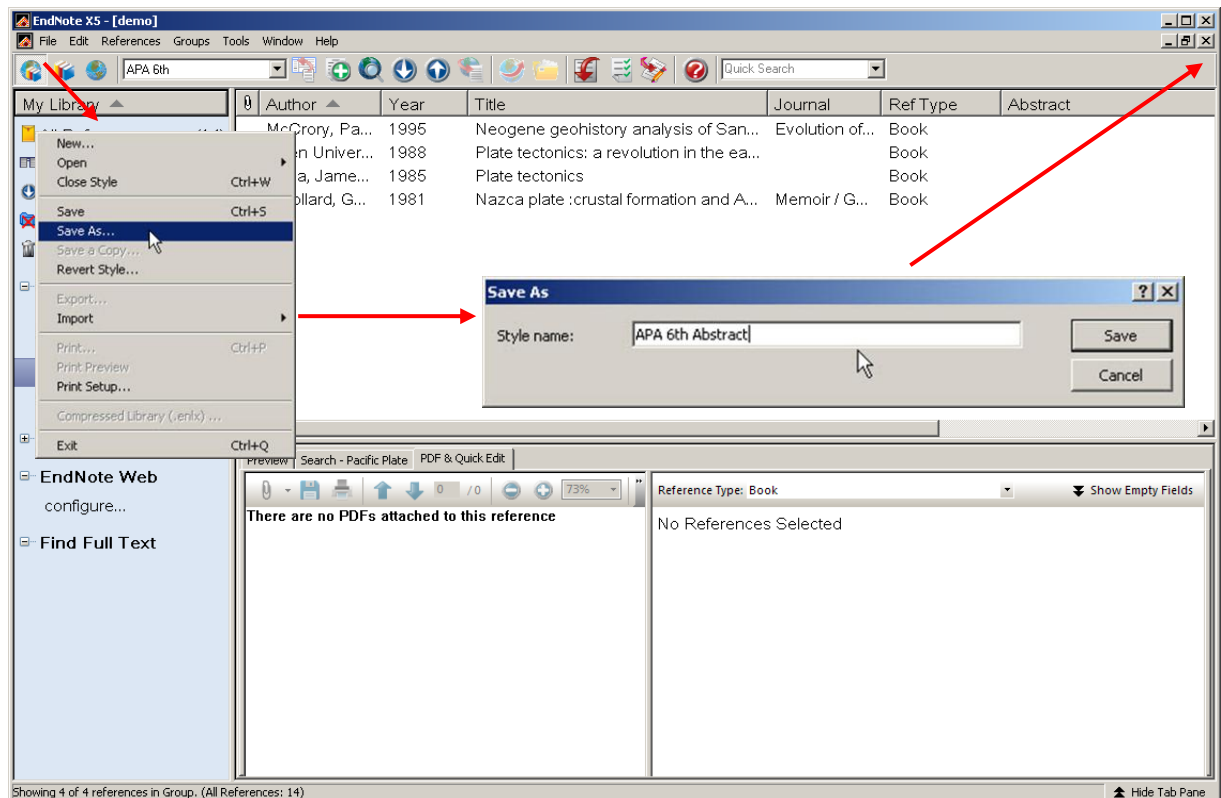
See image overleaf for detail.

The image shows the 'APA 6th' Field Substitutions dialog box. The 'Field Substitutions' section is circled in red. The first option, 'If the DOI field is empty, use:', is checked. The text input field contains 'doi: `DOI' and the dropdown menu is set to 'Insert Field'. A red arrow points from this dropdown to a list of field types on the right, where 'URL' is highlighted. A text box with a white background and black border contains the text: 'Overtyping the 'doi' with 'url' to ensure the field in your bibliography is correctly labelled.'

The resulting reference in your bibliography will look like this:



When you close the Edit Style window you can save the modified style with a different style name. The modified style can now be selected as an output style like any other. To save the style click **File > Save As...**, name the style and click **<Save>**. Press on the **✕** to close the edit style window.

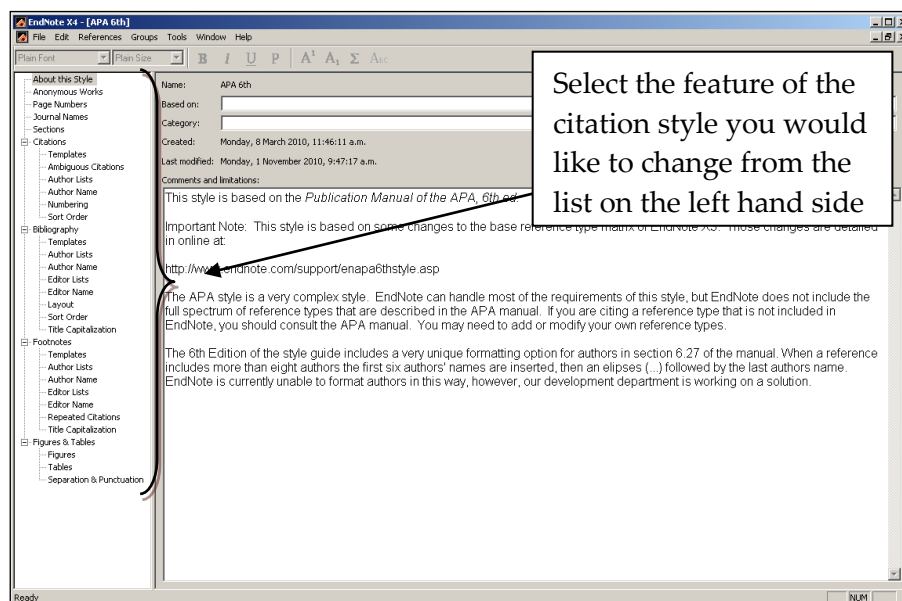


With this modification every time you cite an article in your thesis, or when you assemble a bibliography from your library, the article abstract will be added to the output.

Creating a New Citation Style

Click on the **Edit** menu, select **Output Styles** and then **New Style...**

Use the options in the left hand pane to input the features you want in the style.



Once you have the style as you want it to be, simply save it, then select it as an option in your style library.

Adding or Updating a Citation Style

Go to www.endnote.com

1. Click <What's New> to check updates for your EndNote version, e.g. APA 6th edition
2. Follow the Download instructions on screen, saving the new style to your Desktop
3. Go to **My Computer > Local Disk C: > Program Files > EndNote X5**
4. Open the **Styles** folder. Click and drag the updated APA 6th style into this folder*
5. Close your EndNote Style folder and return to your desktop
6. Restart EndNote then open your EndNote Library
7. Go to the top menu bar and <Select Another Style>, find and <Choose> APA 6th as part of your short list of styles

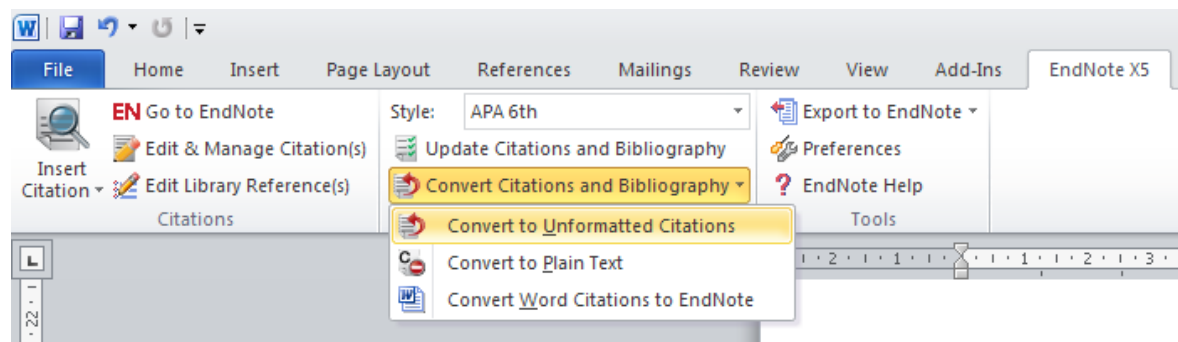
*For Mac users the location of the Styles folder is **MAC HARD DRIVE (HD) > Applications > EndNote X5 folder > EndNote X5 Styles.**

See Appendix 1 for more detail on adding a new style to EndNote on a PC or Mac.

Editing your Bibliography

Setting Bibliography Preferences

Preferences can be set for your bibliography from within Microsoft Word by clicking on the Bibliography arrow in the EndNote X5 ribbon in Microsoft Word. This function allows you to change a few details in the bibliography, including the name of the bibliography, the font, line spacing and indentation.

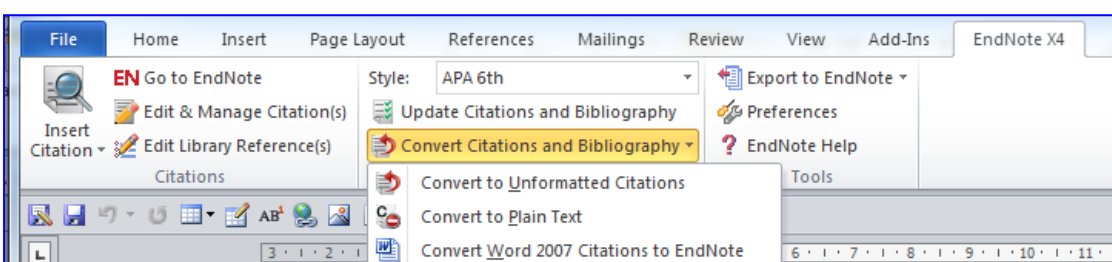


Formatting and Unformatting a Bibliography

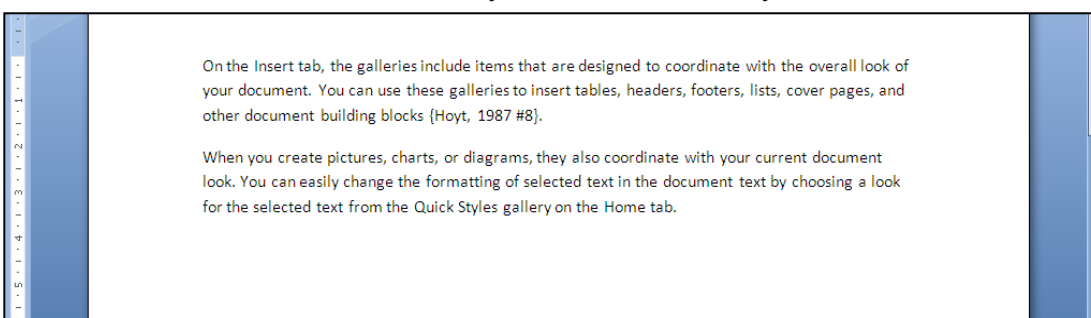
For essays and reports forming the in-text and bibliography simultaneously is recommended, known as 'Formatted' mode. For long works, e.g. a thesis, it is recommended that you leave the document unformatted until you are ready to print. This leaves the citations in a raw, working state, instead of looking complete, but it reduces possible corruption if information linking your EndNote Library to in-text citations or footnotes is incorrectly removed.

To Unformat a Bibliography

Select EndNote X5 tab → **Convert Citations & Bibliography** → **Convert to Unformatted Citations**. Citation and record number will now display in curly braces in your Word document. There is no bibliography displaying at the end of the document.

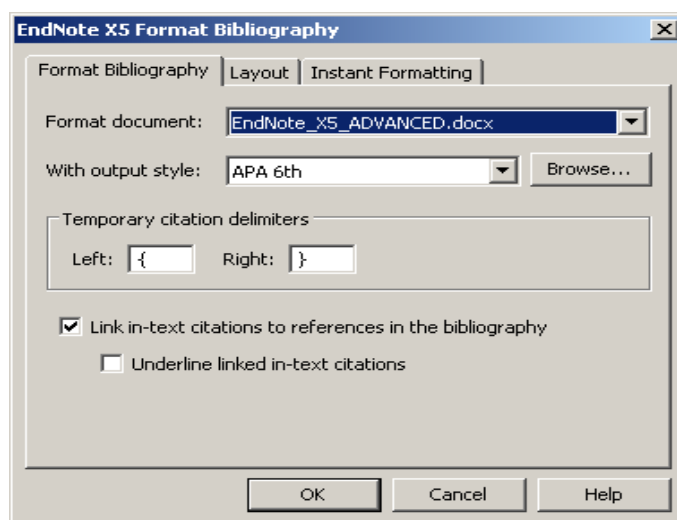


Note: #8 refers to the 8th record from your EndNote Library.

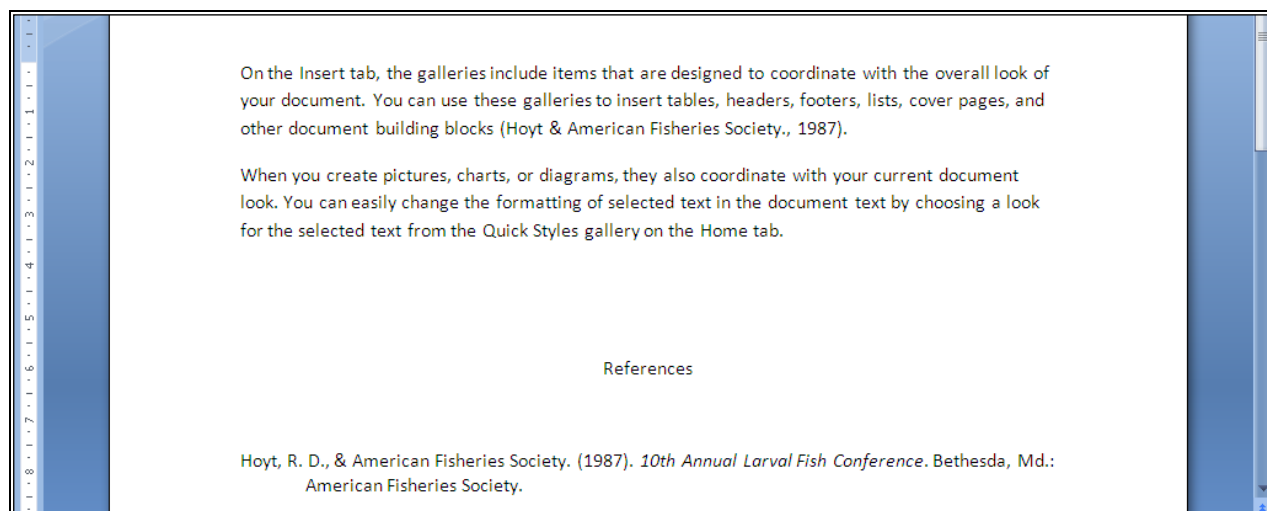


To Format a Bibliography

1. PC users select EndNote X5 tab → Bibliography
Mac users select Tools → EndNote X5 → Format Bibliography
2. Follow instructions for each tab to format your document



3. **Note:** braces have changed to parentheses, the record number is hidden, and the reference appears in the bibliography at the end of the document.



An alternative is to click <Update Citations & Bibliography> and the document will reformat according to your current EndNote Library output style.

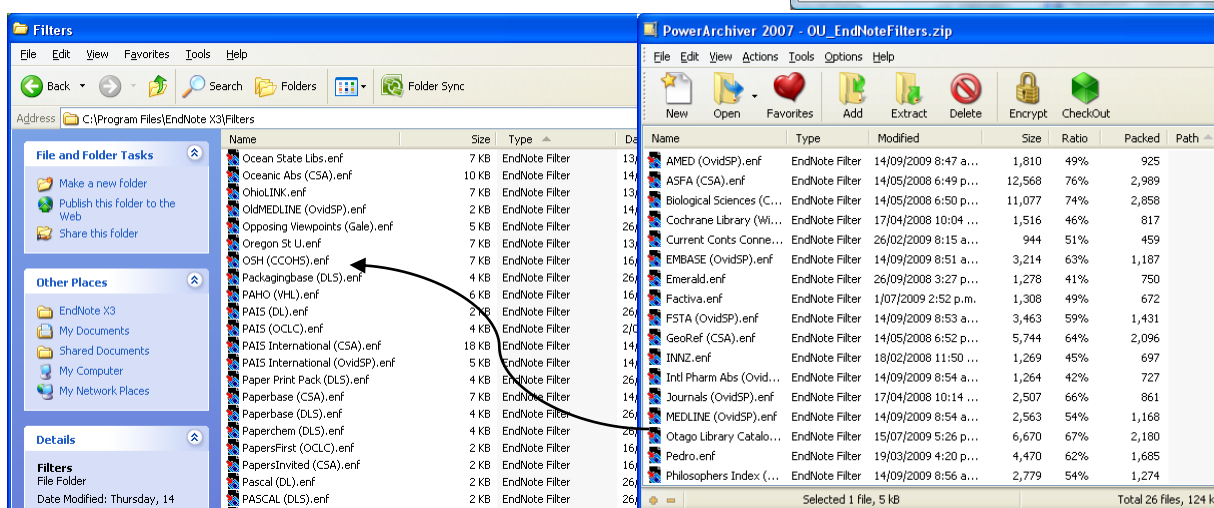
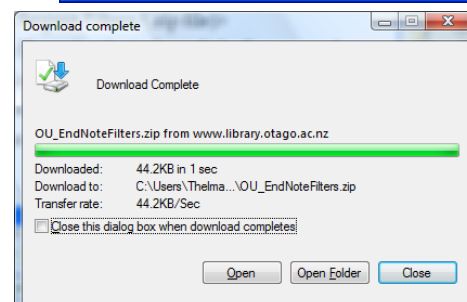
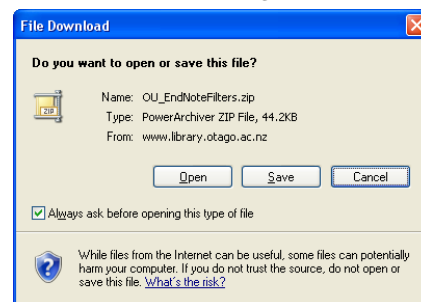
Adding Connection Files and Filters

Otago Student Desktop access already includes all the Styles, Filters and Connection files needed to use EndNote effectively. If you have installed EndNote on your home computer or laptop you may need to add some styles, filters or connections, depending on your subject needs. The Library has customised some Filters and Connections for Otago users, e.g. Otago Library Catalogue, and recommends you add the zipped package, available at Library Homepage>Research>EndNote>Download Import Filters and Connection Files.

To install additional Import Filters

Go to <http://www.library.otago.ac.nz/endnote/connection.html> for filters that Otago recommends for use with EndNote X5.

1. Click <All Import Filters (.zip file)>
2. <Save> the OU_EndNoteFilters.zip file to your Desktop
3. If prompted, click <Open> from the 'Download Complete' window. You will see available filters
4. Go to **My Computer > Local Disk (C:) > Program Files > EndNote X5** - click <Filters> and place this Filters window alongside the OU_EndNoteFilters.zip



5. Compare the dates of Otago's Filters with existing EndNote filters. Click and drag each Filter you wish to include, e.g. Otago Library Catalogue, Index New Zealand (INNZN), Te Puna, & Emerald. Replace with the most recent version when prompted.

OR

- a) If using Vista, click <Extract all files> then select the destination folder (**Program Files > EndNote X5 > Filters**) and <Extract> the Import Filter files. If prompted click <Continue> to permit copying to this destination folder. Replace with the most recent version if prompted.

OR

b) If using XP or Windows 7, click <Extract>, click <All files> then select the destination folder (**Program Files > EndNote X5 > Filters**) and <Extract> the Import Filters. Replace with the most recent version if prompted.

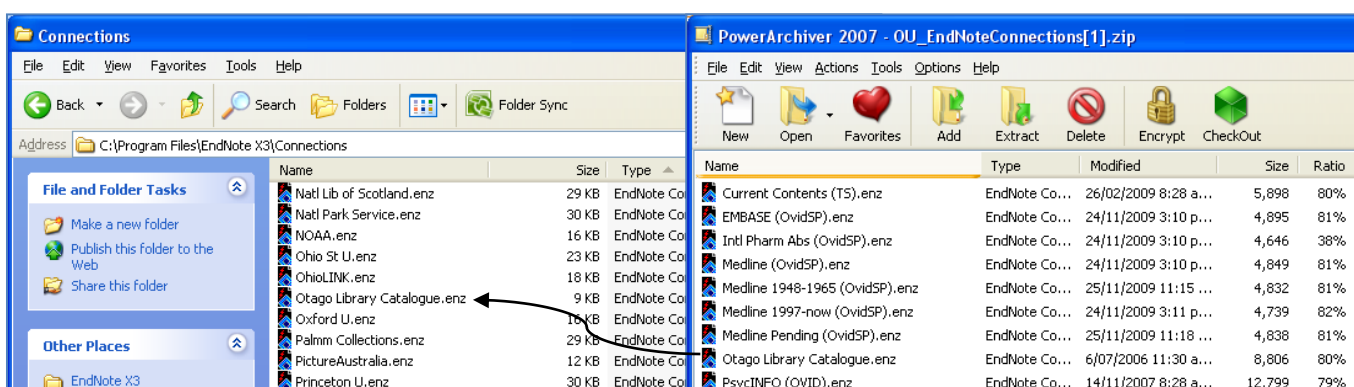
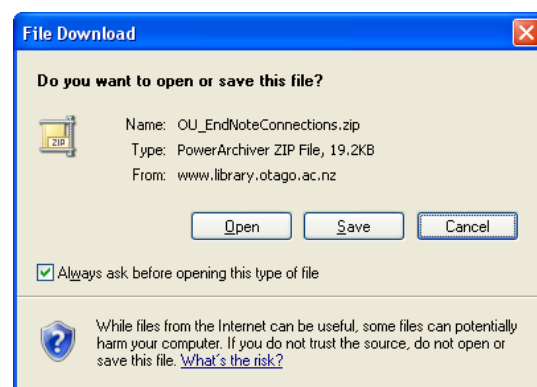
6. Close your EndNote Filters windows and return to your desktop
7. Restart EndNote X5 and continue working with your EndNote Library

See Appendix 2 for more detail on adding a new filter to EndNote on a PC or Mac.

To install additional Connection Files

Go to <http://www.library.otago.ac.nz/endnote/connection.html> for ones that Otago recommends for use with EndNote.

1. Click <All Connection Files (.zip file)>
2. <Save> the OU_EndNoteConnections.zip file to your Desktop
3. If prompted, click <Open> from the Download complete Window. You will see available Connections
4. Go to **My Computer > Local Disk (C:) > Program Files > EndNote X5** - click <Connections> and place this Connections window alongside the OU_EndNoteConnections.



5. Compare the dates of Otago's Connections with existing EndNote Connections. Copy or drag each Connection you wish to include, e.g. Otago Library Catalogue, Medline (OVIDSP) & PubMed. Replace with the most recent version if prompted.

OR

a) If using Vista, click <Extract all files> then select the destination folder (**Program Files>EndNote X5> Connections**) and <Extract> the Connection files. If prompted click <Continue> to permit copying to this destination folder. Replace with the most recent version if prompted.

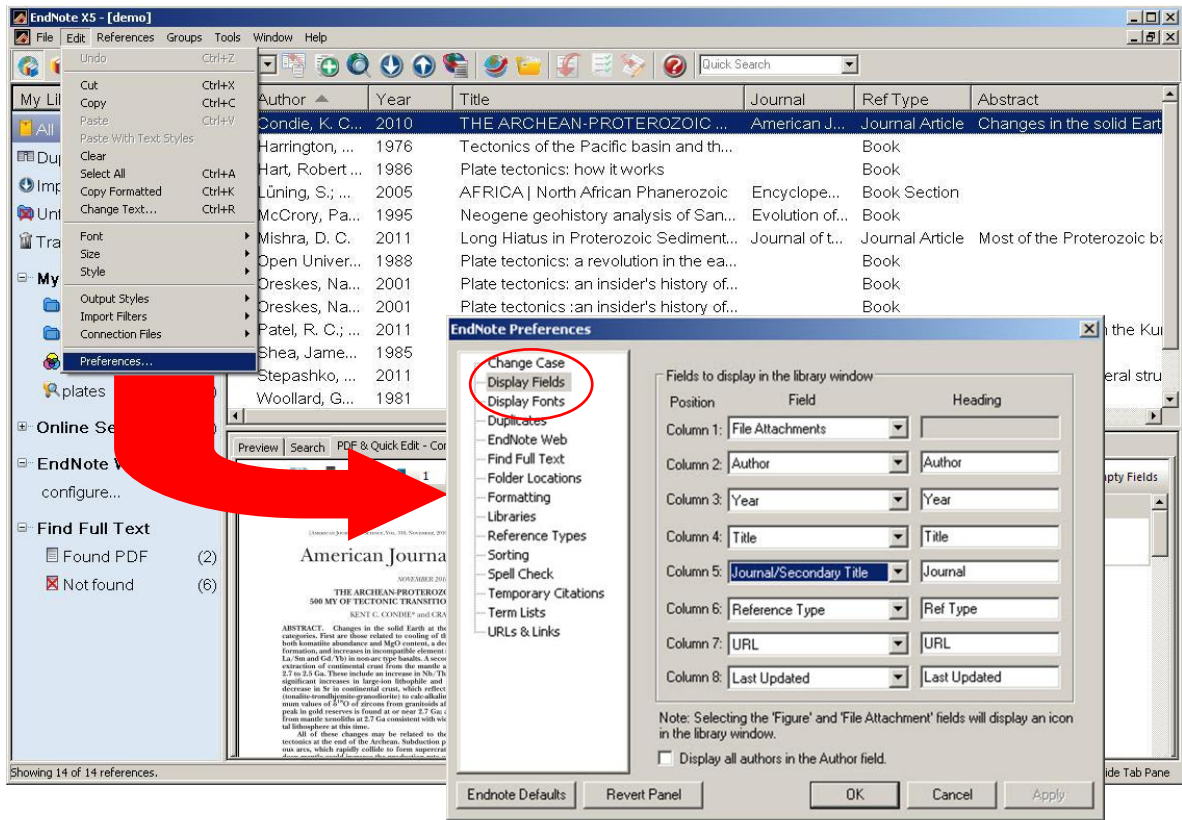
OR

b) If using XP or Windows 7, click <Extract>, click <All files> then select the destination folder (**Program Files>EndNote X5> Connections**) and <Extract> the Connection Files. Replace with the most recent version if prompted

6. Close your EndNote Connections windows and return to your desktop
7. Restart EndNote X5 and continue working with your EndNote Library.

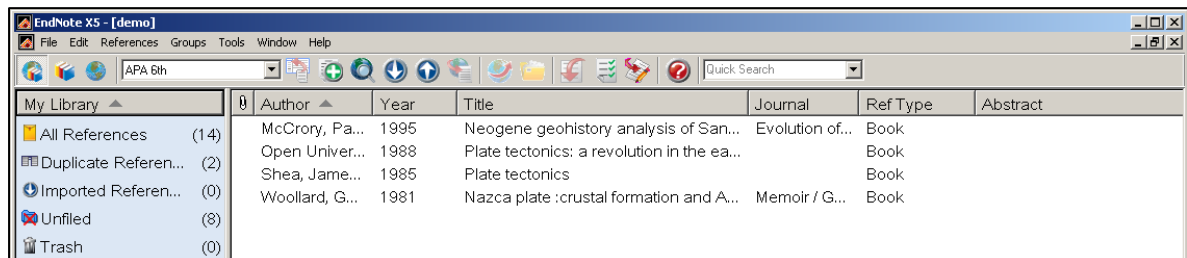
Editing Display Preferences

You can change the fields you have showing on your reference records, and the way they are ordered by using the **Preferences** option in the **Edit** menu.




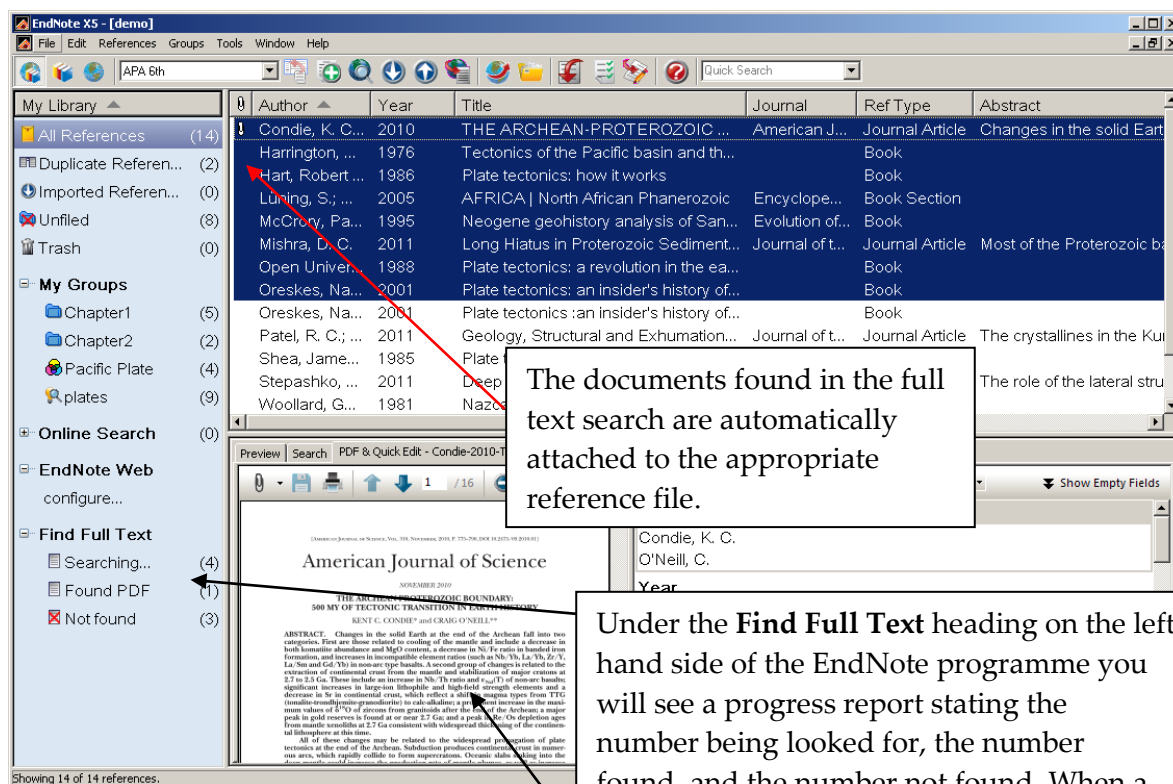
Select and name the fields in the order in which you want them to appear. This does not change the information in the references, it only changes the information you can see. If you do not want to see the author name you can remove it from the display, but the author field will still appear in the citation.

To reorder the references in your Library, group or folder simply click in the relevant field in the EndNote X5 Library page. Click the field header to order the references in ascending or descending order. In the screenshot below the references are ordered in A-Z Title order.



Find Full Text

You can ask EndNote X5 to look for full text versions of documents you have in your Library by selecting the articles you want to look for and clicking on **References > Find Full Text > Find Full Text**. You can also look for full text by selecting the appropriate reference and clicking on , or right click on **Find Full Text** in the My Library column with the selected items you want to search for.



The screenshot shows the EndNote X5 interface. On the left, the 'Find Full Text' section shows a progress report: Searching... (4), Found PDF (1), and Not found (3). A red arrow points from the 'Found PDF' entry to a specific record in the main table. The table lists references with columns for Author, Year, Title, Journal, Ref Type, and Abstract. The record for 'Condie, K. C., 2010, THE ARCHEAN-PROTEROZOIC ...' is highlighted. A callout box explains that documents found in the full text search are automatically attached to the appropriate reference file. Another callout box points to the 'Found PDF' entry, explaining that when a PDF is found and attached, a preview of the PDF is shown in the highlighted record.

Author	Year	Title	Journal	Ref Type	Abstract
Condie, K. C.	2010	THE ARCHEAN-PROTEROZOIC ...	American J...	Journal Article	Changes in the solid Earth
Harrington, ...	1976	Tectonics of the Pacific basin and th...		Book	
Hart, Robert...	1986	Plate tectonics: how it works		Book	
Luning, S.; ...	2005	AFRICA North African Phanerozoic	Encyclope...	Book Section	
McCrory, Pa...	1995	Neogene geohistory analysis of San...	Evolution of...	Book	
Mishra, D. C.	2011	Long Hiatus in Proterozoic Sediment...	Journal of t...	Journal Article	Most of the Proterozoic b
Open Univer...	1988	Plate tectonics: a revolution in the ea...		Book	
Oreskes, Na...	2001	Plate tectonics: an insider's history of...		Book	
Oreskes, Na...	2001	Plate tectonics: an insider's history of...		Book	
Patel, R. C.; ...	2011	Geology, Structural and Exhumation...	Journal of t...	Journal Article	The crystallines in the Ku
Shea, Jame...	1985	Plate			
Stepashko, ...	2011	Deep			The role of the lateral stru
Woollard, G...	1981	Nazca			

Note: The Find Full Text feature is often unpredictable and sometimes unsuccessful.

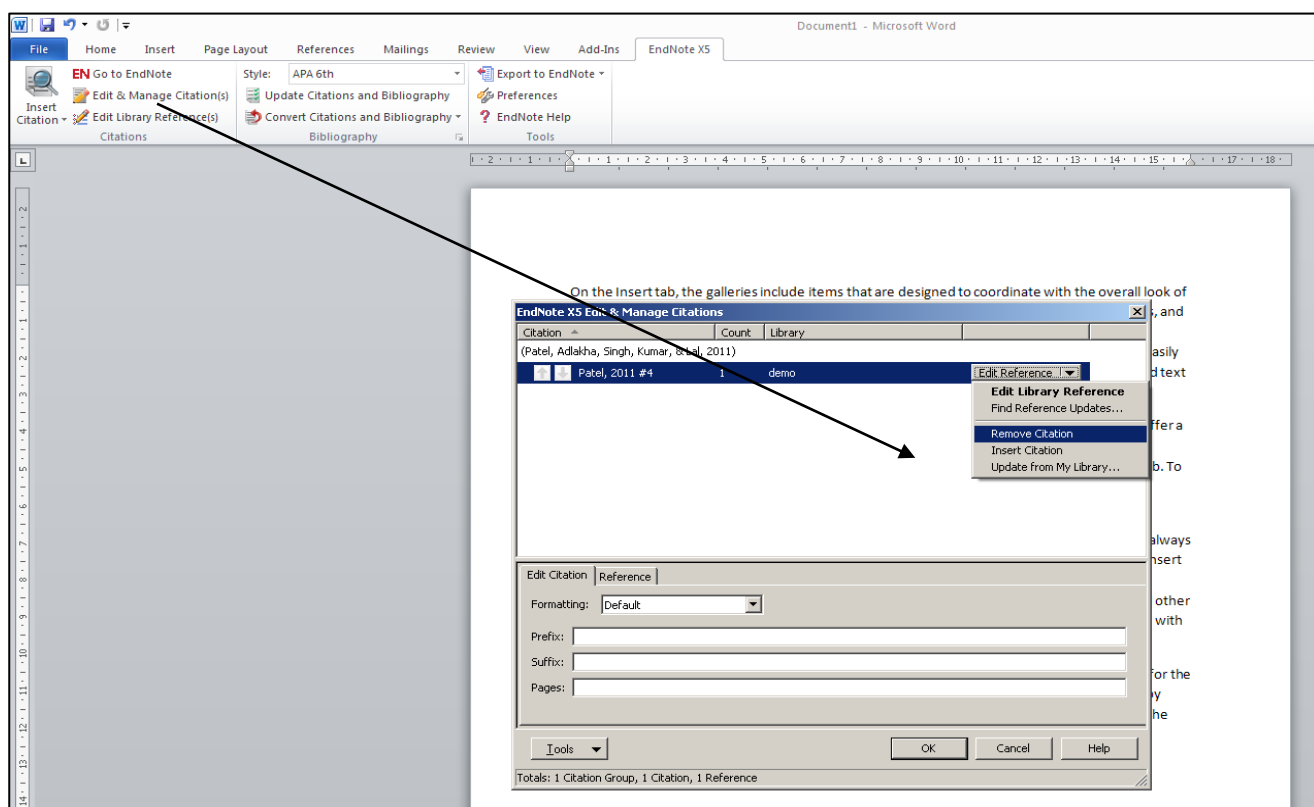
Removing / Editing an Erroneous Citation

In an Formatted Document

Remove

Just deleting a citation will leave behind hidden field codes (those # symbols are what can corrupt a document!!). To remove a citation and field codes:

1. Select the in-text citation. The citation it is now highlighted in dark grey
2. Go to the EndNote X5 tab → **Edit & Manage Citation(s)**
3. Click **<Edit Reference>** and select **<Remove Citation>**
4. Click **<OK>**



Edit

Citations should be correct from EndNote as they are, but to add page numbers to an in-text citation where quoting:

1. Select in-text citation in document
2. Go to EndNote X5 tab → **Edit & Manage Citation(s)**
3. Under the 'Edit Citation' tab at the bottom of the EndNote X5 Edit & Manage Citations dialog box type the page number(s) you wish to insert in the 'Pages:' field. Do not type the word 'page(s)'
4. Click **<OK>**

In an Unformatted document

Remove

<Delete> the entire citation, curly brackets and all. This also removes the reference from the bibliography at the end of the document when you next Update or Format the bibliography.

Edit

Citations should be correct from EndNote as they are, but to add page numbers to an in-text citation you are quoting from:

1. Find the citation you would like to edit
2. Go to the end of the citation, just before the closing curly bracket
3. Type @, followed by the page numbers, e.g. {Smith, 2006 #1@22-23}
4. When you format the document it will automatically add the appropriate "pages" or "pp." as appropriate for the style
5. If text is required before or after the reference add within the braces and resave the document changes, e.g. {as cited in Smith, 2006 #1@22-23}.

Additional Tips & Hints

Printing a Bibliography sorted by type of reference

E.g. Journals then books then conference papers ...

You need to change the sorting order by altering the Output Style preferences.

1. Go to **Edit > Output Styles** – (e.g.) **Edit APA 6th**.
2. Go to **Bibliography > Sort Order** – click <Other> – choose first sort by Reference Type, then Author, Year...

Changing fonts from pasted references

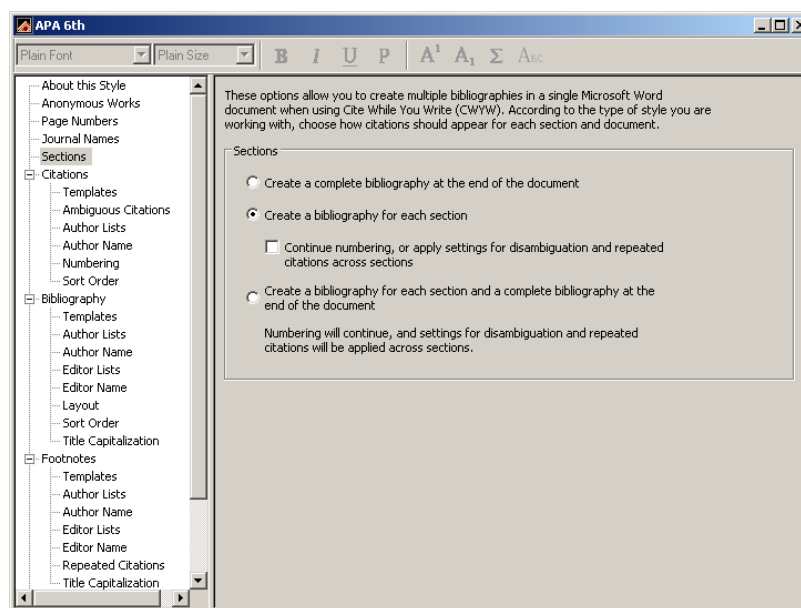
If you have pasted parts of a reference from another document in a different font to your EndNote Library they will look different in the Preview pane, and your bibliography later. Return to the detailed record view and highlight each reference part, resetting the font to the default of Plain Size 12 point (or whatever you have for your Library).

If this has happened over many references you can reset your entire Library using these steps:

1. Open Your EndNote Library and change the Output Style to <Refer Export>
2. Select All References
3. Select **File→Export** and save to your desktop as a text file AND change the output style to <Refer Export>
4. Open a New Library
5. Select **File→Import**. Choose your text file. Choose <Refer/BibIX> as the Import filter option
6. Click <Import>
7. Change your new Library back to your preferred output style
8. You should now have a Library without standard font settings
9. **Note:** You will need to re-save your PDFs and drag them to the new Library records.

Sections

EndNote X5 allows you to add a bibliography after each section or chapter, and/or at the end of your work. Select options at **Edit > Output Styles > Edit 'APA 6th' > Sections**



Appendix 1: Adding a New Style to EndNote

The EndNote team has developed over 5,000 different output styles. Because installing all of these styles can slow performance, a 'Typical' EndNote installation includes only the 100 most popular styles. You can install sets of styles by discipline with the EndNote installer, or you can download individual styles from the EndNote website.

Instructions for a PC

Using the EndNote installer to install additional output styles

First, make sure EndNote is closed and not running. You can run the EndNote installation program again, choose the option to **Modify** the installation, and then select sets of output styles to install.

To install sets of output styles:

Log in to the machine with administrative rights or as a user with program installation privileges.

Do one of these:

Start the EndNote installation program as you would for a new installation.

Or, from the Windows **Start** menu:

1. Select **Control Panel**, or choose **Settings** and then **Control Panel**
2. Choose **Add or Remove Programs**. In the list, click on EndNote X5 and then **Change**.
3. On the "Application Maintenance" dialog, select the **Modify** option and click **Next**.

4. On the “Select Features” dialog, click the plus sign (+) next to Additional Styles. For each set of styles you would like to install, click the triangle and select either "Will be installed on local hard drive" or "Entire feature will be installed on local hard drive."
5. Click **Next** to continue with the installation.

The styles will be copied to the EndNote Styles folder, which is typically Program Files\EndNote X5\Styles, and the new files will be available for use the next time you start EndNote.

Finding individual output styles on the EndNote website

You can use the Style Manager in EndNote to find and download individual output styles.

To download individual output styles:

1. From the **Edit** menu in EndNote, choose **Output Styles** and then **Open Style Manager**.
2. Click **Get More on the Web** to start your default browser and go to the appropriate page on the EndNote website.
3. Browse through an alphabetical listing of the available output styles, and **Download** those files you want to install.
4. Copy the downloaded files to your Styles folder, which is typically located at Program Files\EndNote X5\Styles, or to your personal Styles folder (see [Folder Locations Preferences](#)).
5. If EndNote is still open, please **Exit** the program and then restart EndNote to read in the added output styles.

The styles will now be available in EndNote to select for formatting.

Instructions for a Mac

Using the EndNote Customizer to install additional output styles

Before you begin, make sure no applications are running—including virus protection software and Microsoft Word.

To install sets of output styles:

1. Start the EndNote program.
2. From the EndNote X5 menu, choose <**Customizer**>.
3. On the “Component Selection” dialog, select the components you want to install (or keep installed). You can select the check box next to Output Styles to install all of the 5,000+ styles, or you can expand the Output Styles category in order to select groups of output styles by discipline. Any components that are not selected will be removed.
4. Click **Next** to continue with the installation.

The styles will be copied to the EndNote Styles folder, which is typically Applications: EndNote X5: Styles.

You will need to **Exit** from the EndNote program and then restart EndNote to read in the added output styles.

Finding individual output styles on the EndNote website

You can use the Style Manager in EndNote to find and download individual output styles.

To download individual output styles:

1. From the **Edit** menu in EndNote, choose **Output Styles** and then **Open Style Manager**.
2. Click **Get More on the Web** to start your default browser and go to the appropriate page on the EndNote website.
3. **Note:** Another way to direct your browser to this web page is to select **Web Styles Finder** from the **Help** menu.
4. Click **Accept** to accept the Terms of Use.
5. Browse through an alphabetical listing of the available output styles, and **Download** those files you want to install.
6. Copy the downloaded files to your Styles folder, which is typically located in the Applications:EndNote X5 folder, or to your personal Styles folder (see [Folder Locations Preferences](#)).
7. If EndNote is still open, please **Exit** the program and then restart EndNote to read in the added output styles.

The styles will now be available in EndNote to select for formatting.

Appendix 2: Adding a New Filter to EndNote

The EndNote team has developed hundreds of different filter files. Because installing all of these files may slow performance, a Typical EndNote installation includes only the 100 most popular filters. You can install sets of filters by provider with the EndNote installer, or you can download individual filters from the EndNote website.

Instructions for a PC

Using the EndNote installer to install additional filters

First, make sure EndNote is closed and not running. You can run the EndNote installation program again, choose the option to Modify the installation, and then select sets of filters to install.

To install sets of filters:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:
Start the EndNote installation program as you would for a new installation.

Or, from the Windows **Start** menu, select **Control Panel**, or choose **Settings** and then

Control Panel. Then, choose **Add or Remove Programs**. In the list, click on EndNote X5 and then **Change**.

3. On the **Application Maintenance** dialog, select the **Modify** option and click **Next**.
4. On the **Select Features** dialog, click the plus sign (+) next to Additional Filters.
5. For each set of filters you would like to install, click the triangle and select either "Will be installed on local hard drive" or "Entire feature will be installed on local hard drive."
6. Click **Next** to continue with the installation.

The filters will be copied to the EndNote Filters folder, which is typically Program Files\EndNote X5\Filters.

Finding individual filters on the EndNote website

You can use the Filter Manager in EndNote to find and download individual filter files.

To download individual filters:

1. From the **Edit** menu in EndNote, choose **Import Filters** and then **Open Filter Manager**.
2. Click **Get More on the Web** to start your default browser and go to the appropriate page on the EndNote website.
3. Click **Accept** to accept the Terms of Use.
4. Browse through an alphabetical listing of the available filter files, and **Download** those files you want to install.
5. Copy the downloaded files to your Filters folder, which is typically located at: Program Files\EndNote X5\Filters

Instructions for a Mac

The EndNote team has developed hundreds of different filter files. Because installing all of these files may slow performance, a typical EndNote installation includes only the 100 most popular filters. You can install sets of filters by provider with the EndNote Customizer, or you can download individual filters from the EndNote website.

Using the EndNote Customizer to install additional filters

Before you begin, make sure no applications are running—including virus protection software and Microsoft Word.

To install sets of filters:

1. Start the EndNote program.
2. From the **EndNote X5** menu, choose **Customizer**.
3. On the **Component Selection** dialog, select the components you want to install (or keep installed). You can select the check box next to Import Filters to install all of the filters, or you can expand the Import Filters category in order to select groups of filters by provider. Any components that are not selected will be removed.
4. Click **Next** to continue with the installation.

The import filters will be copied to the EndNote Filters folder, which is typically Applications:EndNote X5:Filters.

You will need to **Quit** from the EndNote program and then restart EndNote to read in the added import filters.

Finding individual filters on the EndNote website

You can use the Filter Manager in EndNote to find and download individual filter files.

To download individual filters:

1. From the **Edit** menu in EndNote, choose **Import Filters** and then **Open Filter Manager**.
2. Click **Get More on the Web** to start your default browser and go to the appropriate page on the EndNote website.
3. Click **Accept** to accept the Terms of Use.
4. Browse through an alphabetical listing of the available filter files, and **Download** those files you want to install.

Copy the downloaded files to your Filters folder, which is typically located in the Applications:EndNote X5 folder.