Using EndNote with Pages, Nisus Writer, Scrivener, or Similar Word Processors on Macintosh

EndNote Training
1 Introduction

This class is going to show how to use EndNote to create formatted bibliographies in Apple Pages, Nisus Writer Express, and Scrivener. The Format Paper method will be shown for Nisus Writer and Scrivener, and can be used with any word processor that can create a rich text format (RTF) document.

2 Apple Pages

Apple Pages uses EndNote’s Cite While You Write feature to search your EndNote library for references, insert them in the document, and format them according to the selected style.

2.1 Selecting Styles

The style you want to use in Pages must be on your favorite styles list in EndNote before you open Pages. Only styles on the favorites list will appear in Pages.

2.2 Inserting Citations

2.2.1 In-Text Citations

All citations must be inserted by searching the open EndNote libraries from within Pages. In Pages—

- Place your cursor where you want to insert a citation.
- Select EndNote Citation from the Insert menu.
- In the Find field of the Find EndNote Citations screen, shown below, type a word or phrase that is anywhere in the EndNote record you are looking for, then press the Return key. A list of references matching your search will be displayed.
Select (highlight) the references you want to insert, and any options for those references, and click the **Insert** button. Note that the option to “Only insert into the bibliography” is only available here. It cannot be selected when editing citations later.

If you want to add a citation to another citation, to create a grouped citation, position your cursor next to the previous citation, with no space between the original citation and your cursor, and select **EndNote Citation** from the **Insert** menu, as described above.

### 2.2.2 Footnote/EndNote Citations

Footnote/Endnote citations work much the same way in-text citations do, but Pages controls the numbering and placement of the footnote or endnote.

- Insert a footnote in the document by selecting **Footnote** from the **Insert** menu.
- Place your cursor where you want to insert a citation in the footnote.
- Select **EndNote Citation** from the **Insert** menu.
- Proceed just as you would when inserting a citation into the text, as described above.
2.3 Formatting the Bibliography

- Select *EndNote Citations* from the *Edit* menu, then select the EndNote bibliography style you want to use from your list of favorite styles. Only styles you have set as favorites in EndNote will be available in the list.

Your citations and bibliography will be instantly formatted to meet the requirements of that style. New citations you add to the paper will also match the style requirements.

2.4 Editing Citations

You can add page numbers, prefixes, suffixes, or exclude the author or the year by editing the citation. This list of options is similar to those you saw when inserting citations, but there will be no option to show the citation only in the bibliography.

- Click on a reference in a citation to open the editing window, shown below.

![Editing Citation Window](image)

- Add a prefix, suffix, or page numbers in the fields at the left.
- Exclude the author or year by marking the appropriate boxes.
- Use the arrows at the bottom-right of the window to move through references in the citation.

3 Nisus Writer Express

EndNote’s Format Paper feature can be used with Nisus Writer Express and other word processors that do not use Cite While You Write. To insert citations when using Format Paper, plain-text placeholders, called “unformatted citations,” are inserted in the document. EndNote then scans the document, applies a style, and creates a second document with formatted citations and bibliography.
3.1 Inserting Citations in Nisus Writer

- In EndNote, select (highlight) the records you want to insert as citations.
- Select *Copy* from the *Edit* menu, or press *Command-C* on the keyboard.
- In Nisus Writer, position your cursor where you want the citation to appear and select *Paste* from the *Edit* menu, or press *Command-V* on the keyboard.
- Alternatively, you can drag-and-drop the citation(s) from EndNote to their location in Nisus Writer.

3.2 Editing Citations

By default, when you paste a citation it will include three pieces of information: the first author’s last name, the year, and the EndNote record number. Here is an example of an unformatted citation:

{Billoski, 1992 #2}

This citation would appear as below when using the APA 6th style.

(Billoski, 1992)

If you want page numbers, prefix text, or suffix text to appear in the formatted citations, or if you want to omit the author’s name or the year from the citation, you will need to change the unformatted citations in the original document by removing text or adding coded text. Below are examples showing how to edit the Billoski citation shown above to create the customized citations shown below.

<table>
<thead>
<tr>
<th>Formatted Citation, APA 6th</th>
<th>Unformatted Citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Billoski, 1992)</td>
<td>{Billoski, 1992 #2}</td>
</tr>
<tr>
<td>(1992)</td>
<td>{, 1992 #2}</td>
</tr>
<tr>
<td>(Billoski)</td>
<td>{Billoski, #2}</td>
</tr>
<tr>
<td>(see Billoski, 1992)</td>
<td>{see \Billoski, 1992 #2}</td>
</tr>
<tr>
<td>(Billoski, 1992, p. 36)</td>
<td>{Billoski, 1992 #2@36}</td>
</tr>
<tr>
<td>(Billoski, 1992, p. 36, table 2)</td>
<td>{Billoski, 1992 #2`, table 2@36}</td>
</tr>
<tr>
<td>(see Billoski, 1992, p. 36, table 2)</td>
<td>{see \Billoski, 1992 #2`, table 2@36}</td>
</tr>
</tbody>
</table>
### Table: Formatted Citation, APA 6th vs. Unformatted Citation

<table>
<thead>
<tr>
<th>Formatted Citation, APA 6th</th>
<th>Unformatted Citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>No citation but appears in bibliography</td>
<td>{#2} (This works for author-date formats only.)</td>
</tr>
<tr>
<td>Billoski (1992)</td>
<td>Billoski, 1992 #2</td>
</tr>
<tr>
<td></td>
<td>(Note that the author’s name, as you want it to appear, must be manually typed outside the unformatted citation. What you are really doing here is excluding the author’s name from the citation and typing it into the text of the document.)</td>
</tr>
</tbody>
</table>

#### 3.3 Formatting the Bibliography

The instructions below assume you are saving the document in the rich text format, which is the default for Nisus Writer.

- In EndNote, all libraries used in the document must be open.
- **Close and save** the Nisus Writer document.
- In EndNote, select *Format Paper*, then *Format Paper* again at the right, from the *Tools* menu, then select the original Nisus Writer document.
- EndNote will scan the paper for citations that match the library, and bring up a list of all the citations in the paper. There should be a single match, and only a single match, for each citation.
- Select the *Output Style* to be used for the formatted paper.
- Click on the *Format* button.
- EndNote will assign a new name for the document by merging the original document name with the output style name.
- Click on the *Save* button to save the document.
- Open the new document in Nisus Writer to see the formatted citations and bibliography. The bibliography will be at the end of the document, but you can cut-and-paste it into another location.

#### 4 Scrivener

Scrivener is not exactly a word processor, but it is a very powerful writing tool, especially for long documents, allowing you to keep detailed background information and write in sections, or “scenes,” that can be easily reordered and exported to a rich text format document. The resulting rich text format
document can then be formatted by EndNote to create a second document with formatted citations and bibliography, much like Nisus Writer.

To easily open EndNote from within Scrivener, set a link to EndNote as the bibliography manager by editing the Scrivener preferences.

- Select Preferences from the Scrivener menu.
- Click the General button.
- At the bottom of the screen, click on the Choose button for the Bibliography Manager option.
- Navigate to the EndNote application and Open it.
- Close the Preferences window.

4.1 Inserting and Editing Citations

- Select Bibliography/Citations from the Format menu, or press Command-Y on the keyboard. You will be sent to the EndNote application.
- Copy-and-paste, or drag-and-drop, the EndNote citation(s) you want to use into your Scrivener document just as you would for Nisus Writer.
- Edit citations to add page numbers or other text, or to omit the author’s name or the year just as you would for Nisus Writer.

4.2 Formatting the Bibliography

You cannot format the bibliography when your paper is still in the Scrivener format. You will first need to compile it to a rich text format document, then format the compiled document.

- In Scrivener, select Compile from the File menu.
- Set your compiling settings to save the document as a Word-compatible rich text format document, then click on the Compile button.
- Format the resulting rich text format document using the Format Paper command just as you would for a Nisus Writer document. Note that you can open the compiled document in most word processors for “fine-tuning” before formatting it with EndNote.
- As with Nisus Writer, the bibliography will be at the end of the document, but you can cut-and-paste it into another location in the document.