

*EndNote 9 is a database that contains specific references you create. It assists in keeping track of references, which can be retrieved using search terms. Bibliographies can be generated in a variety of style formats.*

**This product is available to PNNL staff only.**

### Installing EndNote 9

1. From the PNNL Installer, select the **Core Apps** tab, double click the **Other Utilities** folder and then double click the **Bibliographic Management Systems** folder.
2. Select **EndNote 9**, click **Install** and follow the instructions on the screen to complete installation.

### Creating a Library

1. When opening *EndNote 9* a pop-up window will appear. Click the **Create a new EndNote library** radio button, and then click **OK**. Or,
2. If already in *EndNote 9* select **File** and then **New** from the menu bar. You will be prompted to name and save your new library. In the **File name** box, type the desired file name and click **Save**. The file type extension is .enl. A **New Reference Library** window will appear. **Note:** The new library may be installed anywhere on your hard drive.

### Opening an Existing Library

1. When opening *EndNote 9* click the **Open an existing EndNote library** radio button from the *EndNote 9* pop-up window, and select the desired library from the drop-down menu (or use the **Browse** button). Click **OK**. Or,
2. If already in *EndNote 9*, select **File**, **Open**, and then **Open Library**. Select the desired library and click **Open**.

### Adding Records to a Library

#### Option 1: Entering Records via EndNote Connection Files (e.g., PubMed)

Searching a **Connection File** site such as *PubMed* allows users to use the *EndNote 9* interface to run your search. Other Connection Files available in *EndNote 9* include a large number of library catalogs across the country or subscription databases. Using the *EndNote 9* interface, users can select and then search these catalogs in one search.

1. Select **Tools** from the menu bar, and then select **Connect**, or click the **Connect** icon (). A **Choose a Connection File** screen will appear.
2. Scroll down to **PubMed** and click **Connect**. A **Remote Search PubMed** window will appear.
3. Input the desired search term(s). Use the drop down menu to select the desired field. If using a second field, select the appropriate connector (**AND**, **OR**, or **NOT**), the desired field and input the second search term. **Note:** If more than three search fields are needed, click the **More** arrow and then **Add Field**.
4. Click the **Search** button. A **Confirm Remote Search** window will appear stating the number of records found. Click **OK** to retrieve these records or specify a range of records to retrieve, and then click **OK** to download the references. At this point, your downloaded references are contained only in a **temporary EndNote 9** library.
5. To move references into the desired library, click the **Copy All References To** button on the upper right corner of the screen. **Note:** To download a portion of the references obtained by the search, press the **CTRL** key and then click the references of interest to select the desired records.
6. Select either **New Library** or **Choose Library** as the destination for your selected references. References are then copied and saved into the selected library.

#### Option 2: Entering Records Manually

1. Open the desired library (See the **Opening an Existing Library** section of this tip sheet).
2. From the menu bar, select **References**, and then pick **New Reference**.
3. From the **Reference Type** drop-down menu, select the appropriate work form (e.g., abstract, report, journal, etc.).
4. Input the applicable data into the work form. **Note:** Because of the different indexes *EndNote 9* creates with the data, cutting and pasting data into the forms is not an option for many of the fields (author, journal name, keywords).
5. Select **File** and **Save** from the menu bar to save the record into the desired library.

#### Data Entry Tips

- Authors' names can be entered either as **First Middle Last** (e.g., **Ronald Scott Smith**) or **Last, First Middle** (e.g., **Smith, Ronald Scott**). You **must** enter each author name on a separate line. Use a hard return to go to the next line.
- Keywords must be separated by a semicolon (;), backslash (\), or hard return.

### Option 3: Entering Records by Importing Search Results

If you perform a search in databases that provide results in a tagged format (e.g., Dialog, STN, etc.), you can import these results into an *EndNote 9* library by using an import filter. If the database used does not offer a tagged format for results (i.e., a plain text format that provides the name or "tag" for each field of information), they cannot be imported into *EndNote 9*, but instead will have to be manually entered into a library.

1. Open the desired library (see the **Opening an Existing Library** section of this tip sheet).
2. From the **File** menu bar, choose **Import**.
3. Click the **Choose File** button to locate and open the file you wish to import. With the exception of files from other *EndNote* libraries, all files must be ANSI or ASCII text files. Select the file and click **Open**.
4. Select an **Import Option** by choosing the filter for the database from which you obtained the records. **Note:** Select **Other Filters** to view additional import filters.
5. Select an option from the **Duplicates** list. You can either import all records, discard duplicate records, or have the duplicate records sent to their own library for further evaluation.
6. Click the **Import** button. The imported records are imported into the open library.

**Note:** The filters can be unreliable. *Be sure to check that your references imported correctly.*

### Option 4: Direct Imports from Databases

#### **Web of Science, BIOSIS Previews or Current Contents Connect**

The Institute for Scientific Information (ISI) created an easy plug-in feature to allow easy export of records from the *Web of Science* or *BIOSIS Previews* databases into *EndNote*.

1. After marking records in the *Web of Science* database, click **Submit Marks**, and then click the **Marked List** button located at the top of the screen.
2. Select the desired field(s) to include with your references.
3. Click the **Export to Reference Software** button and select the appropriate library for the records when prompted. The records will automatically be added to the library.

Tip sheets are available on how to use *Web of Science*, *BIOSIS Previews* or *Current Contents Connect* can be found at: <https://library.pnl.gov/tipsheet/index.asp>.

#### **Compendex or INSPEC**

After performing your search in the *Compendex* or *Inspec* databases marking the desired records, and choosing the format of the records, click the **Download** button. From the pop-up window, select **RIS, EndNote, ProCite, Reference Manager**. A second window opens that allows you to select an existing database or create one by typing in a new name.

Tip sheets are available for the *Compendex* and *Inspec* databases *Previews* can be found at: <https://library.pnl.gov/tipsheet/index.asp>.

#### **ERICA to EndNote**

1. Set up your search in ERICA, and click the **Results Format** link.
2. Select **Bibliographic Format (RIS)**, and then click the **Search/Report** button.
3. Click **Open** from the File Download window and select the appropriate library for the records when prompted.

*Be sure to check that your references imported correctly.*

## Customizing the Reference List Display

The default fields that are displayed in the *EndNote 9* library are Author, Year, Title and URL.

1. Select **Edit** from the menu bar, and then select **Preferences**.
2. Select **Display Fields** from the list of preferences.
3. From the drop down menus in the **Field** boxes, select the desired field(s). Change the **Heading**, as desired, and then click **OK**. The newly added field(s) is now displayed in the reference list.

## Creating a Bibliography of all References in a Library

Open the desired *EndNote* Library.

1. First, select an Output Style for your bibliography:
  - a. From the **Edit** menu, select **Output Styles**, and then **Open Style Manager**.
  - b. In the **EndNotes Style** screen, click the checkboxes next to the desired style(s), and then close the screen. **Note:** If your style is not available, modify an existing style by using the **Style Manager**.
  - c. Again, select **Edit, Output Styles**. The submenu will contain a list of output styles you selected in Step 3. Select the desired style.
2. Next, create the bibliography:
  - a. Click **File** and select **Export**. Input a file name, then select **Rich Text Format (\*.rtf)** as the file type.
  - b. Click **Save** to save the file in the desired directory.
3. To view the bibliography, open the document in your word processing software (e.g., Microsoft Word).

## Create a Subject Bibliography

Open the desired *EndNote* library.

1. From the **Tools** menu, select **Subject Bibliography** to display a list of *EndNote* fields.
2. Highlight the field(s) whose contents you wish to use as subject headings and then click **OK** to display the terms found in the selected fields.
3. Select the desired terms. To quickly select or clear all terms, use the buttons to the right of the dialog window.
4. Click **OK** to format the subject bibliography on the screen. To modify the term selections, to either add or remove terms from the selected field(s), click the **Terms** button. **NOTE:** Subject headings print as they appear in your records. No special formatting of author names and no journal title substitution is applied.
5. Click the **Layout** button to modify the layout and style of the subject bibliography.

Once the subject bibliography is formatted, use the **Print** or **Print Preview** buttons to print the document or click the **Save** button at the bottom of the screen to save the file.

## Using the Cite While You Write Function

The *Cite While You Write* function allows you to link references from your library listings in *EndNote 9* to a word processing document, and also generates notes and bibliographies in specified formats. **Note:** After downloading *EndNote 9* for the first time, you may need to restart your computer to obtain the toolbar function.

1. Open Microsoft Word and *EndNote 9*
2. Select **View** from the menu bar, and then **Toolbars** to select the *EndNote* toolbar (this will create a toolbar of the **Cite While You Write** functions) **or** access these functions under **Tools, EndNote 9** on the menu bar.
3. When ready to cite an article in the document you are generating, click the **Find Citation** icon (  ). An **EndNote Insert Citation** screen will appear.
4. In the **Find** box, type in any identifying text to pinpoint the item you wish to cite, and then click **Insert**. If more than one item is retrieved, a list will appear. Select the appropriate item from the list and click **Insert**. The Word document will automatically format into the latest style selected.

**Note:** To disable Instant Formatting, click the **Cite While You Write Preferences** Icon (  ). The cited references will then appear in a generic format until a style for the document has been selected.

5. To create the bibliography, select the **Format Bibliography** icon (  ).
6. From the **EndNote Format Bibliography** pop-up window, select an output style (use the **Browse** button for assistance). **Note:** The remaining options will default to the selected output style, though changes can be made manually, if desired.
7. Once the output style is selected, click **OK**. The document will be reformatted to place the notes and references in the appropriate style.

For additional information on *EndNote*, see <http://infosource.pnl.gov/software/Bibliographic/default.htm>.  
For additional assistance, contact the Hanford Technical Library Reference Desk at 509/ 372-7430.