

EndNote 9 is a software product that enables you to find, import, manage, and format reference data for research papers or professional journals. Use it to keep track of specific references in your field of interest.

ACCESS IS LIMITED TO PNNL STAFF ONLY

Installing EndNote 9

1. Access the PNNL Mac Installer at <http://infosource/macintosh/Instructions.htm>.
2. Click on the OSX tab. Scroll down to EndNote 9 and click **Install**. **Note:** Microsoft Word version 10.1.2 is the minimum required version. Follow the instructions on the screen to complete the installation.

Recommendation: accept the default settings.

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**, 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 **Save As** 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. To open an existing library, select **File**, **Open**, and then **Open Library**. Select the desired library and click **Open**.

Adding Records to a Library

Option 1: Using the EndNote interface to search Internet databases

Searching a **Connection File** site allows users to run a search from the *EndNote 9* interface. Connection files available include a large number of library catalogs across the country, *PubMed*, and subscription-based databases.

1. Select **Tools** from the menu bar, and then select **Connect -> Connect**, or click the **Connect** icon (). A **Choose a Connection File** screen will appear.
2. Select a file and click **Connect**. A search window will appear.
3. Each file will have unique search fields; use the drop-down menu to select the desired field(s) and input search term(s). If using more than one field, select the appropriate connectors (**AND**, **OR**, **NOT**) from the drop down list. (Example from *PubMed*: **Author: Panisko AND Any Field: Yeast**). **Note:** If more than three search fields are needed, click **Add Fields**.
4. Click **Search**. A **Search Complete** 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 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 on the references of interest to select them.
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 **Creating a Library** section of this tip sheet).
2. Select **References** from the menu bar, and then select **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, etc.).
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**). However, 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: Direct Imports from Databases

Web of Science, BIOSIS Previews or Current Contents Connect

Internet Explorer cannot handle direct import files from these to *EndNote*. Instead, you will need to save the file, and then import to *EndNote* using the **ISI CE import filter**. (See Option 4, below). **Recommendation:** use **Mozilla** as your browser to import records because you can configure Mozilla easily to recognize these files for direct import into *EndNote*. Tip sheets are available for the *Web of Science*, *BIOSIS Previews* and *Current Contents Connect* at: <https://library.pnl.gov/tipsheet/index.asp>

Compendex or INSPEC

After performing your search in the *Compendex* or *INSPEC* databases, and marking the desired records, click the **Download** button. From the pop-up window, select **RIS format** and save the file. Import to *EndNote* using the **Reference Manager (RIS) filter**. (See Option 4, below). Tip sheets are available for the *Compendex* and *INSPEC* databases at: <https://library.pnl.gov/tipsheet/index.asp>

Option 4: Entering Records by Importing Search Results: : If you have performed a search in databases such as Dialog, STN, or Cambridge Scientific Abstracts that provide results in a tagged format (i.e., a plain text format that provides the name or "tag" for each field of information), you can import these results into your database.

1. From the desired library, choose **Import** from the **File** menu bar.
2. Click the **Choose File** button to locate and open the file you wish to import. With the exception of files from other *EndNote* 9 libraries, all files must be ANSI or ASCII text files. Select the file and click **Open**.
3. 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.
4. 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. *Be sure to check references to make sure all fields are imported correctly.*
5. Click **Import**. The imported records are stored in their own worksheet and copy automatically into an open library. Deleting references in the Import Worksheet also deletes them from the open library.

Creating a Bibliography of all References in a Library

1. From the desired library, select **Output Styles** from the Edit menu and then **Open Style Manager**.
2. In the **EndNotes Style** screen, select the desired style(s), and then close the screen. **Note:** If your style is not available, you can modify an existing style by using the **Style Manager**. The selected style is now available from the drop-down menu on the *EndNote* tool bar so you can now use it for your bibliography.
3. Click **File** and select **Export**. Input a file name and a destination, then select **Rich Text Format (*.rtf)**
4. Click **Save** to save the file in the desired location.
5. To view the bibliography, open the document in your word processing software (e.g., Microsoft Word).

Create a Subject Bibliography

1. From the desired library, select **Subject Bibliography** from the **Tools** menu.
2. Highlight the field(s) you want to use as subject headings and then click **OK**.
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. **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.
6. Once the subject bibliography is formatted, you can print or 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 document, and also generates notes and bibliographies in specified formats.

1. Open Microsoft Word and *EndNote* 9. The *EndNote* toolbar should now be part of your Word Program. If not, select **View, Toolbars** and select the *EndNote* toolbar.
2. When ready to cite an article in your document, click the **Find Citation** icon ().
3. From the **EndNote Insert Citation** screen, type in keywords into the **Find** box, 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 last style selected.
4. To create the bibliography, select the **Format Bibliography** icon ().
5. 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. Changes can be made manually, if desired.
7. After selecting the output style, click **OK**. The document will reformat to place the notes and references in the appropriate style.

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