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AUGUST 2003

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I would like to thank Jose Olivares whose critical review helped to improve this booklet.

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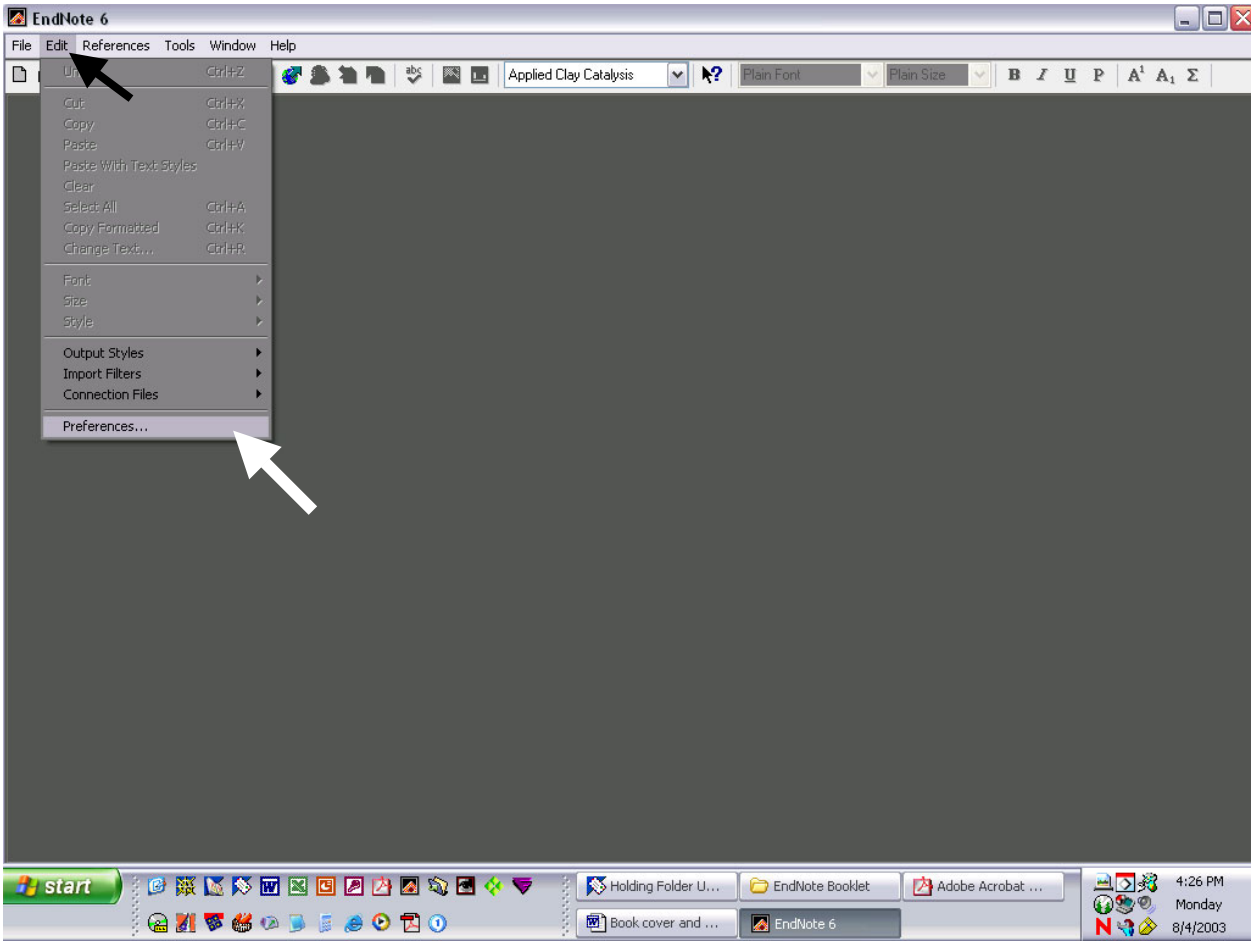
STEP 1

EDIT PREFERENCES

To download citations from Technical and Electronic Information Department (TEID) the *Preference* fields will need to be renamed.

Open EndNote™ application. Choose the Edit menu, preferences.



FOR VERSION 6. THESE PREFERENCES ARE SET UP TO COINCIDE WITH TEID IN ORDER TO DOWNLOAD FROM THEIR DATABASE.

Generic	Journal Article	Book	Book Section	Manuscript	Edited Book	Magazine Article	Newspaper Article	Conference Proceedings - conference abstracts, conference papers, conference proceedings, conference posters	Thesis	Report
Author	author	author	author	author	author	author	Reporter	author	author	author
Year	doc_year	doc_year	doc_year	doc_year	doc_year	doc_year	doc_year	doc_year	doc_year	doc_year
Title	doc_title	doc_title	doc_title	doc_title	doc_title	doc_title	doc_title	doc_title	doc_title	doc_title
Secondary Author	edited_by	edited_by	edited_by	edited_by	edited_by	edited_by	edited_by	edited_by	edited_by	edited_by
Secondary Title	Journal Title	Series Title	Book Title	Collection Title	Series Title	Magazine	Newspaper	conf_title	Academic Department	
Place Published		publisher_loc	publisher_loc	publisher_loc	publisher_loc	publisher_loc	City	conf_location	City	City
Publisher	publisher	publisher	publisher		Publisher			publisher	University	Institution
Volume	jvol	bvol	bvol		bvol	volume		bvol		
Number of Volumes		Number of Volumes			Number of Volumes			Number of Volumes		
Number	jissue			Number		Issue Number				
Pages	jpagination/ no_of_pages	bpagination/ no_of_pages	bpagination/ no_of_pages	No_of_Pages	No_of_Pages	No_of_Pages		no_of_pages	no_of_pages	no_of_pages
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Tertiary Author								Series Editor		
Tertiary Title								Series Title		
Edition		Edition	Edition		Edition		Edition	Edition		
Date	doc_date	doc_date	doc_date	doc_date	doc_date	doc_date	Issue Date	doc_date	doc_date	doc_date
Type of Work				Type of Work			Type of Article		thesis_degree	Type
Subsidiary Author		Translator	Translator							
Short Title	Short Title	Short Title	Short Title	Short Title	Short Title	Short Title		Short Title		Short Title
Alternate Title										
ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	ISBN/ISSN	report number
Original Publication	Original Publication	Original Publication	Original Publication		Original Publication	Original Publication	Original Publication	Original Publication		
Reprint Edition	Reprint Edition	Reprint Edition	Reprint Edition		Reprint Edition	Reprint Edition				
Reviewed Item	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by	div_reviewed_by
Custom 1	Cited References	Cited References	Cited References	Cited References	Cited References	Cited References	Cited References	Cited References	Cited References	Cited References
Custom 2	funding_source	funding_source	funding_source	funding_source	funding_source	funding_source	funding_source	funding_source	funding_source	funding_source
Custom 3	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)	Project ID (Account #)
Custom 4		Book Print Date					Newspaper Date	Conf_Dates		Print Date
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Custom 6	group/ program	group/ program	group/ program	group/ program	group/ program	group/ program	group/ program	group/ program	group/ program	group/ program
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Keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords	keywords
Abstract	Abstract							Abstract		
Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes	Notes
URL	URL	URL	URL	URL	URL	URL	URL	URL	URL	URL
Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address	Author Address
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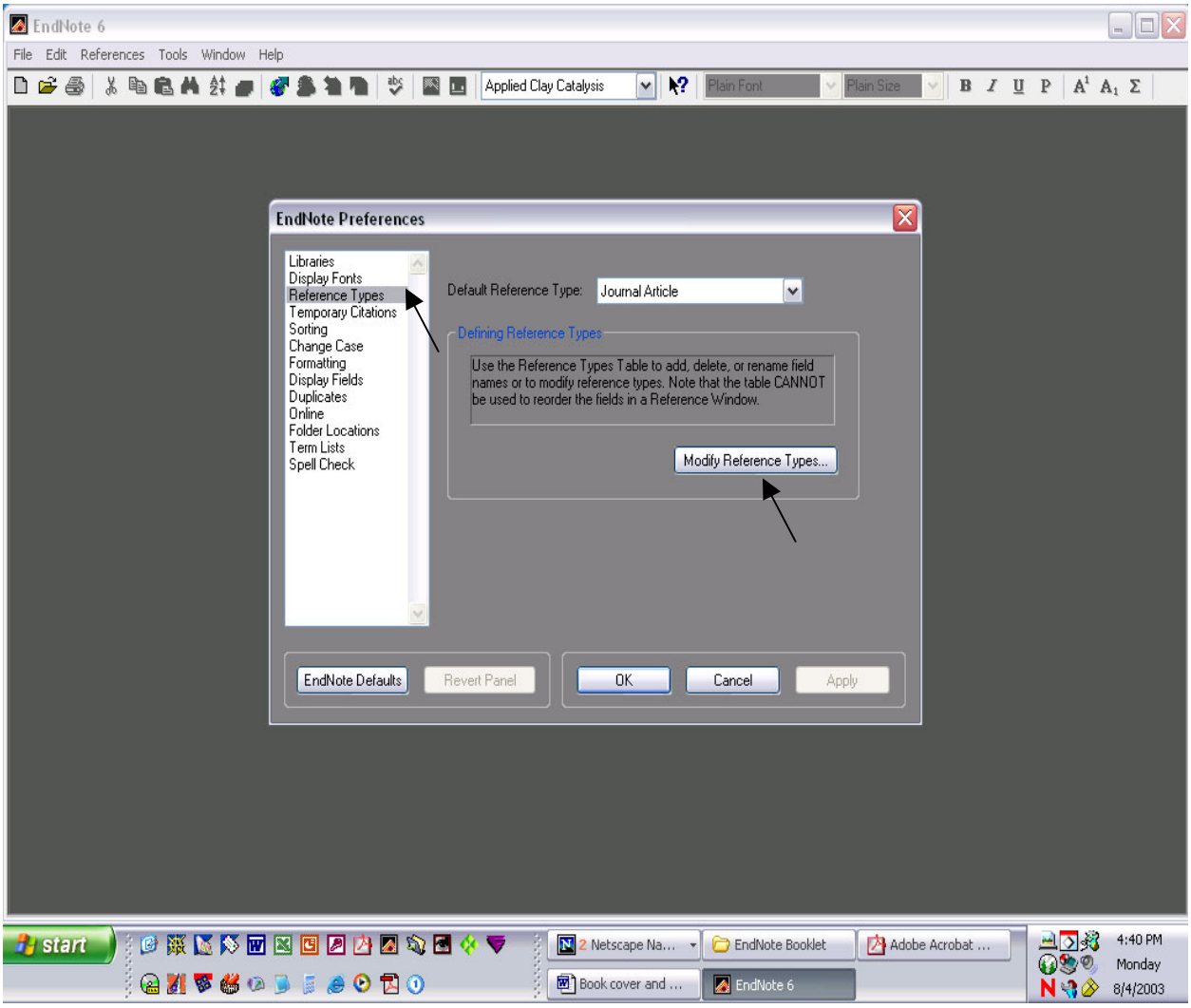
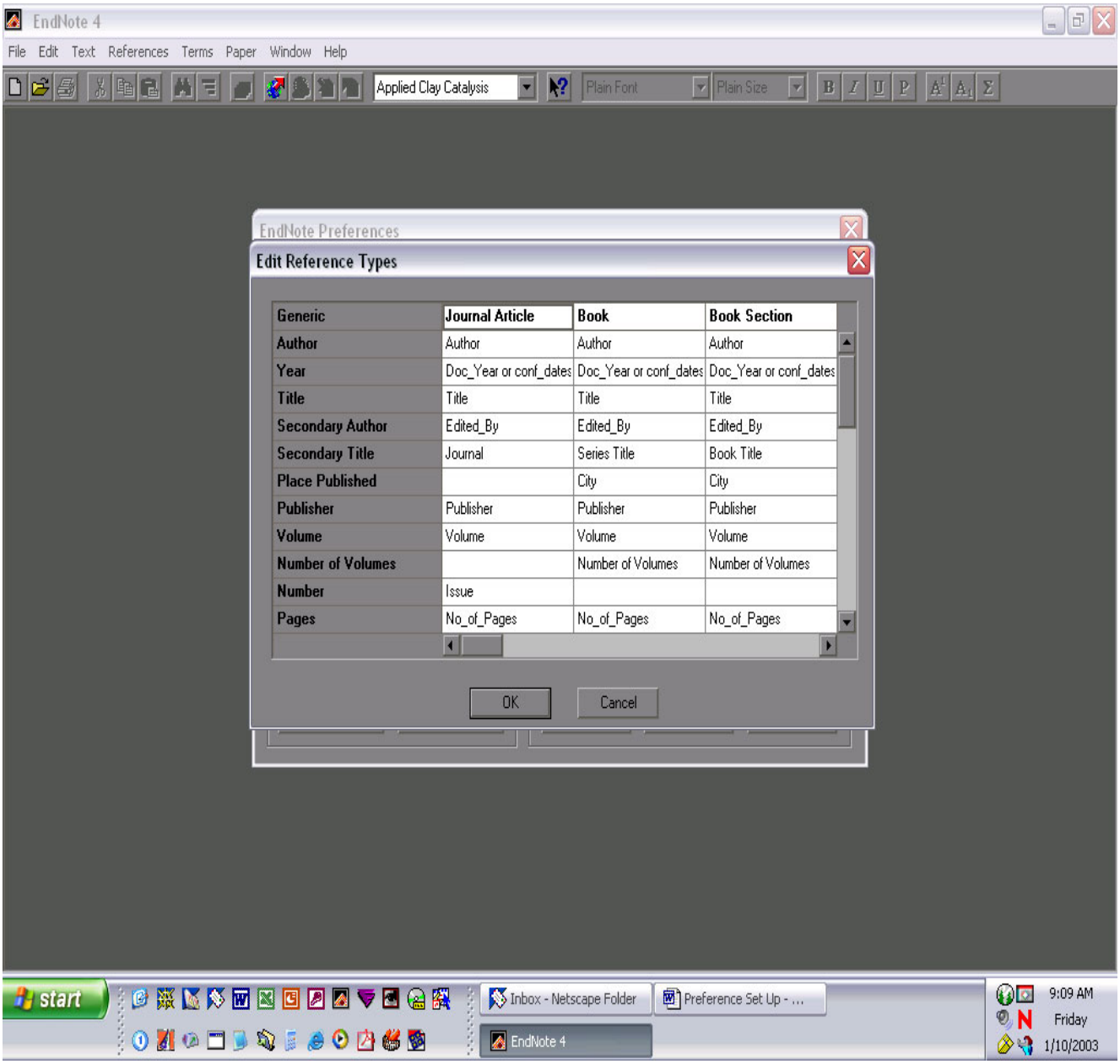
Choose Reference Types, Modify Reference Types to open the Reference table.

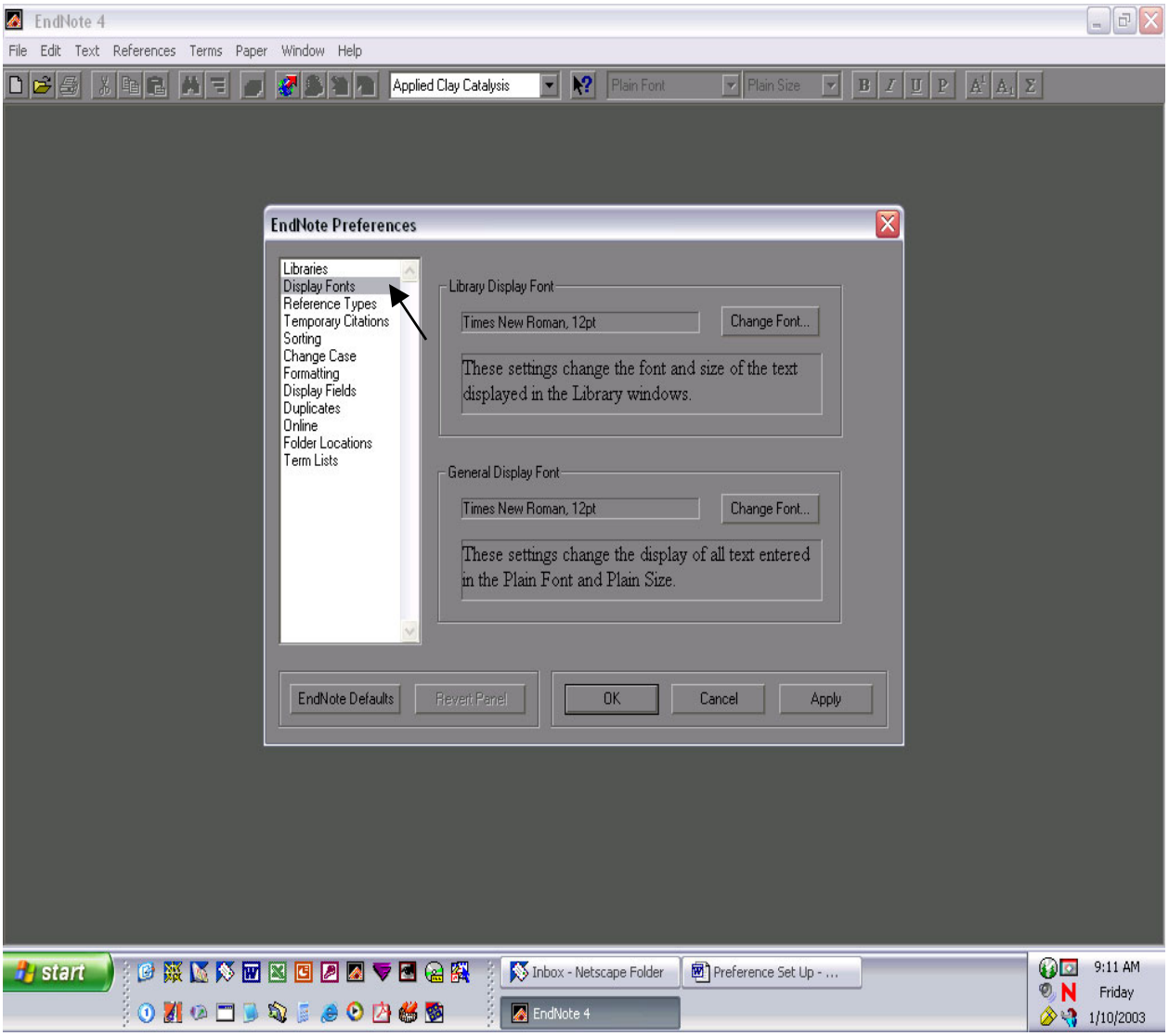


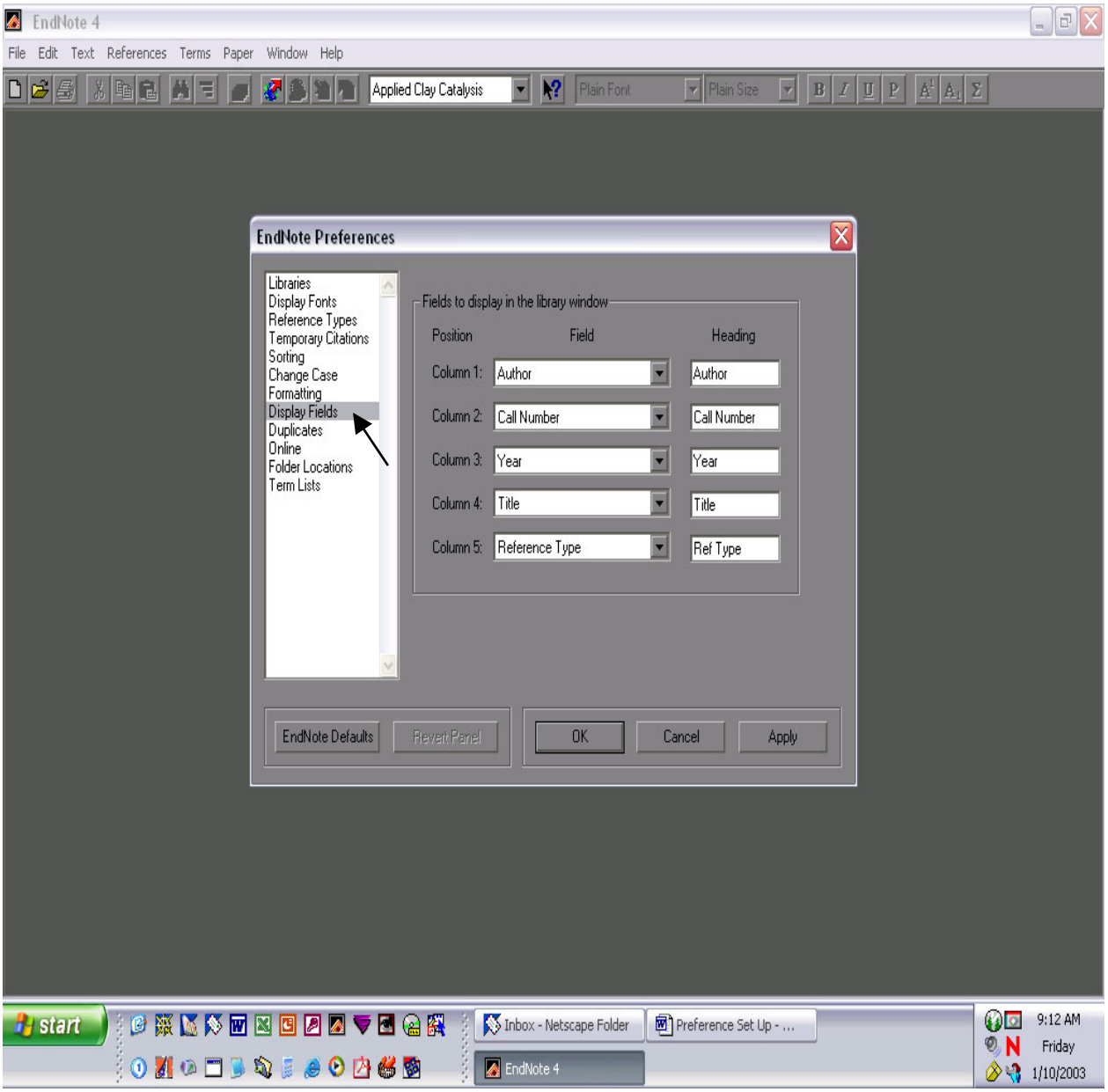
Your default references open and look like this example.



Generic	Journal Article	Book	Book Section
Author	Author	Author	Author
Year	Doc_Year or conf_dates	Doc_Year or conf_dates	Doc_Year or conf_dates
Title	Title	Title	Title
Secondary Author	Edited_By	Edited_By	Edited_By
Secondary Title	Journal	Series Title	Book Title
Place Published		City	City
Publisher	Publisher	Publisher	Publisher
Volume	Volume	Volume	Volume
Number of Volumes		Number of Volumes	Number of Volumes
Number	Issue		
Pages	No_of_Pages	No_of_Pages	No_of_Pages

Other recommended changes.

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Online
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Term Lists
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Position
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Column 1:
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Column 2:
Call Number
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Column 3:
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Column 4:
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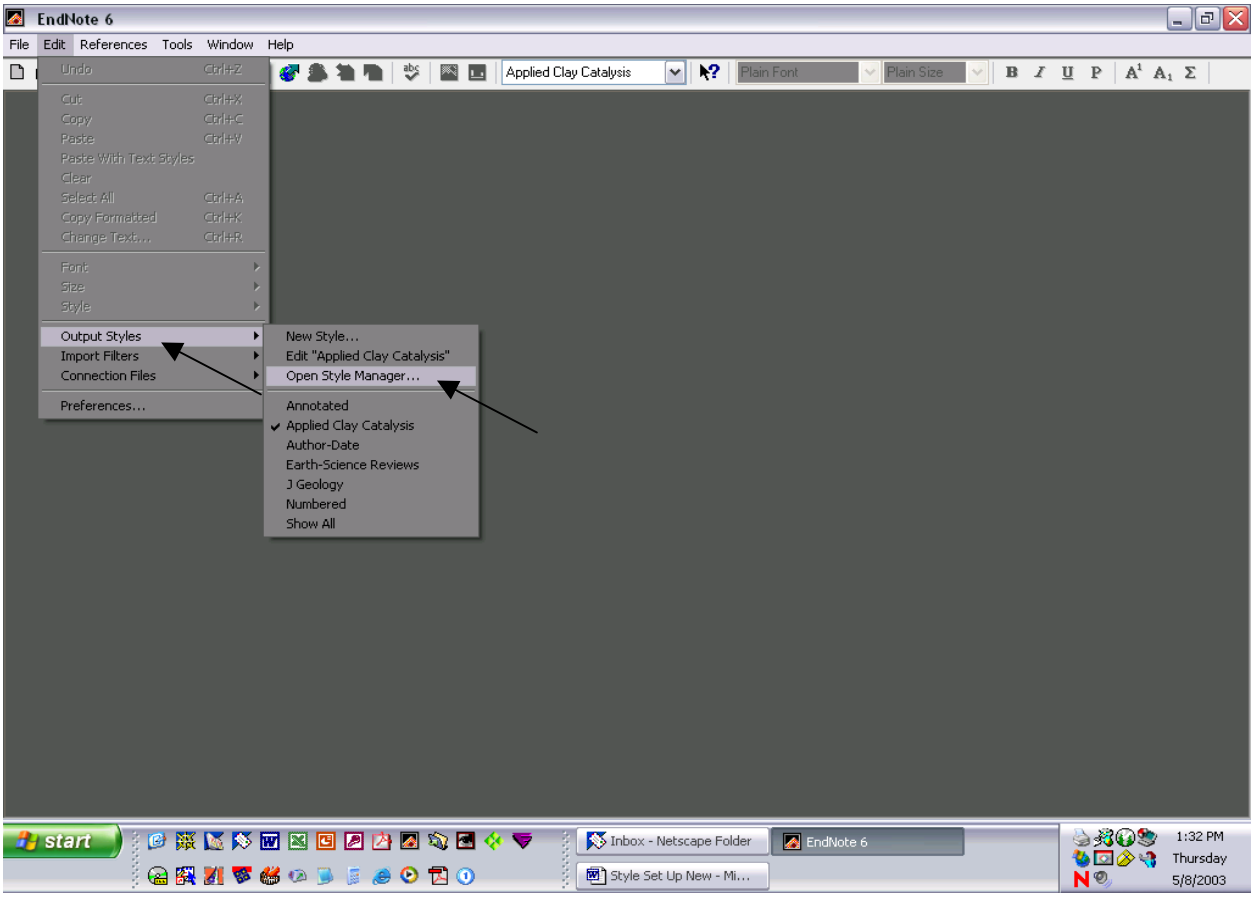
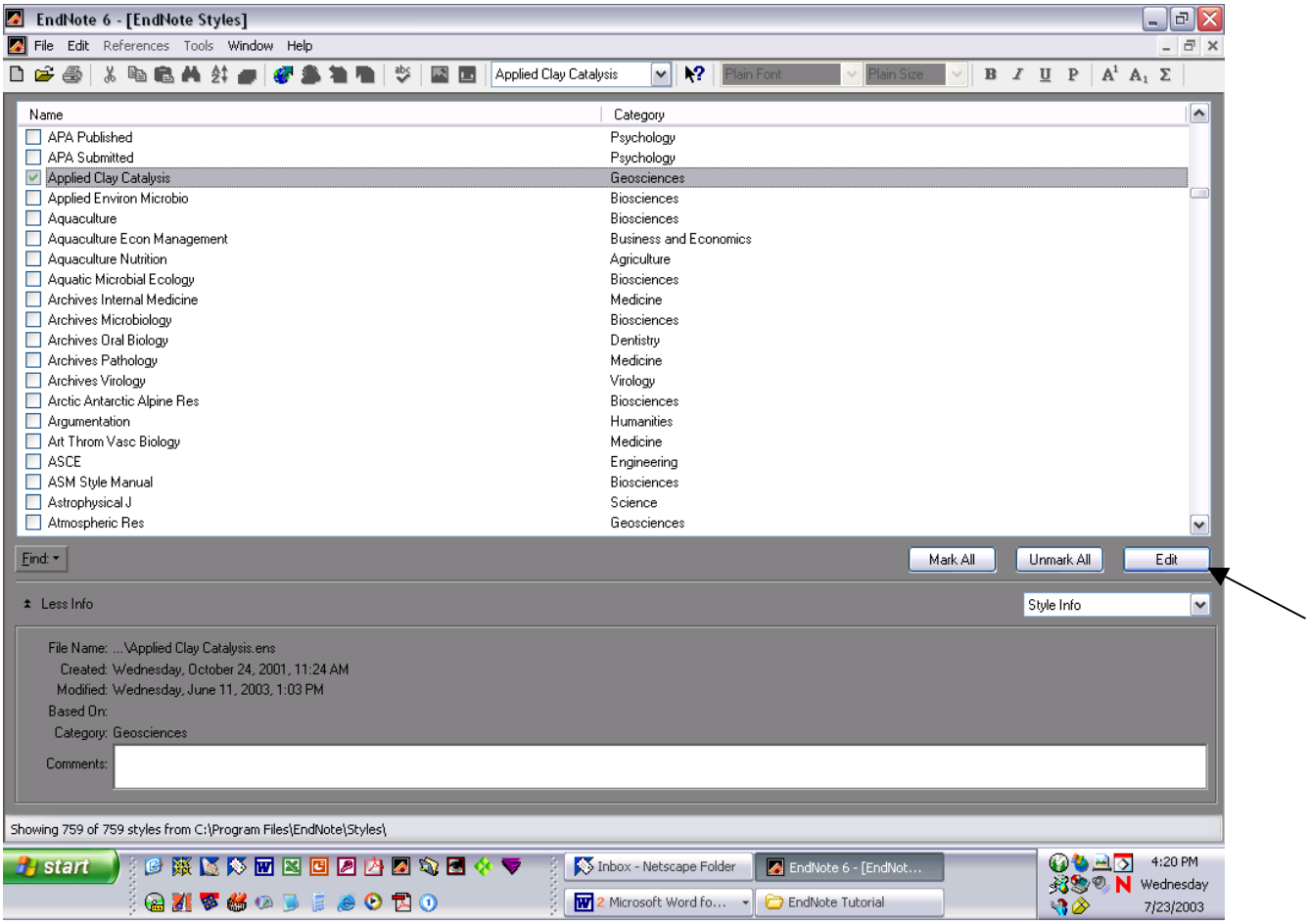
STEP 2

STYLES

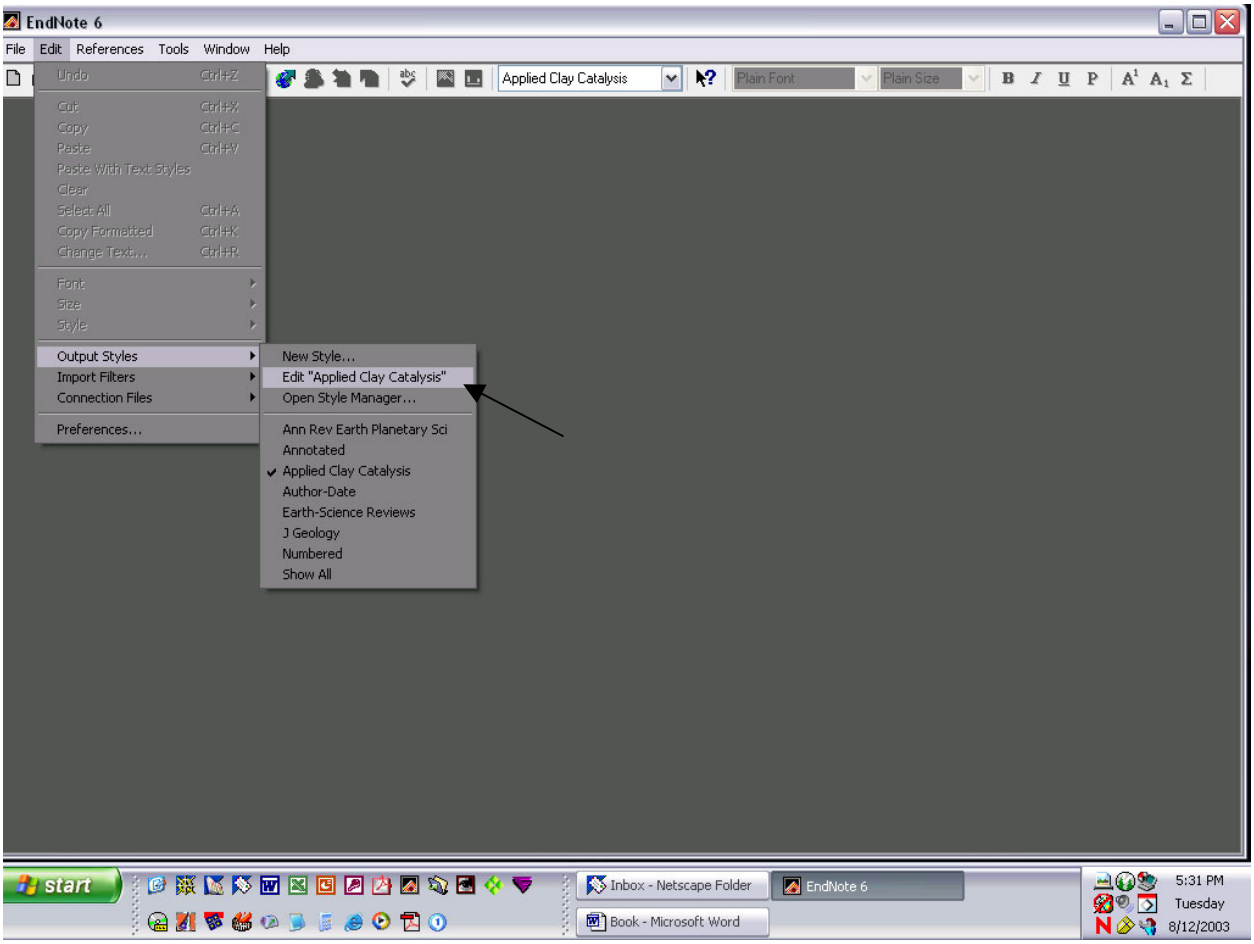
To format a Style, choose Edit, Output Styles, Open Style Manager.



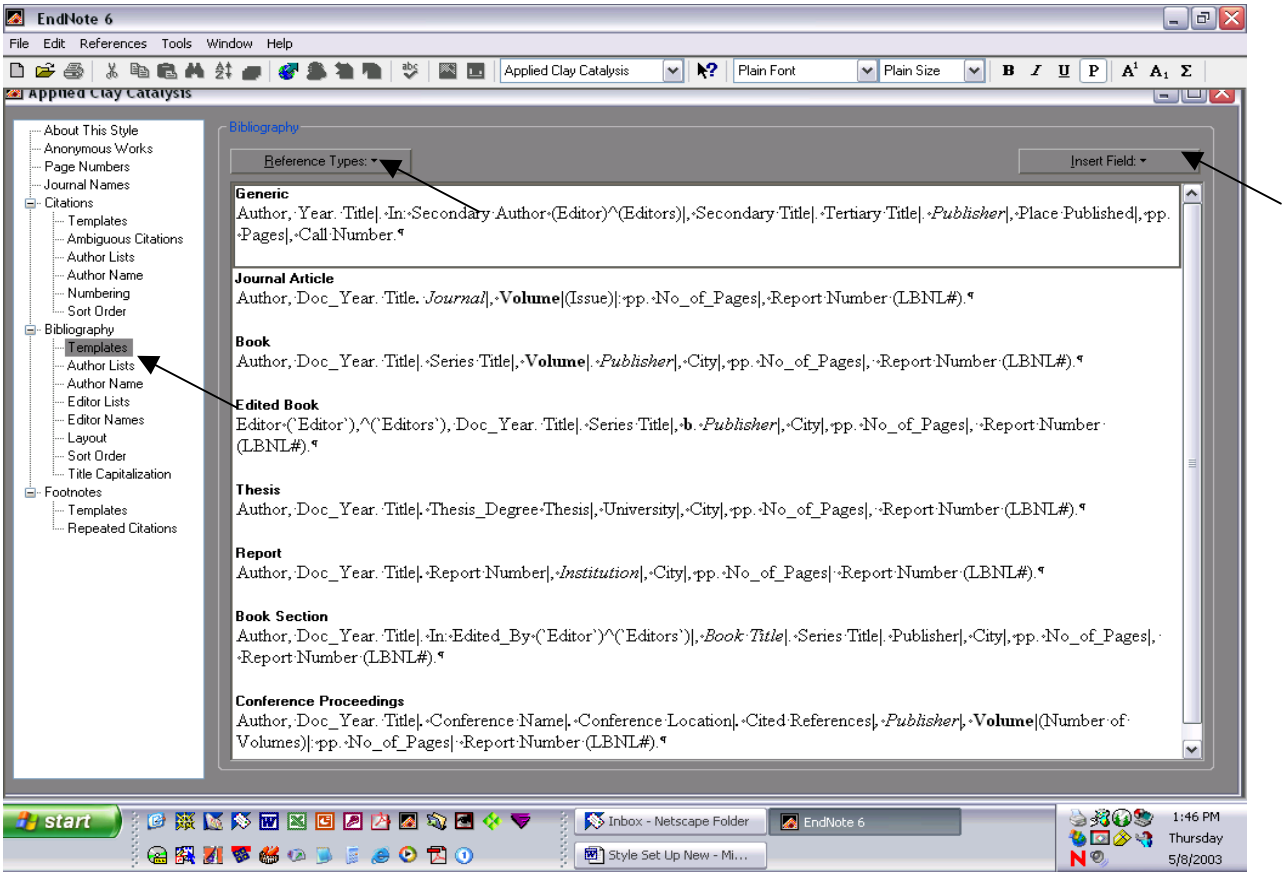
Choose a style that is required by the Journal, conference, or your Division, etc. Click on Edit.



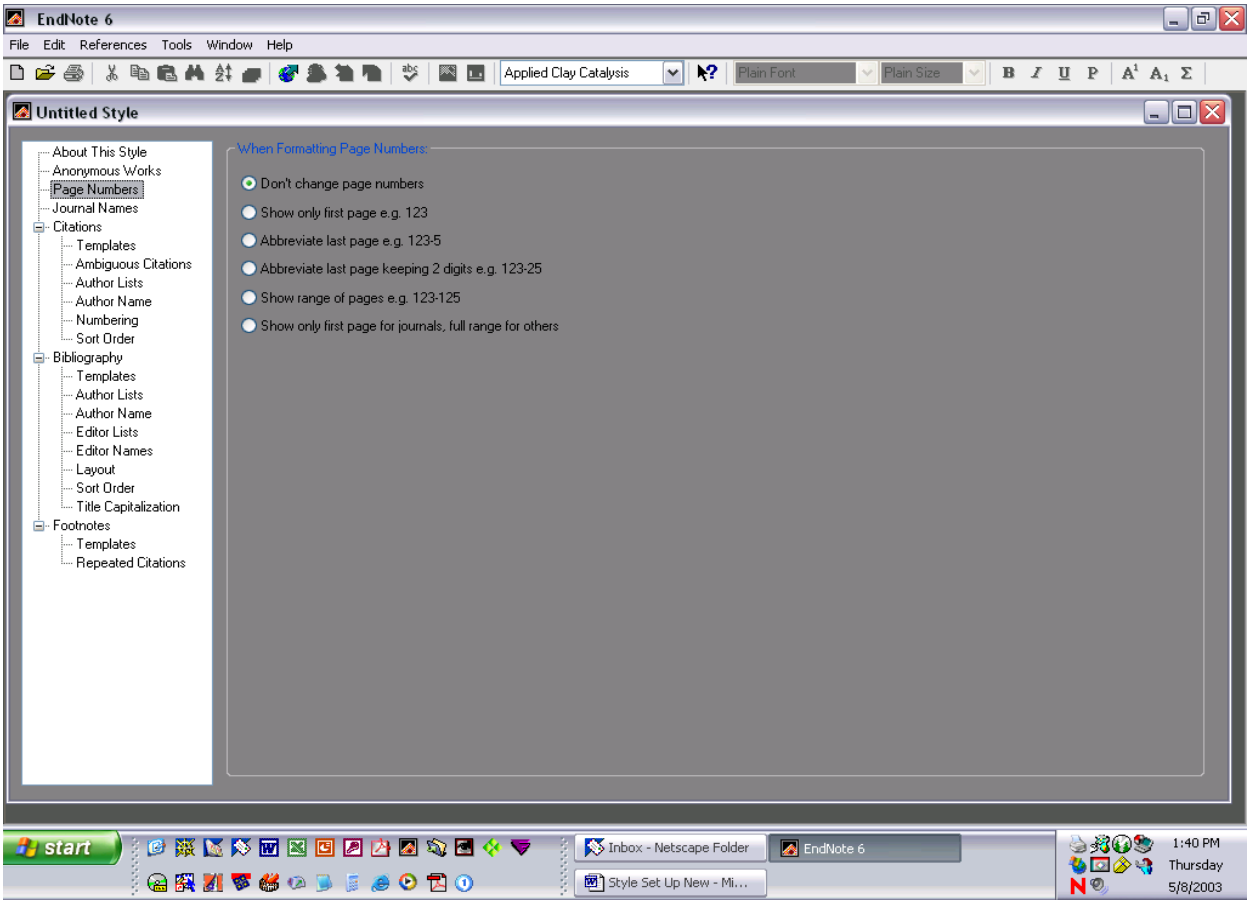
If a style has already been chosen and you wish to modify it you can go to Edit, Output Styles, Edit "choose style you wish to edit"

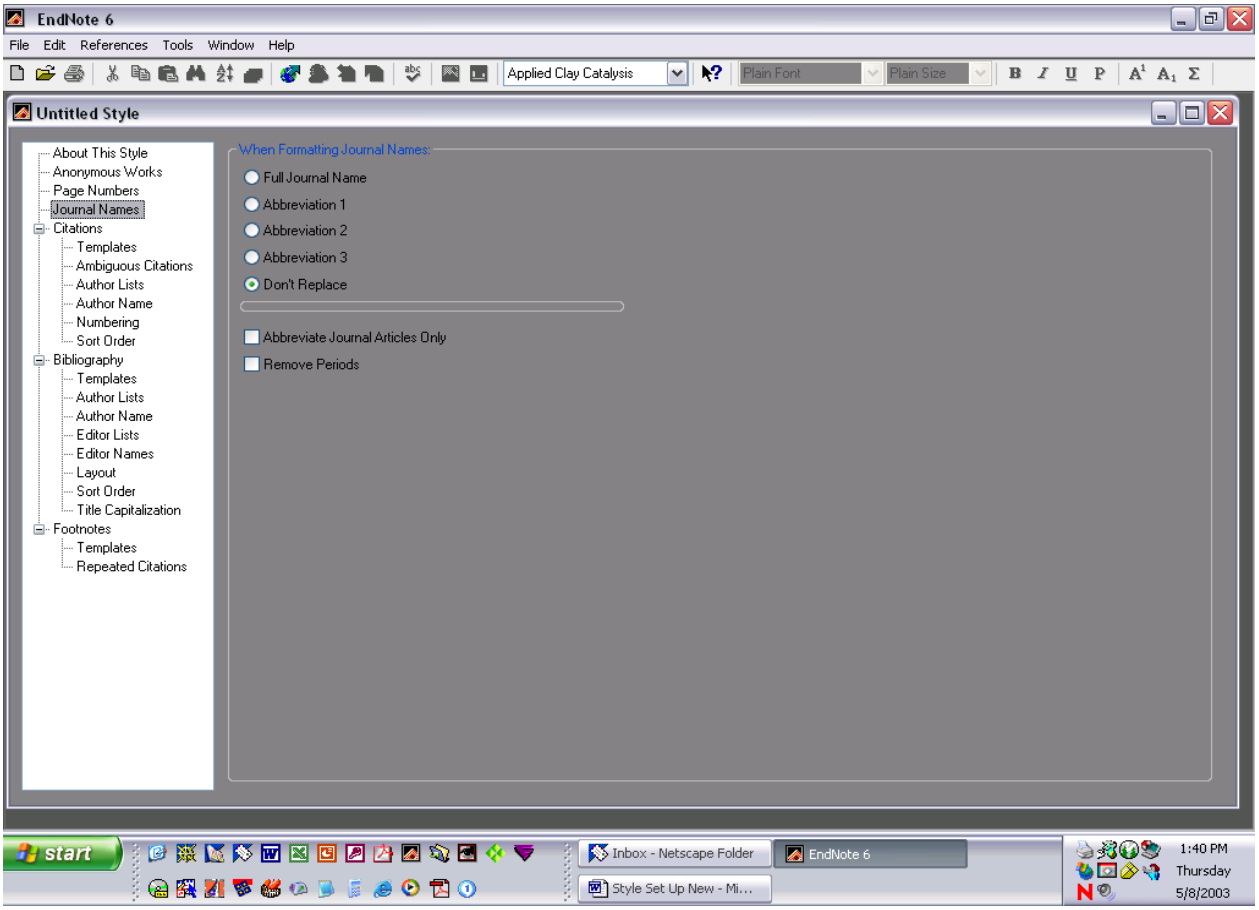


Only the default fields will show up in **Insert Field** unless you have changed your preferences. You can add additional references by clicking on **Reference Types.**



Other items you might want to customize.

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Full Journal Name
Abbreviation 1
Abbreviation 2
Abbreviation 3
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Abbreviate Journal Articles Only
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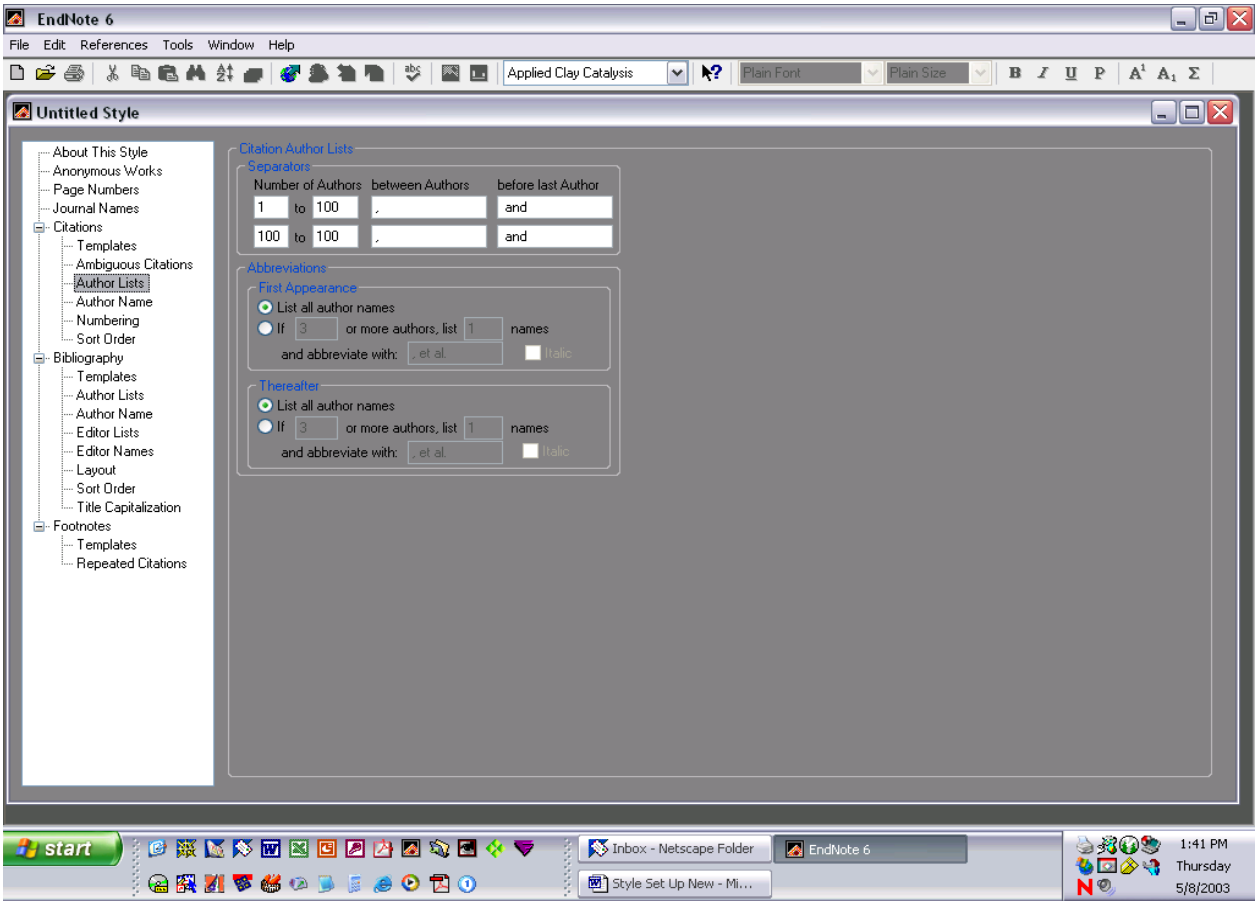
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Abbreviations
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List all author names
If 3 or more authors, list 1 names
and abbreviate with: , et al.
Italic
Thereafter
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If 3 or more authors, list 1 names
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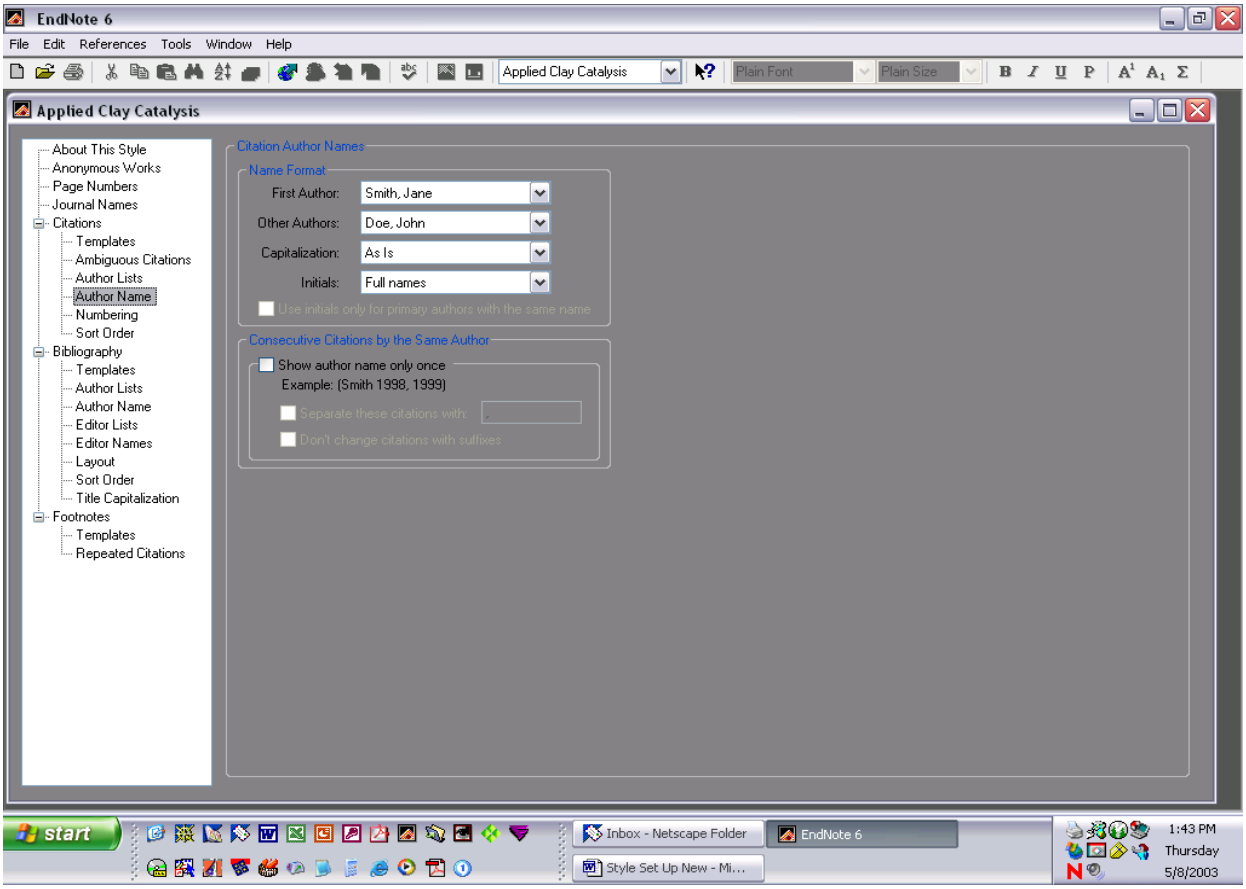
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Repeated Citations
Citation Author Names
Name Format
First Author: Smith, Jane
Other Authors: Doe, John
Capitalization: As Is
Initials: Full names
Use initials only for primary authors with the same name
Consecutive Citations by the Same Author
Show author name only once
Example: (Smith 1998, 1999)
Separate these citations with:
Don't change citations with suffixes
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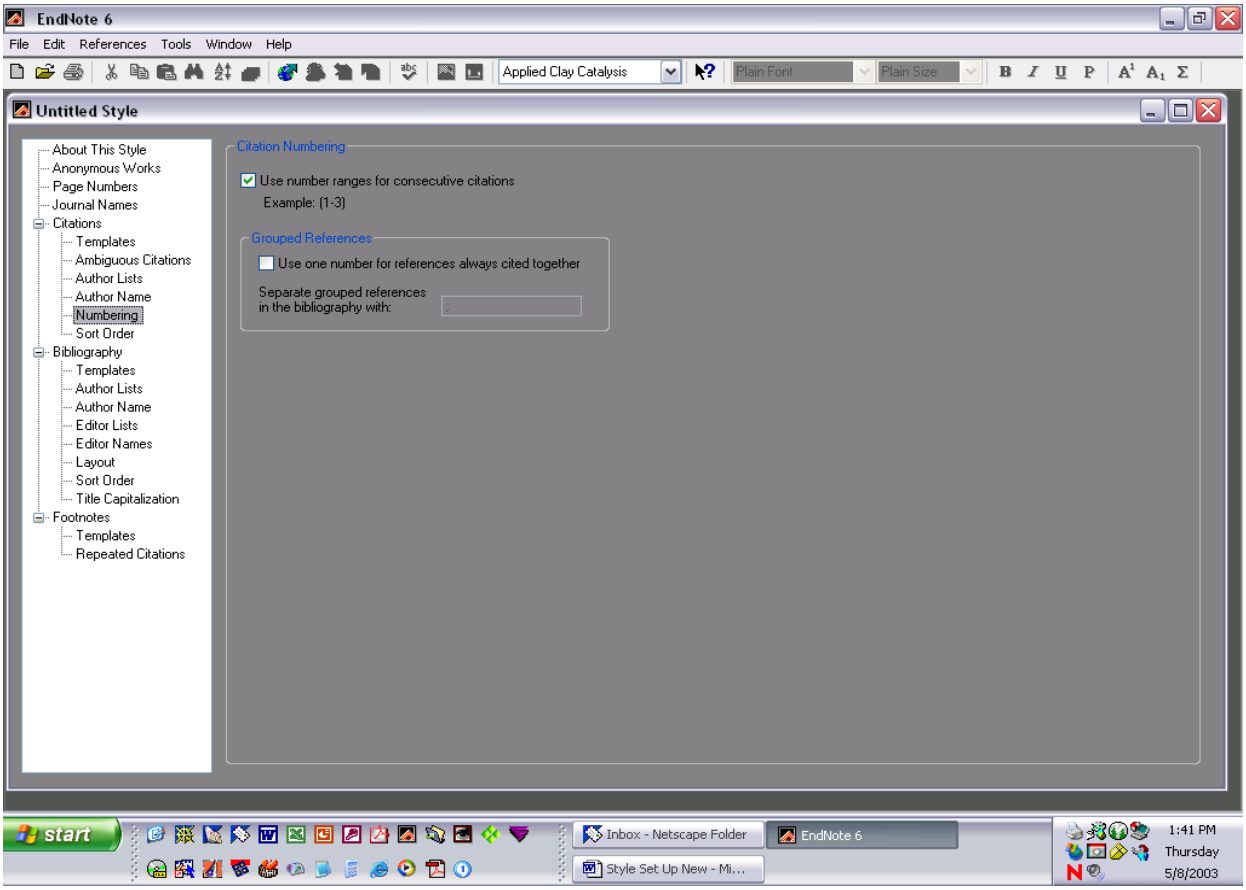
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Citation Numbering
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Example: (1-3)
Grouped References
Use one number for references always cited together
Separate grouped references
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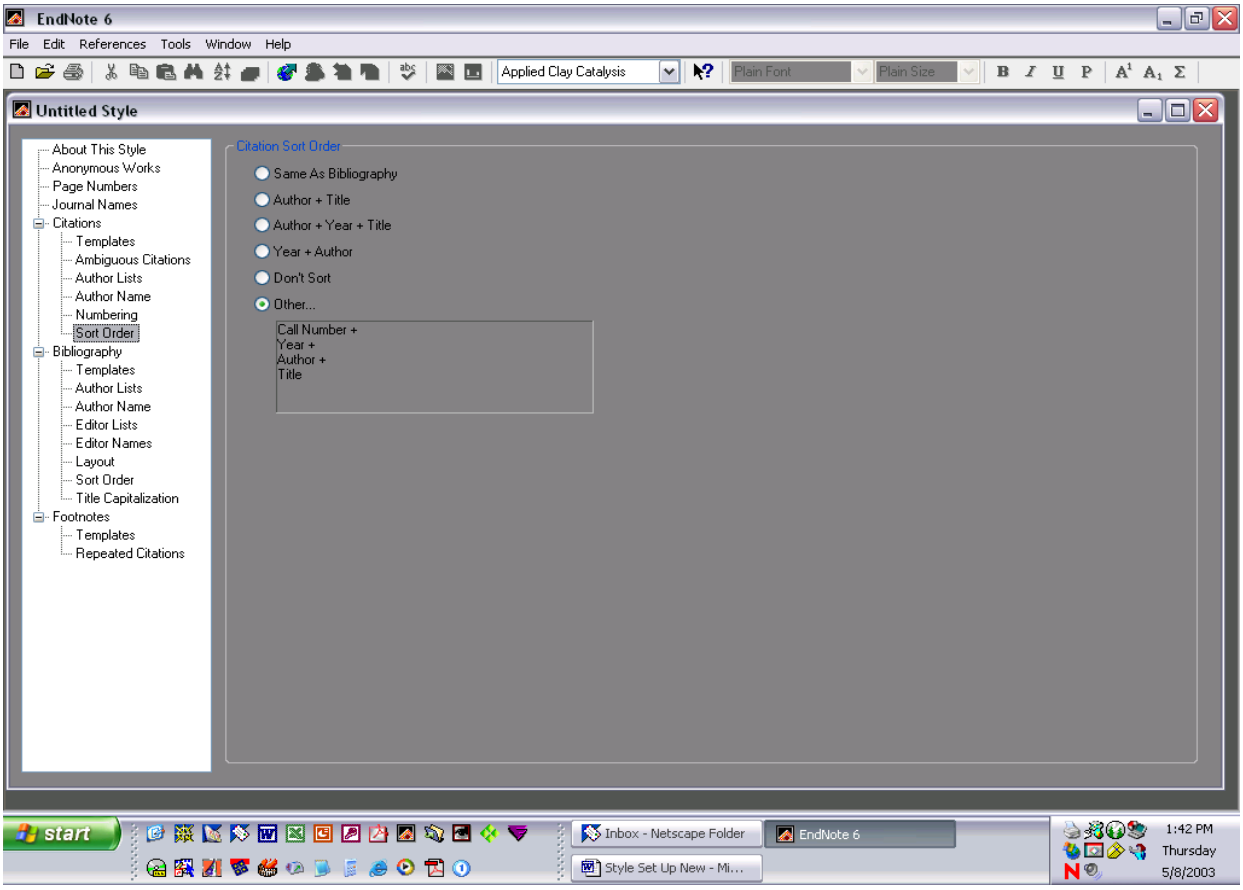
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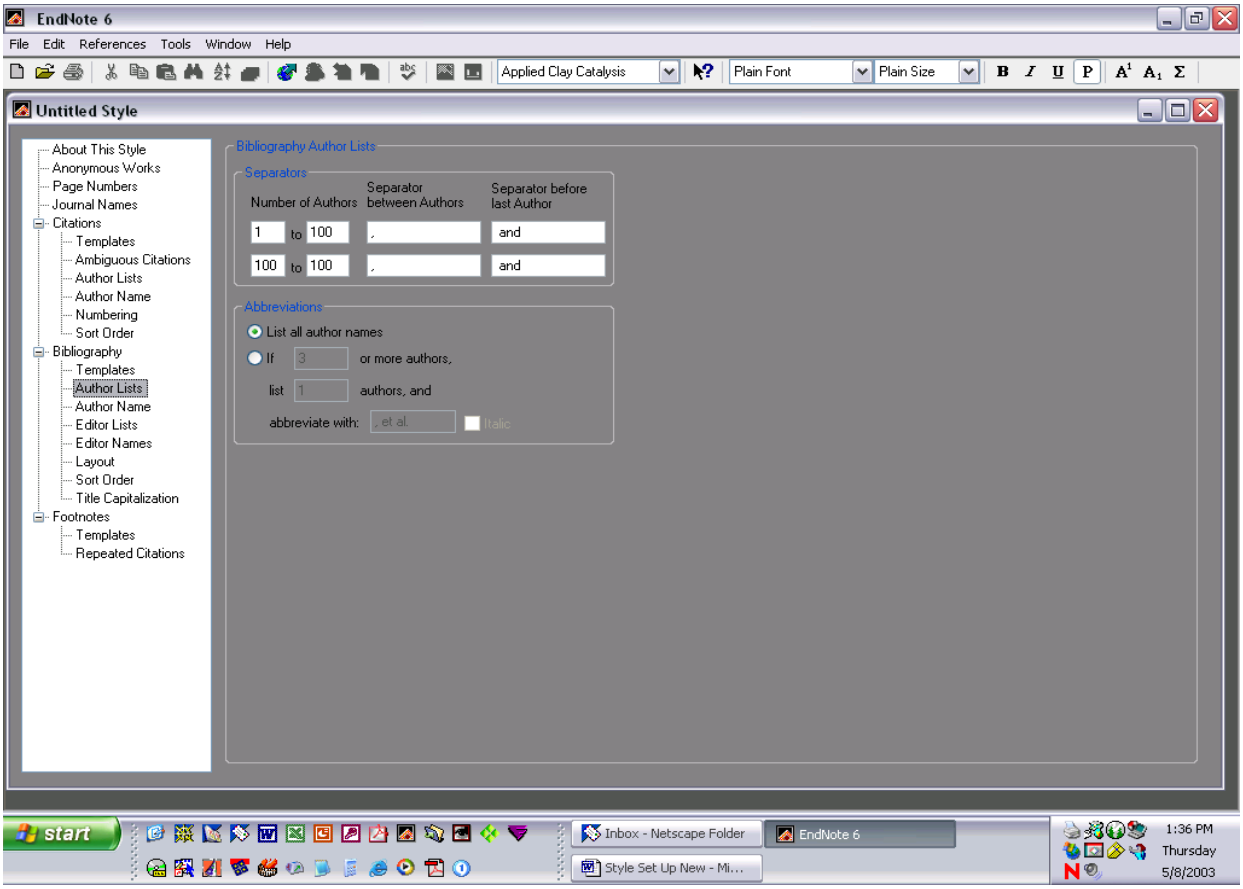
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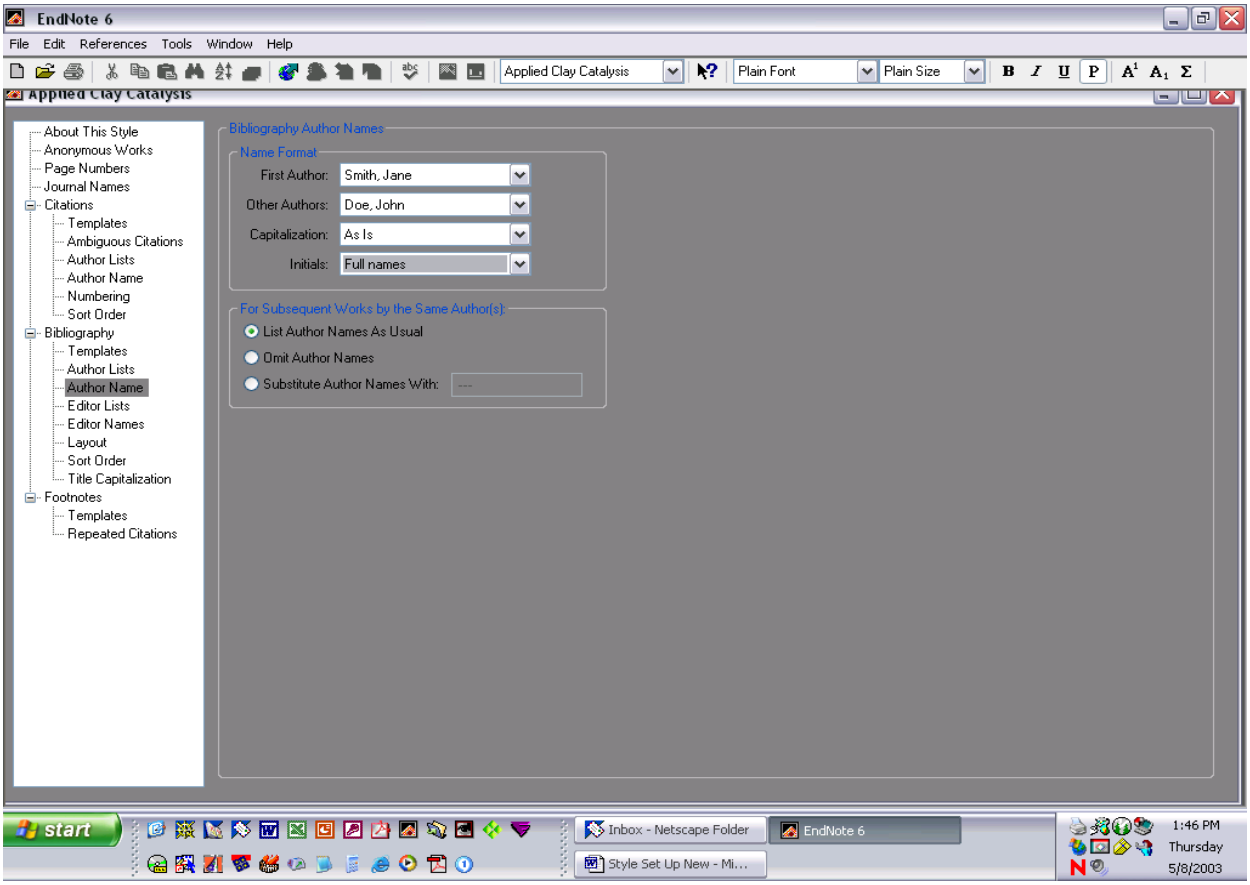
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Name Format
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Other Authors: Doe, John
Capitalization: As Is
Initials: Full names
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List Author Names As Usual
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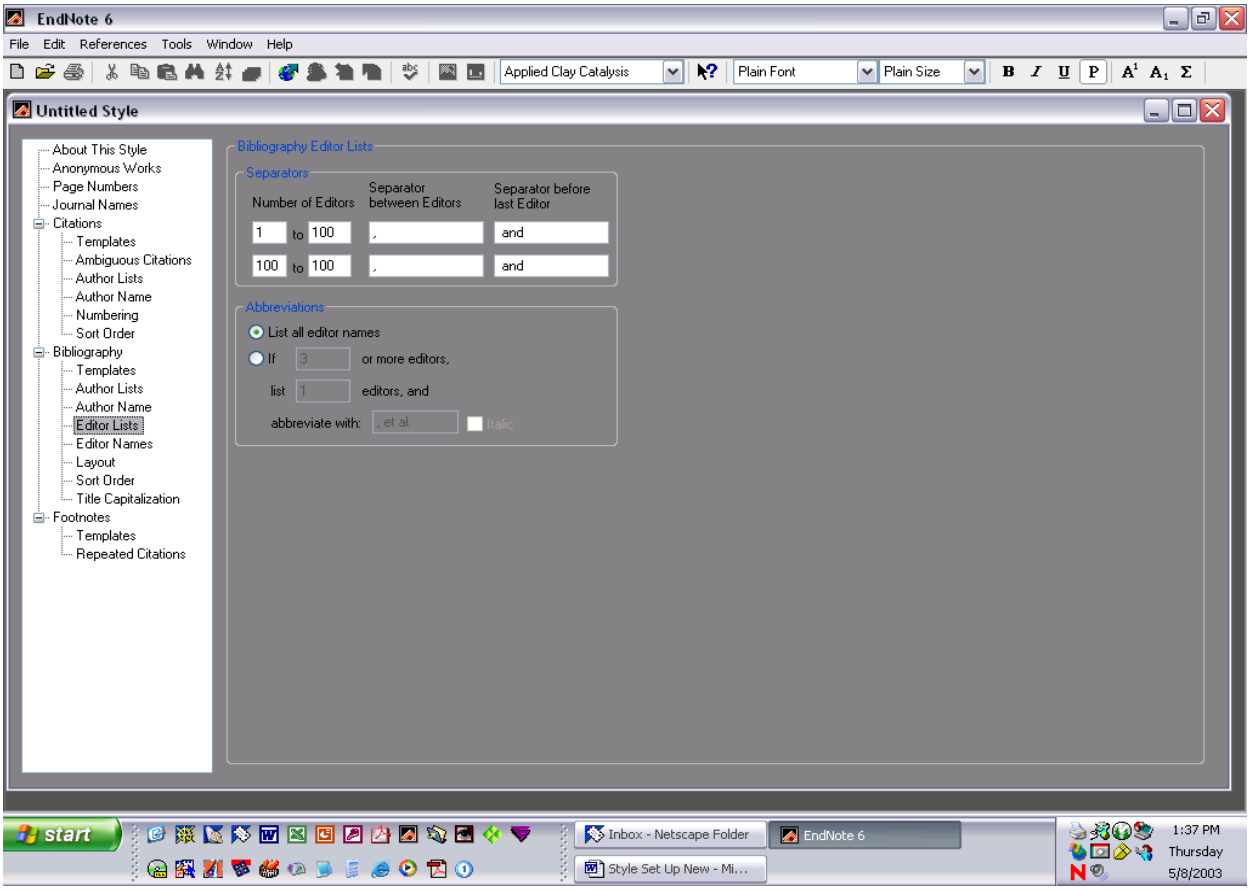
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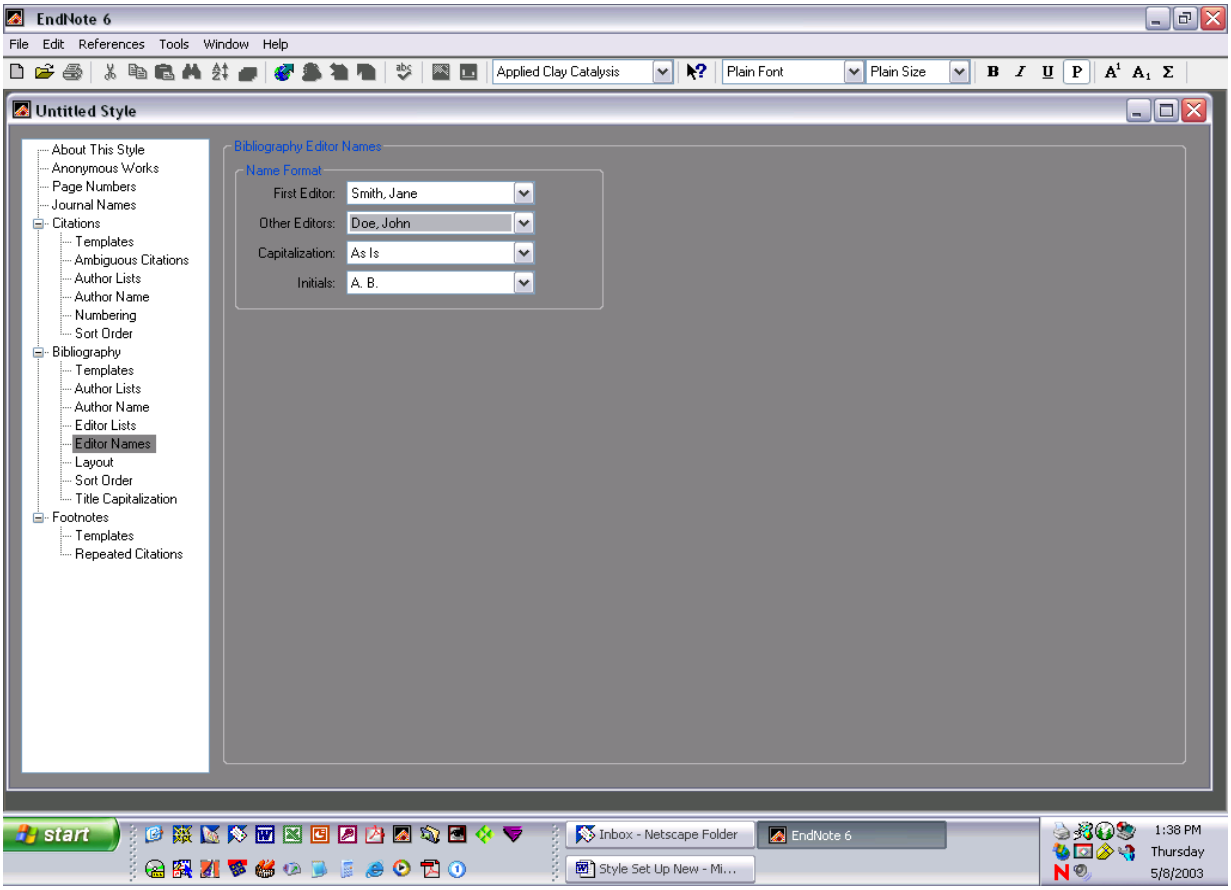
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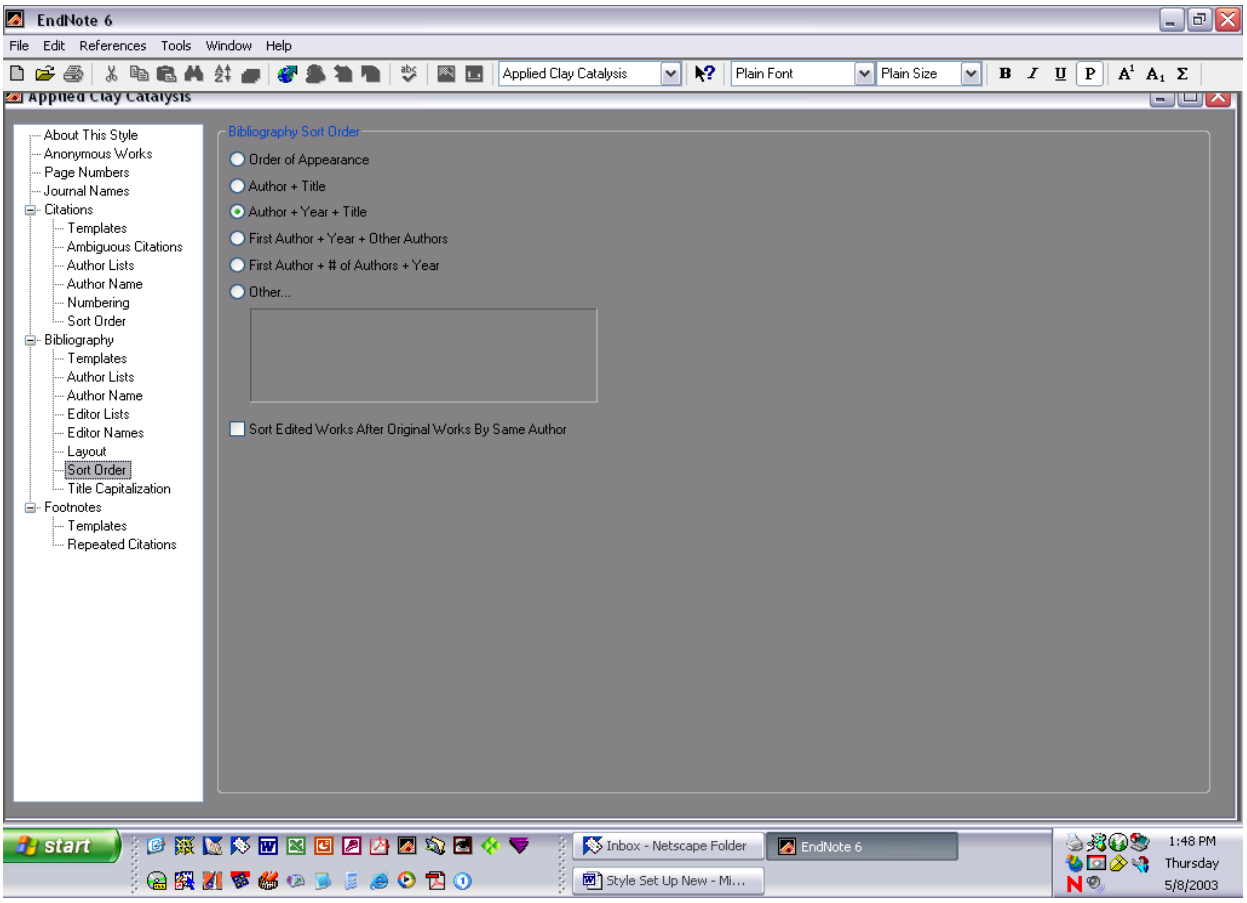
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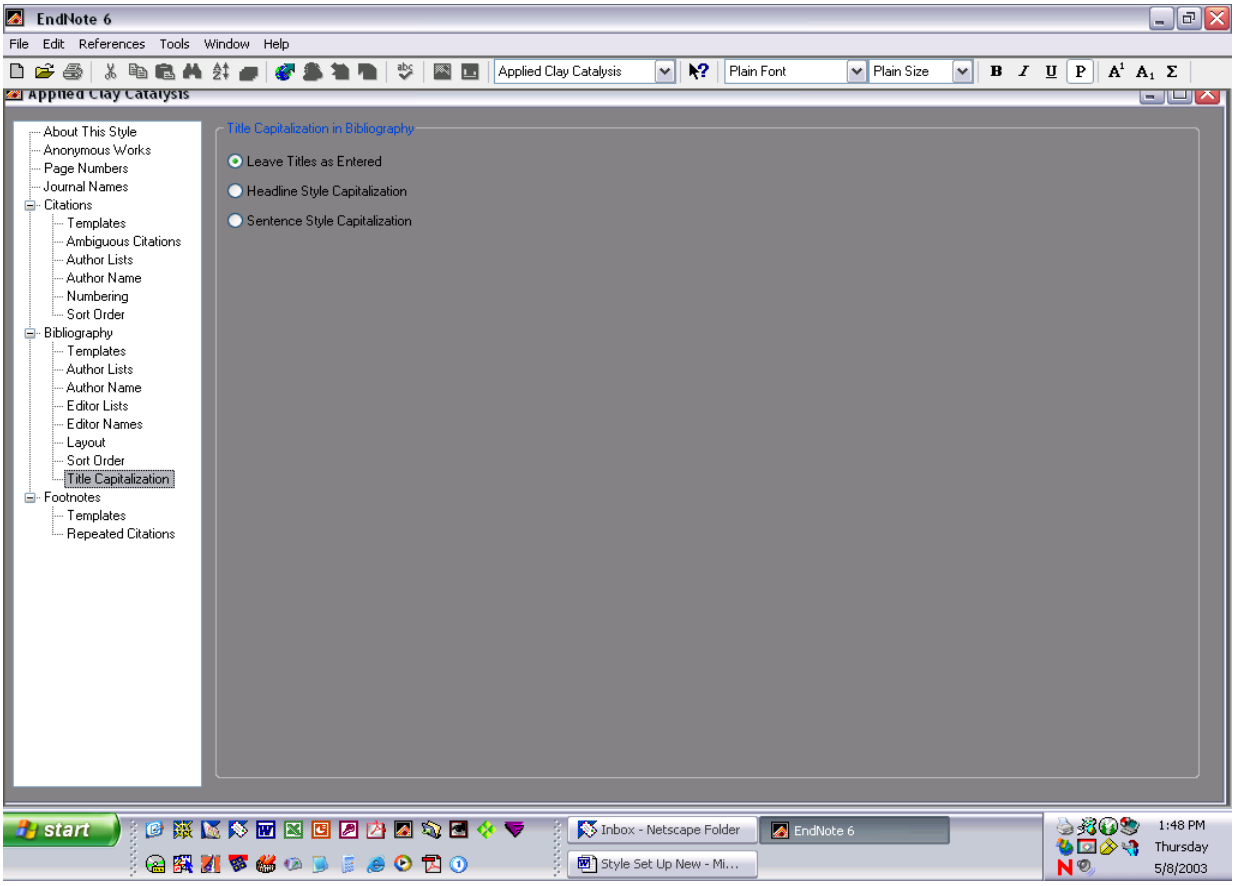
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IMPORTING FROM TEID

Instructions to download TEID citation(s):

For both PC and MAC go to TEID's website at
http://www-library.lbl.gov/teid/tmTeid/aboutus/TeidDefault.htm

PC

1. After you press the "Make Report" button you will get a list of records formatted for EndNote™.
2. Select the "File" menu. Within that select "Save As.."
3. Name the file and save as type: All Files (*.*)
4. Open your Notepad.
   (Click on "Start". Click on "Programs". Click on "Accessories". Select "Notepad".
5. Delete ALL HTML statements from the top starting with <HTML> ending with <PRE>
6. Delete ALL HTML statements from the bottom of file starting with </PRE> through </HTML>
7. Save and exit
8. Go to EndNote™
9. Choose Import (located under the File menu)
10. Click the Choose File and select your file.
11. Import Option: Select Tab-Delimited
12. Select Discard Duplicates (Duplicates)
13. . Text Translation: Select No Translation
14. Click Import

MAC

1. After you press the "Make Report" button you will get a list of records formatted for EndNote™.
2. Select the "File" menu. Within that select "Save As.."
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4. Open in Simple Text.
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6. Delete ALL HTML statements from the bottom of file starting with </PRE> through </HTML>
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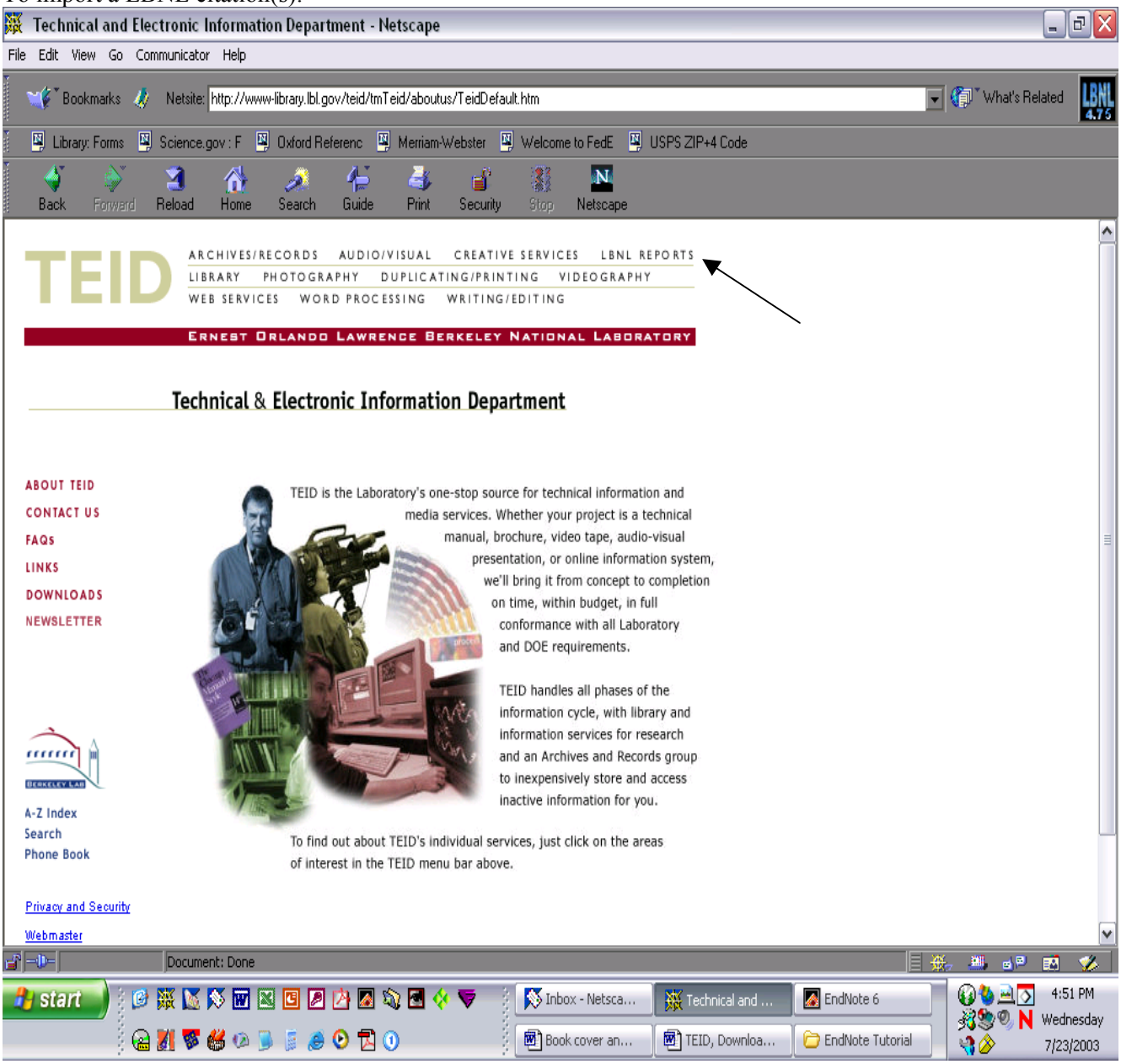
8. Go to EndNote™
9. Choose Import (located under the File menu)
10. Click the Choose File and select your file.
11. Import Option: Select Tab-Delimited
12. Select Discard Duplicates (Duplicates)
13. Text Translation: Select No Translation
14. Click Import

To import a LBNL citation(s):



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Forms

Report Coordination Forms

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Request a report number. It is not a substitute for submitting the document submission form along with a copy of the document.

When do I request a report number?

Request a Report Number for a Collaboration Form

This request for a report number is to be used if your paper has gone through document control procedures at another institution.

Document Submission Form

Submit a document for the first time to Report Coordination. In addition, you can place a print order and/or a reprint order.

Print Order Form

Document: Done

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Place an order for reprints from a publisher.

Authorize payment of page charges, color charges, abstract charges, manuscript submission charges, etc.

Pay an invoice for reprints, page charges, etc. or other services that were not ordered originally through the Library.

Division Reviewer Change Form

Departments/Programs/Groups Change Form

List of report numbers assigned to a division

Quick search using words from the title

Exceptions Report
Items not fully processed

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Submit your electronic document to Report Coordination via Netscape

Ernest Orlando Lawrence Berkeley National Laboratory

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Total Records in This Search: 1
Searched for: division_id='ESD' and alldnos has 'LBNL-48440'* and access_level < 2 order by doc_number

Report Number	Date Report Number Assigned	Date Submission Form Recvd by Rep Coord	Date Document Recvd by Rep Coord	Date Patent Cleared	Group	28	Title	Other Information
LBNL-48440	07/02/2001	07/23/2001	07/23/2001 [paper]	07/24/2001		journal article	Breakthroughs in field-scale bacterial transport	EOS; v.82; no.38; pp.417-425; 2001

Request Bibliographic List Creates a listing for you of the record(s) you have found.

Document: Done

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Create Your Own Records Listing - Netscape

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Create Your Own Records Listing

Select a bibliographic citation format to create a bibliographic listing. Then go to the "Make Report" button.

- Bibliographic citation format using Chicago Manual of Style -
  You do not get a choice about fields or sequence of fields.
- Bibliographic citation format using AIP Style Manual -
  You do not get a choice about fields or sequence of fields.
- EndNote Format - formats records so they can be imported into EndNote.
  You do not get a choice about fields or sequence of fields.
  Read about EndNote Format.

Select a format from those shown below. Then select which fields you want and the sequence of those fields.

- Labeled fields format - This record listing is in FIELDNAME=VALUE format.
  For example: AUTHOR=Hawking, Stephen
  For example: TITLE=A Short History of Time
- Tabbed format - This record listing is in a tabbed format - a tab between each field.
  For example: Hawking, Stephen^A Short History of Time
- Comma-separated format - This record listing is in a comma separated format - a comma between each field. Each field is enclosed in double quotes.
  For example: "Hawking, Stephen","A Short History of Time"
- Column format - This record listing is in a table/column format
  For example: Report Number Date Assigned Date Received Title

Document: Done

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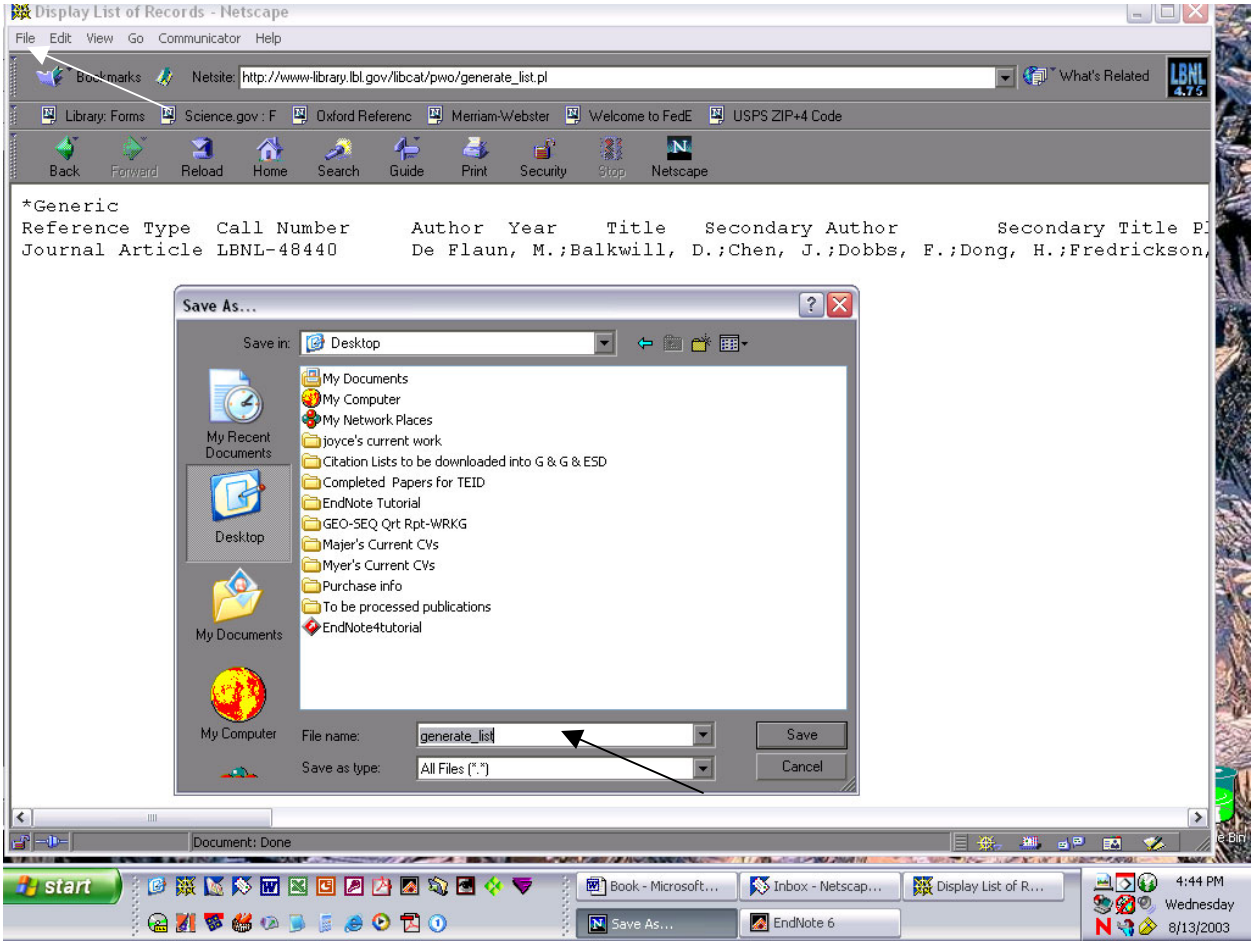
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*Generic
Reference Type Call Number Author Year Title Secondary Author Secondary Title P
Journal Article LBNL-48440 De Flaun, M.;Balkwill, D.;Chen, J.;Dobbs, F.;Dong, H.;Fredrickson,
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Save in: Desktop
My Documents
My Computer
My Network Places
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Citation Lists to be downloaded into G & G & ESD
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My Documents
My Computer
File name: generate_list
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Save As...
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generate_list - Notepad

File Edit Format View Help

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</HEAD>
<BODY BGCOLOR="#FFFFFF" LINK="#06117F" VLINK="#046664" ALINK="7F0523">
<PRE>
*Generic
Reference Type  Call Number     Author  Year    Title   Secondary Author        Secondary Title Place Published Publisher
Journal Article LBNL-48440      De Flaun, M.;Balkwill, D.;Chen, J.;Dobbs, F.;Dong, H.;Fredrickson, J.;Fuller, M.;Green, M
</PRE>
</BODY>
</HTML>
```

start

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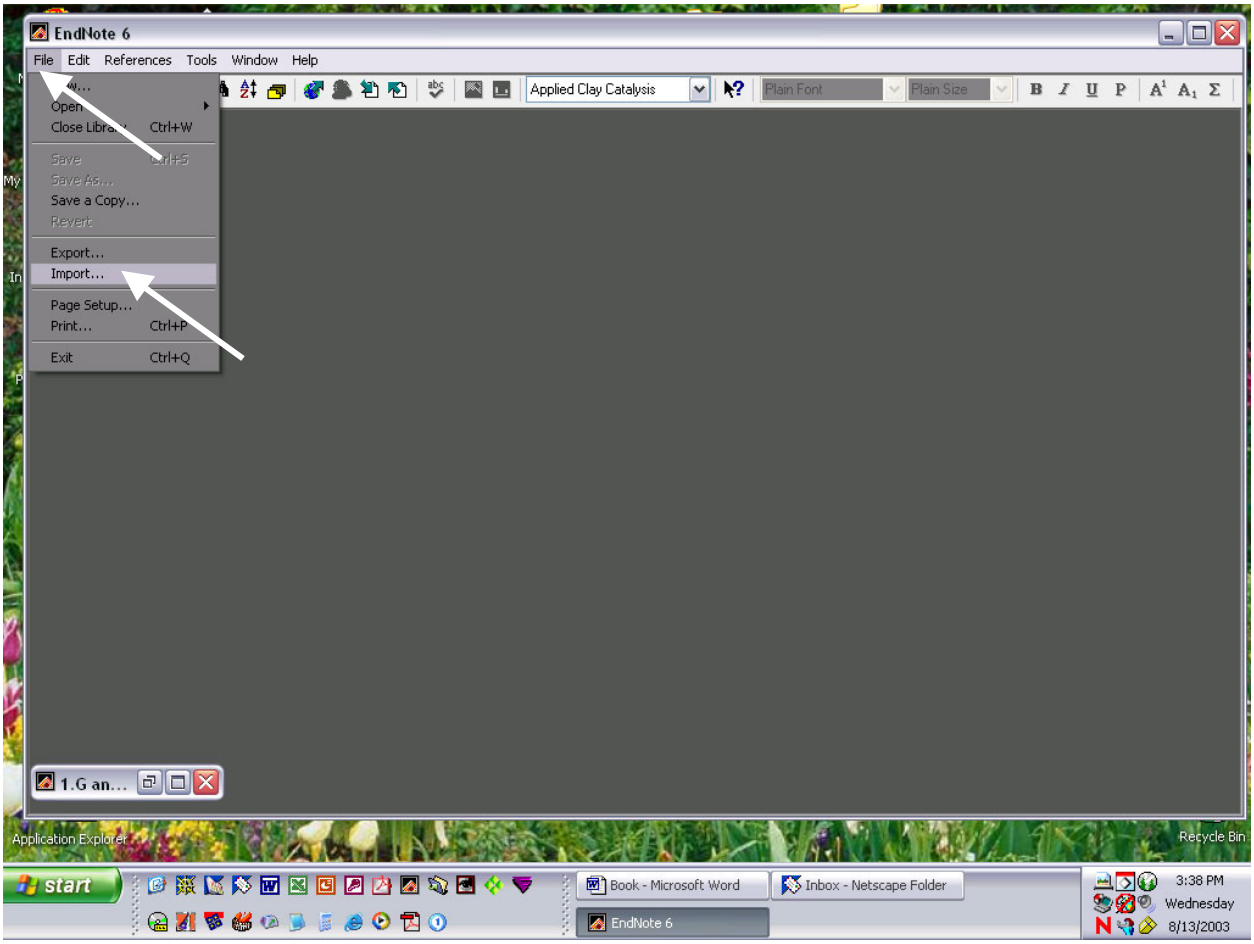
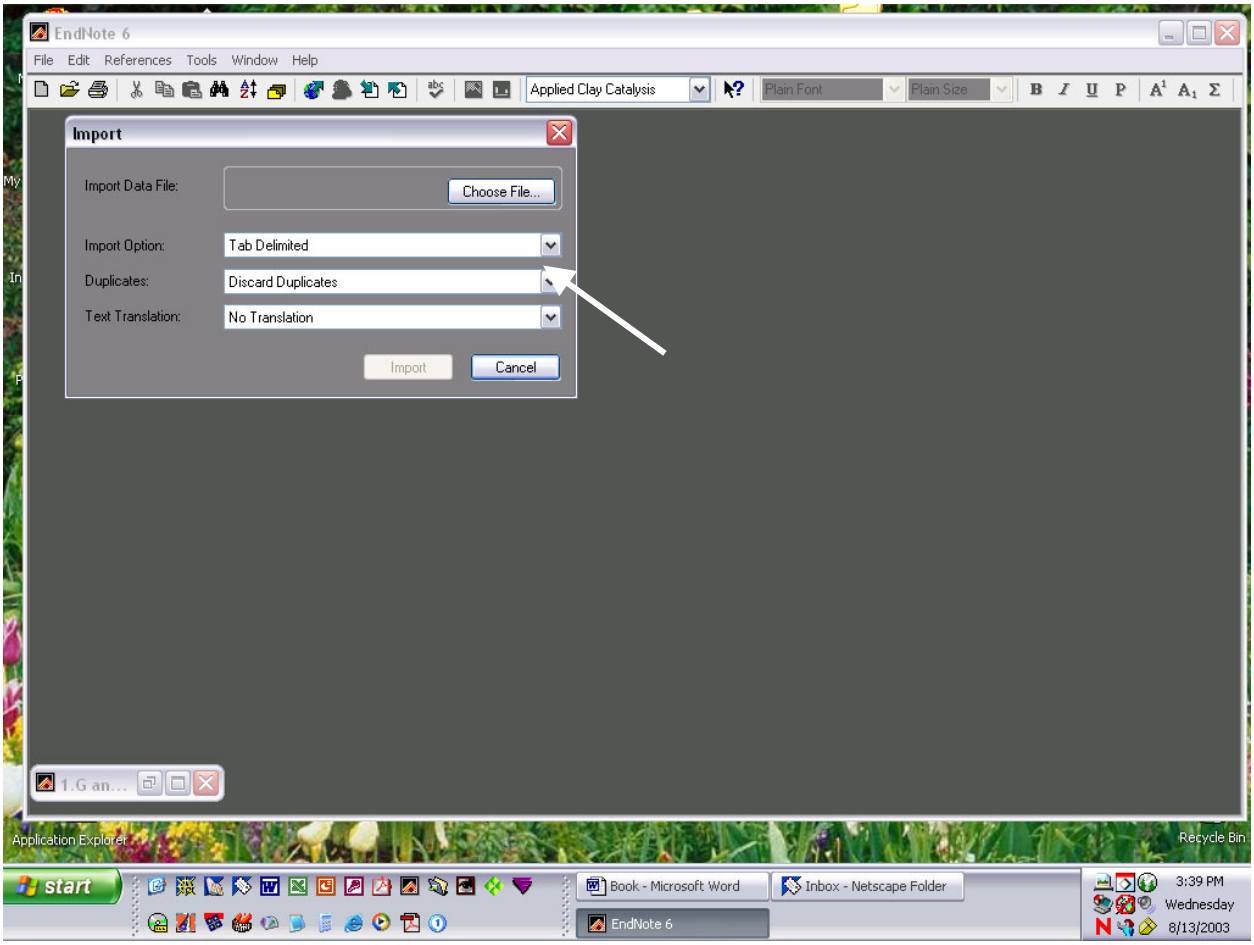
To import the citation(s) into your library go to:

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Choose File...
Import Option:
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IMPORTING FROM OUTSIDE LIBRARIES THROUGH TEID OR DIRECTLY FROM EndNote™

TO IMPORT DIRECTLY TO ENDNOTE™

- Open EndNote™
- Choose TOOLS, choose CONNECT then Connect. This menu allows you to choose a connection protocol for using Databases that allow direct connection.
- Enter name and click SEARCH Button, this works just like you were searching a library only in this case you are searching an online database.
- A window will come up with a display of how many references were found. If there are too many then you can close this window and refine your search criteria until you get an appropriate number (Note: when you tell it to go ahead it will download all of those references into a temporary library for you to peruse, 100's of references could take quite a bit of time).
- A window will display the references; you can highlight and drag one or more references to your permanent Library or click on COPY REFERENCES TO drop down menu to put the references in different libraries.
- Currently INSPEC, PUBMED, University of California (MELVYL), Library of Congress, NOAA, NIH can all be accessed directly from LBNL.

TO IMPORT FROM THE LBNL LIBRARY

- Choose LIBRARY; choose CATALOGS, located on left hand side of screen, and click.

- Use the same procedures for MELVYL, INSPEC, and PubMed Catalogs:
  - Click on MELVYL
  - Choose MELVYL from the drop down list
  - Click on AUTHOR
  - Type in name (last name, first initial space middle initial)
  - Scroll to bottom of the page and click on SUBMIT SEARCH
  - Under SUGGESTED ACTION, click on DISPLAY
  - Scroll down and choose the citations you want to download and click on DOWNLOAD
  - If you didn't select particular citation(s) you will have another chance by either clicking on DOWNLOAD ALL or the second line where you can designate i.e. 1-30.
  - Go to CITATION FORMAT and use the scroll down message and use TAGS LONG

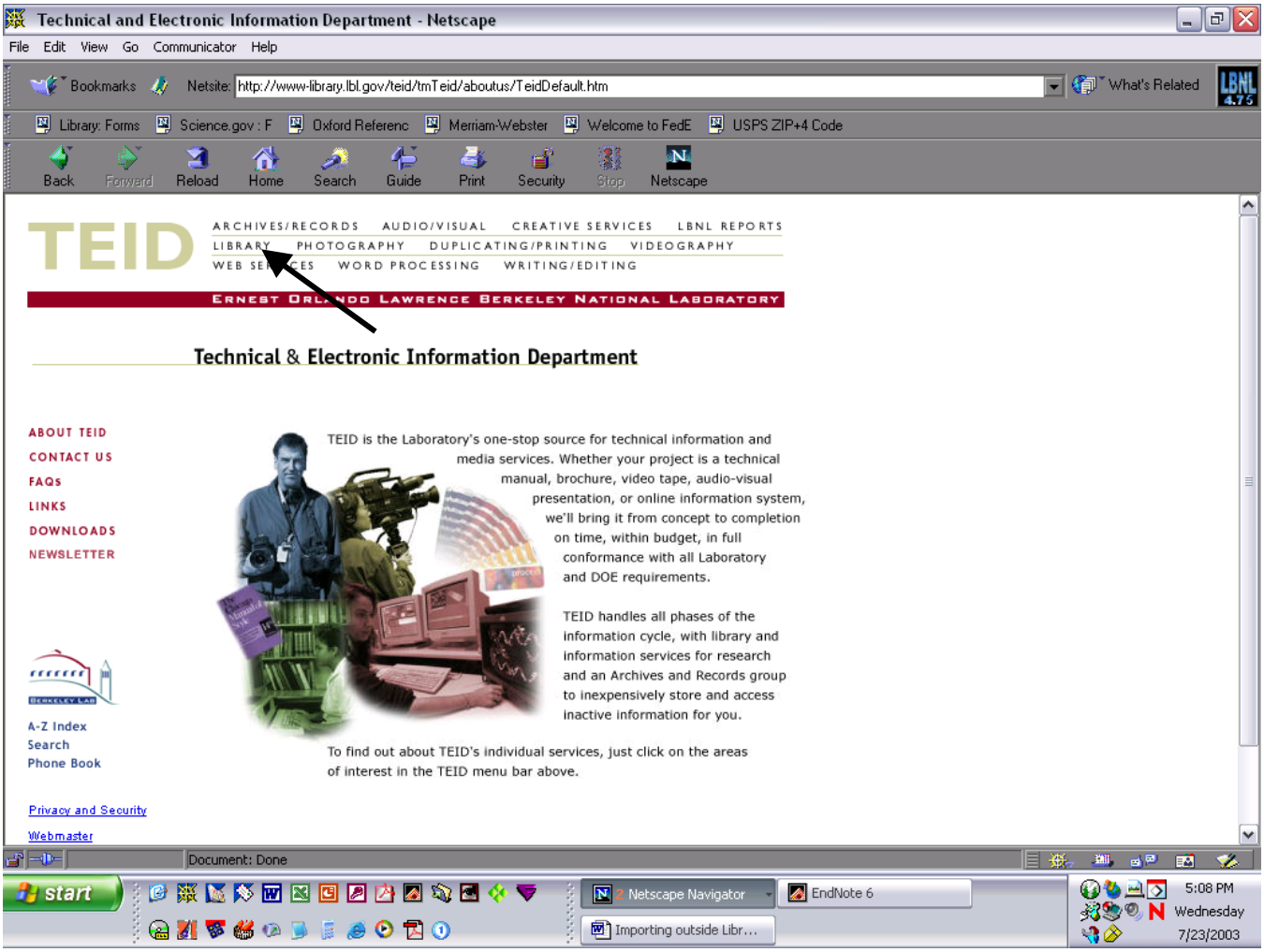
  Click on DOWNLOAD NOW, designate where on your computer you want the info downloaded

- Open EndNote™ and choose the designated Library.
  - FILE, open IMPORT
  - In IMPORT OPTIONS choose LIBRARY CATALOG (CDL)
  - CHOOSE FILE and click on IMPORT

- Use the same procedures for CURRENT CONTENTS and BIOSIS PREVIEWS catalogs
  - Click on CURRENT CONTENTS
    Do Search for example: Click on AUTHOR Enter AUTHOR'S LAST NAME SPACE and FIRST INITIAL space and MIDDLE INITIAL
  - Click on PERFORM SEARCH
  - Go down the index entries and choose
  - Click on PERFORM SEARCH
  - Click on DISPLAY
  - Decide which or if all citations you want to download
  - Scroll to the bottom of the page
  - First column CITATIONS, choose appropriate citation request
  - Second column FIELDS, choose appropriate field (recommend Complete Reference)

- Third column CITATION FORMAT, choose **Direct Export**
- Fourth column ACTION, choose SAVE
- The program will ask you where you want to save the file. You will need to locate the appropriate EndNote™ Library, double click and the information is loaded into your EndNote™. With a Mac and Netscape you have to tell it to save to an application and then select the EndNote™ application in the Applications folder. It will then ask you for the library to use.

Go to: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UC Journals - Select "Periodicals Titles" from the drop down menu at the MELVYL site.
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The Library has arranged for site licenses to many electronic journals. You can determine which titles are available to Lab employees by going to the Library's journal page. You will need to have a copy of the Adobe Acrobat Reader installed on your browser to read the articles.
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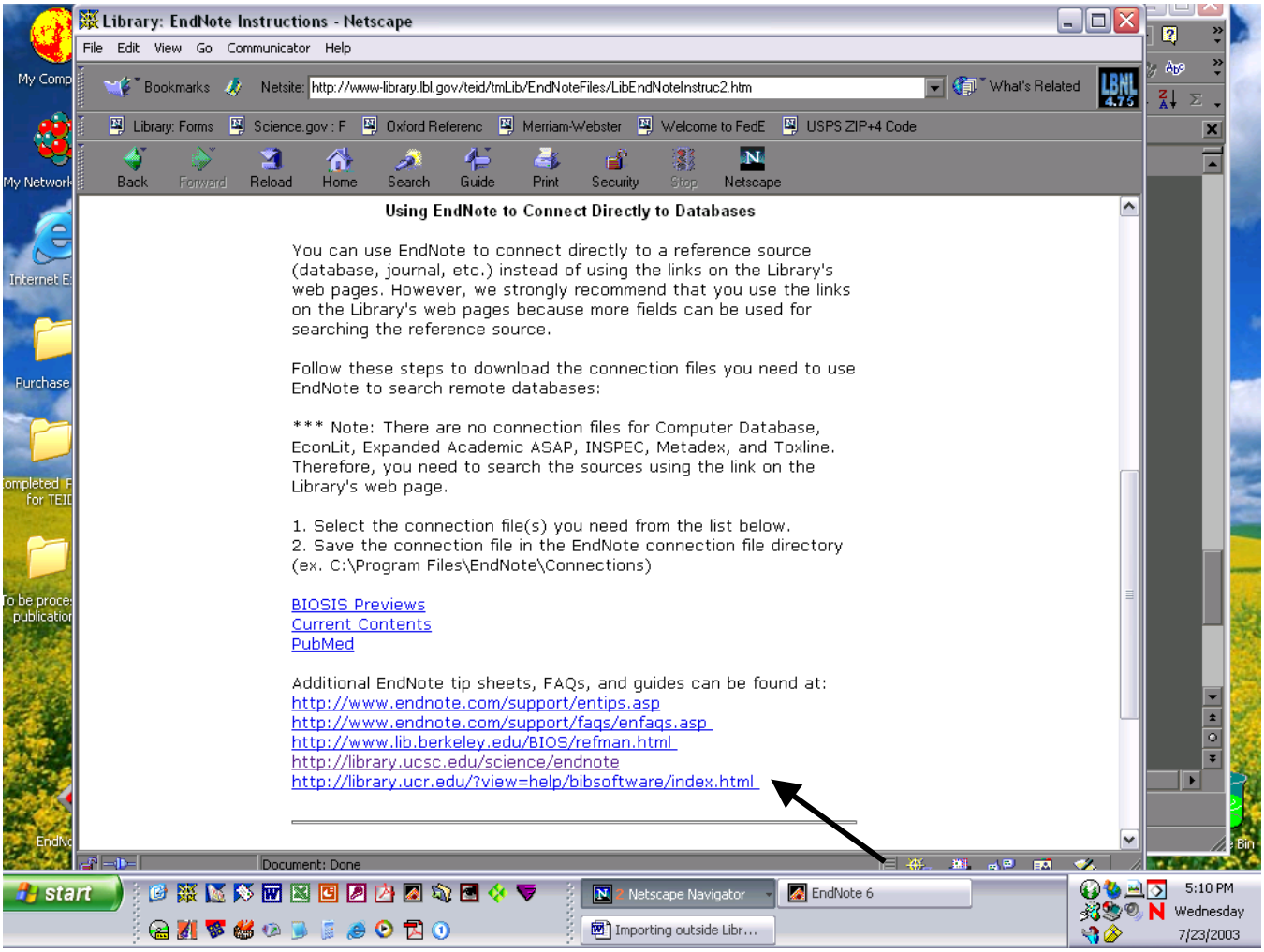
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You can use EndNote to connect directly to a reference source (database, journal, etc.) instead of using the links on the Library's web pages. However, we strongly recommend that you use the links on the Library's web pages because more fields can be used for searching the reference source.
Follow these steps to download the connection files you need to use EndNote to search remote databases:
*** Note: There are no connection files for Computer Database, EconLit, Expanded Academic ASAP, INSPEC, Metadex, and Toxline. Therefore, you need to search the sources using the link on the Library's web page.
1. Select the connection file(s) you need from the list below.
2. Save the connection file in the EndNote connection file directory (ex. C:\Program Files\EndNote\Connections)
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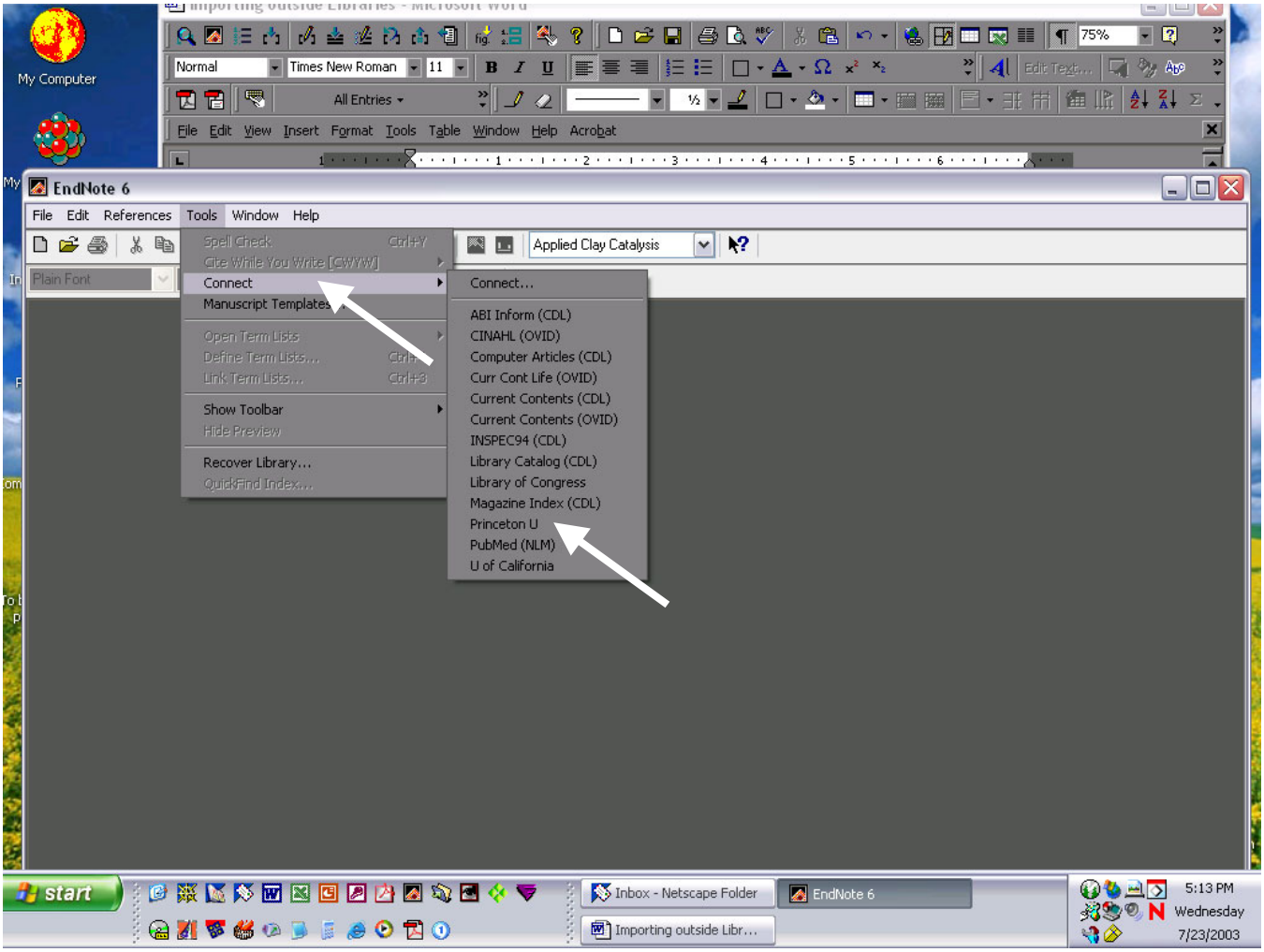

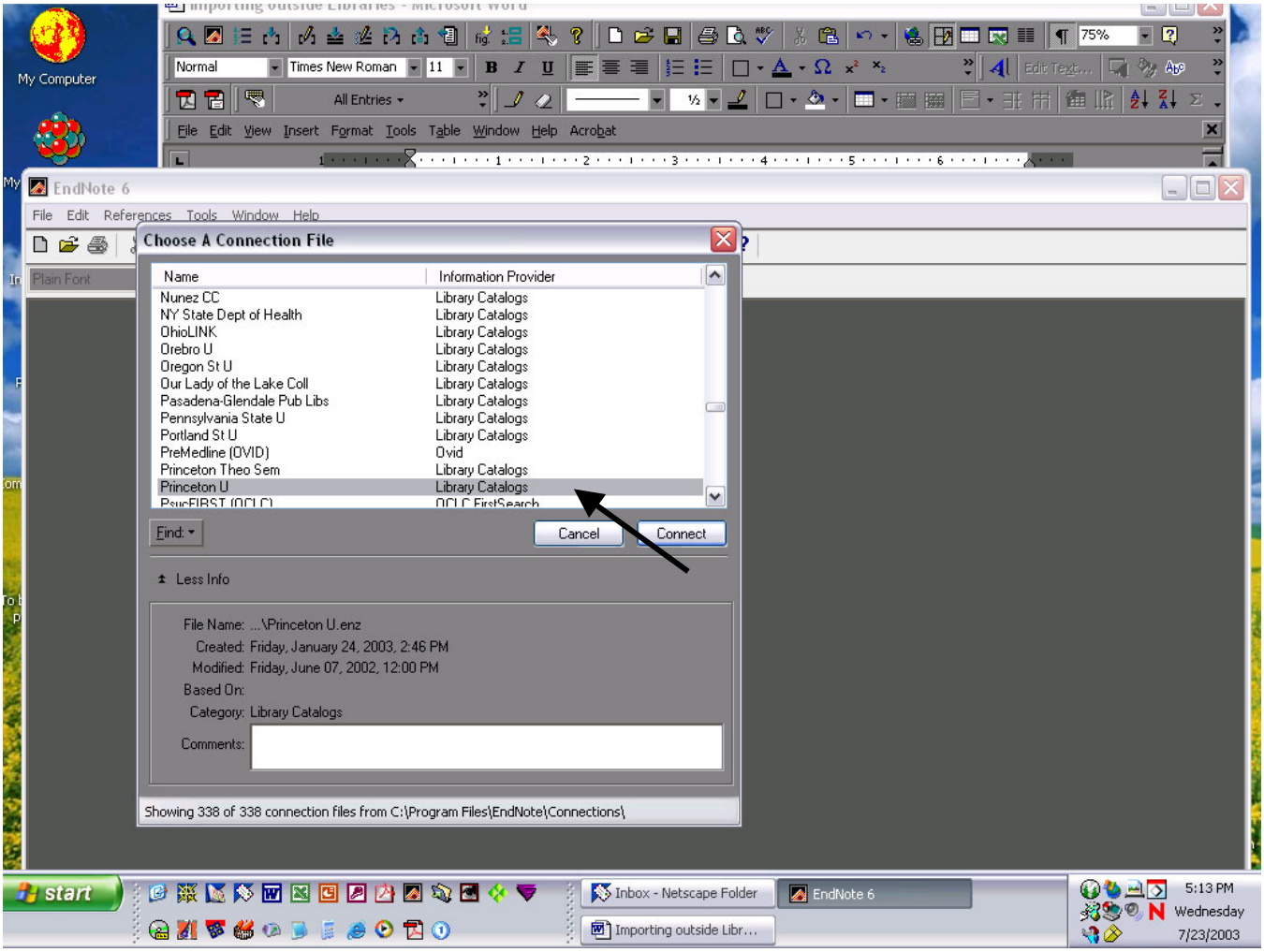
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