Using EndNote Online: health

1.   Registration & Access

1a.   Registering with EndNote Online

- **System and browser requirements**: if you are using your own device to access EndNote Online, check that your system and browser are compatible: http://www.myendnoteweb.com/help/ENW/hgs_requirements.htm

- **Go to the Library webpage**, 'Health: Search the Literature':
  https://library.bath.ac.uk/health/literature-search

  If you are registering from an **off-campus** location, you need to connect to the library website using a UniDesk connection. Instructions for setting up UniDesk are available at:
  http://www.bath.ac.uk/guides/working-from-any-location-with-your-own-device/

- Once you have entered Web of Science, click **sign-in** and then **register** (top right of screen). Enter your University of Bath email address. **Do not** enter any other address, and **do not** register via Facebook or LinkedIn (this can cause problems e.g. no access to Harvard Bath). Click 'continue'.
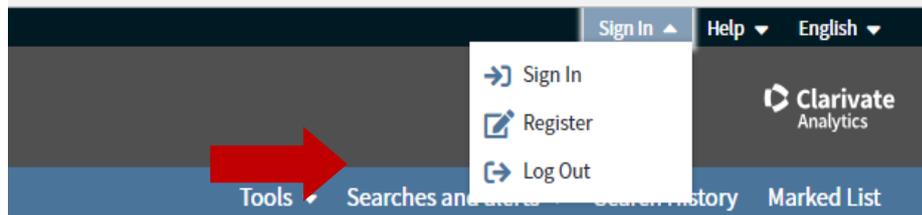
- As part of the registration process, an email is sent to your University of Bath account – the email will contain a code that you will need to paste into your registration box. You may find the email in your **junk folder** or 'other' folder (rather than 'focused' folder in Outlook).

  When completing the registration form, **follow the exact requirements** for creating your password e.g. only select symbols that appear in the list of approved symbols.

1b. Accessing EndNote Online

- **Access EndNote Online** by visiting the Library website and then connecting to Web of Science (which is listed on the Health/Search the Literature page: https://library.bath.ac.uk/health/literature-search

- **Ensuring continued access throughout your studies:** if you connect to EndNote Online directly via Google, rather than Web of Science, you may find that after 12 months, you only have access to "EndNote Basic" which offers less functionality (e.g. fewer referencing style options and a limit of 50,000 references).

- **After you have completed your studies at the University of Bath:** you retain access to the full version of EndNote online until 12 months have passed (at which point, you will be able to access 'EndNote Basic' which stores up to 50,000 of your references).

## 2.   Collecting and organising references in EndNote Online

2a.   Transferring results: **Web of Science** into EndNote Online

- **Access EndNote Online**: refer to 1b for important instructions.

- **Search for articles in Web of Science** on a topic of your choice. To use multiple search boxes (i.e. one box per theme), click '+ add another field'**.** You may want to re-sort your search results in order of relevance.
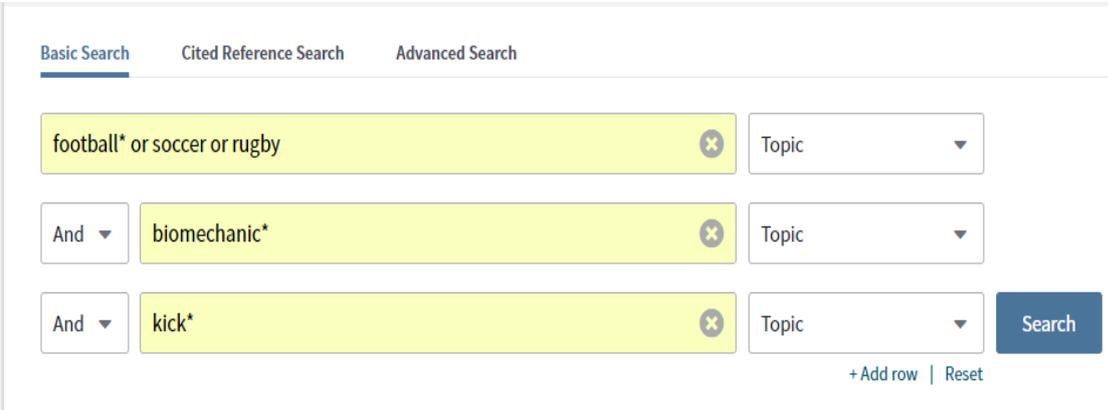
- **Select the individual references** that you wish to transfer to EndNote Online by ticking the box next to each relevant search result. For the purposes of this exercise, note down an author's name from two of your references.

- Click **Export** above the results and then select **EndNote Online**. Enter your EndNote Online username and password on request.
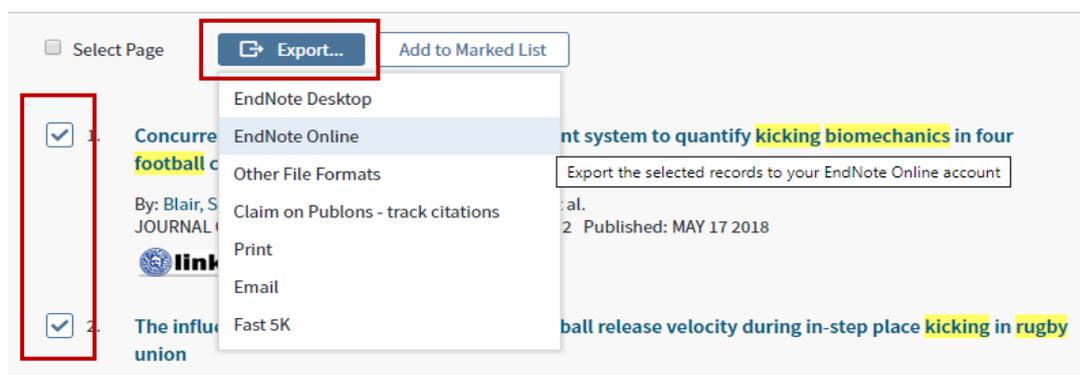
A dialog box appears (you can opt to include abstracts). Click **Export**. Once the references have transferred, a confirmation will appear.

Export Records to EndNote Online

⦿ You have selected 2 results for export

○ All records on page

○ Records from: `1` to `323`

No more than 500 records at a time.

Record Content:

`Author, Title, Source` ▾

Cancel **Export**

Other options for saving Web of Science results include emailing results (via an envelope icon) and saving them in HTML format (e.g. to a memory stick). It is best practice to **use multiple methods** rather than rely solely on one.

Selecting references across multiple pages of search results: after each page, click 'add to marked list' (located above the results). Then, click 'marked list' near the top right-hand corner of the screen. Another screen appears – this includes an option to 'save to EndNote Online'.

2b. Viewing and organising your results in EndNote Online

- Click the **EndNote** link at the top of Web of Science. Your results should have transferred to '**all my references**' or 'unfiled' (left-hand menu). Occasionally, you may find yourself waiting a little while for these to appear – you may need to refresh the screen in order to activate their appearance. Alternatively, sign-out and then back into EndNote Online.

    Note: you can click the blue & white 'Links' icon: to check whether or not the full article is available to you.

- **Organising your references by theme or piece of work**: you can opt to select/tick individual references and then click 'add to group' followed by 'new group'. Then enter a name for the group and click OK. The group name will appear in the left-hand menu.

- Also note: you can also select individual references that you no longer require and then click the 'delete' button in EndNote Online. Deleted references are sent to the 'trash' folder in the left-hand column. You can opt to 'empty' your trash but it is advisable not to do that.

2c. Transferring references: **PubMed** into EndNote Online

- In PubMed (as with many other databases), you have to use a more indirect method to transfer selected references to EndNote Online. **Connect to PubMed** using a link in the library website and search for articles on a topic of your choice (click the advanced search option). Select/tick the boxes next to any individual results of interest. Then click 'Send to' button, followed by 'citation manager'.

- Click '**create file**'.
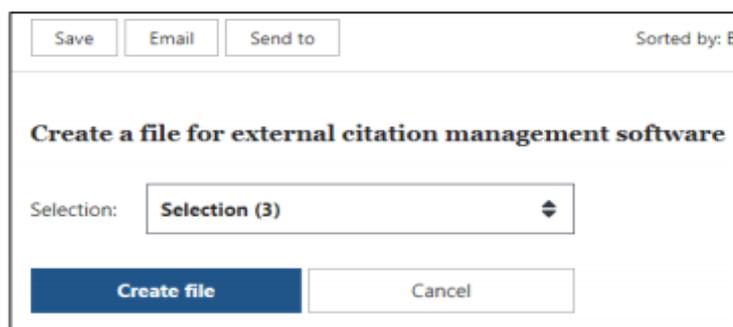
- Depending your internet browser, either the file will appear automatically in your 'downloads' folder, or a 'save' option will appear (requiring you to save the file to a location of your choice e.g. to 'documents' or a USB).

  Note: There are two versions of EndNote, online and desktop. If you open the file instead of saving it, and you are also using the desktop version (e.g. available on the University's public access PCs), you will open the desktop version.

- Open EndNote Online. Click Collect & then 'Import References'.
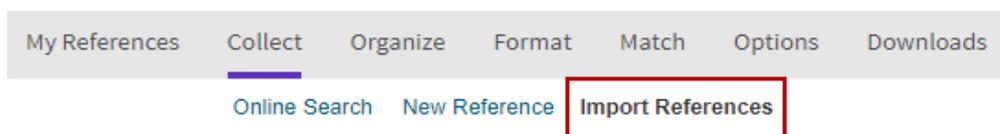
  Click **browse** to locate the file of results that you saved.

- Click the **Import option** menu and select 'PubMed (NLM). If it is not listed, click 'select favourites' and select it from the longer list. Finally click 'Copy to Favorites' and select PubMed (NLM) from 'favorites'.

  The 'to' option: either select an existing group of references or create a new group. Click 'import'.

2d.   Transferring references from other resources

Instructions for downloading references from the following resources are available at: hhttps://www.bath.ac.uk/guides/how-to-use-endnote-online-library-guides-part-2-downloading-database-references/

- **Google Scholar**
- The Library Catalogue
- A large range of databases not covered in this guide

3.   Citing & referencing while you write

3a.   Displaying the EndNote toolbar and signing-in

- Open Word. The final tab may already be set up as 'EndNote - if so, click this tab to open it.
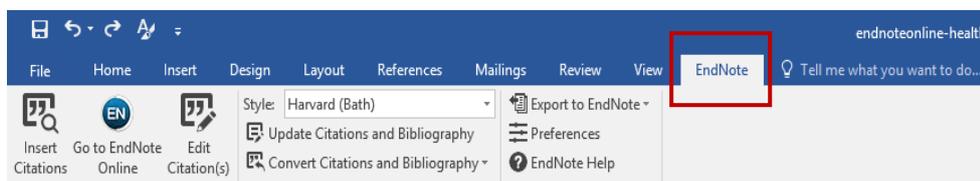
- If the EndNote **tab is not visible in Word** and you are **using a University PC on-campus**, try another University PC or contact Computing Services (include the ID number of the PC in your enquiry): https://bath.topdesk.net/tas/public/ssp/

- If the EndNote **tab is not visible in Word** and you are **using your own device,** connect to EndNote Online (via the Web of Science link in the Library website). Then, follow these instructions:

    i.   Click the '**format**' tab. Then click the '**Cite While You Write' plugin**. You may need to check the instruction and system requirements provided via links on the same screen.

    ii. Click either the link to the Windows or Macintosh file to download the tool bar.

If you are using a Mac, you will then need to double-click the file in your device's 'downloads' folder and then follow the instructions provided.

iii. Open Word to view the EndNote tab. If it is **still** not displaying in Word and you are using a Windows devices, click File > Options > Customize Ribbon. Then, select the EndNote option in the second menu and click OK. Both Mac and Windows user can contact the provider, Clarivate, if problems persist: https://support.clarivate.com/s/

- **Once the EndNote tab is visible in Word**: open it and click '**preferences**' (right-hand side of the toolbar).
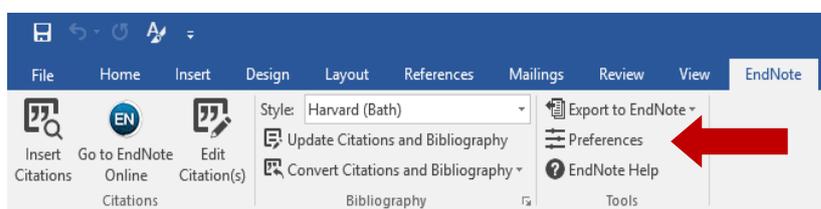
In the 'preferences' box, click the **application** tab. Select the EndNote Online option from the menu if it is not already visible.
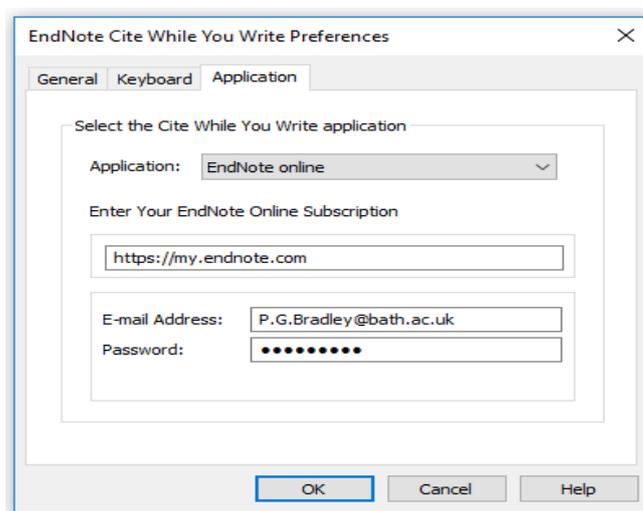
Enter your EndNote Online **email and password** (the one with which you registered). Click OK.

3b. Setting the required referencing style

In Word's EndNote tab, check that the required referencing style is selected in the 'style' menu. If it is not listed, click 'select another style' to find it.
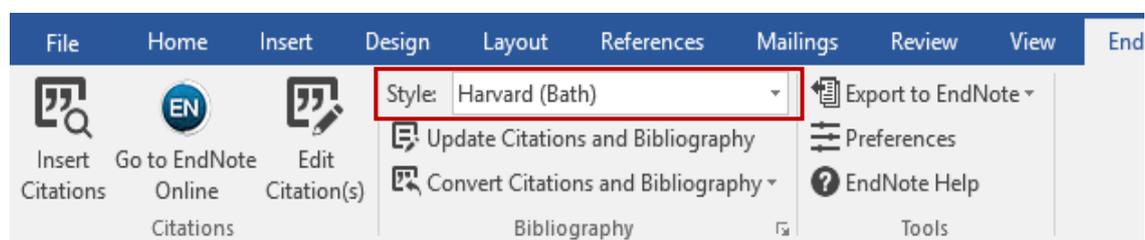
If the required referencing style is still unlisted:

- Open EndNote Online. Click the **format** tab and then click **bibliography** just below. From the 'references' options, select either 'all references in my Library' or a specific group.
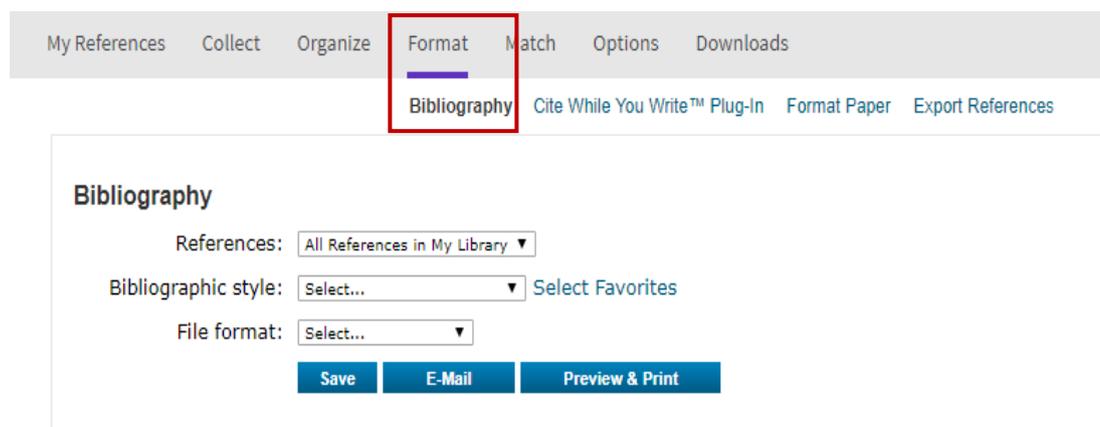
- Next, click 'select favourites' and scroll down the longer list of styles. Select the required style, click 'copy to favorites' and then select the style from your 'favorites' list. Finally, for the 'file format', select 'TXT' file type. Click 'save'. You may then need to refresh your screen.

- You may need to close Word and reopen it to view the updated style list.

3c.   Inserting citations

i.   **Type any sentence** into Word. Leave the cursor at the point where you require a citation to be entered. Click '**insert citations**' on the toolbar (the magnifying glass on the left).
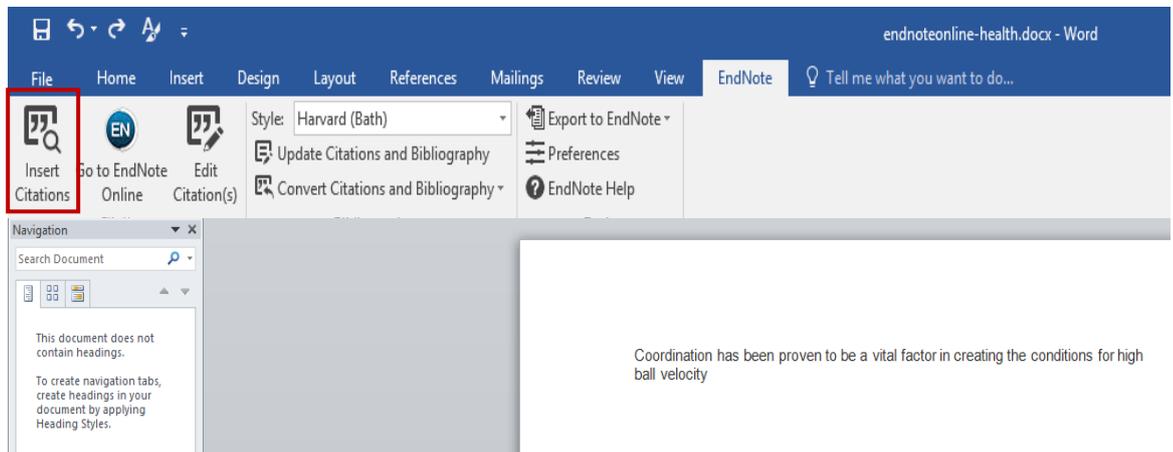
ii.   **Search for the author's name** of one of references that you transferred to EndNote Online from Web of Science.
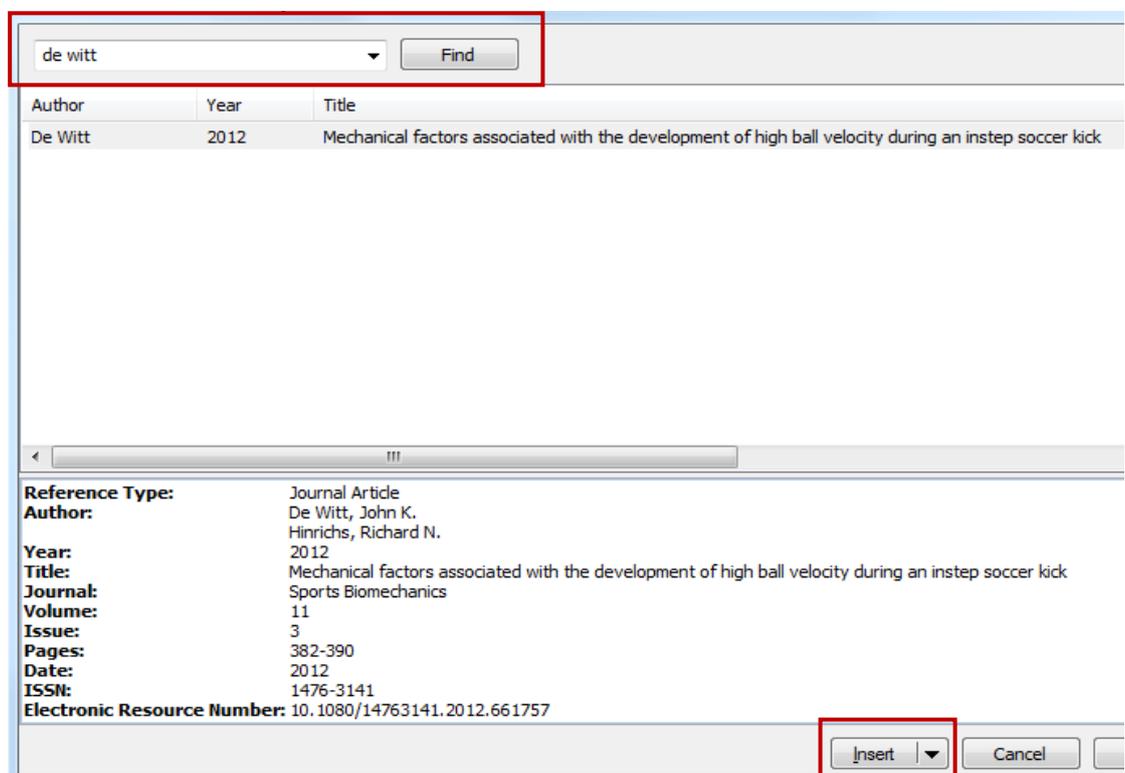
iii. Click **insert** (if there are multiple references to the author: select the correct one first). You should now see the author's name and the date of the paper appear as a citation within your writing. Simultaneously, a full reference should appear at the end of your writing.

....evaluated a range of studies that analysed the conditions that cause this injury (Dai et al., 2012)

Dai, B., Herman, D., Liu, H., Garrett, W.E. and Yu, B., 2012. Prevention of ACL Injury, Part I: Injury Characteristics, Risk Factors, and Loading Mechanism. *Research in Sports Medicine*, 20(3-4), pp.180-197.

iv. Type some further text. Then, repeat steps ii-iii above (but search for a different author's name). Note that a list of references will start to emerge – and in alphabetical order by author surname.

v. **Excluding the author from brackets**: note the options available via the **'insert'** drop-down menu (click the arrow). It is possible to insert the full reference but simultaneously exclude the author or year from the (bracketed) in-text citation. This enables you to vary your writing style i.e. it provides the option for you to manually enter the author name outside of the brackets.

4.   Manually amending a citation or reference

4a.   Adding page numbers to a citation

- Do **not** manually add the page numbers into your Word document. Instead, highlight the citation in your Word document and click the 'Edit Citation(s)' button within your EndNote toolbar.

- Enter the page number(s) in the **pages** field (do not enter "p" or "pp"). Then, click OK.

  If this does not work, instead try entering the following in the **suffix** field. Leave a space and then enter the page(s). For example, enter p.4 or pp.4-5 (do not add a full stop). Then, click OK.

4b.   Removing authors from brackets in a citation

- Do **not** manually delete the authors in your Word document. Instead, highlight the relevant citation and click the 'edit citation(s)' button within your EndNote toolbar.
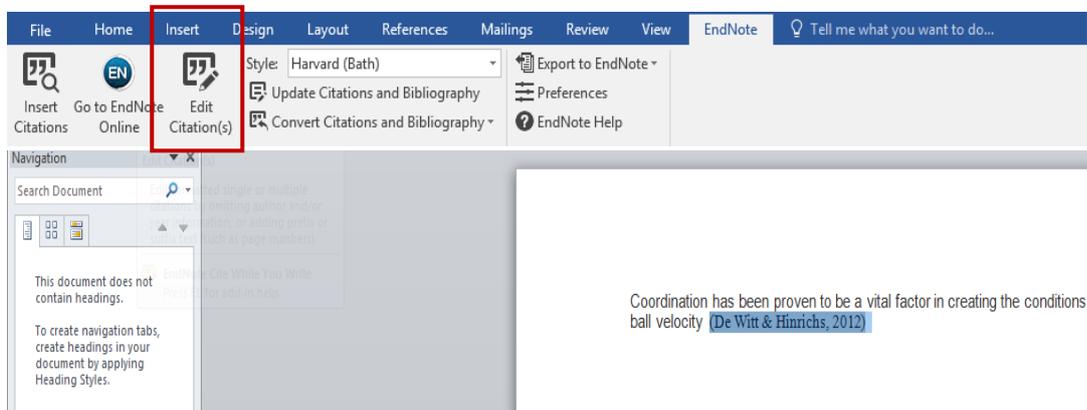
- A dialog box will appear. In the 'edit citations' section of the box, click 'exclude author'. Then, click OK. You can now manually enter the author surname(s) manually outside of the brackets and the full reference should still include the author surname(s).
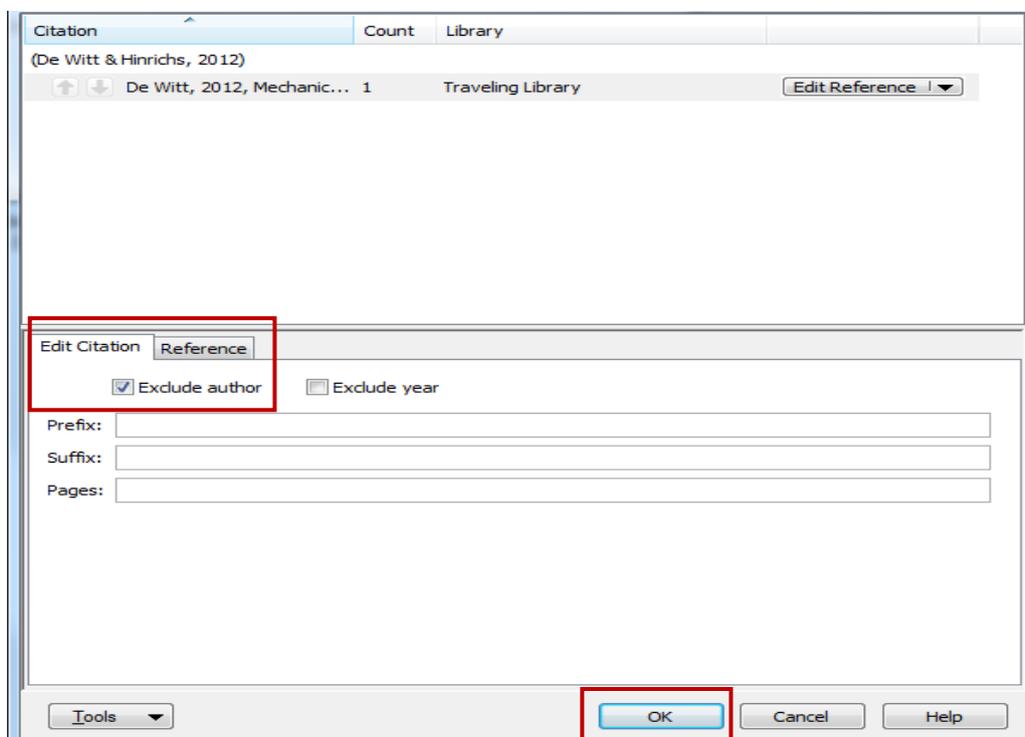
4c. Creating a secondary citation (author 1 cited by author 2)

Highlight the relevant citation and click the 'edit citation(s)' button within your EndNote toolbar. A dialog box will appear. In the 'edit citations' section of the box, enter the following in the **prefix** field: the surname of the author who cited the original source, a comma, a space, the year of the corresponding publication and a final space.

Then, in the **suffix field**, add a comma followed by a blank space and the page numbers (don't enter these in the pages field!). For example: , pp.17-18.

4d. Amending a reference

Check that EndNote has imported all your references as they need to appear (just selecting the correct referencing style might not be sufficient). If a reference is incorrect, don't try to amend it in Word. Instead, save your document and keep it open. Then, connect to EndNote Online, go to 'my references' and click on the relevant reference. Finally, click each piece of information that needs editing, make your amendments. For example:

Referencing **a specific chapter in an edited book**: ensure the 'reference type' at the top of reference page is set to **'book section'** (not 'book'). Check that details for both author(s) and editor(s) are included. Enter the chapter title and page numbers in the relevant fields. Click 'save'.

Referencing **institutional authors**: you may need to add a comma at the end of the institution's name, in EndNote Online so that it appears correctly in Word. The comma won't appear in Word. Click 'save'.

- **After making your amendments in EndNote Online**: re-import the reference into your document. In Word, highlight the relevant citation. Click 'Edit Citation(s)' within the EndNote toolbar. Then click 'edit reference' and 'update from My Library'. Finally, click 'insert' and 'OK'.

4e. Amending spaces between references in your reference list

If your departmental guidelines require you to amend/add these spaces, click the small arrow to the right of the single word, 'bibliography' in Word's EndNote toolbar. Click the 'layout' tab in the resulting dialog box, select the amount of space required from the 'line spacing' options. Click 'OK'.

5.   Manually creating a reference

If you are not able to transfer a reference into EndNote Online, you will need to create the entire reference manually within EndNote Online. **To do this**:

- Connect to EndNote Online. Click on the **'collect'** tab followed by '**new reference**' located just below.   Select the relevant reference type.

- Click each relevant field/row and add the information needed for your reference. Once you have completed this, click '**save**'. Then insert the reference into Word (you may need to first log out of both EndNote Online and Word before reconnecting).

- **Annotating reference:** you can annotate references (e.g. to summarise or reflect upon content). To do this: click on a reference's '**research notes**' field further down the screen, enter your text and click save.

6.   Submitting assignments: reference issues

Moodle has a tool that lecturers can use to convert assignments into a format that so that they can be annotated. This tool does not properly convert references that have been created in Word through EndNote (or via other tools e.g. Mendeley and Word's own citation tool). The Library has been advised that one workaround that *might* **be permitted** is for you to convert your assignments from Word documents to PDFs before submitting them to Moodle. However, **please confirm** the situation with your department first and if a PDF conversion is not permitted, please contact the Library for details of an alternative option to try: library@bath.ac.uk

7.   Further support: https://library.bath.ac.uk/referencing/endnote-online

Peter Bradley, University of Bath, 03/03/2021

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