Managing References using EndNote® online: Pharmacy & Pharmacology

The web version of EndNote is a very useful tool for keeping track of references in support of academic research and writing activities. Success in using EndNote relies on a sound knowledge of the principles and practice of referencing and attention to detail in creating and maintaining the quality of your data.

1. Creating an EndNote Library
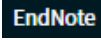
Task 1: Connect to Web of Science

1. Go to the Library website – resources for Pharmacy and Pharmacology
   https://library.bath.ac.uk/pharmacy-pharmacology
2. Click on 'Search the literature', then scroll to the *General subject databases* heading and select *Web of Science*

Task 2: Register with Web of Science

1. Click on *Sign in* (top toolbar) **Sign In ▼** and then *Register*
2. Follow the instructions to register

Task 3: To access EndNote Online you can either:

- Log in at https://www.myendnoteweb.com (use your Web of Science login details)
- Sign in to Web of Science and click the *EndNote* link on the top toolbar **EndNote**

2. Collecting references

Your EndNote online library is made up of individual records of the papers, books and other sources that you gather in your study and that you may wish to refer in your academic or professional writing. There are three ways to add references to your EndNote online library:

- you can *manually type in* data
- most databases allow you to *export references* in a special file format for import into EndNote
- a few databases, such as Web of Science, provide a link to *directly transfer* references into your EndNote library.

Task 1: Add references manually

1. Go to EndNote online
2. Click the *Collect* tab
3. Click *New Reference*
4. Select *Book* from the Reference Type (drop-down list)
5. Fill the relevant fields using the details from the following box and click Save when finished.
   - Author: (enter each name on a new line)
     Rang, Humphrey P.
     Ritter, James M.
     Flower, Rod J.

Henderson, Graeme
- Title: Rang and Dale's pharmacology
- Year: 2016
- Place Published: London
- Publisher: Churchill Livingstone
- Edition: 8th

Bibliographic Fields: Cancel Save *Reference is saved.*

Reference Type: Book

Author:
Rang, Humphrey P.
Ritter, James M.
Flower, Rod J.
Henderson, Graeme
Use format Last Name, First name. Enter each name on a new line.

Title: Rang and Dale's pharmacology

Year: 2016

NOTE: When adding references manually it is **important** to select the correct *reference type*.

Task 2: Editing references

1. To edit the information in an EndNote record, click on the text you want to edit. To edit *Place Published*: click on "**London**" and change to "**Edinburgh**". To add *Number of Pages*: click in the empty pages box (*field*) and type 1-10. Don't forget to *save* your changes.

2. You can also *Delete* references – sending them to *Trash* (left hand side of screen) which you can empty later

Task 3: Filing references

3. Click on *[Unfiled]* records from **My References** on the left hand side of the screen

4. Select some references, using the tick boxes, from your EndNote online library

5. Click the *Add to group…* drop down list and select *New group* and give it a name e.g. Test

6. Click *OK*

Add to group...
Add to group...
- Test *
New group
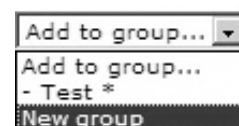
Task 4: Connect to a Pharmacy database to collect references

The following databases allow you to export a file and import the references into EndNote online.

1. Open a new web browser window

2. Go to the Library website https://library.bath.ac.uk/home

3. Under 'Resources for your subject', click on the *Pharmacy & Pharmacology* page

4. Under the 'Search the literature' tab you will find recommended databases for your subject

a) Import references from Embase

1. Run a simple search in Embase for a topic of your choice

2. Select a few results using the tick boxes

3. Click the *Export* link at the top of the results list

4. Choose *RIS format* (this is the default)

5. Click the *Export* button

6. When prompted, save the file to a location you will remember (e.g. to your desktop)

7. Open your EndNote online Library

8. Click the **Collect** tab then *Import References*

9. Use *Choose file* to locate the saved file

10. Select *Import Option* as *RefMan RIS*

11. Choose destination folder e.g. Your "Test" library

12. Click the *Import* button

13. View the imported records in your "Test" Library

Export Data

Choose a format: RIS format (Mendeley, EndNote)   Records selected: 1

Content:
- A1: Author names
- AD: Correspondence address
- C1: Drug trade names
- C2: Drug manufacturers
- C3: Device trade names
- C4: Device manufacturers
- C5: Medline PMID
- DB: Name of Database
- DO: Digital Object Identifier (DOI)
- EP: End page
- ER: End of record
- IS: Issue
- JF: Journal Title (full)
- JO: Journal Title
- KW: Keyword
- L2: DOI/full text link

- LA: Language of article
- M1: Author addresses
- M3: Publication type
- N2: Abstract (English)
- U1: Abstract (Non-English)
- SN: Serial number (ISSN/ISBN)
- SP: Start page
- T1: Title (English)
- T2: Title (Non-English)
- TY: Source type, Journal, Book, etc
- U2: Embase identification number (PUI)
- U3: AiP/IP entry date
- U4: Full record entry date
- UR: Web URL - Full record link to Embase
- VL: Volume
- Y1: Publication year

Cancel >   Export >

b) Import references from PubMed

1. Run a simple search in PubMed for a topic of your choice

2. Select a few results using the tick boxes

3. Click the *Send to* button above your results, and select *Citation manager*

4. Click *Create file*

5. Open your EndNote online Library

6. Click the **Collect** tab then *Import References*

7. Use *Choose file* to locate the saved file

8. Select Import Option as *PubMed (NLM)*

9. Choose destination folder e.g. Your "Test" library

10. Click the *Import* button

11. View the imported records in your "Test" Library
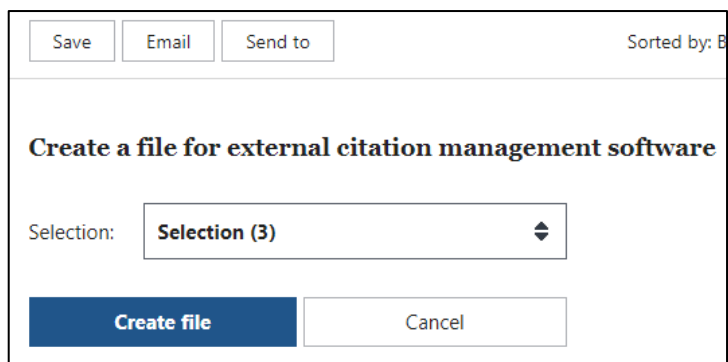
NOTE: There are two versions of EndNote, online and desktop. If you *open* the file instead of *saving* it, you will open the desktop version (which is installed on University public access computers) rather than the online version which is covered in this guide.

DUPLICATES: EndNote allows you to check for duplicate records in your library. To do this, use the *Find Duplicates* link under the *Organize* tab. EndNote compares the Author, Year, Title, and Reference Type fields to identify duplicates.

3. Cite While You Write (CWYW) in Microsoft Word

The EndNote toolbar is installed in Microsoft Word on all public access computers.
On a personally owned computer or laptop, the plug-in can be installed by anyone with an EndNote online account. Go to the Download tab and select the CWYW link for your operating system. Select Installation Instructions for further help

Task 1: Display the EndNote Online toolbar in Word

1. Open Word

2. Click the EndNote tab to view this toolbar:

3. Click the *Preferences* button:

4. Click *Application*

5. Select *'EndNote online'*

6. Enter your EndNote online/Web of Science account email and password (the one you registered and signed in with)

7. Click OK. The toolbar is now labelled *'EndNote'* (**NOT** *'EndNote X9'*) as shown below
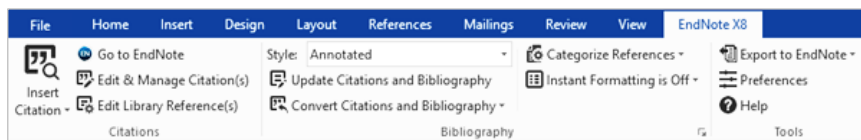
Task 2: Inserting citations

1. Type the following paragraph (From Watson – Pharmaceutical analysis) into a Word document:

> Lactose and other sugars are commonly used as filters in tablets and capsules. They normally make up the largest part of the formulation.

2. Position your cursor at the end of the sentence, where your citation will go

3. Click *Insert Citations* on the EndNote toolbar

4. Search for the reference: enter title keywords or author's surname and click *Find*

5. *Select* the reference you need from the search results and click *Insert*

6. To remove a citation you must select it, click *Edit Citation(s),* click *Edit Reference*, then *Remove Citation* then *OK*.
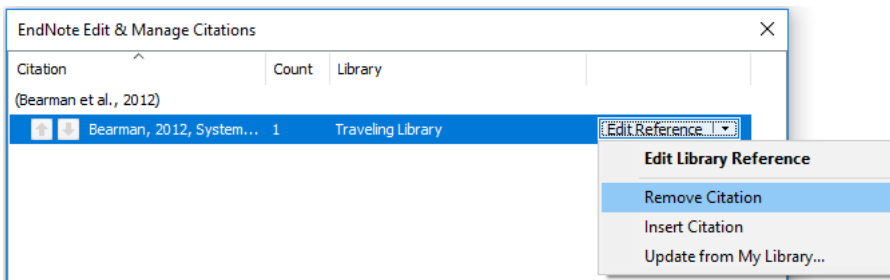
NOTE: DO NOT remove citations by selecting them and using the delete key

Task 3: Choosing a citation/referencing style

1. Use the Style drop-down box to select your preferred style e.g. Harvard (Bath) or Vancouver, etc.
   - You may need to use the *Select Another Style* option at the top of the list to find the style you want.
2. Select the Harvard (Bath) style and view your references
3. Try switching to a numeric style (e.g. Vancouver), and view your references again to see how they compare.
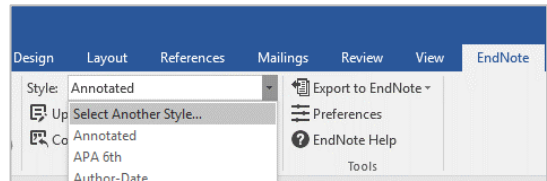
Task 4: Formatting your reference list

1. Click the small arrow next to 'Bibliography'
2. Click the *Layout* tab
3. You can change the title to 'References' if you wish
4. You can also *set the font and style* for your reference list
5. Click OK when finished
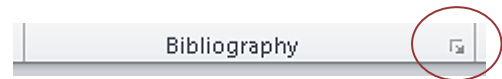
Top tips

- You must **edit references in your EndNote online account** to ensure that changes are updated in your document. If you spot a mistake, you cannot manually edit your references in Microsoft Word, unless you have taken the step of converting your citations and references to plain text. **Do not** convert your references to plain text if there is a possibility that you still need to edit your work.

- **Not connected to EndNote whilst trying to Cite While You Write?** Got this error message? Check you have entered your username and password for EndNote online correctly. Click Preferences on the CWYW EndNote toolbar in Word and check the Applications settings. If your details are missing, re-enter them. If your details are there, try re-entering your password and check your email is correct

- **Warning!** When importing from databases, or other electronic sources, make sure that you capture all the required information for your references and that information is located in the correct fields. This will help ensure that citations and references will be complete and correct in your written work. In particular, watch out for very recent journal articles which may not yet have page numbers. Patent records will probably also need editing in your EndNote library.

- Don't use the bottom status bar for word counts. This can be inaccurate. Use the *Word Count* tool under the *REVIEW* tab.

Last updated by: MF 28/10/2020