# Managing References using EndNote® online: POLIS

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. Register for EndNote Online via Web of Science.
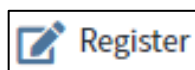
1. Creating an EndNote Library

Task 1: Connect to Web of Science

1. Go to the Library website
   http://www.bath.ac.uk/library
2. In the *catalogue* search box, type in *Web of Science*
3. Then open the Web of Science database by clicking *online access*
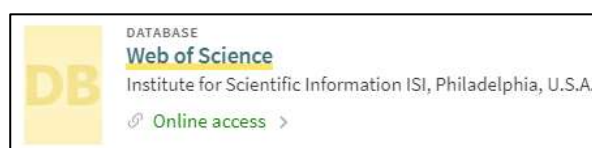
Task 2: Register with Web of Science

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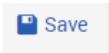2. Follow the instructions to register

Task 3: To access EndNote Online you can either:

- Log in at http://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

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, some databases allow you to export references in a special file format for import into EndNote and others, such as Web of Science, provide a button or link to directly transfer references into your EndNote online library.

Task 4: Try out IBSS (International Bibliography of the Social Sciences)

1. On the Library's homepage choose the POLIS subject page, then from **Search the literature**, scroll to and connect to **IBSS**.
2. Run a search e.g. type in "Cuban missile crisis".
3. Select/tick the box beside each result that you wish to download then choose Save.
4. Choose RIS, Endnote, Citavi or Reference Manager. Click Continue.
5. A "file download" dialog box for saving documents should appear (possibly along the bottom of the screen).
6. Select the "save as" option and save your results as an RIS file to a location of your choice (e.g. 'h drive', memory stick...).
7. Log onto EndNote Online via the link in Web of Science.

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

9. Use Browse to locate the saved text file.

10. Select Import Option as RIS or Proquest.

11. If this import option does not appear, click 'Select Favorites'. Scroll to the correct option, select it and click 'Copy to Favorites'.

12. Choose destination e.g. To: "Test" library. Click the Import button.

Task 5: 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)
  May, Ernest
  Zelikow, Philip
- Title: The Kennedy tapes: inside the White House during the Cuban missile crisis
- Year: 1997
- Place Published: London
- Publisher: Belknap

Bibliographic Fields:	Cancel	Save	*Reference is saved.*
Reference Type:	Book		
Author:	May, Ernest Zelikow, Philip Use format Last Name, First name. Enter each name on a new line.		
Title:	The Kennedy tapes: inside the White House during the Cuban missile crisis		
Year:	1997		

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

Task 6: 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 "**New York**". 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 7: Filing references

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

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

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

4. Click *OK*

Add to group...
Add to group...
- Test *
New group
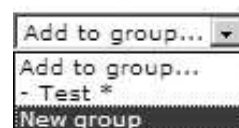
Task 8: Export from the library catalogue into Endnote online

1. Open the library homepage and enter a search term into the Catalogue search box

2. For the item that you want to reference, click on the 'EndNote basic' button (next to the email and pin options)

3. If you are not already logged into EndNote, you will be prompted for your login details.

4. You will see a message that says 'Primo Import Results'. This means that your reference has been successfully added to your EndNote online library.

Task 9: Run a Google Scholar search

1. Open a new web browser window.

2. Go to the website https://scholar.google.co.uk/
    NB: This is different to the general Google search.

3. Click on the three vertical lines ☰ to find 'settings', in the top left hand of the screen

4. Under *Bibliography Manager*, select Endnote and save your settings

5. Run a simple search, decide which item you want to add to your EndNote
   Library and look for the link ' Import into EndNote'.

Cited by 170   Related articles   All 13 versions   Import into EndNote

Bibliography manager

☐ Don't show any citation import links
● Show links to import citations into   BibTeX
                                         EndNote
                                         RefMan
   RefWorks

6. Save the file somewhere that you can find it easily, e.g. to your desktop

7. Open your EndNote online Library

8. Click the Collect tab then Import References

9. Use C*hoose file* to locate the saved file

10. Select the Import Option: EndNote Import.

11. Choose the group that the reference will belong to and click the Import button

12. View the imported records in your 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 BUCS 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 2016

The EndNote toolbar is installed in Microsoft Word on all BUCS 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 Downloads tab and select the Download link for your operating system. Select Installation Instructions for further help

Task 10: Display the EndNote Online toolbar in Word 2016

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 X8'*) as shown below:
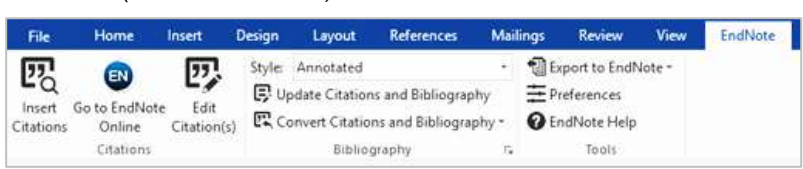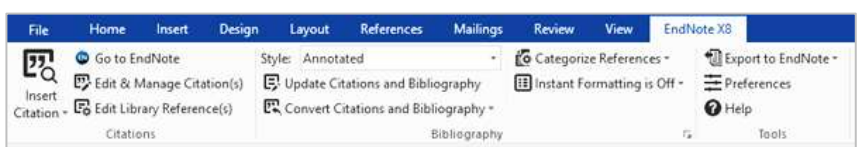
**Task 11: Inserting references/citations: an example**

Type the following sentence (from May & Zelikow, The Kennedy tapes) into a Word document:

Kennedy's attitude to global events leading up to the Cuban missile crisis is interesting. It is worth noting that "on Kennedy himself the Pearl harbour attack had no immediate effect."

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

2. Click *Insert Citations* on the EndNote toolbar

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

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

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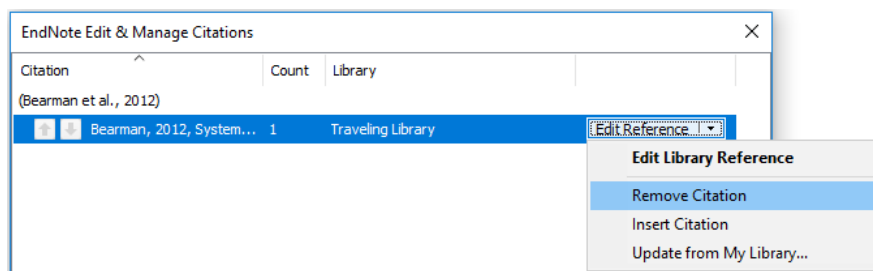
NOTE: DO NOT remove citations by selecting them and using the delete key

Task 12: Choosing a citation/referencing style

1. Use the Style drop-down box to select your preferred style e.g. APA or Harvard (Bath), 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, Nature) and view your references again to see how they compare.
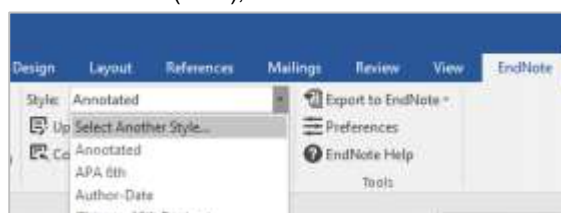
Task 13: Formatting your reference list

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
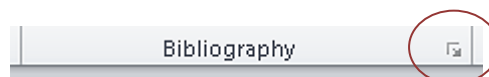
Top tips

- **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. 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.

- **You must edit references in Endnote online** 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 if there is a possibility that you still need to edit your work.

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