

Using EndNote Online: health

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1. Registration & Access

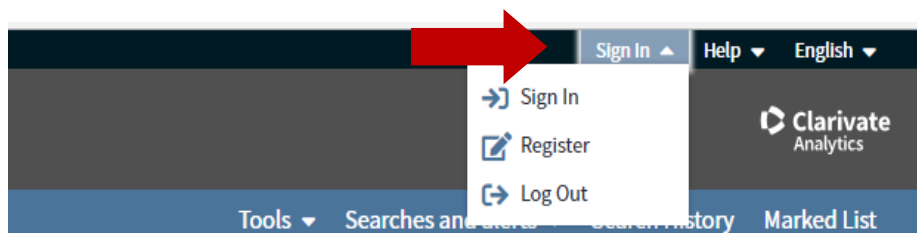
1a. Registering with EndNote Online

- **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 either Facebook or LinkedIn (doing so 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.** When completing the registration form, **follow the exact requirements for creating your password** e.g. only select symbols from the list provided.

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 resources' '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 & organising references in EndNote Online

2a. Transferring results from 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.

The screenshot shows the 'Basic Search' interface with three search rows. Each row contains a search term in a yellow box, a 'Topic' dropdown menu, and a search icon. The search terms are 'football* or soccer or rugby', 'biomechanic*', and 'kick*'. The interface includes a 'Search' button, '+ Add row', and 'Reset' options.

- **Select references** to transfer (tick the relevant boxes). For the purposes of this exercise, note down an author's name from two of your references.
- Click **Save to EndNote Online** button above the results and then click Send. Once the references have transferred, a message will appear confirming this.

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 – if that's the case, refreshing the screen may activate their appearance – alternatively, try signing-out and then back into EndNote Online.

Note: you can click the blue & white 'Links' icon to check full-text availability.

Clarivate Analytics
EndNote™ My References Collect Organize Format Match Options Downloads

Quick Search
Search for
in All My References
Search

My References
All My References (70)
[Unfiled] (45)
Quick List (0)
Trash (2) Empty
My Groups
acculturation (1)
biomechanics (4)
microfinance (0)
new (4)
rugby motivation (5)
running motivation (3)

All My References
Show 50 per page
Page 1 of 2 Go

All Page Add to group... Copy To Quick List Delete

Author	Year	Title
<input type="checkbox"/> Lees, A.	1998	The biomechanics of soccer: A review Journal of Sports Sciences Added to Library: 08 Sep 2015 Last Updated: 08 Sep 2015 View in Web of Science™+ Source Record, Related Records, Times Cited: 133
<input type="checkbox"/> Padulo, J.	2013	The place kick in rugby Journal of Sports Medicine and Physical Fitness Added to Library: 08 Sep 2015 Last Updated: 08 Sep 2015 View in Web of Science™+ Source Record, Related Records, Times Cited: 1

- **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.

All My References
Show 50 per page

All Page Add to group...

Author

Lees, A.

Padulo, J.

Add to group...
- acculturation
- biomechanics
- microfinance
- new
- rugby motivation
- running motivation
- Share-refs-test *
- social media
- sport psychology
- sprinting
- test
- undefined
New group

Script Prompt:
Enter a New Group name and click 'OK'

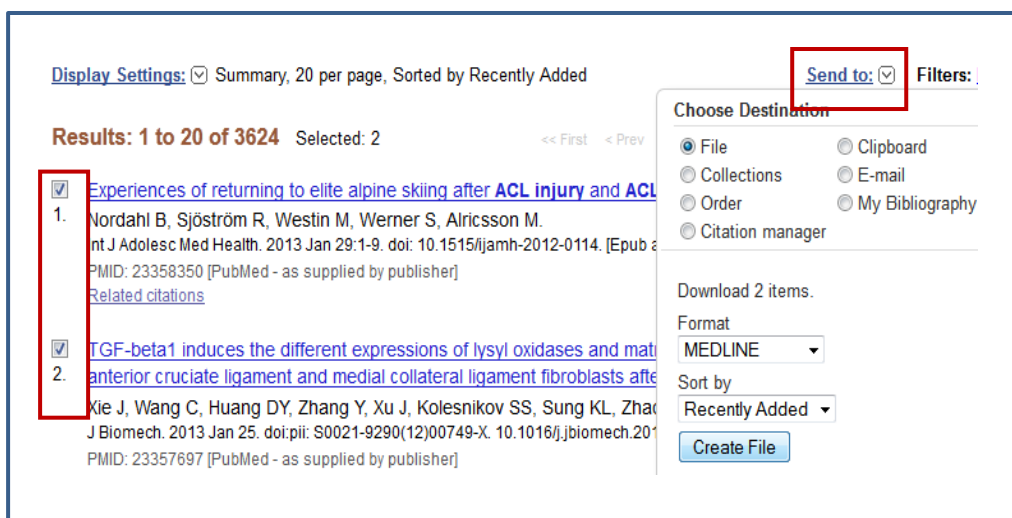
New Group

OK
Cancel

- 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.

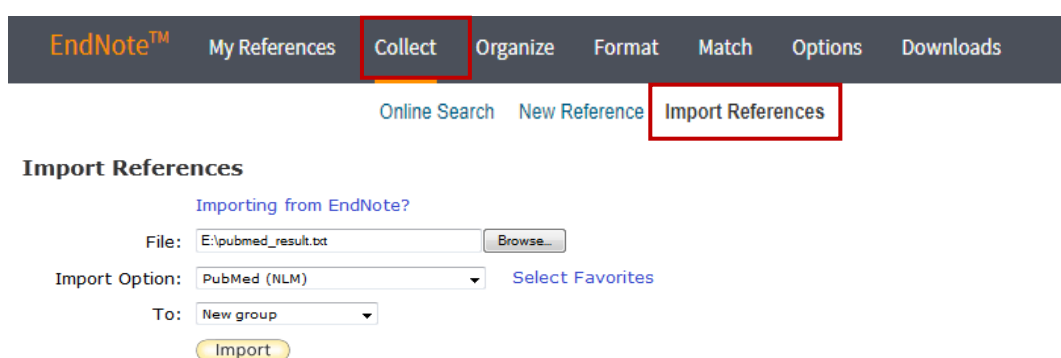
2c. Transferring references from PubMed into EndNote Online

- In PubMed (as with many other databases), you have to use a more indirect method to transfer your selected references to EndNote Online.
- Connect to PubMed from a link within the library website and search for articles on a topic of your choice (click the advanced search option). Select/tick a couple of results and then click the 'Send to'.
- Click 'file' (alternatively, click 'citation manager' instead). Then select the MEDLINE option from the 'Format' drop-down menu. Click 'create file'.



The screenshot shows a PubMed search results page. At the top, it says 'Display Settings: Summary, 20 per page, Sorted by Recently Added'. Below that, it says 'Results: 1 to 20 of 3624 Selected: 2'. Two search results are visible, each with a checkmark in a box. The first result is 'Experiences of returning to elite alpine skiing after ACL injury and ACL reconstruction' by Nordahl B, Sjöström R, Westin M, Werner S, Alricsson M. The second result is 'TGF-beta1 induces the different expressions of lysyl oxidases and matrix metalloproteinases in anterior cruciate ligament and medial collateral ligament fibroblasts after injury' by Xie J, Wang C, Huang DY, Zhang Y, Xu J, Kolesnikov SS, Sung KL, Zhang J, Biomech. 2013 Jan 25. doi:pii: S0021-9290(12)00749-X. 10.1016/j.jbiomech.2012.12.014. PMID: 23357697. On the right side, a 'Send to' menu is open, showing options: File (selected), Clipboard, Collections, E-mail, Order, My Bibliography, and Citation manager. Below the menu, it says 'Download 2 items.', 'Format: MEDLINE', and 'Sort by: Recently Added'. There is a 'Create File' button at the bottom of the menu.

- Depending on which internet browser you are using, either the file will appear automatically in your device's 'downloads' folder, or a 'save' option will appear (requiring you to save the file to a location/drive of your choice e.g. 'documents' folder or a USB stick).
- Open EndNote Online. Click Collect & then 'Import References'.



The screenshot shows the EndNote Online interface. At the top, there is a navigation bar with 'EndNote™', 'My References', 'Collect', 'Organize', 'Format', 'Match', 'Options', and 'Downloads'. The 'Collect' button is highlighted with a red box. Below the navigation bar, there are links for 'Online Search', 'New Reference', and 'Import References', with the 'Import References' link highlighted with a red box. Below the links, there is a section titled 'Import References' with the subtitle 'Importing from EndNote?'. It contains a 'File:' field with the text 'E:\pubmed_result.txt' and a 'Browse...' button. Below that, there is an 'Import Option:' dropdown menu with 'PubMed (NLM)' selected and a 'Select Favorites' link. Below that, there is a 'To:' dropdown menu with 'New group' selected. At the bottom, there is an 'Import' button.

- Click 'browse' to locate the file of results that you saved.
- **Import options** menu: click this and select 'PubMed (NLM)'. If PubMed (NLM) is not listed: click 'select favourites' and select it from the longer list. Finally click 'Copy to Favourites' and then select it from the main list.
- **The 'to' option:** either select an existing group of references or create a new group. Click 'import'.

2d. Transferring references from other resources

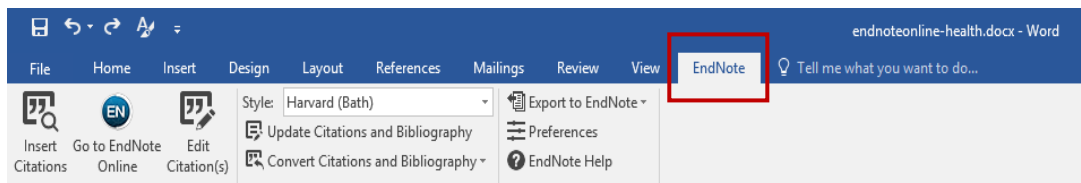
Instructions for downloading references from the following resources are available at: <https://www.bath.ac.uk/guides/how-to-use-endnote-online-library-guides-part-2-downloading-database-references/>

- **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 tool bar and signing-in:

- Open Word. The last tab may already be set up as 'EndNote' – if so, click this.



- **If the EndNote tab is not visible in Word:**

On-campus and using a University PC?

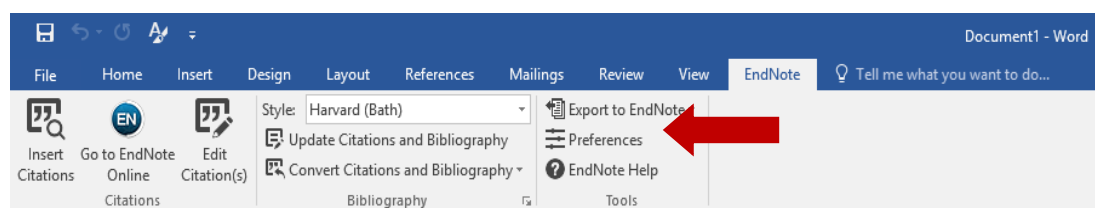
- Try another PC, join another student to complete the exercise or contact Computing Services (include the ID number of the PC): <https://www.bath.ac.uk/professional-services/computing-services/>

Off-campus or using your own device?

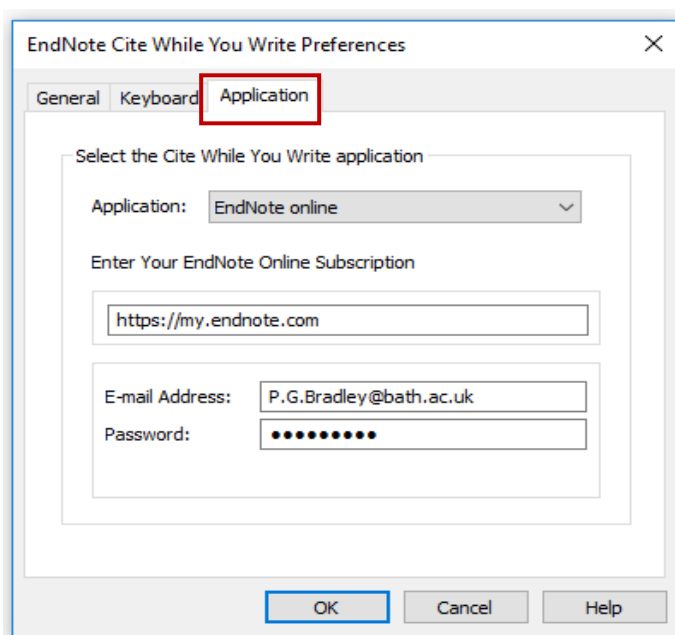
- Connect to EndNote Online.
- Click the '**format**' tab. Then click the '**Cite While You Write**' plugin. You may need to check the instruction and system requirements provided via links on the same screen.
- Click either the link to the Windows or Macintosh file to download the tool bar. **If you 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.
- 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:

Click it and then click 'preferences' (right-hand side of the toolbar).



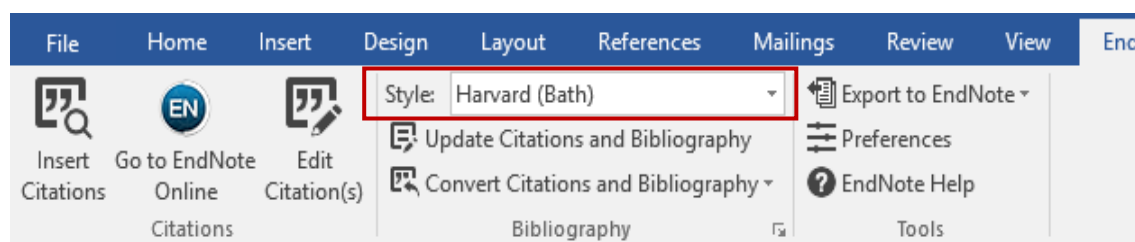
- In the 'preferences' box, click the **application** tab. Select the EndNote Online option from the menu if it is not already visible.



- Enter your EndNote Online **email and password** (the one with which you registered and signed into the service). Click OK.

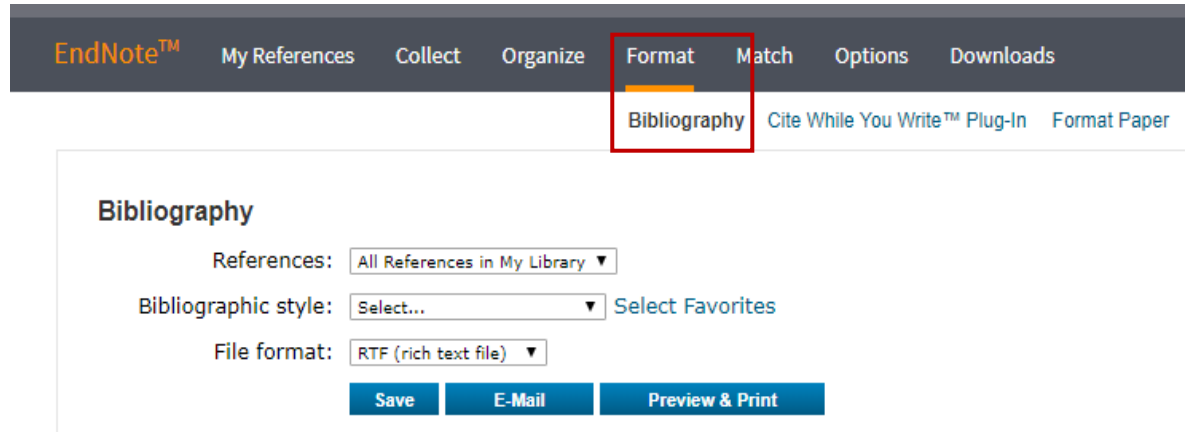
3b. Formatting to the required referencing style

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* not listed:

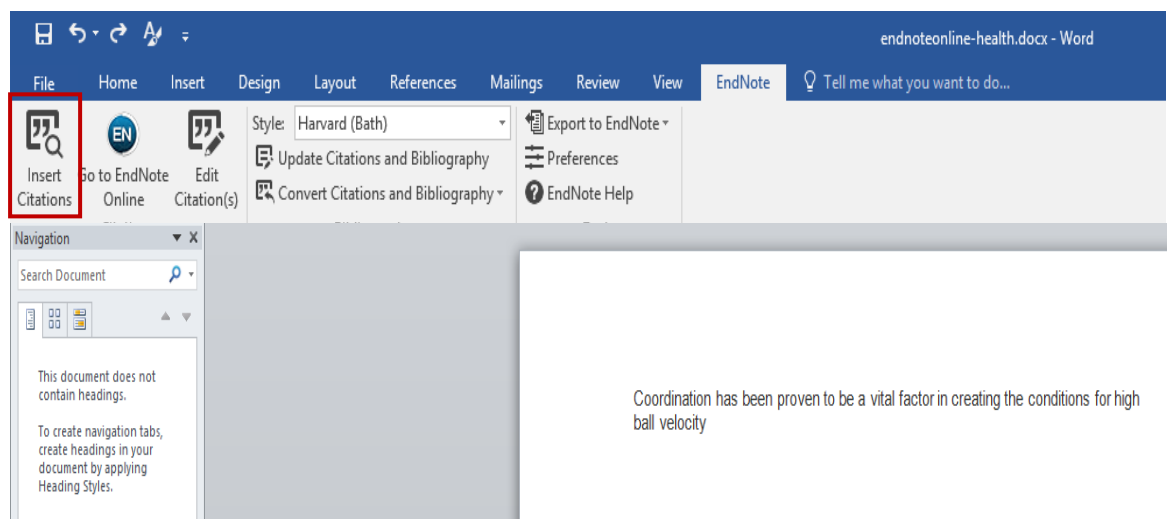
- Open EndNote Online. Click the **'format'** tab and then click **'bibliography'** just below. From the 'references' options, select either 'all references' or a specific group.



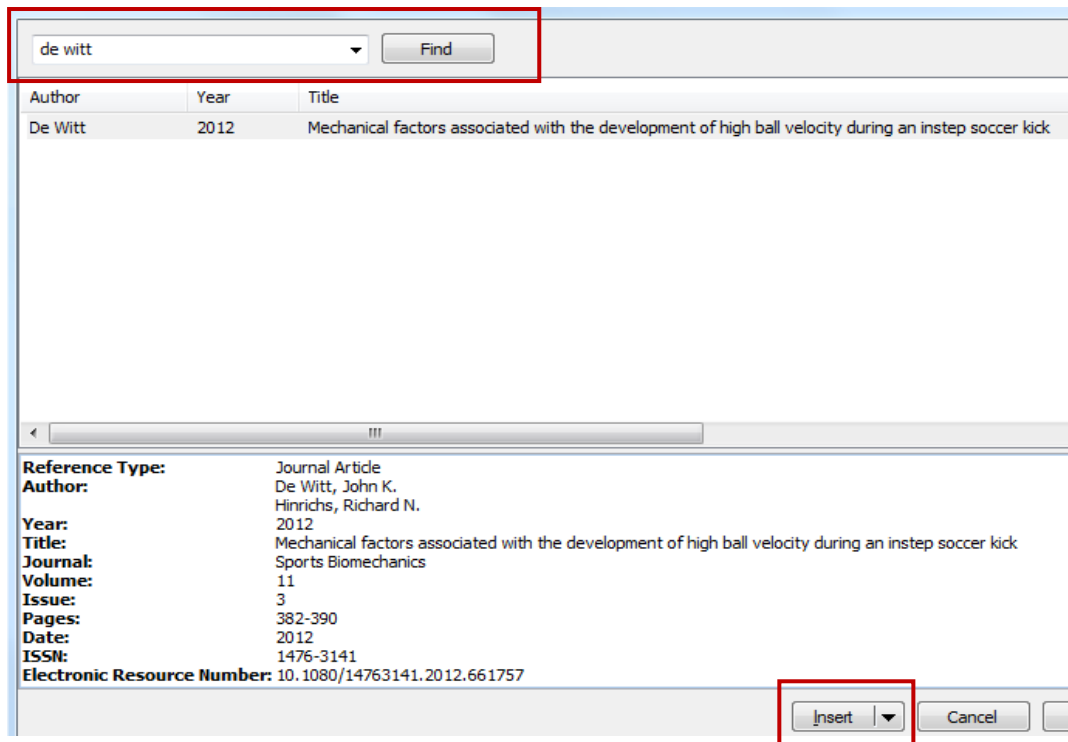
- Next, click 'select favourites' and scroll down the longer list of styles. Select the required style and click 'copy to favourites'. Finally, select 'TXT' file type. click 'save'. You may then need to refresh your screen.
- You will need to close Word and reopen it to view the updated style list.

3c. Inserting citations

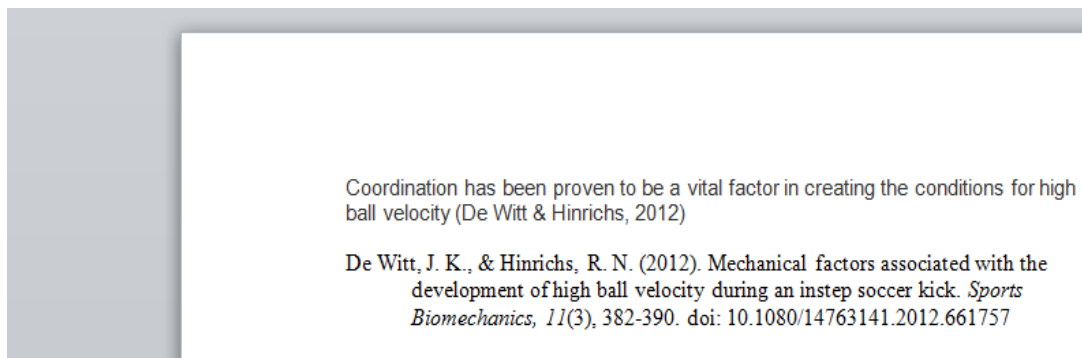
- Type any sentence** into Word. Leave the cursor at the point where you require a citation to be entered. Click **'insert citations'** on the toolbar (the magnifying glass on the left).



- 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.



- 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 - 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 by providing the option to enter manually the author man outside of the brackets.

4. Manually amending a citation or reference

4a. Adding page numbers to a citation

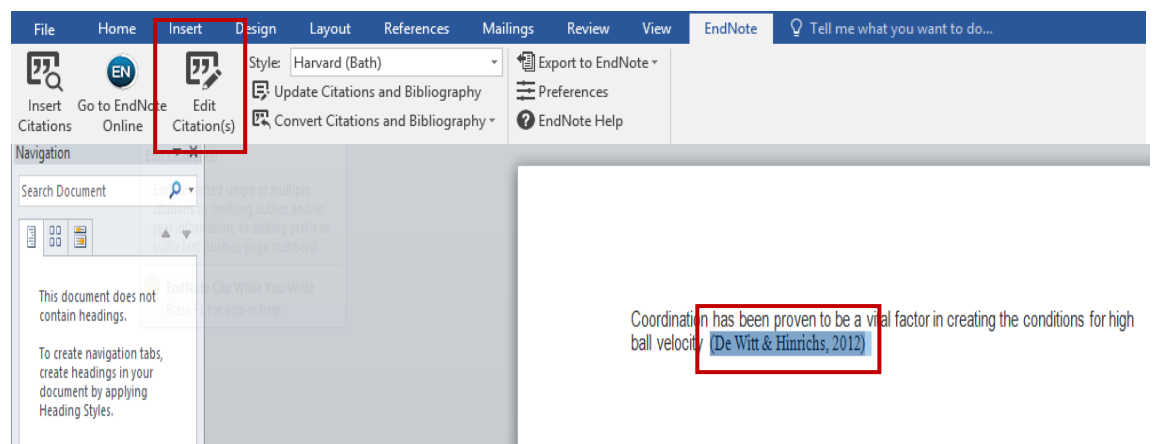
- Do not directly add the page numbers into your Word document. Instead, highlight the citation in your Word document and click the 'Edit Citation(s)' button within your EndNote toolbar.
- Enter the page number(s) in the **pages** field (do not enter "p" or "pp"). Then, click OK.

If this does not work, instead try entering the following in the **suffix** field:

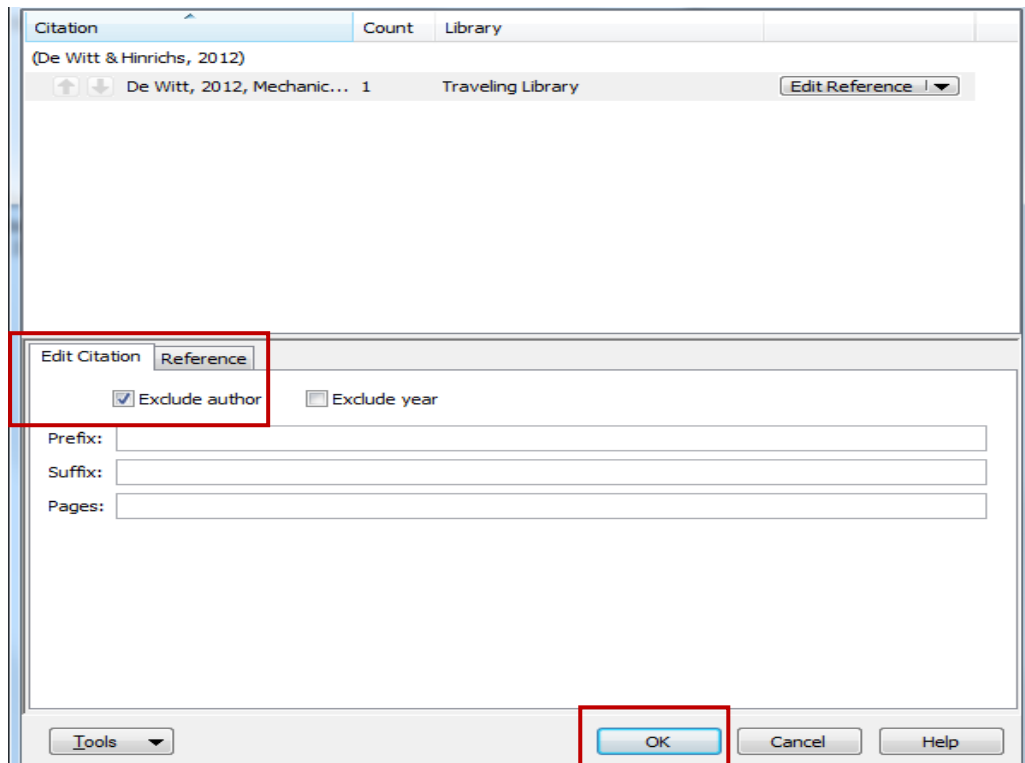
Leave a space and then enter the page(s). For example, enter p.4 or pp.4-5 (do not add a full stop). Then, click OK.

4b. Removing authors from brackets in a citation

- Do not directly delete the authors in your Word document. Instead, highlight the relevant citation and click the 'edit citation(s)' button within your EndNote toolbar.



- 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. Amending a reference

Check that EndNote has imported all your references as they need to appear – even if you have selected the correct referencing style. If a reference is incorrect, **do not try to amend it directly within your Word document**. Instead, save your document and keep it open. Then, connect to EndNote Online, go to ‘my references’ and click on the relevant reference. Click on each piece of information that needs editing, make your amendments and click ‘save’.

- **Common amendments to references:**

Changing letters in a title from **UPPER CASE to lower case**.

Referencing a **specific chapter in an edited book**: ensure the ‘reference type’ at the top of reference page is set to ‘**book section**’ rather than ‘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’.

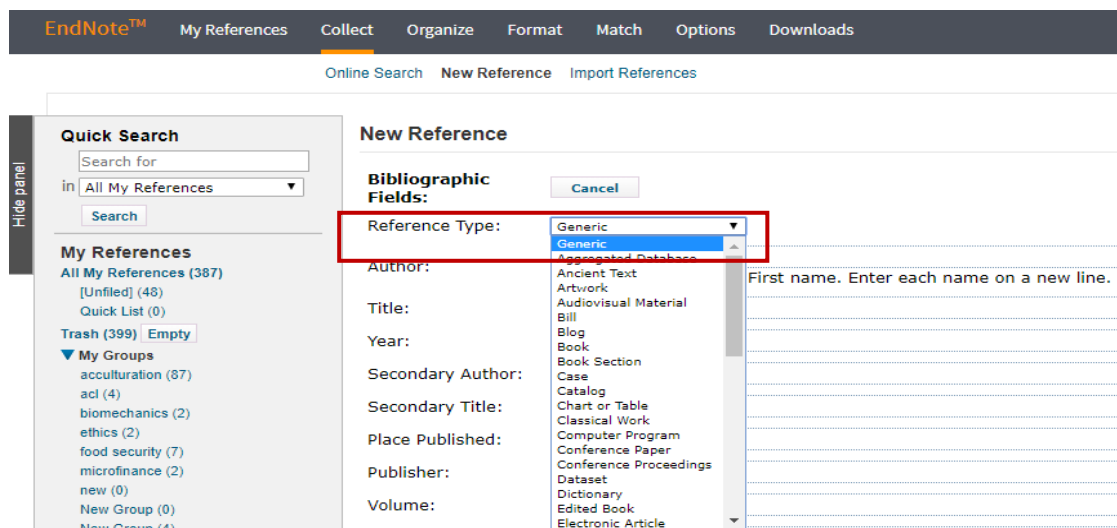
Referencing **institutional authors**: you may need to add a comma at the end of the institution’s name, in EndNote Online so that it appears correctly in Word. The comma will not appear in your Word document. Click ‘save’.

- **After making your amendments in EndNote Online:** re-import the reference into your document. Within Word, highlight the relevant citation. Click the ‘Edit Citation(s)’ button within the EndNote toolbar. Then, click ‘edit reference’ and ‘update from My Library’. Finally, click ‘insert’ and ‘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. Then, click on the **'collect'** tab followed by **'new reference'** located just below. Select the relevant reference type.



- Within each relevant field of the reference: add the information that you need for the reference. Finally, click **'save'**. Then insert the reference into Word (you may need to log out of EndNote Online and Word first).
- **Annotating reference:** you can annotate references (e.g. to summarise or reflect upon the content of a paper). To do this: click on a reference's **'research notes'** field further down the screen, enter your text and save the changes to your reference.

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. Zotero, Mendeley and Word's default citation tool).

The Library has been advised that the **workaround** is for you to convert your assignments from Word documents to PDFs before submitting them to Moodle for marking. However, you may want to confirm the situation with your department first.

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

Peter Bradley 28/01/2019