

## EndNote Online for SPS: guide

1. **Registering to use EndNote Online** p.1
2. **Collecting and organising references in EndNote Online** p.3  
Transferring references from Scopus (p.3) and other resources
3. **Citing and referencing while you write your assignment** p.7  
Downloading the EndNote tool bar into Word (p.7)  
Setting the required referencing style (p.9)
4. **Manually amending a citation or reference** p.11  
Adding page numbers, referencing chapters & institutional authors...  
Removing authors from brackets (p.12); Secondary citations (p.13)  
Line spaces in your reference list (p.13)
5. **Manually creating a reference** p.14

### 1. Access & registration

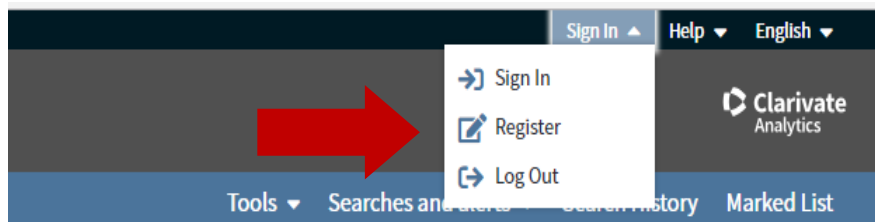
#### 1a. Registering with EndNote Online

- **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](http://www.myendnoteweb.com/help/ENW/hgs_requirements.htm)
- **Go to the Library webpage,** 'Social & Policy Sciences: Search the Literature': <https://library.bath.ac.uk/social-policy-sciences/literature-search> - then connect to the database, Web of Science (listed under 'Search for journal articles').

If you are registering from an off-campus location, you need to connect to the library webpage using a UniDesk connection. Instructions for setting up: <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 of screen). Enter your University of Bath email address twice. **Don't** enter any other email address, and **don't** register via either Facebook or LinkedIn, as 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 from the list provided.

## 1b. Accessing EndNote Online

- **Access EndNote Online** by visiting 'Social & Policy Sciences: Search the Literature': <https://library.bath.ac.uk/social-policy-sciences/literature-search> - then connect to the database, Web of Science (listed under 'Search for journal articles').
- **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 from Scopus into EndNote Online

- i. **Access EndNote Online:** refer to 1b for important instructions. Keep EndNote Online open in one tab/window.

In another tab/window, **go to the Library webpage**, 'Social & Policy Sciences: Search the Literature': <https://library.bath.ac.uk/social-policy-sciences/literature-search> - then connect to the database, Scopus (listed under 'Search for journal articles').

When entering search terms, note that the word, **or**, is entered in between alternative search terms. Also, search terms are organised by "sub-theme" i.e. search terms related to each "sub-theme" are entered in separate search box. Click '+ Add search box' as relevant. Click *Search*.

Note: you can re-sort your results by relevance (options appear to the right above your search results). Click 'Links' to check a document's availability.

Document search

Documents Authors Affiliations Advanced

Search  
"food security" or "food insecurity" or "food supply" or "food shortag X Article title, Abstract, Keywords +  
E.g. "Cognitive architectures" AND robots

AND

Search  
neoliberal\* or neo-liberal\* X Article title, Abstract, Keywords - +

> Limit

Reset form Search Q

- ii. **Select a few references** from your results to transfer (tick the relevant boxes to the left). Click the **export** option above the results.

	Document title	Authors	Year	Source
<input type="checkbox"/> 1	Territorial and agrarian rights: land mobility and land market after 18 years of neoliberal politics in Mexico.   [Bölgesel ve tarımsal haklar: meksika'da 18 yıllık neo-liberal politikalar sonrası toprak hareketliliği ve toprak pazarı]	Diego Quintana, R., Concheiro Borquez, L., Tarrio Garcia, M., Golbasi, S.	2001	Toplum ve bilim (88), pp. 122-143
<input checked="" type="checkbox"/> 2	Introduction: Emerging challenges, new policy frameworks and the resilience of agriculture	Almås, R., Campbell, H.	2012	Research in Rural Sociology and Development 18, pp. 1-22
<input checked="" type="checkbox"/> 3	The urgency and necessity of a different type of market: The perspective of producers organized within the fair trade market	VanderHoff Boersma, F.	2009	Journal of Business Ethics 86(SUPPL. 1), pp. 51-61

iii. A dialog box will appear. Select 'RIS format' and then click 'Export'.

Export document settings

You have chosen to export 2 documents

Select your method of export

MENDELEY 
  RefWorks 
  SciVal 
  RIS Format (EndNote, Reference Manager) 
  CSV (Excel) 
  BibTeX 
  Text (ASCII in HTML)

What information do you want to export?

Customize export

<input checked="" type="checkbox"/> Citation information	<input type="checkbox"/> Bibliographical information	<input type="checkbox"/> Abstract and Keywords	<input type="checkbox"/> Funding Details	<input type="checkbox"/> Other information
<input checked="" type="checkbox"/> Author(s)	<input type="checkbox"/> Affiliations	<input type="checkbox"/> Abstract	<input type="checkbox"/> Number	<input type="checkbox"/> Tradenames and Manufacturers
<input checked="" type="checkbox"/> Document title	<input type="checkbox"/> Serial identifiers (e.g. ISSN)	<input type="checkbox"/> Author Keywords	<input type="checkbox"/> Acronym	<input type="checkbox"/> Accession numbers and Chemicals
<input checked="" type="checkbox"/> Year	<input type="checkbox"/> PubMed ID	<input type="checkbox"/> Index Keywords	<input type="checkbox"/> Sponsor	<input type="checkbox"/> Conference information
<input checked="" type="checkbox"/> Source title	<input type="checkbox"/> Publisher		<input type="checkbox"/> Funding text	<input type="checkbox"/> Include references
<input checked="" type="checkbox"/> Volume, Issue, Pages	<input type="checkbox"/> Editor(s)			
<input checked="" type="checkbox"/> Citation count	<input type="checkbox"/> Language of Original Document			
<input checked="" type="checkbox"/> Source and Document Type	<input type="checkbox"/> Correspondence Address			
<input checked="" type="checkbox"/> DOI	<input type="checkbox"/> Abbreviated Source Title			

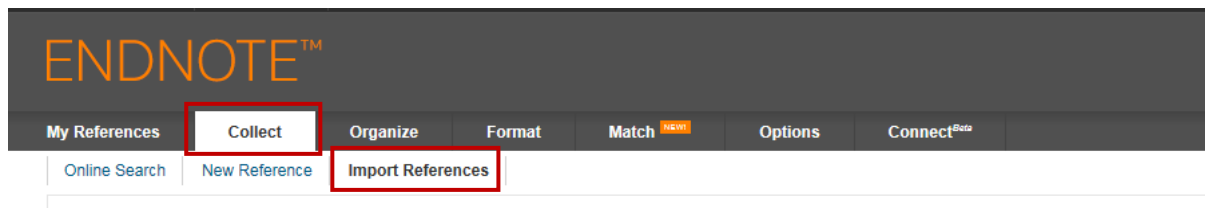
Cancel

**Note: how the references are saved will depend on which internet browser you use:** they may be saved as a file in a downloads folder on your device. Alternatively, you will be provided with a 'Save As' option and you can then opt to save the references as a file in a location/drive of your choice.

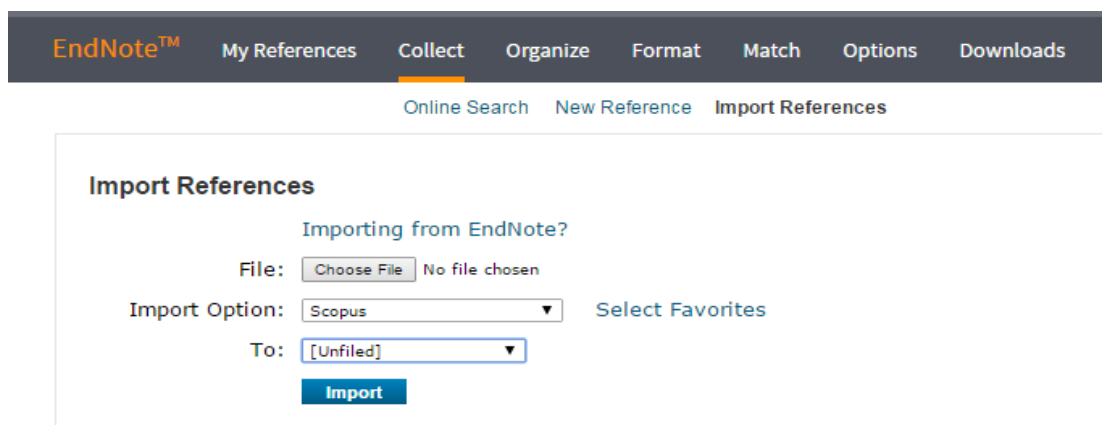
The 'save as' option may appear within a band across the bottom of your screen (if a band appears, click the down arrow to the right of 'save' and then click 'save as').

## 2b. Viewing and organising your results in EndNote Online

**Open EndNote Online** (via Web of Science). Click the **Collect** tab followed by **Import References**.



- I. **Click browse to search for the saved file** of references. Then, click on the Import option menu and select **Scopus** (you may first need to click 'Select Favourites' first, select 'ProQuest' and then click 'Copy to favourites').
- II. Next, you have to give them a location in the **To** field. To do this, you could do one of the following: select an existing 'group' if you've already set one up, select 'New Group' to create one, select [unfiled]. **Finally, click Import.**



- iii. Your results should then transfer to the 'all my references' or 'unfiled' (left-hand menu). Occasionally, you might need to refresh your screen, log out and in again, or wait a little while for these to appear. Note: you can click the blue & white 'Links' icons to check for full-text availability.

### All My References

Show 50 per page Page 1 of 6 Go

All  Page

Author	Year	Title
<input type="checkbox"/> Bigirimana, I. F.	2009	The fallacies behind trade liberalisation of agricultural products: A dilemma of sub-sahara african Creating Global Economies through Innovation and Knowledge Management Theory and Practice - Information Management Association Conference, IBIMA 2009 Added to Library: 29 Nov 2016 Last Updated: 29 Nov 2016 Online Link→ Go to URL 
<input type="checkbox"/> Logan, B. I.	2001	Neoliberalism, regime survival, and the environment: economic reform and agricultural transforma Canadian journal of African studies

- iv. **Organising your references by theme or piece of work:** to do this, select/tick those references that are related. Then, click 'add to group' to open a menu. Click the 'New group' option and enter an easily identifiable name for the group. Click 'OK'. The group will appear in the left-hand menu in 'My Groups'.

All My References

Show 50 per page

All  Page

Author	Year
<input checked="" type="checkbox"/> Besek, Jordan F	5
<input checked="" type="checkbox"/> Rai, Rajnish	5
<input type="checkbox"/> Trauger, Amy	2014

myendnoteweb.com needs some information

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

- v. Note: you can also select individual references that you no longer require and then click the Delete button above. 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.
- vi. **Please note:** I would strongly recommend saving references from Scopus and other databases using **multiple methods** (including email) as "back-ups".

## 2c. Transferring references from other databases and Google Scholar into EndNote Online

You can find instructions for transferring references from a range of databases/resources, including IBSS, Business Source Complete and Google Scholar at: <http://www.bath.ac.uk/library/infoskills/endnote/endnoteweb-download.html>

Please note in **Business Source Complete**: you can send your selected results directly to EndNote Online via the folders option i.e. you don't need to create a file of references first.

## 3. Citing & referencing while you write

### 3a. Displaying the EndNote toolbar and signing in:

- I. Open Word. Click on the last tab; the name of the tool bar/tab will be 'EndNote' or similar.
- II. **If the EndNote tool bar/tab is not present in Word:**

**If you are using an on-campus 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/>

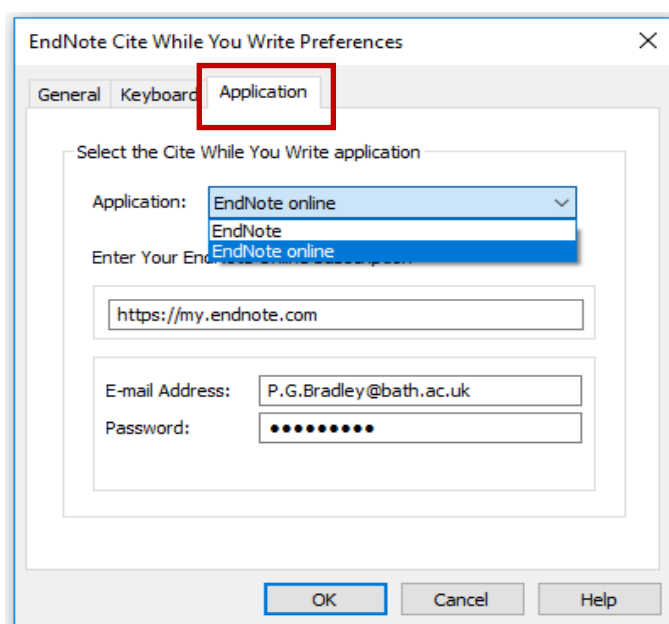
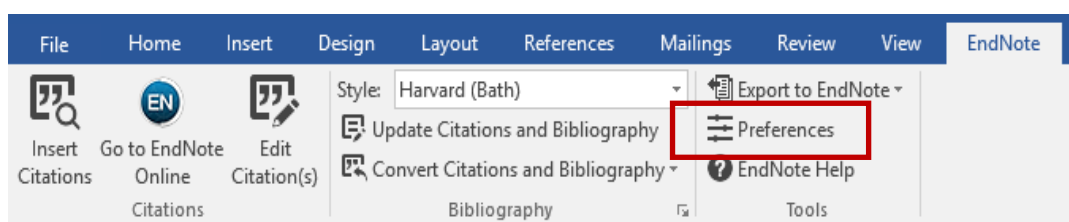
**If you are using your own device:**

- Connect to Web of Science (via the Library website) and sign-into EndNote Online.
- Click the 'Downloads' tab.
- You may need to check the instructions and system requirements.
- Click either the link to the Windows or Macintosh file to download the tool bar. Open Word to view the tab.

**If the tool bar is *still* not present in Word:**

With Windows devices, try clicking File > Options > Customize Ribbon. Then select the EndNote option in the second menu and click OK. If this does not work, or is not available, contact the provider, Clarivate, at <https://support.clarivate.com/s/>

**Once the EndNote tool bar *is* present:** click the **Preferences** icon on the right-hand side of the toolbar.



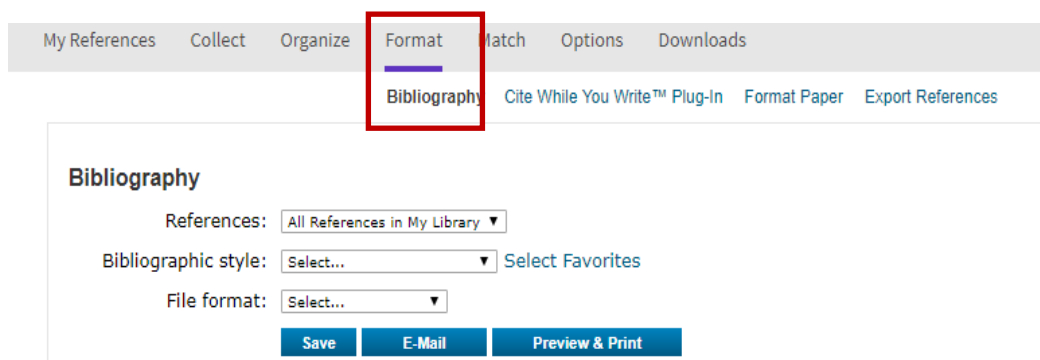
In the Preferences box, click the **application** tab. Select the **EndNote Online** (not 'Endnote' option) from the menu if it's not already displayed.

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



### 3b. Setting the required referencing style

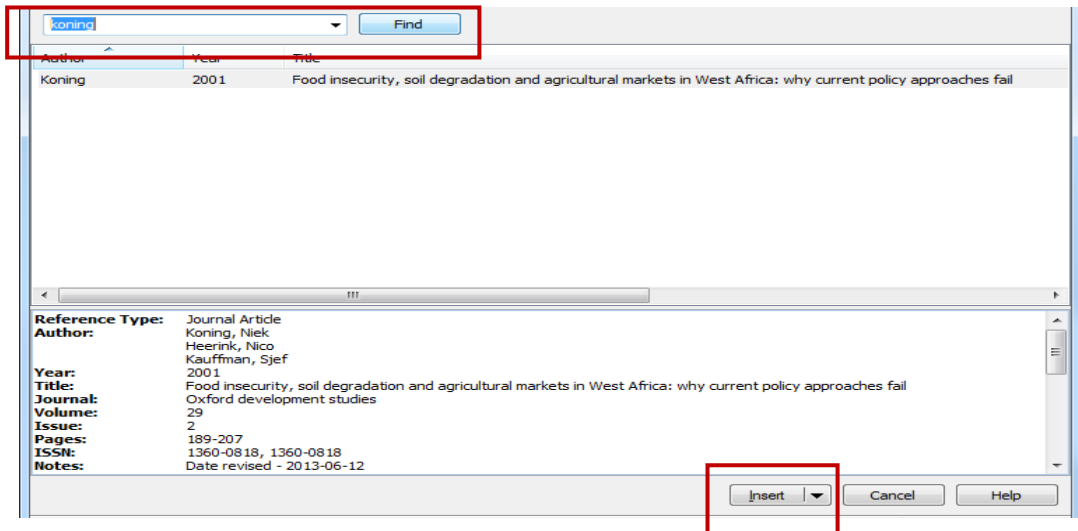
- i. Check that the required referencing style is selected in the **Style** drop-down menu in Word's EndNote tab e.g. 'Harvard (Bath)'. If the required referencing style is not listed, click **Select another style** to find it.
- ii. **If it's still not listed** in Word's EndNote tab, open EndNote Online (via Web of Science). Click the **Format** tab and then click **bibliography** just below. From the "references" options, select either "all references in my library" or a relevant group.



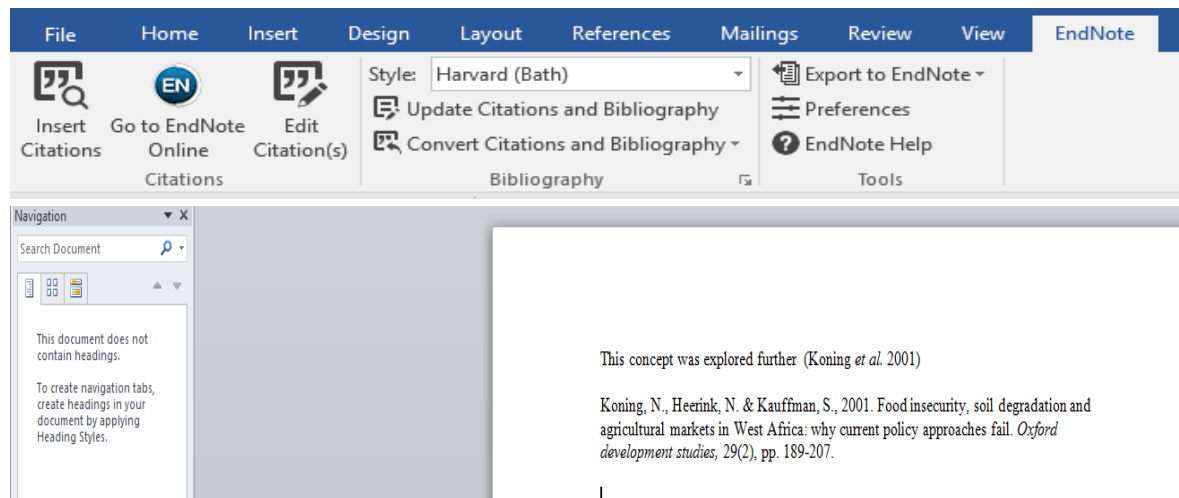
Select the required style, click **copy to favorites** and then **select the style from your favorites list**. You may need to refresh your screen at the end. Finally, select the 'Format file' type as TXT and click 'save'. You may need to close Word and reopen it in order to see the newly added style listed – there may be a delay before you can view it.

### 3c. Inserting citations

- i. **Type any sentence** into Word. Click **Insert Citations** on the toolbar (the magnifying glass on the left).
- ii. **Enter an author surname** for one of references that you transferred to EndNote Online from Web of Science. Click **Find**.



- iii. Click **insert** (multiple references to the same author? select the correct one first). You should now see the author's name and date of the paper appear as a citation. Also, a full reference should appear at the end of your writing.



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

The concept was explored further (Koning *et al.* 2001) and research was undertaken by Boyer (2010)

Boyer, J., 2010. Food security, food sovereignty, and local challenges for transnational agrarian movements: the Honduras case. *Journal of peasant studies*, 37(2), pp. 319-351.

Koning, N., Heerink, N. & Kauffman, S., 2001. Food insecurity, soil degradation and agricultural markets in West Africa: why current policy approaches fail. *Oxford development studies*, 29(2), pp. 189-207.

- 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 exclude the author or year from the in-text citation so that you can enter these manually. This would enable you to vary the ways in which your citations appear.

## 4. Manually amending a citation or reference

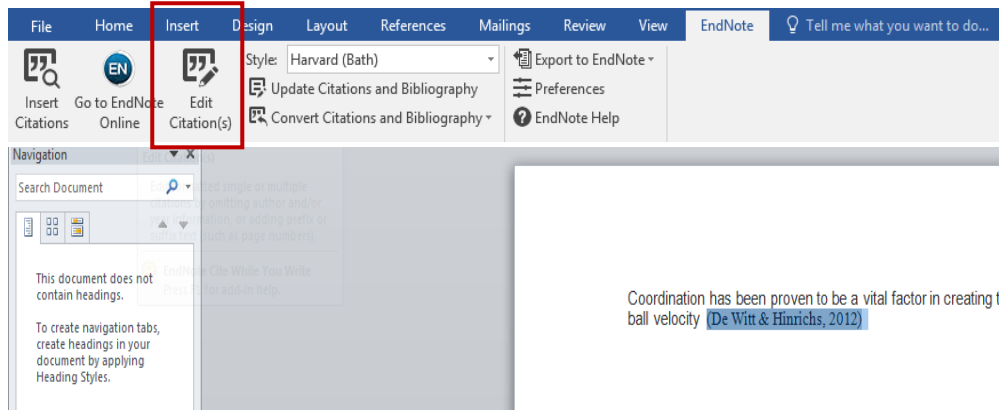
### 4a. Adding page numbers to a citation

- 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.

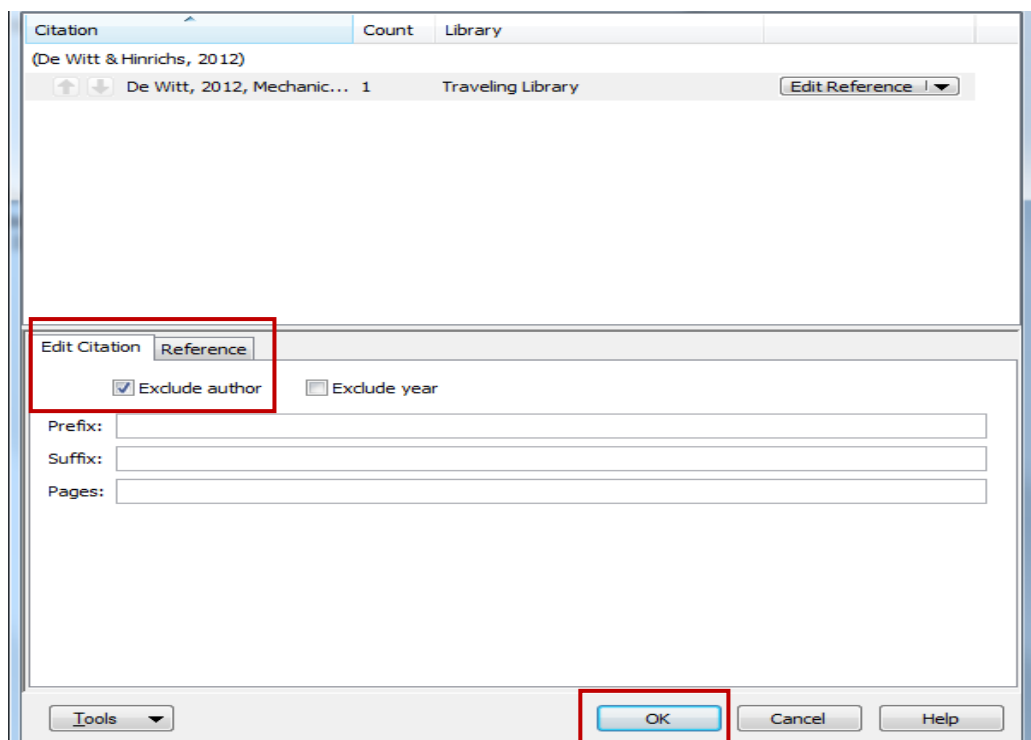
**If this does not work**, instead try entering the following in the **suffix** field. Leave a space and then enter the page(s). For example, enter p.4 or pp.4-5 (do not add a full stop). Then, click OK.

#### 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'.

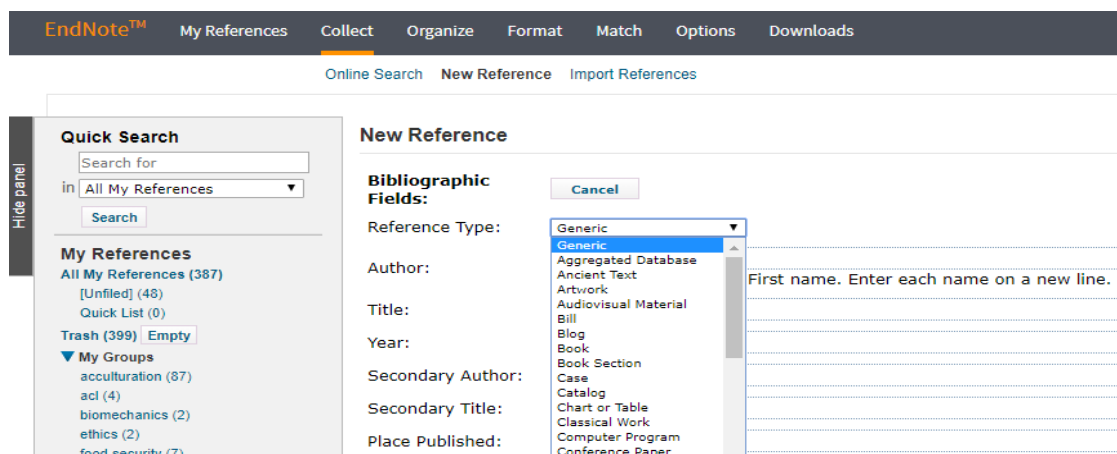
- **After making your amendments in EndNote Online**: re-import the reference into your document. In Word, highlight the relevant citation. Click 'Edit Citation(s)' within the EndNote toolbar. Then click 'edit reference' and 'update from My Library'. Finally, click 'insert' and 'OK'.

#### 4e. Amending the space 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. 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. 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](mailto:library@bath.ac.uk)

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

*Peter Bradley; University of Bath: 03/03/2021*