

EndNote Online for SPS: guide

1. Registering to use EndNote Online p.1
2. Collecting & organising references in EndNote Online:
Transferring references from Scopus & other resources p.2
3. Citing & referencing while you write your assignment
Downloading the EndNote toolbar into Word,
setting the required referencing style, excluding authors from brackets... p.6
4. Manually amending a citation or reference p.10
Adding page numbers, creating book chapters & institutional authors...
5. Manually creating a reference p.12

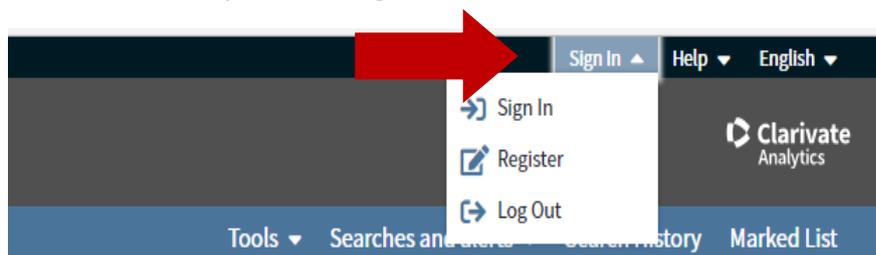
1. Access & registration

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
- **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.** 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 & 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.



- 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. [Bolgesel ve tarimsal haklar: meksika'da 18 yillik neo-liberal politikalar sonrasi toprak hareketiligi ve toprak pazarı]	Diego Quintana, R., Concheiro Borquez, L., Tarrio Garcia, M., Golbasi, S.	2001	Toplum ve bilim (88), pp. 122-143
<input 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 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			

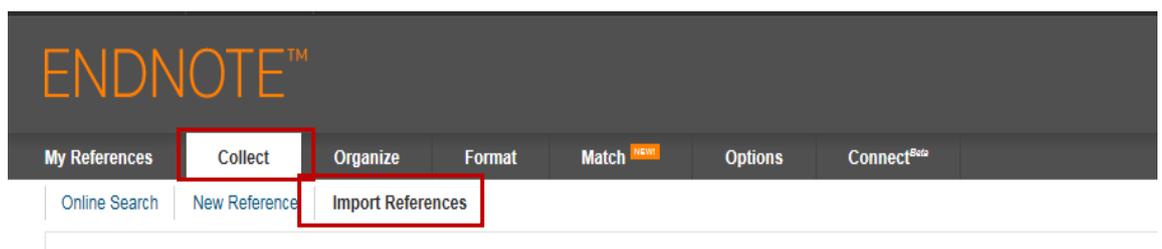
Cancel

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.**

Import References

Importing from EndNote?

File: No file chosen

Import Option: [Select Favorites](#)

To:

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 Added to Library: 29 Nov 2016 Last Updated: 29 Nov 2016 Online Link → Go to URL <input type="button" value="Full Text"/>

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 under 'My Groups'.

All My References

Show 50 per page

All Page

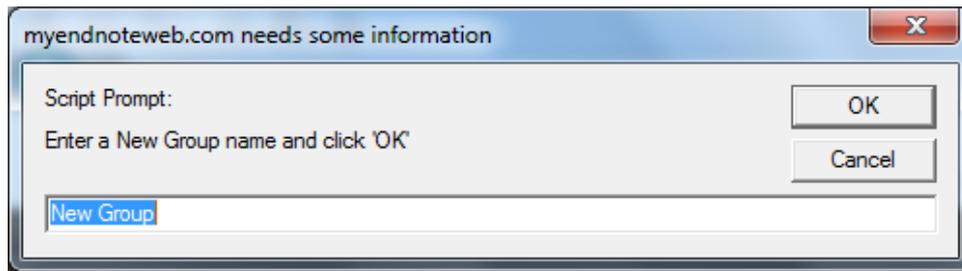
Author	Year
<input checked="" type="checkbox"/> Besek, Jordan F	5
<input checked="" type="checkbox"/> Rai, Rajnish	5
<input type="checkbox"/> Trauger, Amy	2014

Add to group...

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

Groups Shared Others

- Copyright, IPR, FBI, DP



- 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 to 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. Display the EndNote tool bar and sign 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/>

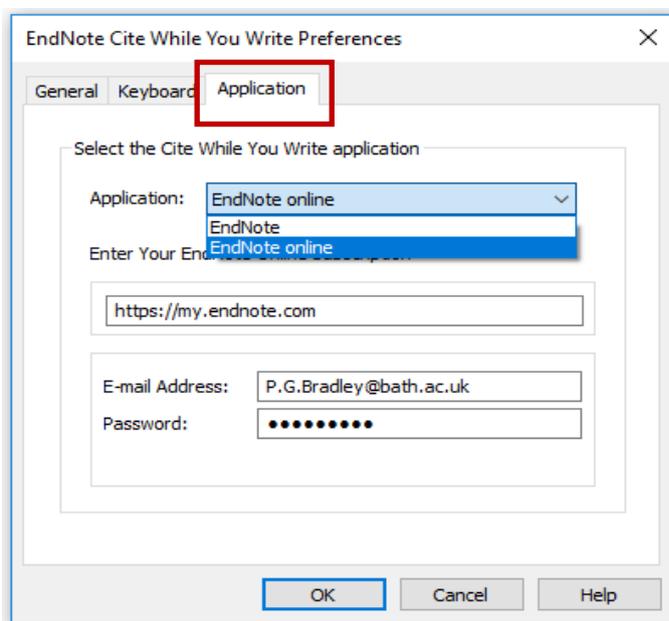
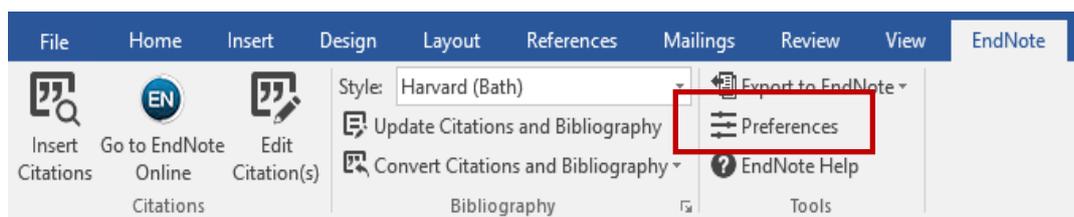
If you are using your own device:

- 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 option does not work, or is not available, please contact the provider, Clarivate, at: <https://support.clarivate.com/s/>

- III. **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

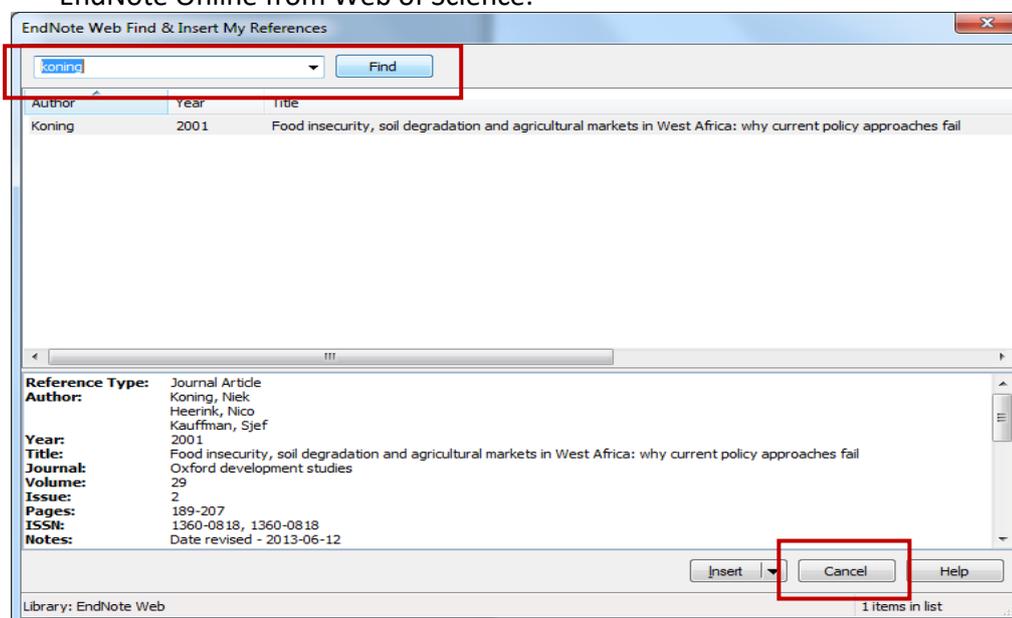
- i. Check that the required referencing style is selected in the 'style' drop-down menu (located within the EndNote tab) e.g. 'Harvard (Bath)'
- ii. **If the required referencing style is not listed in Word's drop-down menu** - click 'Select another style' to find it. If it is *still* not listed in the drop-down menu in Word, 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..." or a relevant group.

Next, click 'Select favourites' and scroll down the long list of potential styles. Select the required style and click 'copy to favourites'. You may need to refresh your screen at the end. Finally, select any file type e.g. TXT and click Save.

You will 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

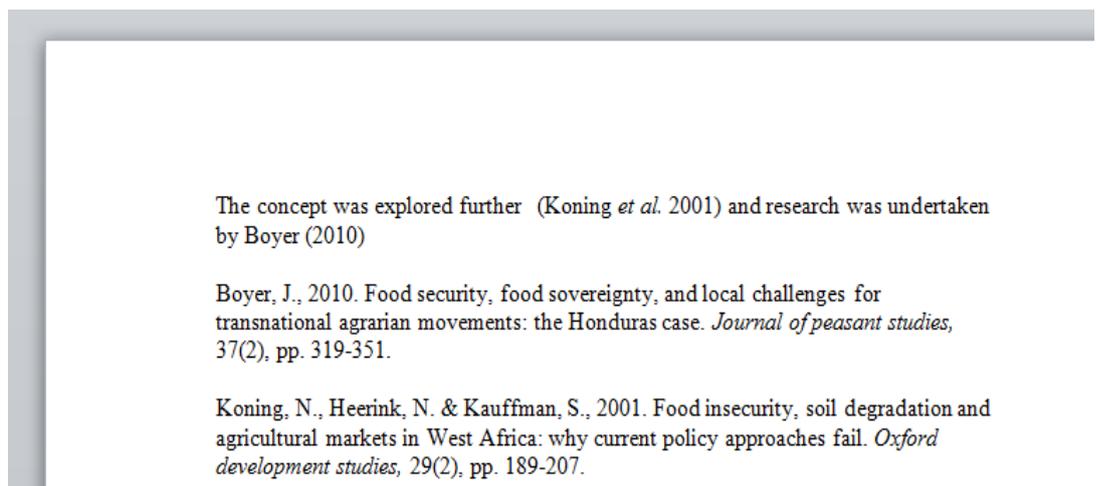
- i. **Type any sentence** into Word. Click **Insert Citations** on the toolbar (the magnifying glass on the left).
- ii. **Search** for the author's name of one of references that you transferred to EndNote Online from Web of Science.



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.



- iii. 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.



- iv. **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

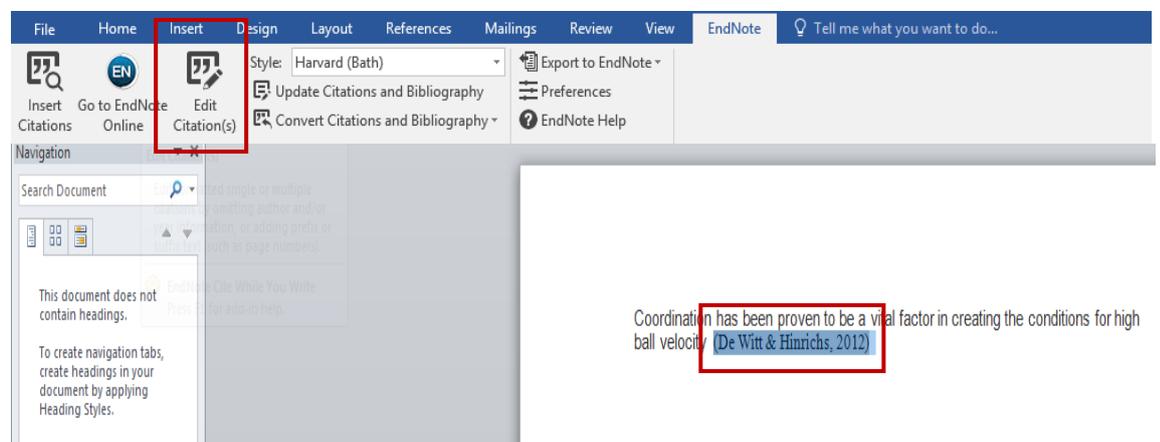
- Do not directly add the page numbers into your Word document. Instead, highlight the citation in your Word document and click the 'Edit Citation(s)' button within your EndNote toolbar.
- Enter the page number(s) in the **pages** field (do not enter "p" or "pp"). Then, click OK.

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

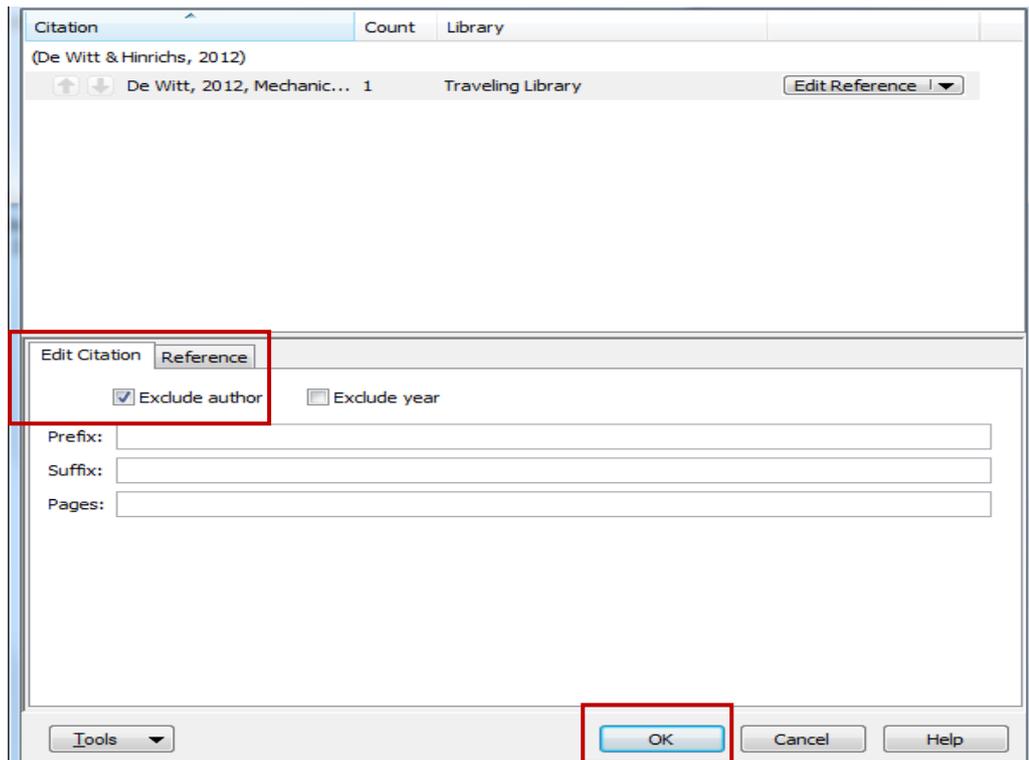
Leave a space and then enter the page(s). For example, enter p.4 or pp.4-5 (do not add a full stop). Then, click OK.

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’.

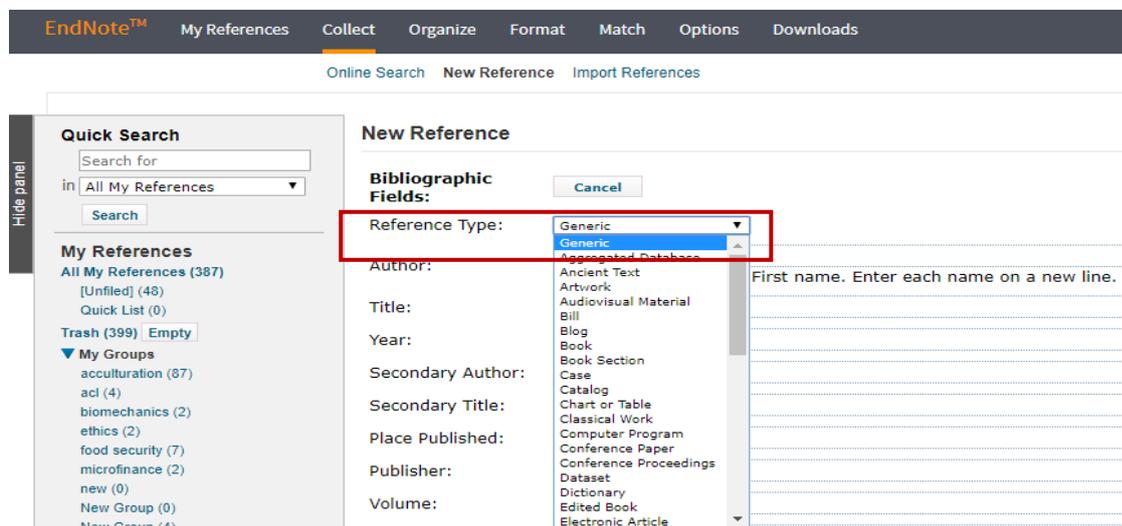
Referencing **institutional authors**: you may need to add a comma at the end of the institution’s name, in EndNote Online so that it appears correctly in Word. The comma will not appear in your Word document. Click ‘save’.

- **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