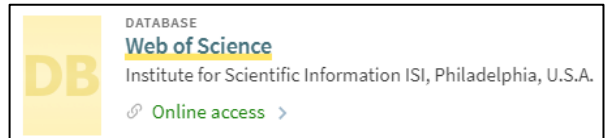


## Managing References using EndNote® online - Management

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.

### Creating an EndNote account

#### Task 1: Connect to Web of Science



1. To register for full access to EndNote Online, either use an on-campus PC or connect your device to the University network using a [VPN connection](#). Go to the Library website and In the catalogue search box, type in **Web of Science** (EndNote is part of Web of Science).
2. Then open the Web of Science database by clicking **online access**. On the Web of Science homepage, click the 'products' link (located on the right hand side of the top menu). Click the EndNote link from the drop-down menu, Then click 'Register'. To register, you **must** enter your University of Bath email address as your EndNote username.
3. A registration link will be emailed to your University of Bath account - this may appear in either your Junk folder or 'Other' folder (if using outlook). Activate the registration link.

#### To access EndNote Online you can either:

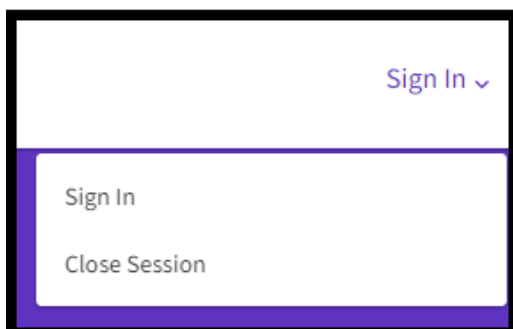
- Log in at <https://www.myendnoteweb.com/> (use your Web of Science login details)
- Sign in to Web of Science and click the **EndNote** link under the **Products** option on the top toolbar

### Collecting references

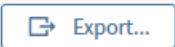
Your EndNote Online collection is made up of individual records of the papers, books and other sources to which you may want to refer in your academic or professional writing. There are three ways to add references to your EndNote online collection. You can manually type in data; some databases allow 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 EndNote Online.

#### Task 1: Exporting from Web of Science

1. Connect to Web of Science
2. Sign in using your email and password (top toolbar **Sign in** then **Sign in**)



3. Search using topic keywords of your choice

- Select references to transfer  
(tick the boxes next to chosen records)
- Click , then choose 'EndNote Online'
- Choose the record content that you wish to include (e.g. author, title, source) and click **export**.
- To view your references, go to EndNote Online and look in the 'My References' section. Your references will be in the **[unfiled]** folder until you assign them a folder.

### Task 2: Add references manually

- Go to EndNote Online
- Click the **Collect** tab
- Click **New Reference**
- Select Book from the Reference Type (drop-down list)
- Fill the relevant fields using the details from the following box and click **Save** when finished
  - Author: (enter each name on a new line)  
Strachan, Tom  
Read, Andrew
  - Title: Human molecular genetics
  - Year: 2011
  - Place Published: London
  - Publisher: Garland Science
  - Edition: 4<sup>th</sup>

<b>Bibliographic Fields:</b>	<input type="button" value="Cancel"/>	<input type="button" value="Save"/> <i>Reference is saved.</i>
Reference Type:	Book	
Author:	Strachan, Tom Read, Andrew <small>Use format Last Name, First name. Enter each name on a new line.</small>	
Title:	Human molecular genetics	
Year:	2011	

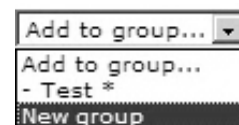
NOTE: When adding references manually it is **important** to select the correct reference type.

### Task 3: Editing references


- 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 "Abingdon". Don't forget to save your changes.
- See **My References** on the left hand side of the screen and then **[unfiled]** to view the record you have added. You may need to change the **sort by** order to show the most recently added item.
- To delete a record tick it and select the **delete** option.

### Task 4: Grouping references


- With your list of **[Unfiled]** records showing on the screen, select some references, using the tick boxes.
- Click the **Add to group...** drop down list and select **New group** and give it a name e.g. Test.
- Click **OK**



### Task 5: Exporting from the Library Catalogue

- Open the Library homepage and enter a search term into the Catalogue Search box.
- For the item that you want to reference, click on the 'EndNote Basic' button  (next to the email and pin options).
- If you are not already logged into EndNote, you will be prompted for your login details.
- You will see a message that says 'Primo Import Results'. This means that your reference has been successfully added to your EndNote collection. To view it, look in the **[unfiled]** area of **my references**.

### Task 6: Exporting from Google Scholar

1. Search for Google Scholar on the Library Catalogue and click on it to launch it.
2. Click on the three vertical lines  to find 'settings', in the top left hand of the screen
3. Under **Bibliography Manager**, select **Endnote** and then **save**.
4. Run a simple search, decide which item you want to add to your EndNote Collection and look for the link 'Import into EndNote'.

Cited by 170 Related articles All 13 versions **Import into EndNote**



5. You will be prompted to save the Scholar file somewhere that you can find it easily, e.g. to your desktop
6. Open your EndNote online collection
7. Click the **Collect** tab then **Import References**
8. Use **Choose file** to locate the saved file and select *open*
9. Select the **Import Option: EndNote Import** from the drop-down list. If missing, find this by clicking **Select Favourites**.
10. Choose the group that the reference will belong to and click the **Import** button
11. View the imported records in **My References** in the group in which you choose to save them.

NOTE: There are two versions of EndNote, online and esktop. If you **open** the file instead of **saving** it, you will open the desktop version (which is installed on university computers) rather than the online version which is covered in this guide.

DUPLICATES: EndNote allows you to check for duplicate records in your collection. 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.

### Task 7: Exporting from Business Source Complete (EBSCO)

1. Use the Library Catalogue to find and open Business Source Complete.
2. Run a search of your choice and click **Search**.
3. Mark a few results for exporting by clicking on the folder icon to the right of each result.
4. Open the folder view at the top right hand side of the page, tick **select all** and click on export on the right of the screen.
5. Make sure the export option is set to "Direct Export to EndNote Web".
6. Click **Save**. EndNote opens automatically and inserts the reference into your [unfiled] collection of references. Occasionally you might experience difficulty with this and see a message saying the references have not been imported. In that case choose 'direct export in RIS format' at step 5 and import the reference as you did for Google Scholar.
7. In EndNote click on **My References** and then select **[unfiled]** to view the references.

### Task 8: Exporting from Scopus

1. Use the Library Catalogue to find and open Scopus.
2. Run a search e.g. "intelligent supply chain management" and click on **search**.
3. Mark two or more items by checking the box to the left of each. Select **export** from the menu and then **RIS Format** from the box and click on **export**.
4. You will be prompted to save the file somewhere that you can find it easily.
5. Open your EndNote collection.
6. Click the **Collect** tab then **Import References** and use **Choose File** to locate and open the saved file.
7. Select Scopus from the Import Option drop-down list. If missing, find this by clicking Select Favourites. Click on **import**.

## Task 9: creating a reference list

Once your references are stored you can easily create a correctly formatted reference list

1. Chose **format** from the menu.
2. In the drop down box next to references select the group of references you want to format.
3. The first time you use **Bibliographic style** you will need to opt to **select favorites**.
4. Choose the style you want e.g. Harvard\_(Bath) and copy to favorites.
5. Now you can select Harvard\_(Bath) from your list of favorites.
6. Select the file format you want (text or rich text is best) and then **Preview and Print** to cut and paste into your Word document or save the file.

## Cite While You Write (CWYW) in Microsoft Word for Office 365 Desktop

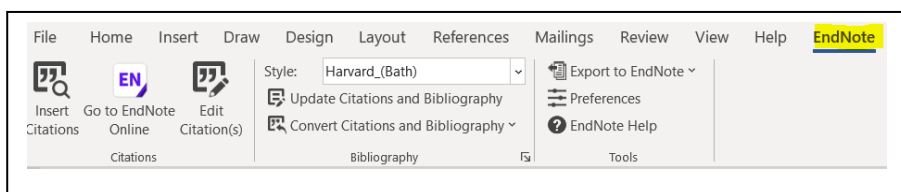
If you want to use the more advanced features of EndNote you can opt to use the CWYW toolbar to insert citations and references directly into your document. **Note: if you are using Office 365 you must be using a locally installed desktop version. CWYW will not work with the Office 365 Word app.**

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. In EndNote go to the 'Downloads' tab and select the download link for your operating system.

**It is highly recommended that you read the installation instructions for further help to ensure this works properly and that all required options are selected.**

### Task 1: Display the EndNote Online toolbar in Word for Office 365 Desktop

1. Open Word
2. Click the EndNote tab to view this toolbar
3. Click the **Preferences** option
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 20')



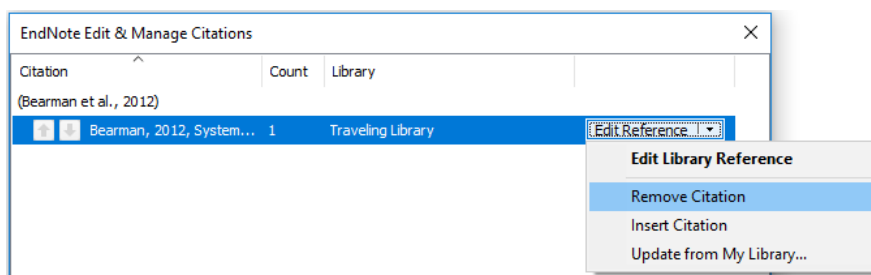
### Task 2: Inserting references/citations: an example

1. Type the following paragraph (from Strachan & Read, Human molecular genetics) into a Word document:

There are many types of mutation and other changes that have an impact on human DNA and therefore make the genome dynamic. This changeability accounts for evolution but also can lead to abnormalities, some of which can be life-threatening.

2. Position your cursor at the end of the sentence, before the full stop, where your citation will go.
3. Click on the EndNote toolbar and then choose **Insert Citations**
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 click on it to select it, then on the main menu click **Edit Citation(s)**, click on the drop down error next to **Edit Reference**, then click **Remove citation** then **OK**.

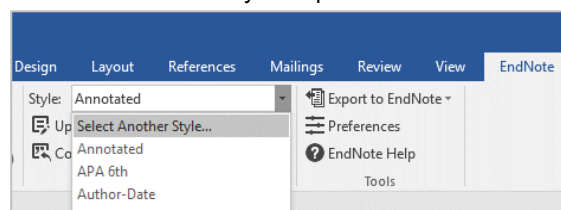




NOTE: **DO NOT** remove citations by selecting them and using the delete key

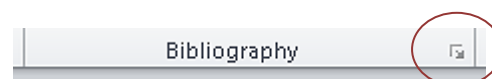
### Task 3: Choosing a citation/referencing style

- Reinstate the Strachan reference following the instructions in Task 2. Then 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.
- Select the Harvard\_(Bath) style and view your references
- Try switching to a numeric style (e.g. Vancouver, Nature) and view your references again to see how they compare.



### Task 4: Formatting your reference list

- Click the small arrow next to 'Bibliography'
- Click the **Layout** tab
- You can **set the font and style** for your reference list
- 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 collection.
- 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.

