# Managing References using EndNote® online - Mechanical Engineering

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.
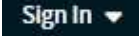
1. Creating an EndNote Library

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*
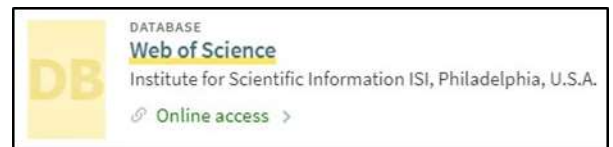
Task 2: Register with Web of Science

1. Click on *Sign in* (top toolbar) 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.
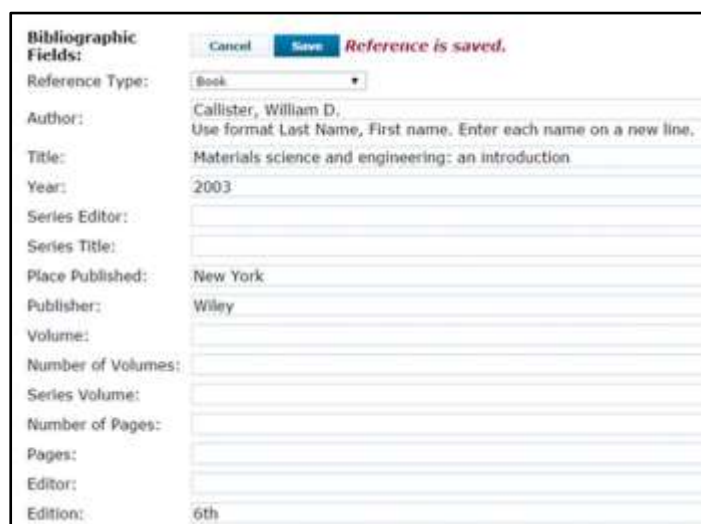
Task 1: Try out Web of Science transfer

1. Connect to Web of Science
2. Sign in using your email & password (top toolbar   then   button)
3. Search using topic keywords e.g. "life cycle assessment"
4. Select references to transfer (tick the boxes next to chosen records)
5. Click Save to EndNote Online
6. Choose whether or not to include abstracts etc., and click send
7. To view your references, go to EndNote Online and look in the 'My References' section

Task 2: Add references manually

1. Go to EndNote Online

2. Click the *Collect* tab

3. Click *New Reference*

4. Select Book from the Reference Type field (drop-down list)

5. Fill the relevant fields using the details from the following box and click Save when finished

> ☐ Authors: Callister, William D.
>
> ☐ Year: 2003
> ☐ Title: Materials science and engineering: an introduction
> ☐ Edition: 6th
> ☐ Publisher: Wiley
> ☐ Place of publication: New York

| Bibliographic Fields:	Cancel **Save** *Reference is saved.*
Reference Type:	Book ▾
Author:	Callister, William D. Use format Last Name, First name. Enter each name on a new line.
Title:	Materials science and engineering: an introduction
Year:	2003
Series Editor:	
Series Title:	
Place Published:	New York
Publisher:	Wiley
Volume:	
Number of Volumes:	
Series Volume:	
Number of Pages:	
Pages:	
Editor:	
Edition:	6th

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

Task 3: Editing references

1. To edit the information in an EndNote record, click on the text you want to edit. For example, to edit *Place Published*: click on "**New York**" and change to "**London**". 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 4: 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, select *New group* and give it a name e.g. Test

4. Click OK

Add to group... ▾
Add to group...
- Test *
New group
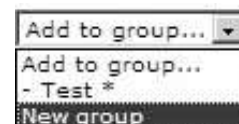
Task 5: Export from the Library catalogue into Endnote online

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 6: Run a Google Scholar search

1. Open a new web browser window.

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

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

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

5. Run a simple search e.g., for "turbocharger", 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

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

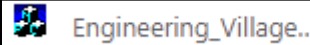| Bibliography manager |
|---|
| ○ Don't show any citation import links. |
| ● Show links to import citations into   BibTeX |
| EndNote |
| RefMan |
| RefWorks |

7. Open your EndNote online library

8. Click the Collect tab then Import References

9. Use *Choose 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 University 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.

Task 7: Downloading and importing references from Compendex via Engineering Village

1. Open a new web browser window

2. On the Mechanical Engineering Library webpage: https://library.bath.ac.uk/mechanical-engineering/home and click on *Search the literature*

3. Click on the link 'Compendex via Engineering Village'

4. Run a search, e.g., type in turbocharger and click the search icon

5. Select at least one of the records you want to export by clicking on the tick box (you can see all the records you have chosen by clicking on Selected records at the top of the screen)

6. Click the *Download this record* icon above the search results and the *Download record(s)* window will appear

7. Leave 'My PC' selected in the Location column, in the Format column select EndNote (RIS, Ref.Manager) and choose an appropriate file name

8. Click 'Download record(s)'. The file will appear at the bottom of your browser: e.g., Engineering_Village....ris
In Chrome the file will automatically save to the *Downloads* folder on your PC. When using Microsoft Edge you can choose where to save the file.

9. The records you have chosen will remain selected for the duration of your Compendex session. When you return to the results page, the *Download this record* icon will now have changed to the *Download selections* icon

10. Open your EndNote online Library. Click the Collect tab then Import References

11. Locate the saved file (e.g., in your Downloads folder or on the Desktop)

12. Select Import Option as RefMan RIS filter (you must choose this from the list by clicking Select Favorites)

13. Choose the destination of the file from the 'To' drop down menu, e.g., select *New group,* click *Import*, and when prompted rename the new group "Test"

14. Click the OK button and then view the imported records in your "Test" group

## 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 1: 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. Tick the box to remember your preferences i.e. username and password

8. Click OK. The toolbar is now labelled 'EndNote' (**NOT** 'EndNote X8') as shown below:
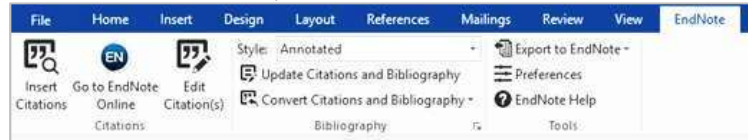
Task 2: Inserting references/citations: an example

1. Type the following paragraph (Callister, W. D.,) into a Word document:

> The whole of our modern society is dependent on materials in many ways that we do not even realise or think about day-to-day; everything from vehicles and transport through to communication devices, food and clothing all really on materials. Our development as a species has hinged on our ability to make and use materials.

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

3. Click Insert Citations on the EndNote toolbar

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 need to select it, click 'Edit Citation(s)', click 'Edit Reference', then 'Remove Citation' then OK.
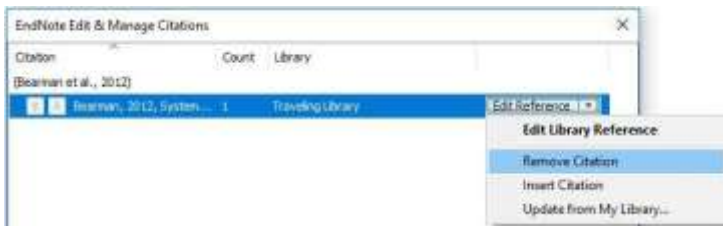
NOTE: DO NOT remove citations by selecting them and using the delete key

Task 3: 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.
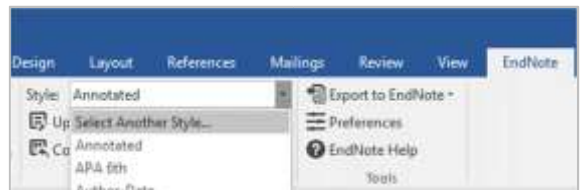
Task 4: Formatting your reference list

1. Click the small arrow next to 'Bibliography':

2. Click the *Layout* tab

3. You can change the title '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 them and ensure you tick the box below to remember your preferences. 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.