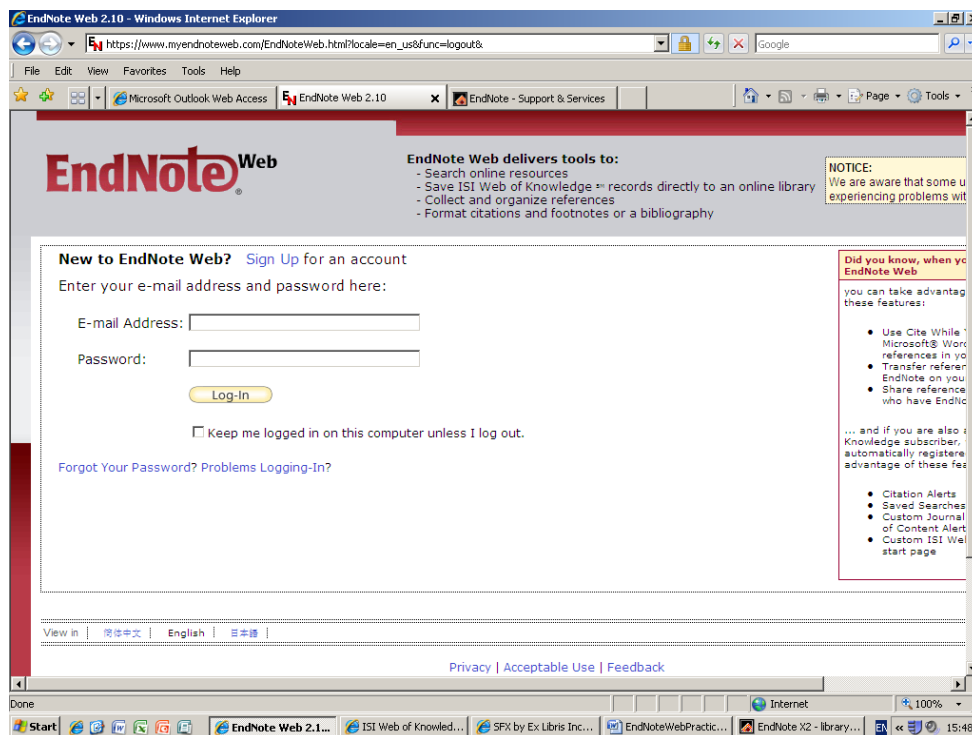


# Referencing & Citing

## Introduction to EndNote Web Practical exercises



Information Services  
October 2011

# Introducing EndNote Web

- EndNote Web (<http://www.myendnoteweb.com>) is accessible over the Internet as part of our subscription to Web of Knowledge (WoK).
- You will need to register to set up an EndNote Web library
  - No extra fee is required to use it off campus
  - You can save up to 10,000 references in EndNote Web.
  - A plugin is available to allow EndNote Web to interact with Word.
  - Most functions of EndNote are available in EndNote Web except that you are not able to edit styles or import filters or customise any settings.
  - It is possible to create folders or groups of references and you can choose to share folders with other users.
  - For a comparison of the features of EndNote and EndNote Web see <http://www.adeptscience.co.uk/products/refman/endnoteweb/compare.html>

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## Section 1: Registering to use EndNote Web

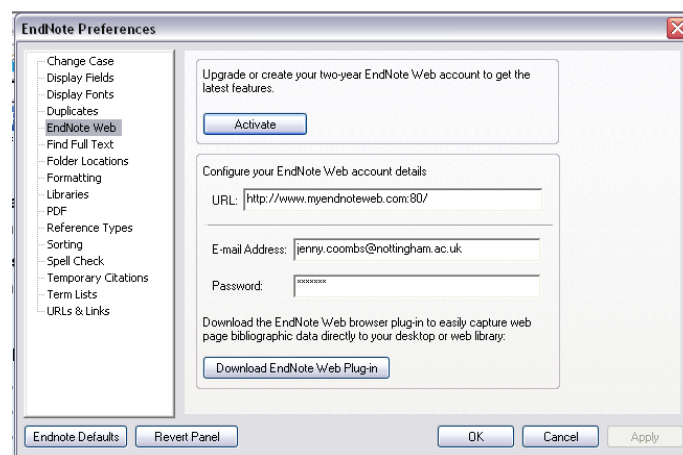
To use the latest version of EndNote Web, sign up via the desktop version of EndNote X5.

From a PC in a University of Nottingham computer room:

- Click on the **start** button
- Click on **all programs**
- Click on **EndNote**
- Click on **EndNote program**.

Within EndNote:

- Click on **edit** from the top menu
- Click on **preferences**
- Click on **EndNote Web**
- Click on the **activate** button under **upgrade or create your EndNote Web account**.



- Enter your email address
- Click on **submit**.
- Fill in your details on the register screen

Fields marked with a \* are required

Please note the strict password guidelines

If you have already registered for EndNote Web previously, you will instead see an option to **upgrade** your EndNote Web account to take advantage of new features. All your references will be automatically upgraded.

### Tip: Signing up via the Web of Science

If you have already signed up for additional features and alerts in the Web of Science, you can use this same password for EndNote Web. Follow the instructions above to upgrade your EndNote Web account.

## Logging in

Go to EndNote Web at: <http://www.myendnoteweb.com>

- Enter your **email address** and your **EndNote Web password**

If you are off-campus:

- Login with your **normal computer username and password**.
- At the Endnote Web login screen, enter your **email address** and **EndNote Web password**.

## Section 2: Manually adding references

- Click on the **collect** tab
- Click on **new reference**
- Select the appropriate reference type from the drop down menu next to **reference type**.
- Fill in the template and **save** the reference.

### **Tip: Entering author names**

If you have more than one author, make sure that you separate each author with a semi-colon (;)

e.g. Smith, John; Thompson, Brian

If you have a corporate author or body, enter a comma after the name to ensure that it displays correctly

e.g. Department of Health,

## Section 3: Importing references from databases

For information on how to download from the most commonly used databases, see the appendix at the end of this document.

### Section 3a: Direct Export

#### Importing from the Web of Science

The Web of Science has a direct export to EndNote Web as well as EndNote.

The Web of Science is a multidisciplinary database covering journals and conferences relevant to the sciences, arts and social sciences and has a direct export function.

To access the Web of Science:

- Login to the **Portal**
- From the **library tab**, click on **eLibrary Gateway**
- Click on the **titles** tab and type in **web of science**
- Click on the link to enter the Web of Science
- Carry out a search.

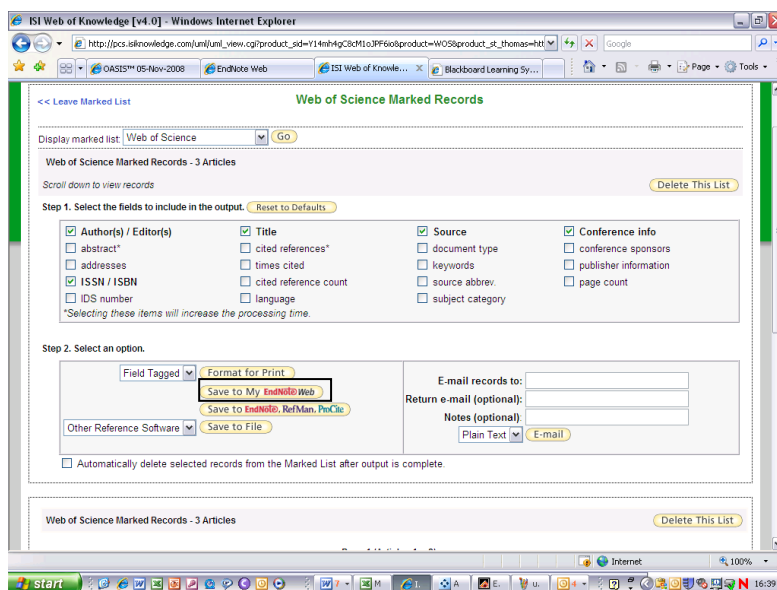
Exporting references to EndNote Web:

- **Mark** some references by ticking the boxes beside them
- At the top of the screen, click on the **save to Endnote Web** button.



Alternatively:

- **Mark** references and add them to the **marked list** to transfer as a batch at the end of your Web of Science session.
- Select **marked list** from the top of the screen
- Select the required fields to transfer
- Click on the **Save to My EndNote Web** button.



References will be entered into your EndNote Web library and placed in the **unfiled** folder. The SFX links are also transferred so that you may easily connect to the full text if available.

On returning to the results display in Web of Science, you should see that the references transferred to EndNote Web are marked **EN Web**.

## Section 3b: Importing references using a non-direct export

Some databases do not have a direct export option. **The Library Online Catalogue (UNLOC)** is an example.

This method involves two steps:

- 1) Saving references as a file
- 2) Importing the file into EndNote using a filter.

If you still have a set of references saved from UNLOC you can use these again to import into EndNote Web. Go straight to step 2.

If you need to save some references from UNLOC again, go to step 1.

### Step1: Saving references as a file

Access UNLOC at: <http://www.nottingham.ac.uk/unloc> or click on the **UNLOC** link from the **library** tab in the **portal**.

- Perform a search and **mark** some relevant references
- Click on the **save/mail selected** option towards the top of the screen.

We are going to **save a set of records to disk**.

- From the drop-down menu, select **reference management format**. This will format the references to enable EndNote to import the appropriate details.
- Click on the **save** button.

Your references are now displayed in a tagged format for EndNote.

- Click on the **file** menu
- Click on **save as**
- Choose a location to save your file to, e.g. your Z drive
- Give your file a **filename**
- From the **save as type** drop-down menu, select **text file (\*.txt)**
- Click on **save**.

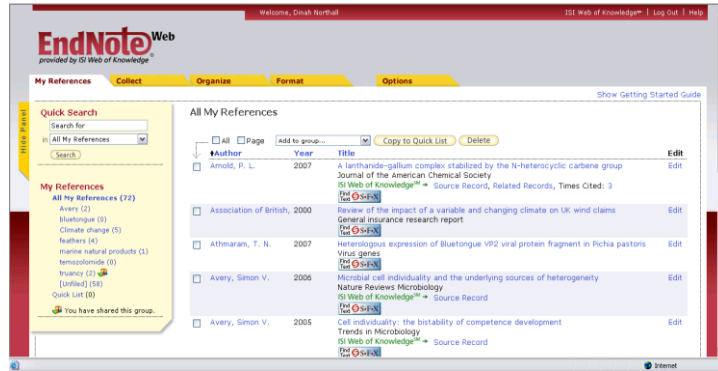
### Step 2: Importing references into EndNote Web

- From the **collect** tab, select **import references**
- Click on **select favourites** to choose the filter **RefMan (RIS)**
- Copy the filter to **my favourites**.
- On the left hand side, **browse** to the file where you saved the references
- You should now see the appropriate filter in the drop-down menu
- In the drop-down menu, select **unfiled** to add to your default library. If you have already created a group you can add your references to a specific group, or create a new group.
- Click on **import**.
- Click on the **my references** tab to view the references which will have been filed in alphabetical order by surname.

## Section 4: Managing References

Click on the tab **my references**

Note that there is a folder called **all my references** which contains all the references you have added to EndNote Web shown in the order of the author's name.



### Editing a reference

- Click on the **title** of a reference to open the full record
- Click in the relevant **fields** if you wish to make any changes or additions to the details.

### Sorting references

References can easily be sorted into the order of author's name, year or title by clicking on the column headings. Click a second time to reverse the order.

### Searching for references

There is a **quick search** box on the left hand side of the screen where keywords, authors' names etc could be used to locate references. It is possible to use the wildcard \* to find variant word endings.

You can search **all references** or choose a **group** to search within from the drop-down menu

### Organizing References into Groups

Groups can be created to collect together references on a particular topic

- Go to the **organize tab** and to **manage my groups**
- Create a group by clicking on **new group** and typing in a name
- Go back to the **my references tab** to allocate references to groups
- **Mark** some references and click on **add to group** at the top of the screen
- Choose a **group** from the drop-down menu.

Note that the record remains in your master list of references (all my references) as well as in the group.

## Sharing groups

You can opt to share a group with another EndNote Web user

- Click on the **manage sharing** option
- Click on **start sharing this group**
- Type in the **email address(es)** of those with whom you wish to share your references
- Click on **apply**.
- Specify whether you want the person to have **read only** or **read and write** privileges.

Other facilities under the **organize** tab include linking to groups others are sharing with you and identifying any duplicated references so that they can be eliminated.

## Linking to the Full-text

Use the **SFX links** to check whether the university subscribes to the full-text of an article.

Alternatively, you can **save an attachment** to a reference, for example, the PDF file of a journal article:

- Click on the **paperclip icon** underneath the reference
- Click on the **attach files** link
- **Browse** for the file
- Click on **upload**

To then view the file attachment

- Click on the **paperclip icon**
- Click on the **filename** to open the document.

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## Section 5: Creating Reference Lists

Click on the **format** tab to explore the options for outputting lists of references.

- Select **bibliography**
- Click **customize this List** to select output styles for your list of references
- Choose some styles e.g. *Harvard* and *Nature* and add them to **my favourites**.
- Click on the drop down menu next to **references** where you can choose a group of references or return to the **my references** tab and mark references to put into the **quick list**.
- Choose the desired **style** and **file format**
- Click to **preview** the list.
- Select a different style to alter the format of the references.

Note that the styles available are similar to those in EndNote but that they cannot be amended in EndNote Web.

## Section 6: Using EndNote Web with Microsoft Word

For EndNote Web to work with Word, it requires a **plugin**. On a networked PC at the University, this plugin will automatically have been installed.

### Tip: Installing the plugin

If you use EndNote Web on computers not connected to the University network, you will need to install the **cite while you write plugin** which is available under the **format** tab.

## Working with Word 2010 and Word 2007

### Insert an EndNote Citation into the Paper

Open Word:

- Click on the **start** button
- Click on **all programs**
- Click on **Microsoft Office**
- Click on **Microsoft Word**

Open an existing paper or begin typing a new paper.

You should see that a tab for **EndNote X5** or **EndNote Web** has appeared at the top of the screen. If you cannot see the **EndNote** or **EndNote Web** tab, close down Word and reopen.

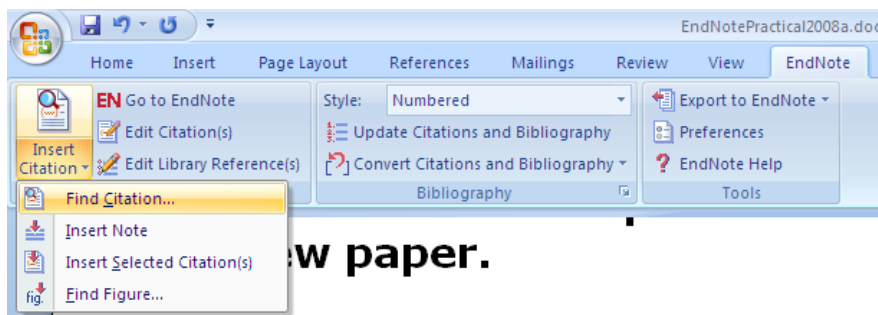
Note that you always need to have your EndNote Web library open when working with Word

Tip: You may first need to switch from **Endnote** to the **EndNoteWeb** toolbar:

- Click on **preferences** in the third column of the Endnote tab
- Choose the **applications** tab
- Click in the radio button to select **EndNote Web**
- Login with your email address and Endnote Web password.

To insert a citation:

- Click on the **EndNote Web** tab
- Click on the option to **insert citation**
- Click on **find citation**



This will take you to a dialog box allowing you to search for the reference you require.

- Choose the appropriate reference
- Click on **insert**.

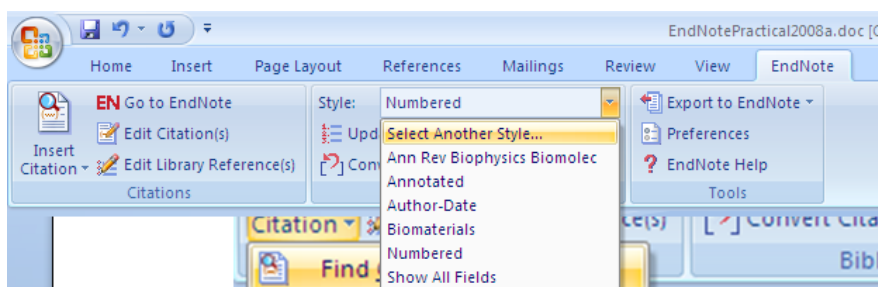
This will add the reference into the text in Word and begin creating the bibliography.

Repeat the process until all references have been inserted. Then save your document.

### To format again with a different bibliographic style:

To format your reference list according to the reference style of your choice:

- Click on the drop-down menu in the second column beside the word **style**.



You will see some default styles such as **author-date** and **numbered** and any other styles that you have previously selected or saved as favourites

- Select a **style** and you will see that your intext citation and bibliography will be reformatted according to that referencing style
- To see a full list of output styles, click on **select another style** from the drop-down menu and click on the style of your choice to reformat.
- If you can't see further styles, you can select favourites from within EndNote Web itself:
  - Click on the **format** tab
  - Click on **bibliography**
  - Click on **select favourites**
  - Select your style(s)
  - Click on **copy to favourites**

These will now show in both EndNote Web and within the style drop-down menu in Word.

## Working with Word 2003

### Insert an EndNote Citation into the Paper

Tip: To change the settings from Endnote to EndNote Web:

- Select **tools > EndNote > Cite while you Write Preferences**
- Click on the **application** tab and select **EndNote Web**
- Enter your login details.

The toolbar will change to display the EndNote Web options as shown below.



To insert a reference:

- Click on the **search icon** (magnifying glass) or select **find citation** from the **EndNote Web toolbar** on the **tools** menu
- Locate the relevant reference(s) to insert into the text in Word.

This will add the citation in the text in Word and begin creating the bibliography.

#### **Tip: Editing a citation**

For details on editing a citation, see the Endnote practical workbook

### Formatting with a different bibliographic style

- Choose the **format bibliography icon** (numbered list) from the **EndNote Web toolbar** or select **format bibliography** from the toolbar on the **tools** menu.

A Format Bibliography dialog box appears.

- Change the **with output style selection** to select another style and begin formatting the paper and bibliography in a new format.

#### **Tip: Using either Endnote or EndNote Web**

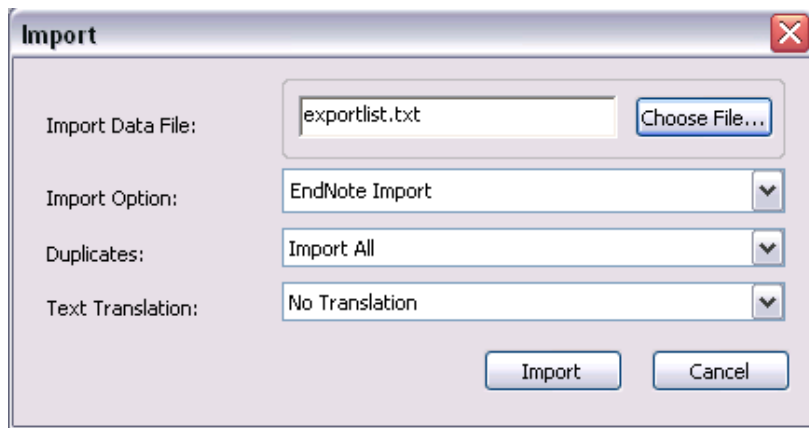
Be aware that in any document you can only select references from one or the other package and not both

## Section 7: Using EndNote Web with EndNote

It is possible to export references from EndNote Web into EndNote. There are 2 ways of achieving this:

### 1. Exporting a saved file from within EndNote Web

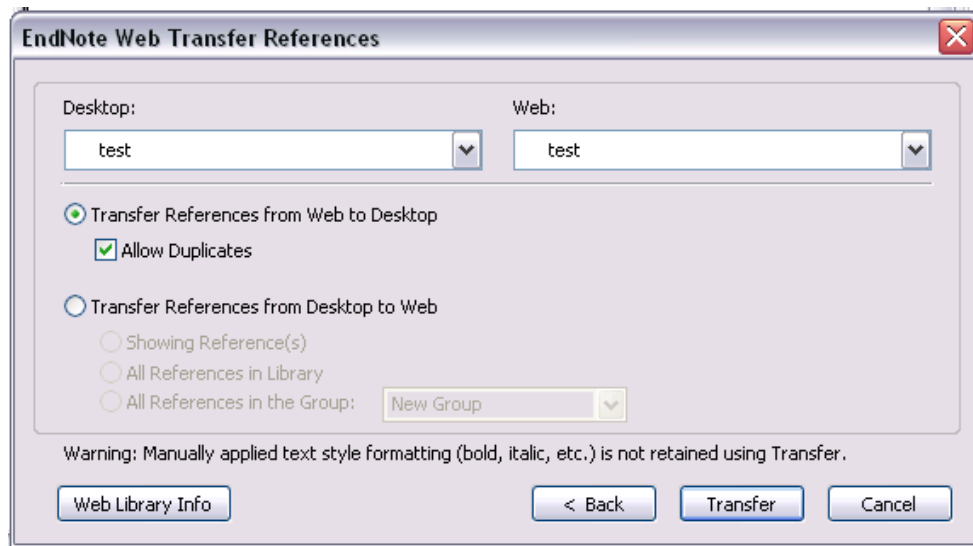
- From the **format** tab, click on the **export references** option
- Choose the relevant references
- Choose the export style: **EndNote export**.
- **Save** the references
- From the desktop version of EndNote, select the **file** menu
- Select **import < file**
- Find the export file that you have just saved
- Choose **Endnote import** as the import option from the drop-down menu.
- Click on **import**



### 2. Using the transfer option with Endnote desktop

An alternative is to transfer your references from within the Endnote desktop version itself.

- Click on **Endnote Web** from the **tools** menu within the desktop version of Endnote
- Enter the **username** and **password** of your Endnote Web library
- Click on **next**
- Choose the appropriate Endnote and Endnote Web library/group from the drop-down menus
- Click in the radio button for **transfer references from web to desktop**
- Click on **transfer**



This means that it is possible to benefit from the best of both packages.

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## Further Information

<http://www.endnoteweb.com/support/enwebsupport.asp>

For information on how to reference particular types of material, see:  
<http://webct.nottingham.ac.uk>

- Click on the option for *Pathway*
- Click on the button for *Introductory modules*
- Go to *module 12: Citing and Referencing*

# Appendix

## Downloading from commonly use databases

The table below shows how you would download from some of the more commonly used databases.

Remember that databases can be provided by different suppliers. Make sure you download the correct supplier's filter. If in doubt ask your subject librarian.

Supplier	Database	Downloading from database	Importing into EndNote
CAS	SciFinder	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Save references as <b>tagged format (*.txt)</b></li> <li>Click on <b>save</b></li> </ul>	From the <b>collect</b> tab <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved <b>.txt file</b></li> <li>Choose the import option: <b>SciFinder (CAS)</b></li> </ul>
Ei	Ei Compendex (Engineering Village)	<ul style="list-style-type: none"> <li>Click on <b>download</b></li> <li>Select <b>RIS, EndNote, ProCite, Reference Manager</b></li> <li>Click on <b>Download</b></li> <li>Click on <b>Save</b></li> <li><b>Save as the default RIS formatted file</b></li> </ul>	From the <b>collect</b> tab <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved <b>.ris file</b></li> <li>Choose the import option: <b>Ei Compendex (Ei)</b></li> </ul>
Elsevier	Science Direct	<ul style="list-style-type: none"> <li>Click on <b>export citations</b></li> <li>Content format: choose level of information that you require</li> <li>Export format: Choose <b>RIS format (for Reference Manager, Procite and EndNote)</b></li> <li>Click on <b>save</b></li> </ul>	From the <b>collect</b> tab <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved file</li> <li>Choose the import option: <b>RefMan RIS</b></li> </ul>
Elsevier	Scopus	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Choose <b>RIS format</b></li> <li>Choose the level of information that you wish to be imported</li> <li>Click on <b>export</b></li> <li>Click on <b>save</b></li> <li><b>Save as the default RIS formatted file</b></li> </ul>	From the <b>collect</b> tab <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved file</li> <li>Choose the import option: <b>Scopus</b></li> </ul>
Google	Google Scholar	Go to <b>Scholar Preferences</b> <a href="http://scholar.google.co.uk/scholar_preferences?hl=en">http://scholar.google.co.uk/scholar_preferences?hl=en</a> <ul style="list-style-type: none"> <li>Set up the <b>Bibliography Manager</b> to show links to <b>import into RefMan</b></li> </ul> Go back to your results in Google Scholar <ul style="list-style-type: none"> <li>Click on the <b>import into RefMan</b> link</li> <li>Choose <b>open</b> file</li> </ul>	Correct import filter is selected automatically  Some manual editing may be required

NLM	<b>PubMed</b>	<p>There are 2 options:</p> <p><b>Saving as a text file</b></p> <ul style="list-style-type: none"> <li>From the PubMed results display click on drop-down menu beside <b>display settings</b> and choose <b>Medline</b>. Click on <b>apply</b></li> <li>Go to <b>file</b> and <b>save as</b> and save as a <b>text file</b></li> </ul> <p><b>Online search</b></p> <ul style="list-style-type: none"> <li>From the Collect tab, click on <b>online search</b></li> <li>Choose <b>PubMed</b></li> <li>Click on <b>connect</b></li> <li>Enter your search</li> <li>Choose whether you want all references retrieved or a range of references</li> <li>Click on <b>retrieve</b></li> </ul>	<p>From the <b>collect</b> tab</p> <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved <b>.txt file</b></li> <li>Choose <b>Pubmed (NLM)</b> filter</li> </ul>
OvidSP	<p>Various databases including:</p> <ul style="list-style-type: none"> <li><b>AMED</b></li> <li><b>CAB Abstracts</b></li> <li><b>Embase</b></li> <li><b>Food science &amp; technology abstracts</b></li> <li><b>Inspec</b></li> <li><b>International Pharmaceutical Abstracts</b></li> <li><b>Medline</b></li> <li><b>PsycInfo</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>From the export to drop-down menu, choose: <b>Reprint/Medlars</b></li> <li>Choose the amount of information to export. It may work better if you select <b>complete reference</b></li> <li>Click on <b>export citations</b></li> <li><b>Save</b> the file</li> </ul>	<p>From the <b>collect</b> tab</p> <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved file</li> <li>Choose the import option for the database name (e.g. <b>Medline OvidSP, AMED OvidSP</b> etc.)</li> </ul> <p>Some manual editing may be required. E.g. when downloading from CAB Abstracts the year may be missing, or when downloading from INSPEC, the volume, year and pages are not always put in the correct field (Exporting the <b>complete reference</b> rather than just the citation may solve this.)</p>
Proquest	<p>Various indexes including:</p> <ul style="list-style-type: none"> <li><b>ABI/Inform</b></li> <li><b>ASSIA</b></li> <li><b>Biological Sciences</b></li> <li><b>British Humanities Index</b></li> <li><b>Environmental Science &amp; Pollution Management</b></li> <li><b>Medline</b></li> </ul> <p>and others</p>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>From the formatted file option, select: <b>RIS</b></li> <li>Click <b>continue</b></li> <li><b>Save</b> the file</li> </ul>	<p>From the <b>collect</b> tab</p> <ul style="list-style-type: none"> <li>Click on <b>import references</b></li> <li>Browse for the saved file</li> <li>Choose the import option: <b>RefMan RIS</b></li> </ul>

Thomson (TS)	Web of Knowledge including: <ul style="list-style-type: none"> <li>• <b>Web of Science BIOSIS</b></li> <li>• <b>Zoological Record</b></li> </ul>	<ul style="list-style-type: none"> <li>• Click on <b>save to EndNote Web</b> button</li> </ul>	Correct import filter is selected automatically
Ex Libris	<b>UNLOC</b> (Library Online Catalogue)	<ul style="list-style-type: none"> <li>• Click on <b>save/mail selected</b></li> <li>• From the save set of records to disk option, choose: <b>reference management format</b></li> <li>• Click <b>save</b></li> <li>• Click on <b>file</b> and <b>save as</b></li> <li>• Enter a filename</li> <li>• In the save as type drop-down menu, select <b>text file (*.txt)</b></li> </ul>	<p>From the <b>collect</b> tab</p> <ul style="list-style-type: none"> <li>• Click on <b>import references</b></li> <li>• Browse for the saved file</li> </ul> <p>Choose the import option: <b>RefMan RIS</b></p> <p>Some manual editing required. For example, the author may be added to the title field and the place of publication may not be transferred.</p>