

EndNote[®] Web

EndNote web is a software tool for creating a personal database of references which can be integrated with Word to insert citations into a document and create reference lists.

Your main aim should be to capture references electronically, avoid typing in reference information by hand. This is a last resort.

These notes describe how to use it but as notes describing how to use computer applications have their limitations you may find the following resources useful:

- There are some online video tutorials on how to use EndNote Web at www.endnote.com/training/
- Use the Help menu of EndNote Web.
- Try the Technical & Support Services www.endnoteweb.com/support/enwebsupport.asp
- Browse the EndNote Web forum at <http://forums.thomsonscientific.com/ts/?category.id=endnoteweb>

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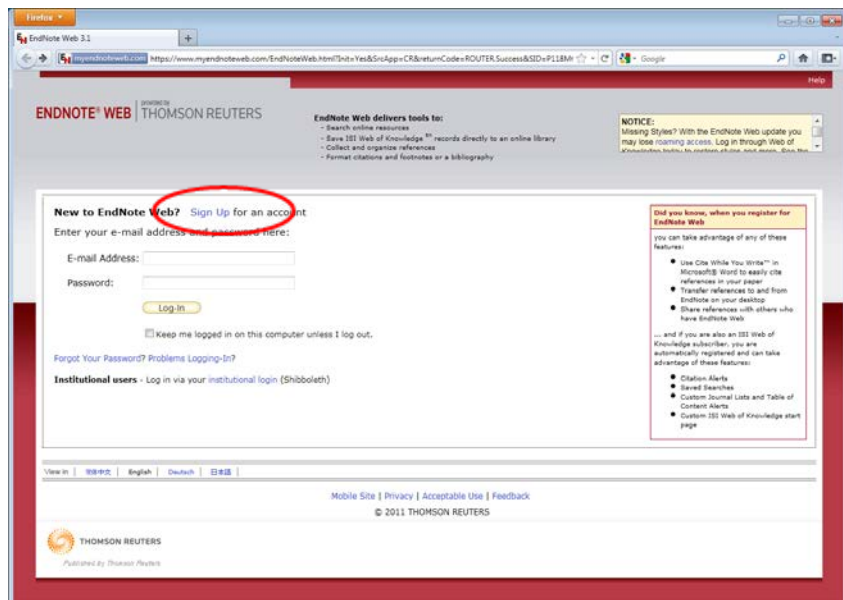
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Registering to use EndNote Web

You must use a computer on the University network (public workstation or halls of residence) or connected by the VPN service to login to: <http://www.myendnoteweb.com/> to register. After this you can login from any location.

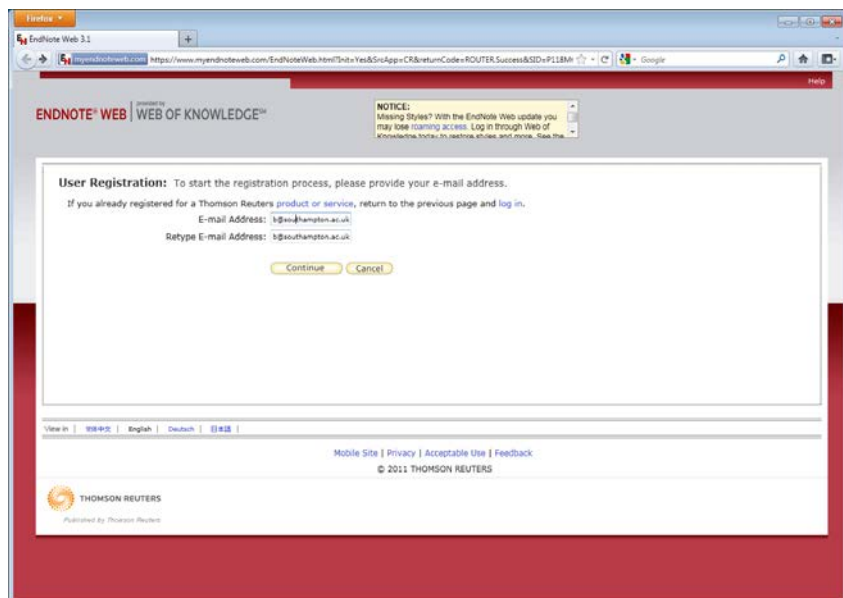
Select the **Sign Up** for an Account link.

DO NOT select the **Institutional Users** link. This will take you to an Institutional Access (Shibboleth) link and then out of EndNote Web to the Web of Knowledge. But you will not be registered for EndNote web (this seems to be a bug).



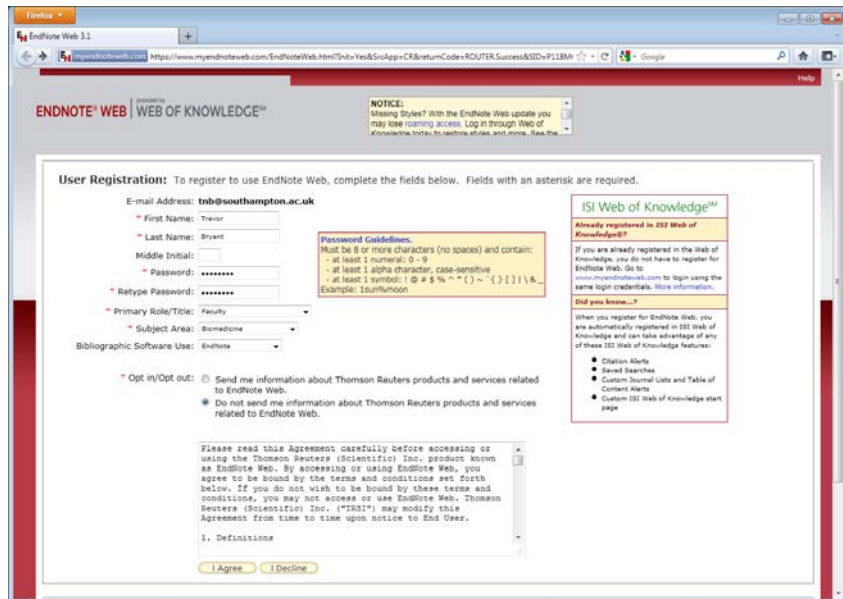
*Note: When using EndNote Web DO NOT use the browser's **Back** button, you may find that you get a 'Page has expired message' and loose some of what you were doing.*

Enter your University Email address.
Click Continue



Then your personal details.

Once your details have been entered correctly press the **I agree** button at the bottom of the page. For the next 12 months you can login and use EndNote Web from any PC using this email address and password) by linking to www.myendnoteweb.com



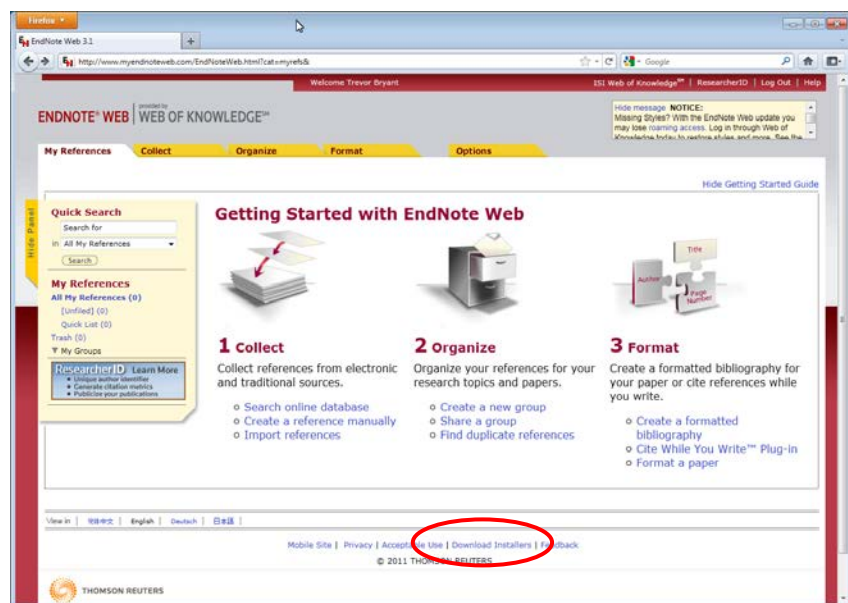
This is called roaming access because your library of EndNote Web references, and options are stored on the EndNote server (located in the USA).

Installing the Plug-in and toolbar on your PC

Note: This is already installed on Public Workstations.

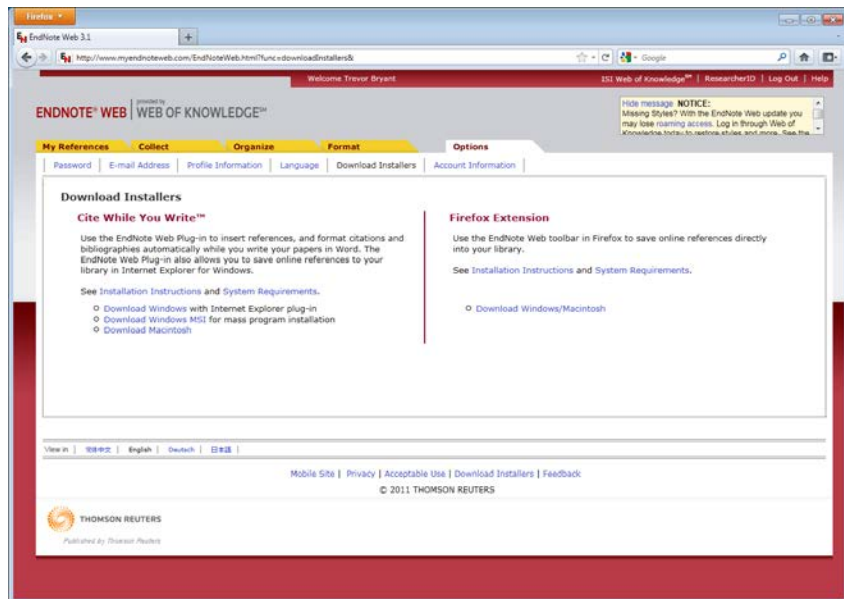
Before you start using EndNote Web with Word on your own computer download and install the EndNote plug-in and web browser toolbar add-in.

Select the **Download Installers** link (at the bottom of the web page above the copyright notice).



The Cite While You Write™ plug in for Word is essential whereas the Browser toolbar is desirable.

Select the **Download Windows** with Internet Explorer link (even if you do not use IE).



Save and **Run** the EndNoteWeb.Exe file to install these features.

Keep Clicking the **Next** buttons and finally the **Finish** button to complete installation.

You can also install an EndNote Web toolbar as a Firefox extension. Sometimes the very latest version of Firefox is not supported and it takes couple of weeks for the toolbar to be updated.

Now you are ready to start using EndNote Web to locate references and cite them in Word documents.

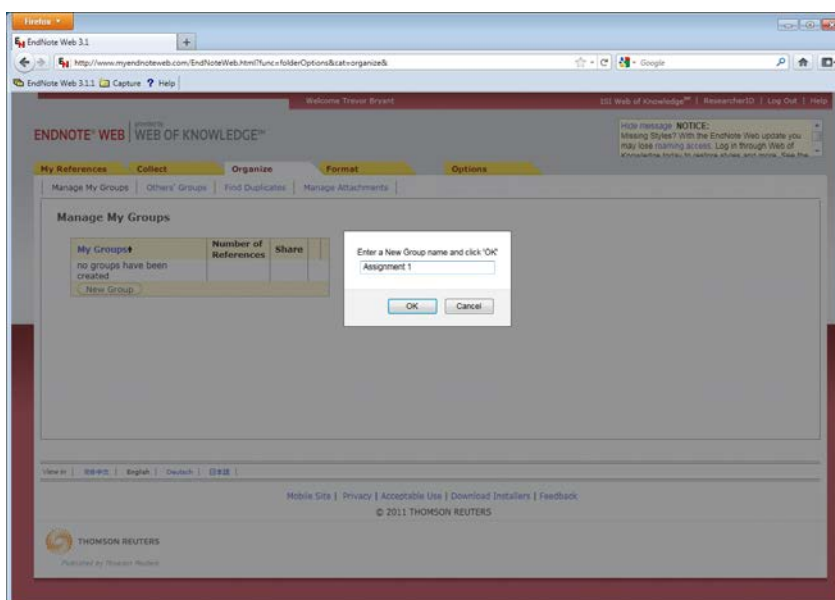


Organising References: Creating a Group

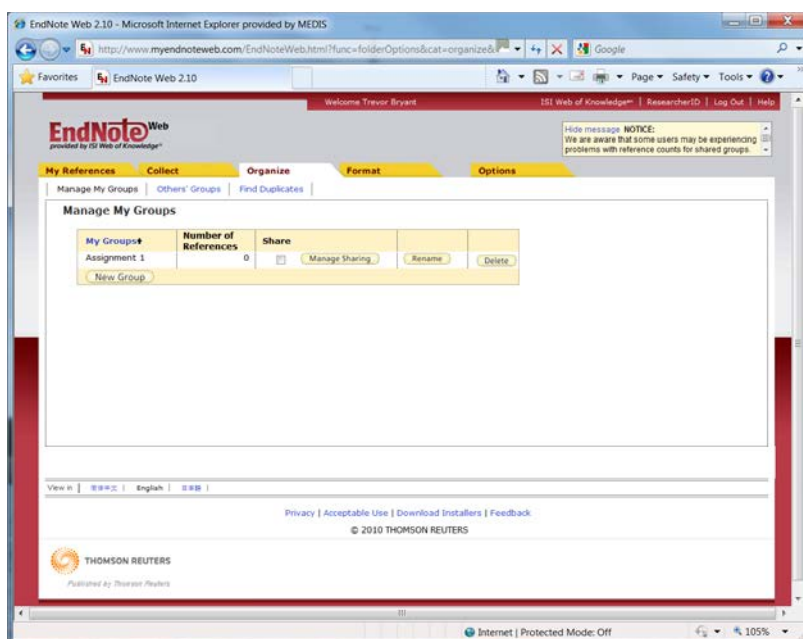
EndNote Web uses groups (equivalent to folders) to store collections of references. Although you can leave References in an 'Unfiled' group, it is recommended that you create groups to store references. Suppose you wish to create a group for an assignment. We will call this 'Assignment 1'

Select the **Organize** tab which will show the **Manage My Groups** section. Click on **New Group**

Enter **Assignment 1** into the text box (currently displaying undefined) and click **OK**



A group called **Assignment 1** is created. It will also appear in the **My References** tab. You are now ready to collect references and add them to your EndNote web database.



Collecting References

There are three approaches to collecting references.

1. Perform an [Online Search](#) within EndNote Web. This is the quickest way, but not always the best approach from a bibliographic searching perspective.
2. Enter a [New Reference](#) manually by typing the details in. This is a last resort and will not be described in these notes because you should rarely need to use it. It is much better to search for a reference online, even if you have the paper copy in front of you.
3. Perform a search using a bibliographic provider such as OVID or EBSCO to search databases and then [Import References](#) found. This is a better approach and is recommended by librarians; the reasons for this will be explained later.

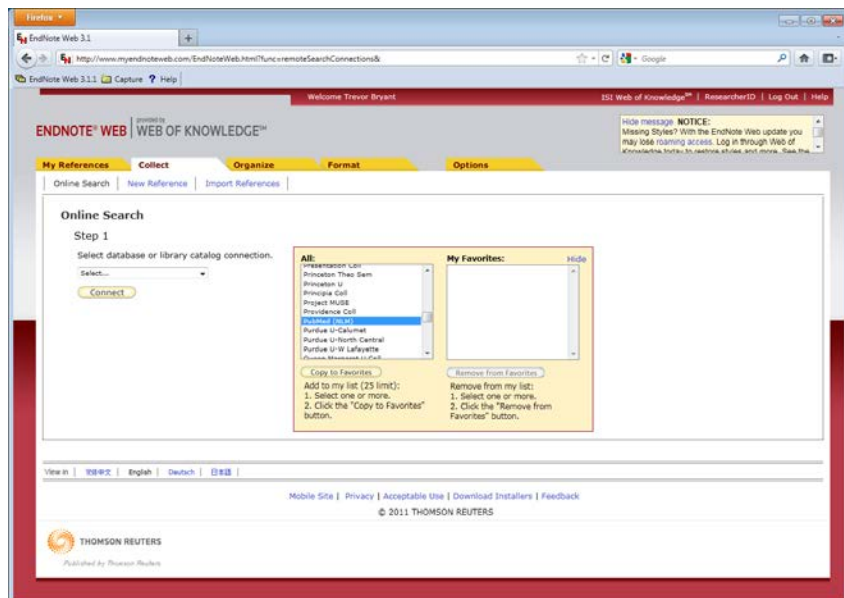
Online Search

Suppose you are interested in whether there is any evidence that pet hamsters are associated with asthma. Select the **Collect** tab and the [Online Search](#) section.

Click the [Select Favorites](#) link. Scroll the **All:** list to locate the bibliographic source you wish to search; in this case *PubMed (NLM)*.

Click the **Copy to Favorites** button.

Adding other bibliographic sources or 'connections' to search will be described later.



To start searching, use the Select drop down list and pick PubMed (NLM) and click **Connect**.

Online Search

Step 1

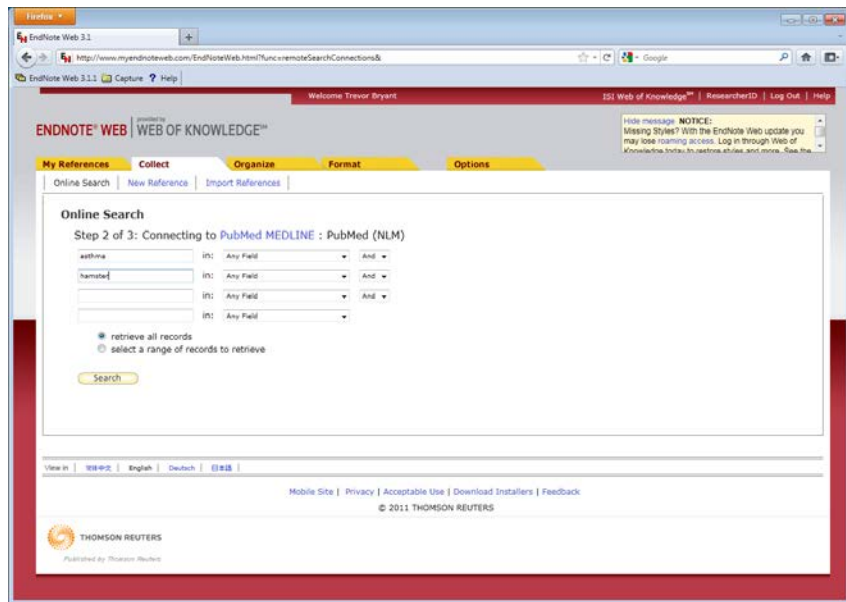
Select database or library catalog connection.

Select...
Select...
PubMed (NLM)

Enter the Search criteria into the text boxes as shown on the next page. In this example we are interested in a link between asthma and owning a pet hamster.

Enter each term (**asthma**, **hamster**) into a separate text box. In this example any PubMed field is searched for a combination of these terms. But you can select specific fields from the **in:** drop-down lists.

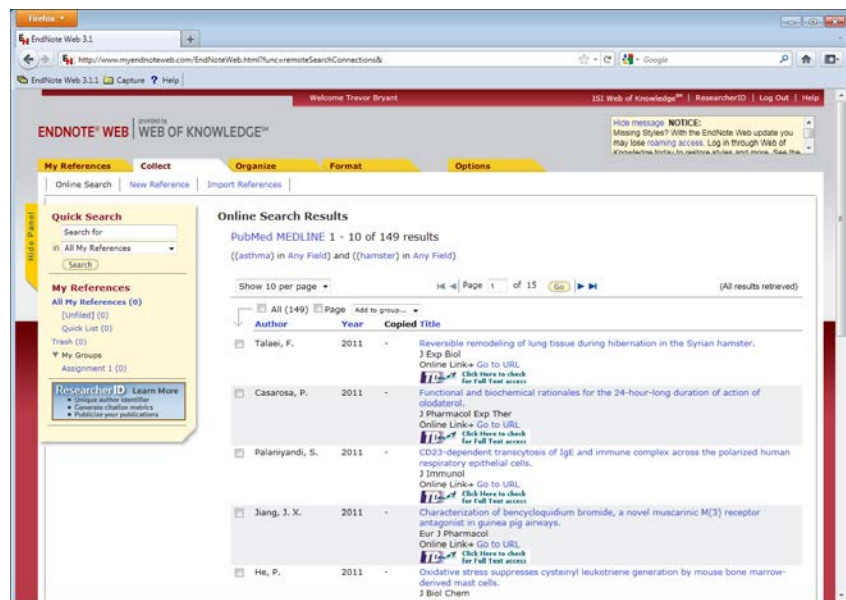
Click **Search**



The Online Search Results page displays 10 references per page, but the number displayed can be changed using the **Show 10 per page** drop down.

If you get too many or too few results you can click on one of the search terms or fields (**blue hyperlinks** below **PubMed MEDLINE 1-10**) which will result in the previous, *Online Search Step 2 of 3*, screen being redisplayed.

Modify your search criteria and perform another search.



Initially a limited number of results (references) may available (Retrieved 61 out of 149) but all results will be retrieved eventually.

You **MUST COPY** the online search results to one of the groups in your database. You can select **All (149)** references, those on the current page or select individual references (as shown above).



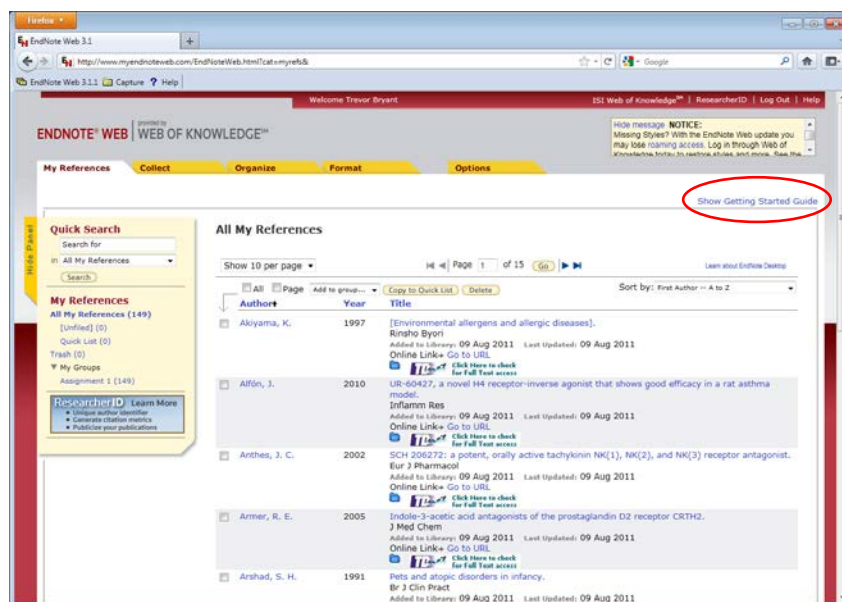
Select the *Add to Group* drop down to add them the group (Assignment 1). A tick appears in the copied column to show that the reference has been copied.

Note You can only copy individual references to a group from the current page. You cannot tick references on several pages and then copy them.

Viewing References

To view references, select the **My References** tab and select the appropriate group, **Assignment 1**, in the **My References** list. The references are listed in alphabetical order. If there are no references then you forgot to copy the online search results.

If you see the Getting Started with EndNote Web guide, click **Hide Getting Started Guide**.

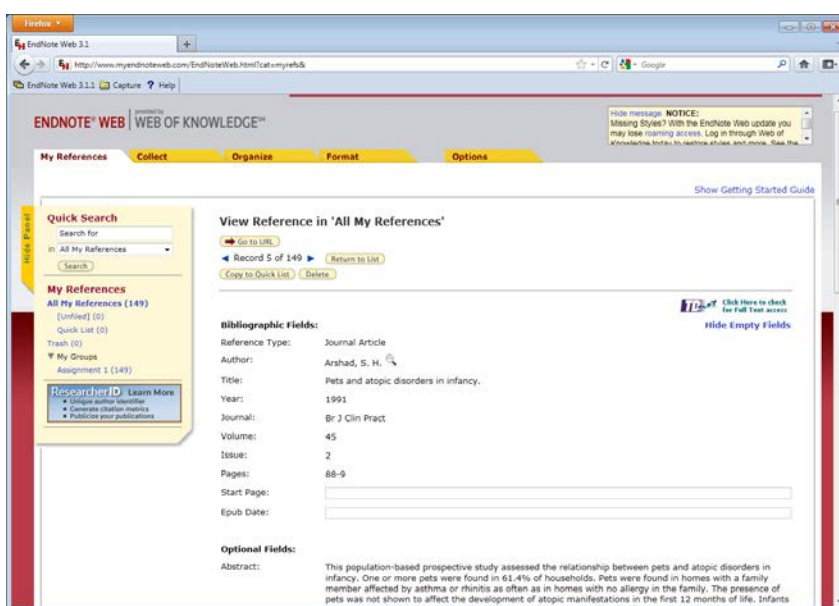


Various items on a page listing reference provide hyperlinks to further information. Clicking on:

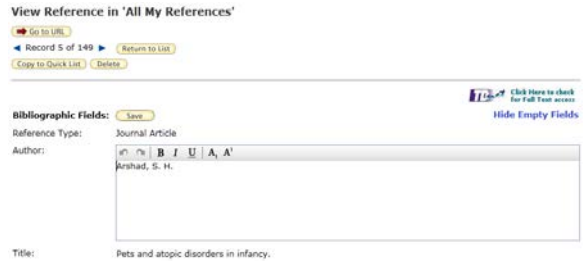
- Any column title (**Author**, **Year** or **Title**) sorts the display in alphabetical or numerical order, a second click reverses the sort order.
- An **Author name**, eg.. *Akiyama, K*, searches your EndNote library for all entries for this author in your EndNote Web library.


- The **Title of an article** displays all the information about a reference including the Abstract. Any field can be edited by clicking on the content (shown on the next page). Other features allow you to move to the previous or next record;

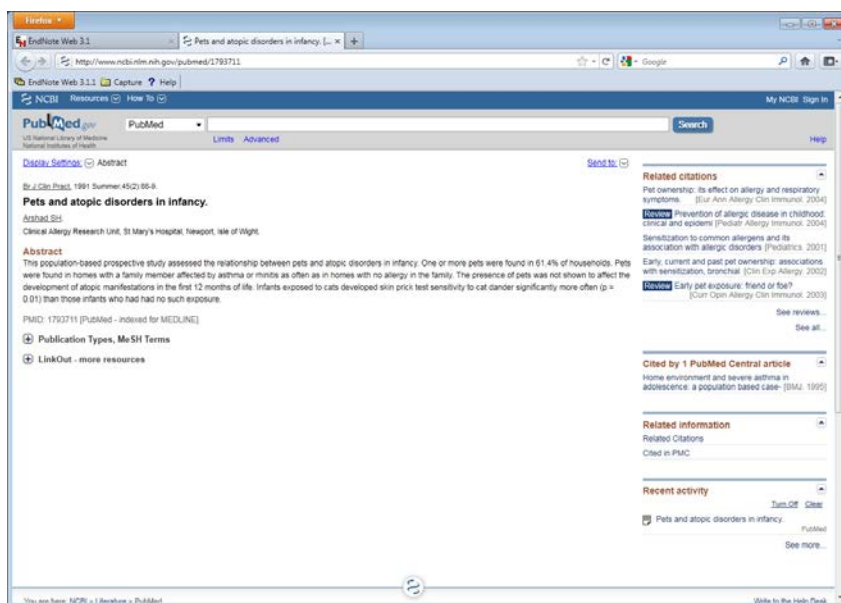
◀ Record 5 of 149 ▶
 Return to List or
 Delete



Any field can be edited by clicking on it. The image opposite shows the Author field selected for editing.

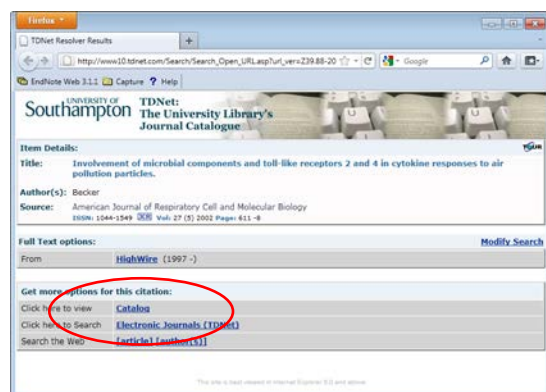


- Some buttons appear on both the *View Reference* and *All My reference* screens.
 - ➔ **Go to URL** / **Go to URL**  **Click Here to check for Full Text access** or **Source Record** may be shown.
- **Go to URL** opens another browser window with the PubMed entry for this reference as shown below.



If you click the link  **Click Here to check for Full Text access**, the TOUR (TDnet Resolver Results) window is displayed.

A click on the *Full Text options* From link will take you to the full text of the article if the library has a subscription for it.



You will not see the  **Click Here to check for Full Text access** link if you search from a home computer and you are not using a VPN connection.

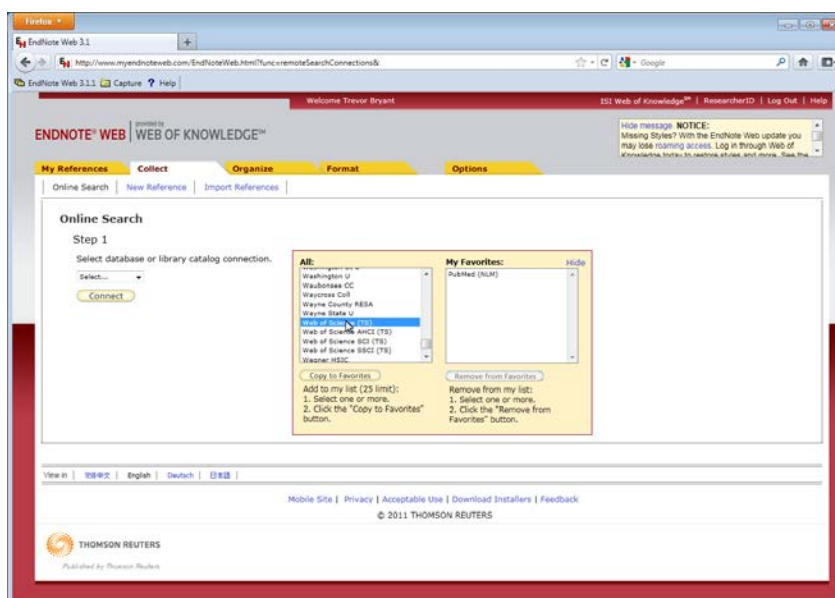
Customising Online Searches

It is likely that you will use the same limited set of bibliographic databases e.g. PubMed and Web of Science (WoS) to find references.

On the **Collect** tab **Online Search** section the **Select Favorites** link displays a dialogue that allows you to add more sources to *My Favorites*:

This allows you to personalise the drop down list of sources to search to those that you use frequently, for example PubMed, Web of Science (WoS) or a library catalogue.

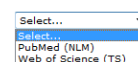
Select the database from the *All:* list and click the **Copy to Favorites** button. The *My Favourites:* box lists the favourites you have selected.



Note You can select multiple items by press the CTRL key and clicking those you wish to select as Favourites.

From now on the select drop down will display your selections.

Select database or library catalog connection.



Searching other online resources

A useful bibliographic source is Web of Science (part of the Web of Knowledge). You can search it as a single global database, Web of Science (TS) or one of three sub databases, for example, Web of Science SCI (TS) which covers only scientific publications. The other sub databases are Arts & Humanities and Social Science.

Suppose you perform a similar search to the previous PubMed search (page 6) using Web of Science (TS) with **hamster** and **asthma** as search criteria. Change the drop down list from **Author** to **Title/Keyword/Abstract**.



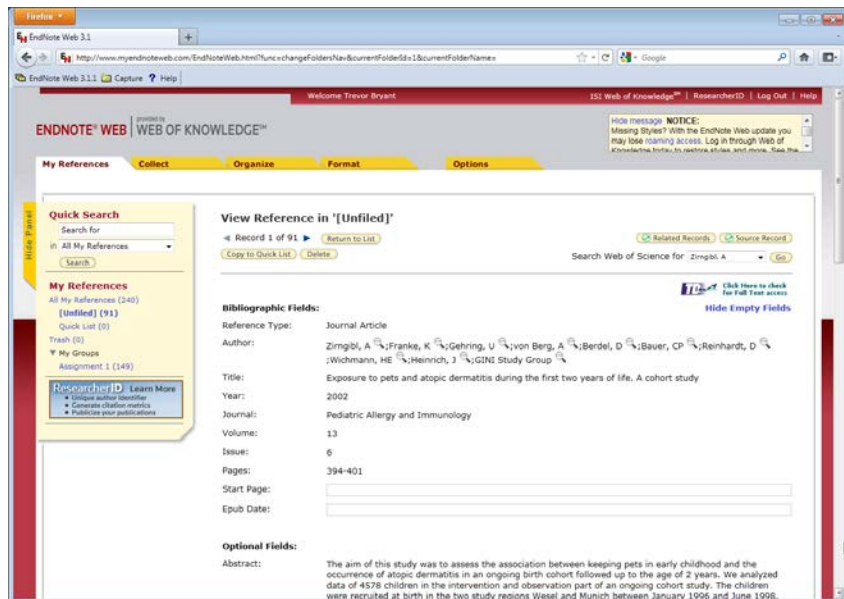
Note A different number of references will be returned compared the PubMed search carried out previously (page 6). Some references will be identical to those from the PubMed search, others will be new. Web of Science catalogues different publications but covers the major biomedical journals and includes conference proceedings.

References retrieved from WoS show different links compared to ones from PubMed, for example they have links to ISI Web of Knowledge for: *Source Record*, *Related Record* and *Times Cited*.

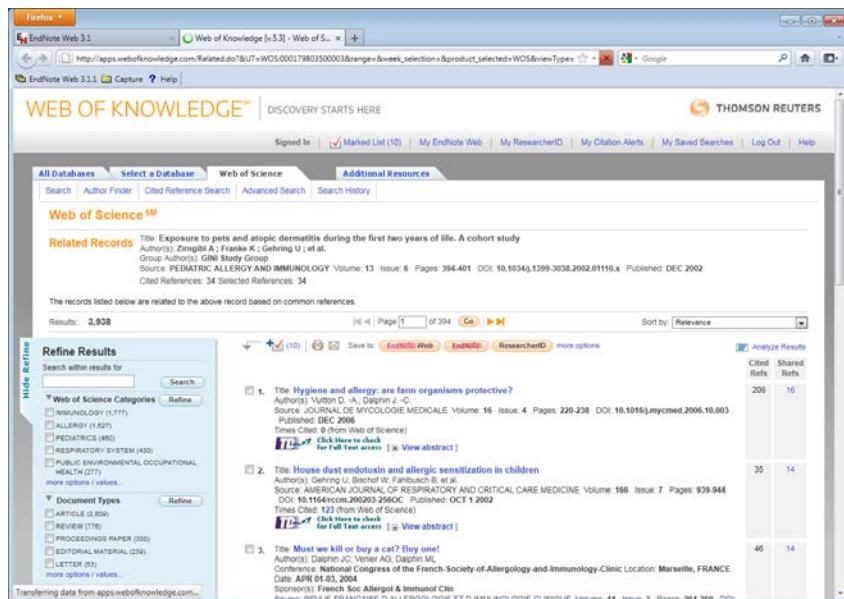


Similar links are also available when you click the title of the reference.

EndNote Web and Web of Knowledge are produced by the same organisation, Thompson Reuters. Therefore they offer closely integrated features that you do not get from PubMed searching.



The [Related Records](#) link will open a new browser window and search Web of Knowledge for articles similar to the current title (based on shared references).



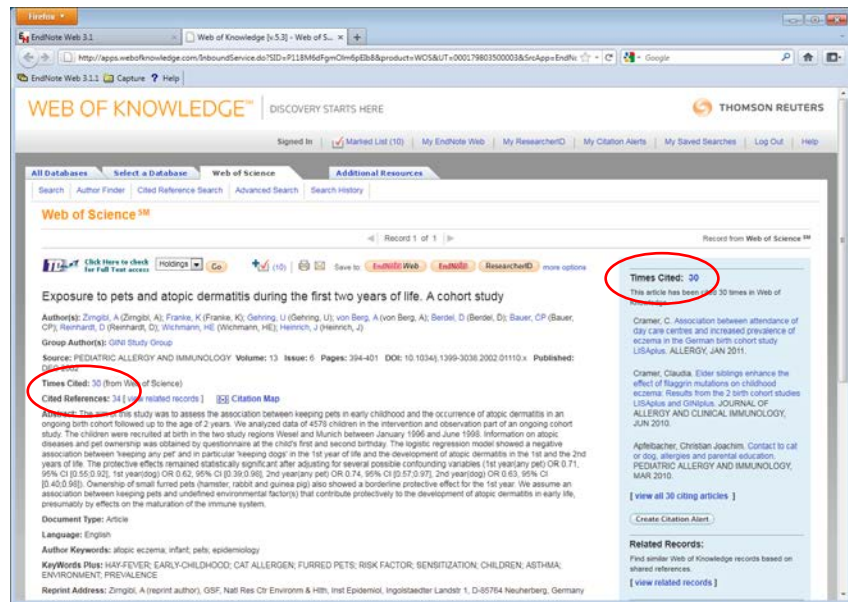
You can select references from this list and transfer them to EndNote Web by clicking on [Save to: EndNote Web](#). This transfers references, into the Unfiled section of your EndNote Web library from where you can move them into a group of references.

additional saving options are presented at the bottom of the page in the *Output Record* section.



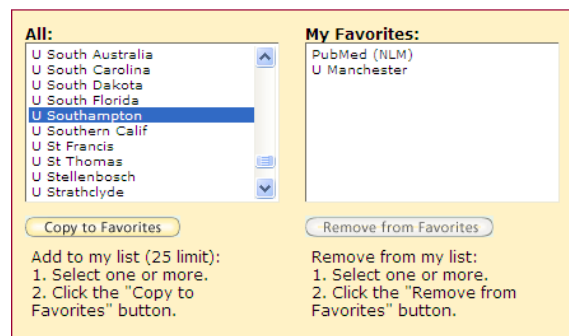
The **Source Record** displays details for the reference information from Web of Knowledge.

If you click on the *Times Cited 30* or *Cited References:34* link, ISI Web of Knowledge displays all the references that cite this article.



Searching Library catalogues for Books

EndNote Web can search University libraries for book details. A *U Southampton* connection could be added to the **Collect Online Search** favourites (see page 10 – Customising Online Searches). However the search facilities are inflexible. For example searching for the author “Altman Douglas” finds 6 books, but a search for “Altman D” finds 1 and “Altman D.G.” fails to locate any books. by the same person. “Altman *” is a better search but will return more ‘hits’.



Importing References

This is used when you search bibliographic databases, such as OVID or EBSCO, without using EndNote Web.

Note: The Library provides [general guides and online information skills tutorials](#) for these resources.


OVID provides access to *AMED (Allied and Complementary Medicine)*, *EMBASE*, *MEDLINE* and other databases.

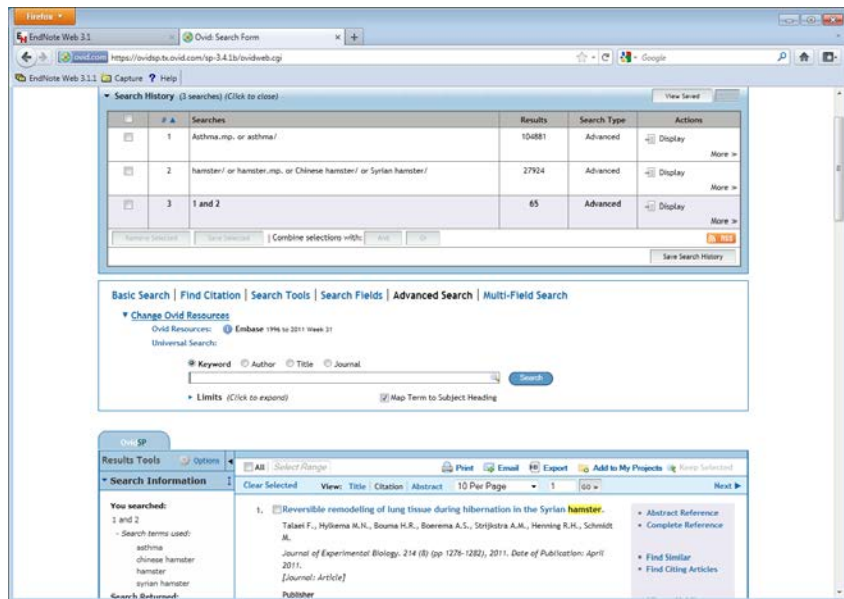
EBSCO enables searching of the *CINAHL*, *PsycINFO*, *PsycARTICLES* and *Medline* health databases.

You can use the OVID system to search Medline or EMBASE, and save the results to a text file. The figure on the next page shows the results of searching the EMBASE database (European equivalent of MEDLINE/PubMed) for ‘Asthma’ and ‘Hamster’.

Select the references to be exported to EndNote Web from the *Results* list.

Individual references can be selected by clicking the check boxes (not shown). All references by checking **All**.

Select the  **Export** button.

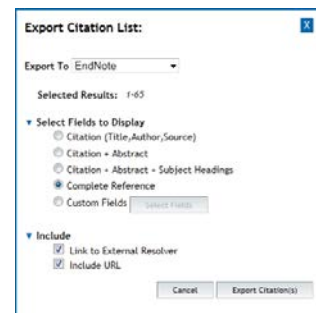


The Export Citation List dialogue will be displayed. Use the *Export To* drop down to select **EndNote**.

Select *Complete Reference* in *Select Fields to Display*.

Click **Export Citation(s)**.

Save the file which is called *ovidweb.cgi*.



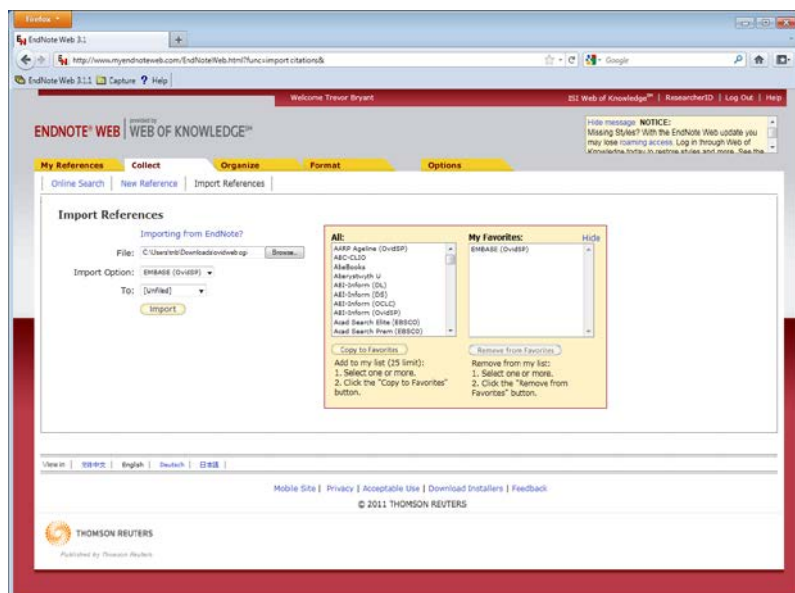
In EndNote Web select the **Collect** tab and the **Import References** section.

Use:

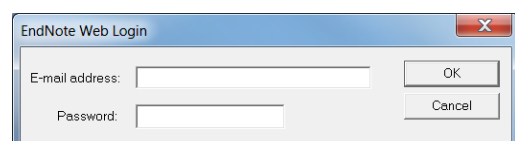
File dropdown list to choose file (*ovidweb.cgi*) containing the database search results.

Import Option which was EMBASE(Ovid SP) in this example (note you can set up favorites).

To to identify where to store these references in EndNote Web, e.g. as unfiled of in a My Groups folder.











In some cases when using OVID a prompt to login to EndNote Web may be displayed, enter your details and click **OK**. It takes one or two minutes to update your references in EndNote Web so click on **All My References** in EndNote Web to check that all references have been added. If they have not, wait and click again.

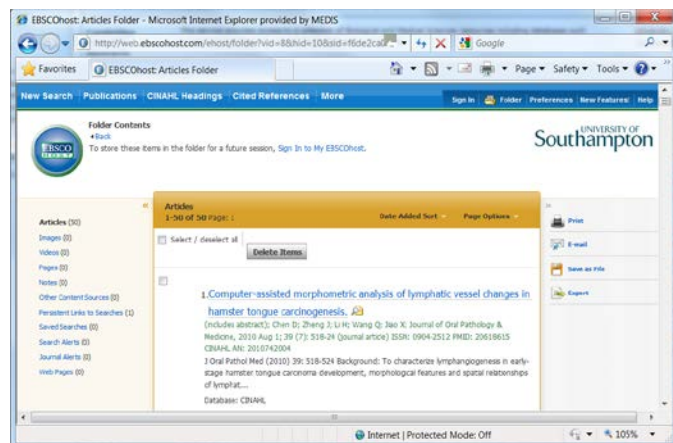


The EBSCO database

EBSCO enables searching of the *CINAHL*, *PsycINFO*, *PsycARTICLES* and *Medline* databases. References can be saved directly into EndNote Web.

1. Search the database
2. Select the references you wish to save using 
3. Add the references to the generic Results folder or to a named folder.
4. Select the folder link (top right of screen)      

5. **Select** (All) the references to save.
6. Click the **Export** button 
7. Choose the **Direct Export to EndNote Web** and click **Save**
8. You may be asked to Login to EndNote Web if it is not active.



A new EndNote Web window is opened displaying EBSCO host Import Results and the Number of records imported. You may wish to close this Window to avoid have two EndNote Web windows open.

The references are placed in the Unfiled Group, but you may need to click this or on All My References to update the count.

Advantages of online searching

1. OVID and EBSCO provide access to a variety of databases not just Medline which is very similar to PubMed. This is particularly useful if your subject area is not biomedicine but more on the social side of medicine. So you may wish to search resources such as:

OVID

- *AMED*-(*Allied and Complementary Medicine*).
- *EMBASE*
- *Medline*

EBSCO

- *CINAHL*
- *PsycINFO*
- *PsycARTICLES*
- *Medline*

2. There are superior searching facilities in OVID which include the use of a Thesaurus therefore terms like 'teenager', 'adolescence', 'youth' will all map to the same term 'adolescent', so any reference catalogued using any of these terms will be identified.

Adding References from Google Scholar

Note This is not as efficient as using other searching approaches because you get less information entered into your database and it can be a slower process overall. For example abstracts are not added and web links to the database entry are not available.

Importing one citation at a time

Customize Google Scholar by clicking on [Scholar Preferences](#) link

In *Bibliographic Manager* section use *Show links* to import citations into, select *EndNote*

Click **Save Preferences**

Search using Google Scholar as normal.

Each record displayed will have an [Import into EndNote](#) link.

Click this link to launch an *Opening scholar.enw* window.

Select *Save File*.

In EndNote web use **Collect** tab, [Import References](#) to select the *File* you have just saved with the *Import Option* set to *EndNote Import* and import *To* your chosen group. This is the same process as described for Importing References (see page 12).

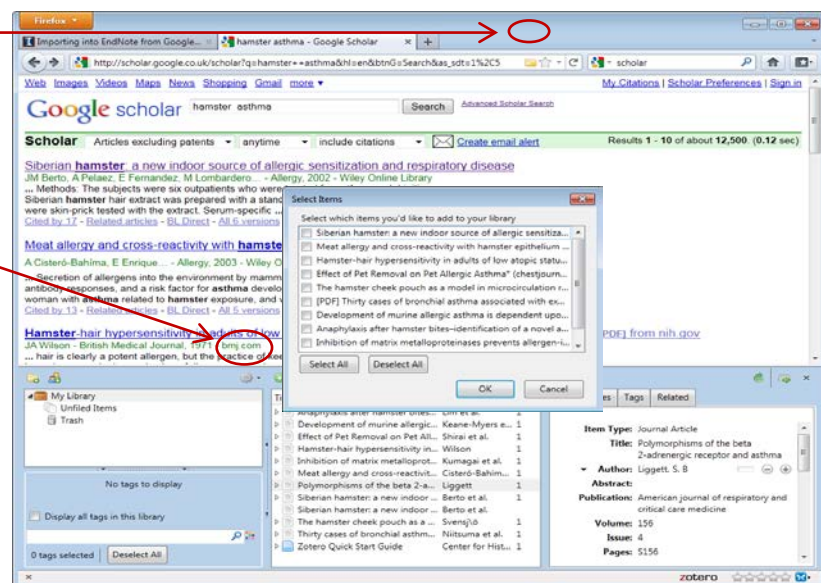
Importing several Google Scholar citations

This requires that you use FireFox and the Zotero addin for FireFox

Download and install Zetero from www.zotero.org.

Perform your search using Google Scholar.

- Click on the Zotero import icon
- Use the *Select Item* dialogue to select the citations you want to import. Click OK.
- Select Zotero Actions Choose Export Library and in the Format dropdown choose RIS. Click OK.
- Export the File
- In EndNote Web use **Collect** tab, [Import References](#) to select the *File* you have just saved with the *Import Option* set to *RefMan RIS* and import *To* your chosen group.

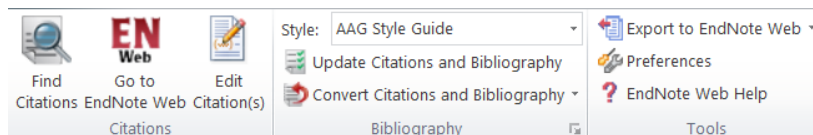


Note This information is based on notes from the University of Illinois at Urbana-Champaign www.library.illinois.edu/biotech/EndNoteGoogleScholar.html

Using Cite While You Write


Cite While You Write enables you to place citations into your Word document as you create it. An EndNote Web toolbar is added to Word to facilitate the process.

Word 2010 toolbar



Word 2003 toolbar



The features of all these buttons are described in EndNote Web Help . Some are described below.

Word 2010

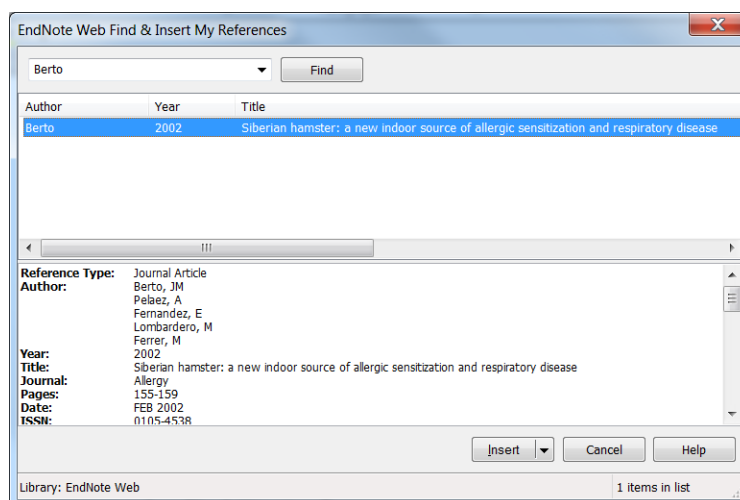
Start writing your Word document, when you reach the point where you need to cite previously published work, click the **Find Citations** button on the toolbar.



An EndNote Web Find & Insert My References window is displayed. Enter a term in the *Search* text box. It could be an author, for example **Berto**.

Click the **Search** button. You may be asked to login to EndNoteWeb at this point.

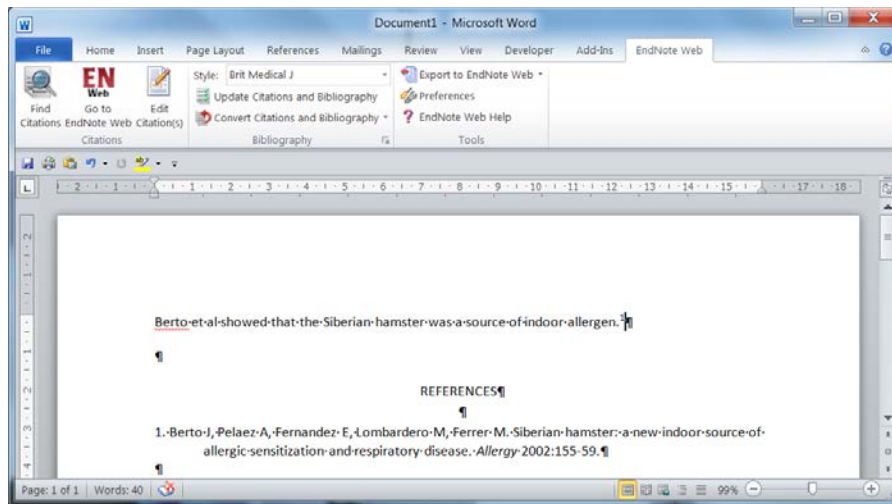
All references matching the search term are displayed, a single reference in this example.



Select the reference by clicking on it.

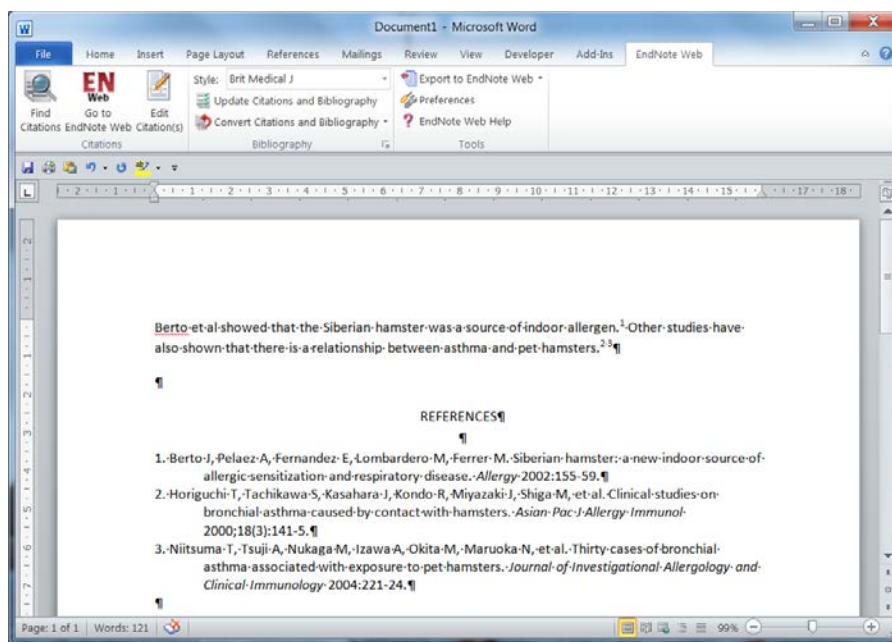
If you find several references and want to insert more than one citation, use <Ctrl Click> to select multiple references.

Click the **Insert** button. The citation is inserted into your Word document and a reference list is added at the end of the document. The format of these references can be set to the Harvard or Vancouver style (see next page).



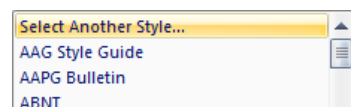
The citation number and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.

Continue writing your document and when you need to cite additional papers use the **Find Citations** button to search your EndNote Web references for them. In the example below two papers were found and added by entering 'asthma hamster' as the search term.



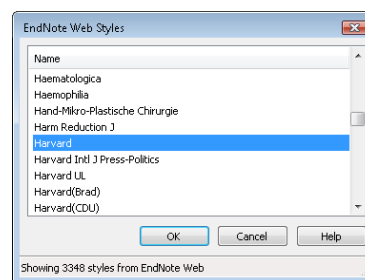
Tips on using Cite While You Write

1. **Changing the Formatting Style** for the list of references, click on the **Style** drop down box Style: Brit Medical J and choose a Format Style from the list of journals. There are so many available styles, over 3000, that you are only shown those starting with the letters A to E.

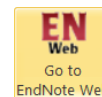


- To select another style, for example Harvard, pick the *Select Another Style...* item.

A list of all available styles is displayed. Select the one you wish to use. This will be added to the bottom of the *Style* drop down list.

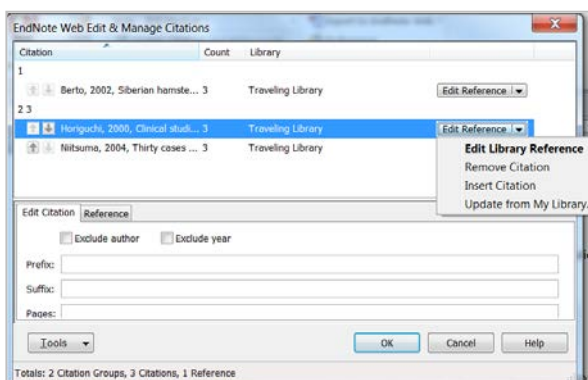


- Errors in Citations.** You may find errors in the citations you have inserted. To correct them, select the EndNote Web window from the Windows task bar or click the **Go to EndNote Web** button. Now you are back in EndNote Web, locate the reference with the error and correct it (see page 8), remember to **Save** it! Return to your Word document. Click on the Update Citations and Bibliography button **Update Citations and Bibliography** to rebuild the document with the corrected reference.



4. *Changing the order of, inserting or deleting citations*

Click the **Edit Citations** button to display the window opposite. Here you can move the order of citations in a list using the buttons. Click the **Insert** button to launch the EndNote Web Find Citation(s) window (see page 19), or the **Remove** button to delete a reference.



5. *Disable automatic generation of the reference list*

On large documents, containing many references you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long.

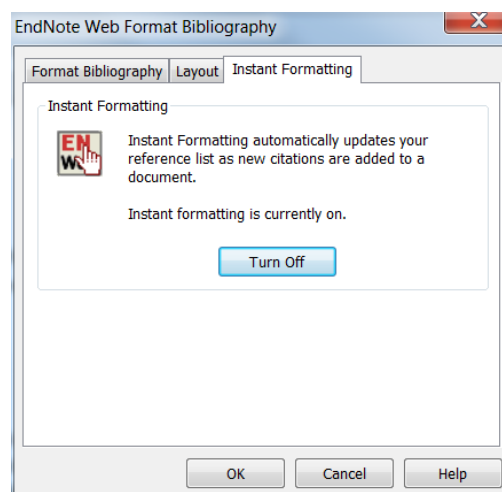
Select the arrow at the bottom of the bibliography section. **Bibliography**

A bibliography dialogue window is displayed. Select the *Instant Formatting* tab and click the **Turn Off** button.

Alternatively, select Preferences and untick the *Enable Instant Formatting on new Word documents* box. The automatic generation of the reference list is turned off.

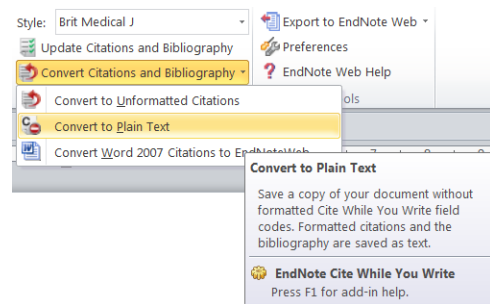
When you want to generate the full list of references use the

Update Citations and Bibliography button.




How to extract your references into another Word document

Select Convert Citations and Bibliography and choose the Convert to Plain Text option. A message informing you that a copy of the Word document, without field codes, will be created in a new document window is displayed. Click **OK**.



A new Word document is created with all the EndNote field codes removed. You can cut and paste the References from this document into another new Word document. This will give you two Word documents, one with the text of your assignment, the other with the references used in it as well as your original Word document that will still have all the EndNote field codes intact. So you will have three documents. If you want to make any changes to your citations or references, you must edit this original document and repeat the process described above. Extracting the References is typically the last thing you do before submitting an assignment.

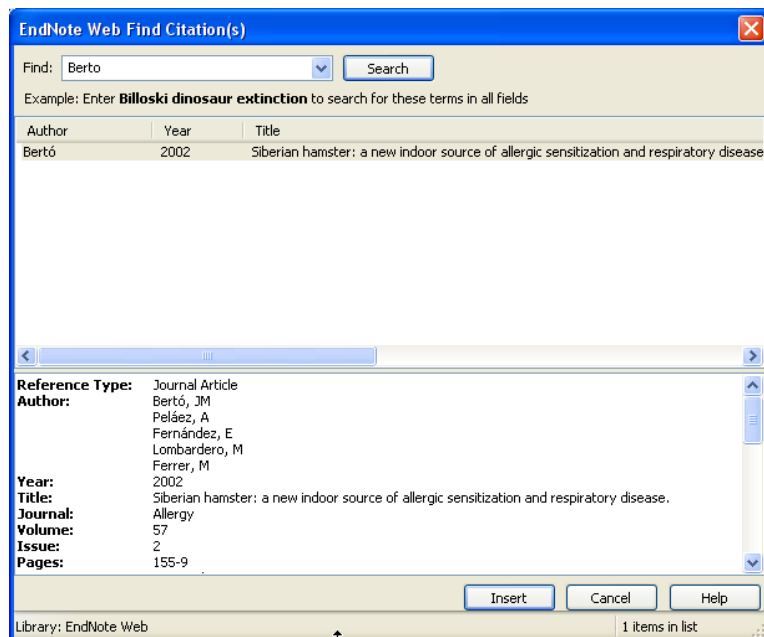
Word 2003

Start writing your Word document, when you reach the point where you need to cite previously published work, click the **Find Citations** button on the toolbar. 

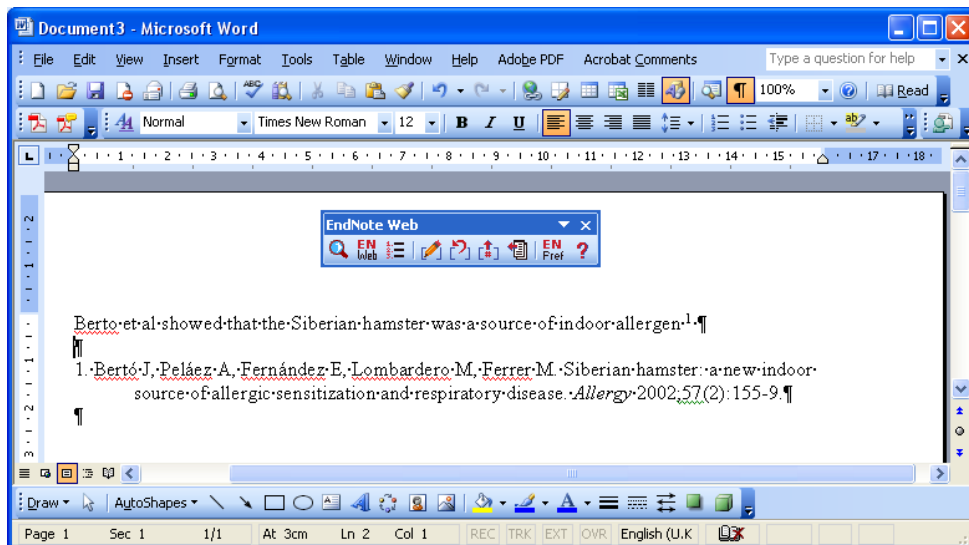
An **EndNote Web Find Citation(s)** window is displayed. Enter a term in the *Search* text box. It could be an author, for example **Berto**.

Click the **Search** button. You may be asked to login to EndNoteWeb at this point. All references matching the search term are displayed, a single reference in this example.

Select the reference by clicking on it. If you find several references and want to insert more than one citation, use <Ctrl Click> to select multiple references.

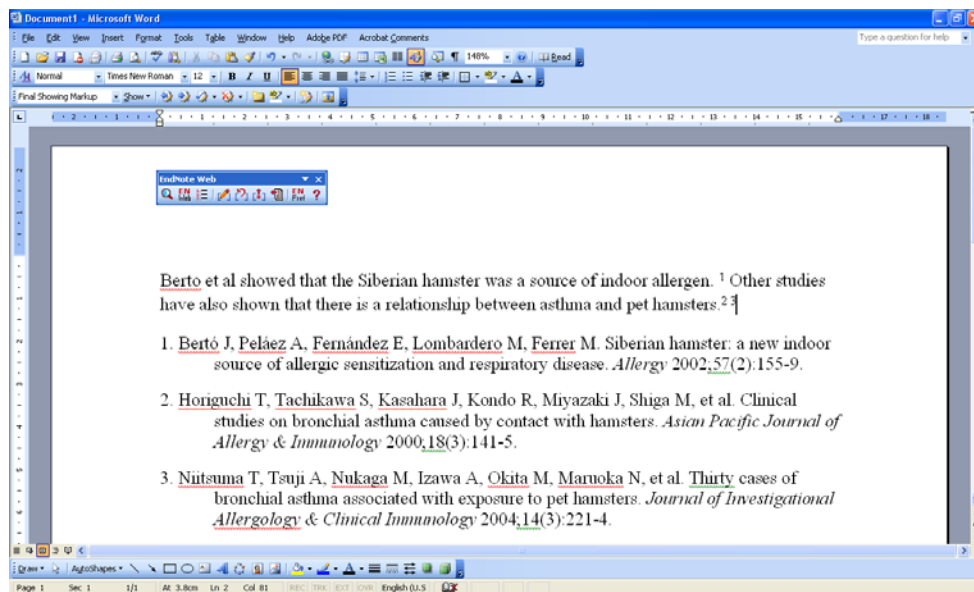


Click the **Insert** button. The citation is inserted into your Word document and a reference list is added at the end of the document. The format of these references can be set to the Harvard or Vancouver style (see next page).




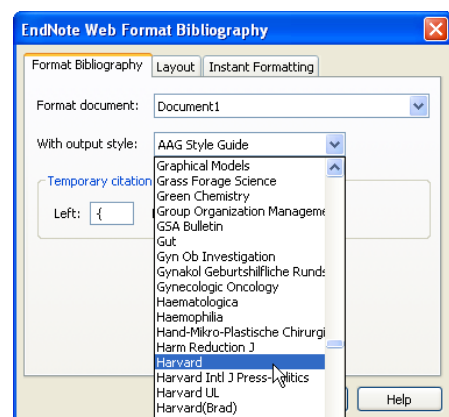
The citation numbers and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.



Continue writing your document and when you need to cite additional papers use the **Find Citation(s)** button to search your EndNote Web references for them. In the example below two papers were found and added by entering 'hamster asthma' as the search term.






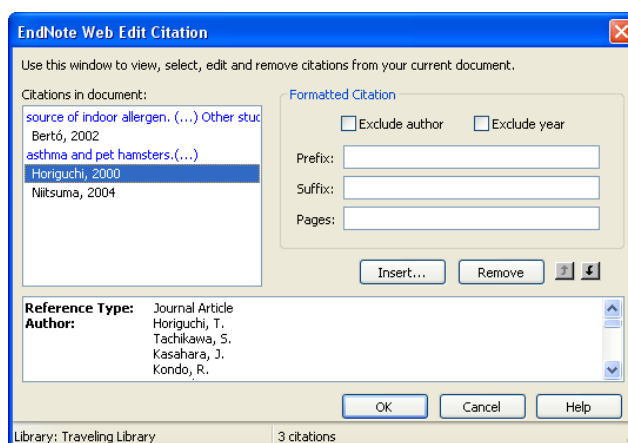
Tips on using CWYW

1. **Changing the Formatting Style** for the list of references, click on the Format Bibliography button  and choose a Journal Style, e.g. Harvard, from the list of journals in the **With Output Style** drop down list.




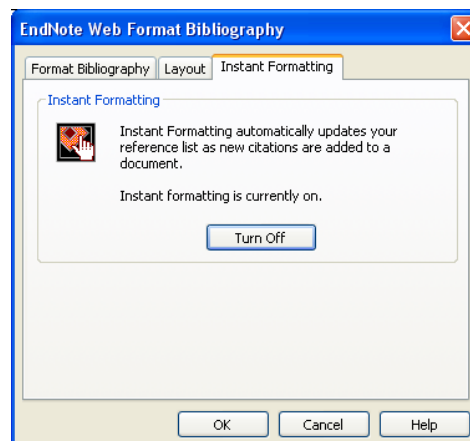
2. **Errors in Citations.** You may find errors in the citations you have inserted. To correct an error, select the EndNote Web window from the Windows task bar or click the **Go to EndNote Web** button . Now you are back in EndNote Web, locate the reference with the error and use the **Edit** link to correct it (see page 8), remember to **Save** it! Return to your Word document. Click on the Format Bibliography button  to rebuild the document with the corrected reference.
3. **Changing the order of, inserting or deleting citations**


Click the **Edit Citations** button  to display the window opposite. Here you can move the order of citations in a list using the   buttons. Click the **Insert** button to launch the EndNote Web Find Citation(s) window (see page 19), or the **Remove** button to delete a reference.




4. **Disabling automatic generation of the reference list**

On large documents, containing many references you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long. Select the Format Bibliography button . A bibliography dialogue window is displayed. Select the *Instant Formatting* tab and click the **Turn Off** button.



Alternatively, select Preferences  and untick the *Enable Instant Formatting on New Word documents* box. The automatic generation of the reference list is turned off.

When you want to generate the full list of references use the  button and use the features on the *Format Bibliography* tab.

Export

Your references are stored on the EndNote Web server in the USA. As a precaution you can export all your references to a text file and keep them on your own PC as a backup.

- Select the **Format** tab and the **Export References** section
- Select the *References* you wish to export, for example Assignment 1
- Select the *Export Style* you wish to use (EndNote Export is recommended)
- Select the **Save** or **Email** button.

These references can be Imported at a later date using the EndNote Import filter on the **Collect** tab **Import References** section.

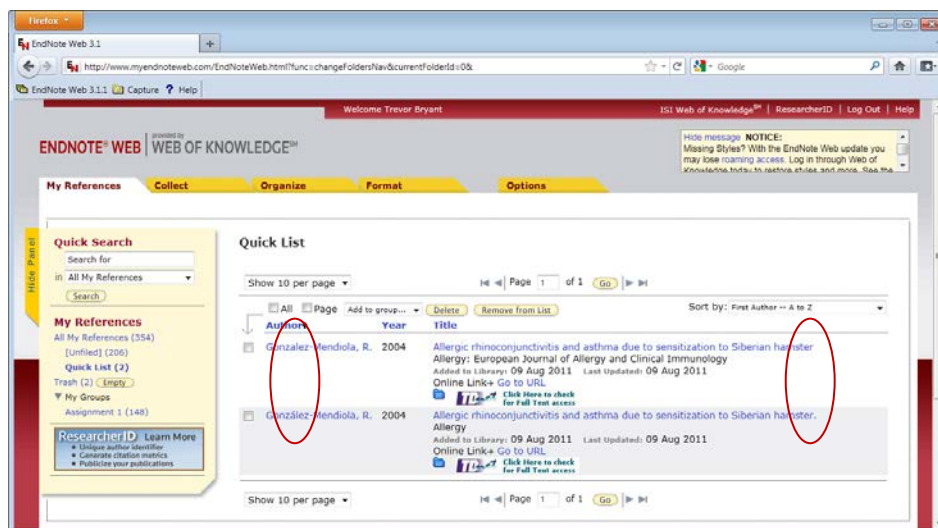
Finding Duplicates

It is important to remove duplicate references from your collection of references. This is because if you cite both entries in the text your reference list will contain both. So it is advisable to check for duplicates each time you add more references.

Select the **Organize** tab and the **Find Duplicates** option. Beware it is not perfect! The screen below shows a folder called Duplicates to illustrate this. It has a pair of duplicate references by Gonzalez-Mendiola *et al* which were not identified as duplicates by EndNote Web. This is because they were obtained from different sources which entered author names differently as:

Gonzalez-Mendiola, R; Montano, PP; Macias, MH; Lombardero, M; Martin, TM
González-Mendiola R, Prieto Montaña P, Hinojosa Macías M, Lombardero M, Muñoz Martin T.

One uses the full European alphabet and has added a full stop at the end of the title!



Any reference identified as a duplicate will have a highlighted background and a tick mark. Use the **Delete** button to remove the duplicate. Duplicates detection is based on Author, Year, Title and Reference Type.

Sharing References

You can share groups of references with anyone that has an EndNote Web account. This is done by entering their email address into EndNote Web. See Managing Shared Groups in Help.