Supporting Literature Searching

Managing references & bibliographies using EndnoteWeb

EndNote™

July 2017
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To help you use this guide…

- indicates a step in the process
- indicates a tip, or an extra piece of information.

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1) Why is Endnote useful?

Plagiarism is a serious issue in academic work, which is why referencing your work properly is vital. But organising the references can feel like the most time consuming part—it’s certainly often considered the most frustrating!

By using software which helps manage your references and present them in the style required, you can save a lot of time.

EndnoteWeb is just one of several programmes which let you gather together your references, format them in a bibliography, and create footnotes easily.

2) Getting started

First you must register with EndnoteWeb. Since this is software which is supported by the University of Cambridge, registering using a University computer is the fastest way to ensure easy registration.

Go to http://www.myendnoteweb.com “Sign up” or “sign in”. It is now possible to link your Facebook or LinkedIn account with your EndnoteWeb account.
3) **First find some articles**
You can bring references into EndnoteWeb in three different ways
a) an online search
b) creating new references manually
c) importing sets of references

**a) Online search**

It’s possible to search a number of databases from inside EndnoteWeb. However, be aware that it is not possible to search e.g. Pubmed as thoroughly via this route compared with a search of Pubmed itself. Click the “collect” tab and stay in “online search”. Select “Pubmed NLM” from the list of options, and “connect”.

You can be reasonably complex about how you’re searching—it’s always worth trying to combine a few key words in order to keep the results manageable.

Click Search.

You can retrieve the whole set, or a limited amount (eg 1 through 100 articles). Click retrieve.

You now make your selection of the articles you want to keep.

**DO NOT USE THE “BACK” BUTTON: you could lose work, and crash your session in EndnoteWeb.**
**ALWAYS use the navigation buttons within the page**
b) Creating new references manually

Often you’ll find useful references without doing a specific search—perhaps from a reading list, or a recommendation, or from reading the references of a useful article.

You’ll still need to add this item into your EndnoteWeb list.

Click the “collect” tab, and select “new reference”

Make sure you fill in as much detail as possible about the article, and identify what “reference type” it is.

This will make a significant difference to how the reference appears in your bibliography at the end of your piece of work.

c) importing sets of references

To do the best quality searches it will be necessary to go into the individual databases (e.g. Pubmed/Medline, Web of Science, Scopus, Embase etc) and search them directly.

Since the process of how to “export” the results from the database vary full details are available in the Appendix.
Once you’ve got your set of references saved from the database search:

Click the “collect” tab, and select “import references”. Browse to find the file of references you’ve created. Filter to find the database you were using (EndnoteWeb must know where the references came from). Chose where you want to send the references to (i.e. to Unfiled, or to a specific group you’ve set up). Import.

4) Organising your references
You can create groups into which to organise your references in 2 ways:

a) My References

From the Unfiled list of references you can mark specific articles and then “Add to Group” either into an existing group, or into a newly created group.

The front page of My References will show All My References, but you can see on the left-hand menu how the items have been spread across the various groups which have been created.

b) Organize

Under the Organize tab, there is the option to create groups, and also to share access to a group—helpful if you’re working on a team project.
There is also the option to **Find Duplicates**. This is a helpful feature if you’re importing references from multiple databases which overlap in their journal coverage.

Although it’s not infallible, it can help spot duplicate records, and so tidy up your list of references.

5) **Formatting your bibliography**

Any piece of work will require that you references are submitted in a particular format. Common referencing styles include Harvard:


and Vancouver:


To create a complete bibliography that you can incorporate into your work, go to Format and stay in **bibliography**

Select the set of references you want to work with.

Select the bibliographic style you want to use and chose the file format you want to produce, and then “save” in that format.
6) “Cite While you Write”

It’s not just complete bibliographies which are necessary for a piece of work. Often you’ll be quoting or referring to specific authors, and will need to create a set of footnotes. There is a “cite while you write” option available, but it requires that you download a plugin to your laptop or desktop computer.

Within the format section, go to Cite While You Write plug-in and follow the instructions.
Whichever you use you should ensure that the plugin is expecting you to use EndnoteWeb / Endnote online: click ‘preferences’, and ‘application’ and pick Endnote Online. You will need to log in, and you may want the plugin to remember your email address and password.

Once this is complete, when you open up Word, a new toolbar will appear:

As you type your document, if you have a need to insert a reference as a footnote, click on the magnifying glass option to “find citation”.

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You’ll have the option to enter the name of the author you’re quoting or search for a keyword of the appropriate paper and ‘insert’ it.

The reference will be inserted according to the last referencing style you used, but you can change the style of referencing very easily using the ‘Style’ dropdown menu in the Endnote ribbon.

There are many other options within the cite-while-you-write toolbar, but this basic function could save you a lot of time—test the extra functionality, and click for help.
7) Customise EndnoteWeb

Chances are you'll only use one or two different formatting styles from the many possible styles, and that you'll only be importing from a handful of databases, so it's good to be able to customise EndnoteWeb to reflect these “favourites”.

It’s possible to customise in the Collect tab, to identify most likely online databases to be used:

Click on “select favourites” if you wish to add and/or remove items from your preferred list.

Customisation is also possible, in much the same way if you want to Import References, and when you move to the Format section, you want to choose a set of preferred bibliographic styles.
Appendix: Importing from the major health and medical databases & iDiscover

Cochrane Library (www.thecochranelibrary.com)

- You must export the selected items in each section of the Cochrane Library separately. Carry out your search and make your selection of relevant items in the first set of results. Click “export all results” or “export selected citations” as appropriate. Change the “export type” to “Abstract and citation”, and save as a text file (default file name: citation-export.txt).

- Open EndnoteWeb, and under the “collect” tab chose “import references”.

- Find your text file, and chose “Cochrane Wiley” as the filter, and allocated to a group, or “unfiled” as appropriate.

Pubmed (tinyurl.com/campubmed)

- Complete your search within Pubmed, ensure the articles you want are all listed under your “clipboard”.

- Open “clipboard” and “send to” citation manager.

- Save the file (the default filename will be citation.nbib).

- Open EndnoteWeb, and under the “collect” tab chose “import references”.

- Browse to find the citations.nbib file, and chose “Pubmed NLM” as the import filter.

- Chose where you’re importing the references to (i.e. which group) and import.

Web of Science (http://wok.mimas.ac.uk)

Web of Science has a direct link with EndnoteWeb since they’re both owned by Thomson Reuters. This means that you can send articles directly to EndnoteWeb as a direct export.

- Send all your preferred articles to the Marked List and when you’re ready to export open the Marked List, and click “export to EndnoteWeb”.

- Make sure you’re logged in to EndnoteWeb, and the export of the articles into the unfiled set will be seamless.
**Scopus** ([http://www.scopus.com](http://www.scopus.com))

You can gather the articles you find in Scopus in MyList. Having finished searching, go to MyList and select all the articles, and click on “export”.

Chose format “RIS (Reference Manager, Procite, Endnote)” and change the Output to “complete format”.

Click export, and save the file (default filename: scopus.ris)

Open EndnoteWeb, and under the “collect” tab chose “import references”.

Find your text file, and chose any of the import options that have RIS in their name, such as Procite RIS or Refman RIS as the filter. Chose where you’re importing the references to (ie which group) and import.

**NHS databases** ([http://www.evidence.nhs.uk](http://www.evidence.nhs.uk)), then pick ‘Journals and Databases’

You can gather the articles you find in the Clipboard. Having finished searching, go to view Clipboard and select all the articles. Chose RIS as the output format and save the .ris file.

Open endnote web, and under the “collect” tab chose “import references”.

Find your text file, and chose “Refman RIS” as the filter. Chose where you’re importing the references to (i.e. which group) and import.

**Embase (via OVID)**
([http://gateway.ovid.com](http://gateway.ovid.com) or browse from [http://library.medschl.cam.ac.uk – research support – databases for literature searching – Embase using RAVEN])

Embase via OVID allows for direct export straight into EndnoteWeb. Search and find the articles you want. In the Results Manager box in Ovid, select “complete reference”, and “export citations”.

Save the file (default filename: ovidweb.cgi)

Find your text file, and select the import option “Embase (OvidSP)” as the filter.

Chose where you’re importing the references to (i.e. which group) and import.
PsycINFO (via Ebsco)
(http://search.ebscohost.com or browse from http://library.medschl.cam.ac.uk – research support – databases for literature searching – PsycINFO using RAVEN)

Add your selected items to “folder” as you search, and when you’re finished, open the folder.
Select all the articles, and click the “export” option.
PsycINFO has a direct export to EndnoteWeb option.

Make sure this option is selected, and that you’re logged into EndnoteWeb. Click Save.

A new window will open up. The items will go straight into the Unfiled set of references, and you must allocate them to a group as appropriate afterwards.

Google Scholar (http://scholar.google.co.uk/)

Before you search, click on the ‘setting’ icon.

In the bibliography manager, select “show links to import citations into” and chose Endnote, and save.

Run your search, and notice the ‘import to endnote’ option beneath each entry. Click on this, and save the file (it will probably be called scholar.enw).

Open EndnoteWeb, and click “collect”, and “import”.

Browse to find the file, then select “Endnote Import” as the import option.

Allocate the file to a group or “unfiled” as appropriate.
Further Help

At Addenbrooke’s and University of Cambridge contact:

Isla Kuhn, Eleanor Barker, or Veronica Phillips
Cambridge University Medical Library

Email: librarytraining@medschl.cam.ac.uk
Phone: (01223) 336750
Web: http://library.medschl.cam.ac.uk