

IOE Library Guide

EndNote Web 3.2 with Word 2007

What is EndNote Web?

EndNote Web is a free web based equivalent of the desktop bibliographic reference manager. It allows you to maintain a personal **'library'** of all your references to books, journal articles, theses and websites. It also allows you to search online bibliographic databases, library catalogues and websites and import these references directly into EndNote.

You can then effortlessly reproduce those references in your own writing assignment, thesis, article or reading list in hundreds of different bibliographic styles. EndNote Web's 'Cite While You Write' feature automatically formats citations, figures, and tables in Microsoft Word to produce a complete bibliography with in-text references. This is possible via the EndNote Web tab in the Word 2007 ribbon and includes integration with Word's own referencing system.

Although EndNote Web is designed as a bibliographic database you do not need to restrict yourself only to references to documents. You can add all sorts of other material to your EndNote library such as personal communications from supervisors and other authors or your own developing thoughts.

Increasingly EndNote Web is used in conjunction with the desktop version as an additional tool, but it can of course simply be used alone. One of the most powerful features is the ability to share your libraries online with fellow colleagues.

Accessing EndNote Web at the Institute

EndNote Web 3.2 can easily be accessed on any Institute computer (see **'getting started'** below).

What's new in EndNote Web 3.2?

You can upgrade to the latest web-based version, EndNote Web 3.2 **if you have purchased EndNote X5 or by activating your account via a student or staff machine running X5**. You will automatically be prompted to do so with your

personal copy of EndNote X5 or can manually do so via the **Edit > Preferences > EndNote Web > Activate** command.

New features include –

- The option to automatically transfer references **and** attachments to and from EndNote Web and EndNote desktop.
- Add file attachments to existing references in EndNote Web for the first time.
- Track your account status and roaming expirations via the **Options> Account Information** tab.
- Reset your roaming access for one year by logging into the **Web of Knowledge** database and selecting "**My EndNote Web**".

Do I need to pay for it?

No! You can create a free EndNote Web account with either of these methods –

- Using our subscription to the Web of Knowledge. This account will remain active for at least a year after you last log into the Web of Knowledge.
- Using EndNote X2.0.1 or later to automatically create an EndNote Web account from within desktop EndNote itself.

The first method is **strongly recommended** as it links your account to the Web of Knowledge allowing access to full text articles and more (see '**getting started**' below').

Help and advice

This is only a brief introductory guide to EndNote. For further sources of information please see -

- EndNote's inbuilt help function accessible via the onscreen menu.
- The complete user manual provided with the software.
- Our new **LibGuide** on the web - libguides.ioe.ac.uk/endnote.
- Library staff at lib.enquiries@ioe.ac.uk.
- EndNote technical support staff - www.adeptscience.co.uk/kb/.

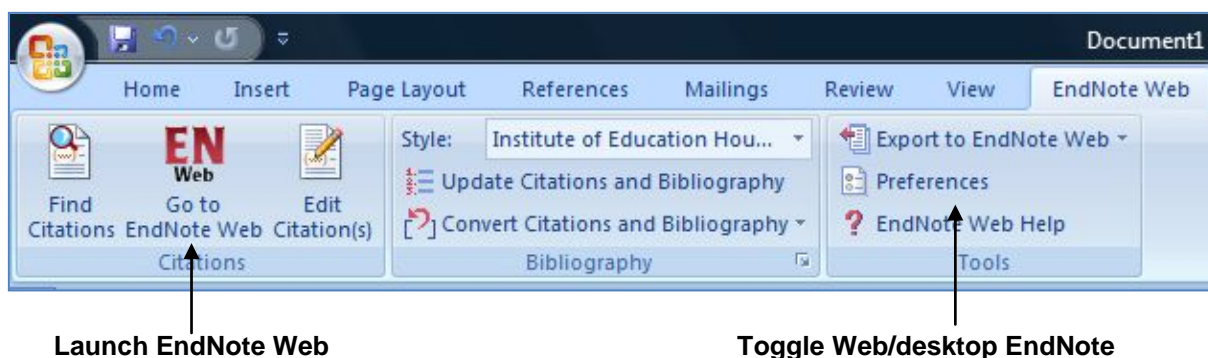
Getting started

Simply login at wok.mimas.ac.uk/ (ATHENS required for remote access) and create an account using the '**My EndNote Web**' link at the top of the page. This will ensure the customized **IOE House Style** and **IOE Library Catalogue** connection file are available to you.

Or register by selecting **Edit > Preferences > EndNote Web** from within desktop EndNote if you already have it.

- You can then access your account from anywhere via www.myendnoteweb.com/ or the mobile site via <https://www.myendnoteweb.com/touch/EndNoteWeb.html>.

- You will need to download the '**cite while you write**' installers from the website to enable EndNote Web to format citations and bibliographies automatically in Word (if required). Institute student computers are already configured for Word.
- Once logged in, go to **Options > Download Installers** and follow the onscreen instructions.
- You can then launch EndNote Web from within Word (see screenshot below). Where you have both the web and desktop versions of EndNote installed, you can toggle between both applications in Word by clicking on the EndNote tab and then selecting **Preferences > Application** and imputing your web account details.



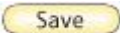
Entering references into EndNote

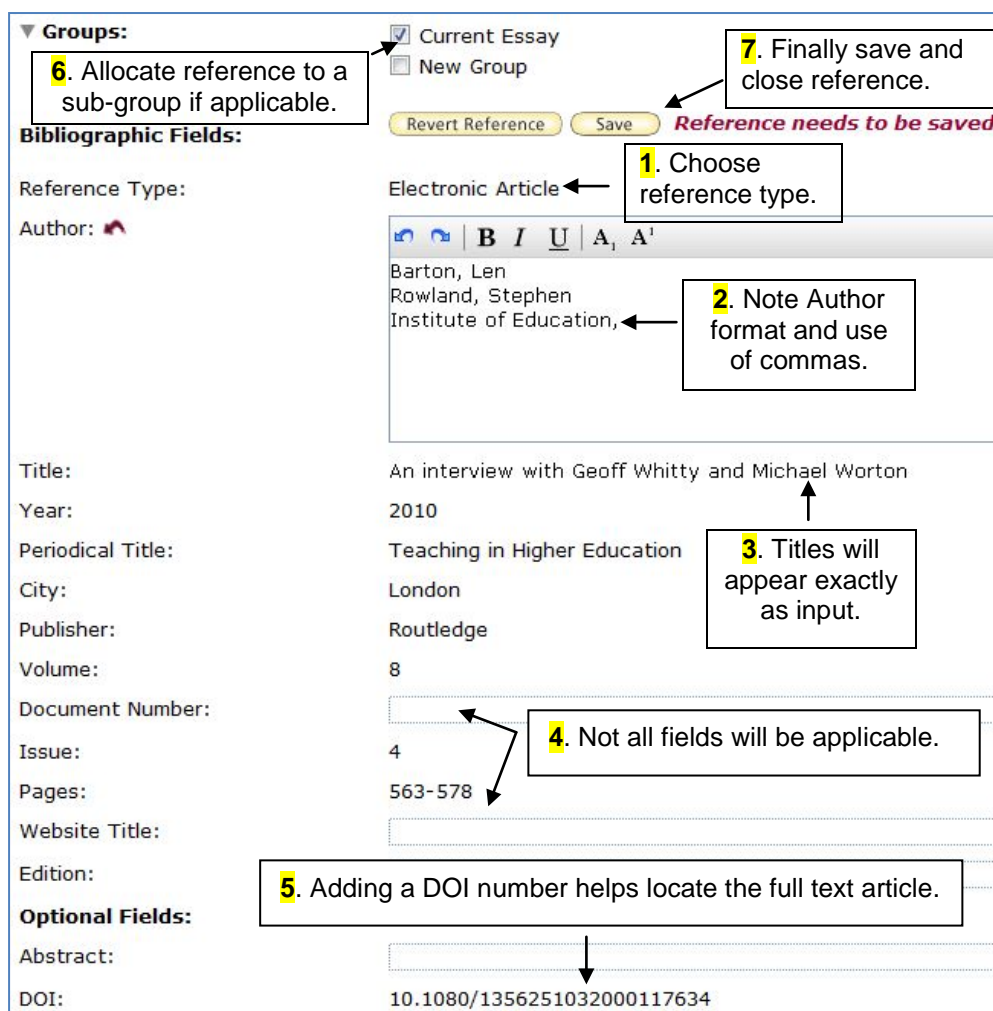
Selecting **My References** in EndNote Web will show you the content of your library. References can either be added manually to a library or automatically imported/exported from remote databases and catalogues thus saving considerable time and effort. Advice on how to select and sort references and navigate within your library is included below under '**managing references**'.

Manual Input

This might be the best option for familiarising yourself with EndNote Web's basic functionality. To add references manually –

1. Open EndNote Web.
2. Select **Collect > New Reference** from the on screen drop-down menu top-left.
3. Select the appropriate readymade reference template (there are over 40 versions) for each entry from the **reference type** dropdown at the top of the window (see illustration below).
4. Click in each bibliographic field to open the text input box, adding as **much** information as possible. Check the accuracy of details carefully whilst following these basic rules –
 - Author names are entered one name per line with last name followed by a comma and then first name, for example **Whitty, Geoff**
 - If you are entering initials instead of full forenames, be sure to type a space between initials. Using full forenames is preferable as some styles do specify that format.

- For corporate authors be sure to add a comma at the end, for example **Institute of Education,**
- Special bibliographic formatting and punctuation such as abbreviation or italicising journal names should **not** be included. Enter only the raw data and leave the formatting to EndNote.
- Styles will not alter the capitalisation of titles. They will appear in the bibliography as originally input.
- You can include abstracts, comments, keywords, quotes and research notes in the relevant fields where appropriate.
- Added a **DOI (digital object identifier)** number to a reference **can** help link to the full text document using the **find full text** command if transferred to your desktop EndNote.
- Each reference can be edited or amended at any time. Just remember to click on the  button.



Groups:
 Current Essay
 New Group

Bibliographic Fields:

Reference Type: Electronic Article

Author: Barton, Len
 Rowland, Stephen
 Institute of Education,

Title: An interview with Geoff Whitty and Michael Worton

Year: 2010

Periodical Title: Teaching in Higher Education

City: London

Publisher: Routledge

Volume: 8

Document Number:

Issue: 4

Pages: 563-578

Website Title:

Edition:

Optional Fields:

Abstract:

DOI: 10.1080/1356251032000117634

6. Allocate reference to a sub-group if applicable.

7. Finally save and close reference.

1. Choose reference type.

2. Note Author format and use of commas.

3. Titles will appear exactly as input.

4. Not all fields will be applicable.

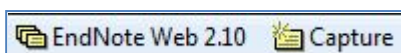
5. Adding a DOI number helps locate the full text article.

Revert Reference Save *Reference needs to be saved.*

Automatic Input

The three import/export options in desktop EndNote are also available in EndNote Web to directly transfer references from remote databases/catalogues into EndNote.

In **addition** you can install EndNote Web's **browser capture toolbar** for Internet Explorer and Firefox to grab individual references from the web.



Go to **Options > Download Installers** and follow the onscreen instructions. Once installed the toolbar will be active via **View > Toolbars > EndNote Web**.

Some manual re-formatting may be required with each option if data is not imported into the correct reference fields but try searching for your existing references using these options to save time -

1. Exporting references directly from within individual databases to EndNote Web.
2. Using EndNote's own search function to retrieve references from remote resources.
3. Searching remote resources directly and importing results into EndNote using a customised import filter.
4. Screen capture of individual references (works well with Pubmed, Eric, Proquest and other databases/publishers)

See our new **LibGuide** for the best methods for transferring references from individual resources into EndNote -

libguides.ioe.ac.uk/content.php?pid=312099&sid=2554558.

1. Direct Export

This is perhaps the best option as it combines the powerful search capabilities within individual resources with automatic export to EndNote Web. However this is only offered in selected databases so far such as the Web of Knowledge. With other databases such as Australian Education Index (AEI), British Education Index (BEI) and ERIC via Dialog DataStar you may have to use the **import** option (see below).

Please note that Google Scholar requires an EndNote or RefMan (RIS) filter.

See our individual eLibrary resource guides for further details –

libguides.ioe.ac.uk/home.

2. EndNote Search

EndNote provides a powerful search interface for both searches of EndNote libraries (see '**managing references**' below) and searches of remote databases or library catalogues. This interface may not offer the sophisticated search options available within individual databases but is a very fast and efficient way of retrieving and importing basic search results. Pre-configured **connection files** to enable such searches are provided for a wide range of resources. See '**content files**' below for more information about customised IOE files.

To establish an external connection to a given resource -

1. Select **Collect > Online Search**.

2. Click on the **select** menu for the full set of resources or choose **customize this list** to compile your own default list of favourites (see illustration below).
3. We have added the **IOE Library Catalogue** file to enable a direct search of the catalogue.
4. You may be prompted for an **ATHENS** username and password if accessing **ATHENS** protected resources at the Institute or remotely.
5. When the connection is established (see illustration below) the search interface will open ready for you to enter your search terms into the appropriate field(s). You can also specify whether to retrieve all records or have the option of choosing a subset.

Step 1

Select database or library catalog connection.

IOE Library Catalogue

Connect

2. Favourites then appear here by default.

3. Click on 'Connect' to start the search.

All:

- Aalborg U
- Aarhus Kommunes Biblio
- Aarhus U
- Aberystwyth U
- Abilene Christian U
- Abilene Lib Consortium
- Abilene Public Library
- Acad Belgica
- Academica Sinica
- Academy of Natural Sciences

Copy to Favorites

Add to my list (25 limit):

1. Select one or more.
2. Click the "Copy to Favorites" button.

My Favorites: [Hide](#)

- British Library
- IOE Library Catalogue
- U London

1. Use 'Customize this list' to add favourite resources.

Remove from Favorites

Remove from my list:

1. Select one or more.
2. Click the "Remove from Favorites" button.

6. The search fields/options/operators available will vary within each database or catalogue.

Step 2 of 3: Connecting to **Institute of Education** : Library Catalogue

truancy in: Any Field Or

absence in: Any Field Or

attendance in: Any Field And

in: Any Field

retrieve all records

select a range of records to retrieve

Search

3. Finally click on 'Search.'

2. Specify search terms, fields and how records are retrieved.

1. Remote connection established.

Use Or, And, Not in this order for best results.

7. EndNote will perform the search and display the number of references that were found to match your search criteria (see illustration below). You have the option of retrieving all of the results or a specific range of references. Click **Retrieve** to display these references.
8. Click on the named connection name to return to the search list and carry one another search.

Step 3 of 3: Connecting to [Institute of Education](#) : Library Catalogue
 ((truancy) in Any Field) or ((absence) in Any Field) or ((attendance) in Any Field)

Found 422 results:

Retrieve through

Click on hyperlinked resource name to select another search.

Specify selection and click 'Retrieve' to display search results.



Show 10 per page Page 1 of 10 Go

All (100) Page Add to group...

Author	Year	Copied Title
<input checked="" type="checkbox"/> Hampson, Kathy Salter	2010	Practical ways to work with young people with anti-social behaviour : practical resources for professionals working with young people
<input checked="" type="checkbox"/> Green, Trish	2010	At the end of the world : a collection of short stories about children leave home
<input type="checkbox"/> Hana, Abdul		
<input checked="" type="checkbox"/> Conolly, Michael	2009	Don't fence me in : essays on the rational truant

1. Click on the hyperlinked title to open/view. Use 'Return to list' to return to results.

2. Use the 'Add to group' dropdown to save your selected (ticked) references to a particular group (if any).

3. Import Filters

Results retrieved by searching individual resources directly can also be imported into EndNote using customised import filters. Although results are not always perfect and some manual reformatting may be required, this can still prove an effective time-saving option. If data is poorly formatted within the resource, it may not be possible to import all the data accurately so always check imported references for inconsistencies. See **content files** below for more information.

To import references from a given resource (ProQuest databases such as ASSIA, ERIC, Medline etc all use this method) -

1. Save your selected search results/references locally as a text file in tagged format.
2. Select **Collect > Import References**.
3. Navigate to the saved file.
4. Click on the **select** menu to choose the appropriate **filter** or click on **customize this list** to compile your own default list of favourites as with search.

5. Choose the appropriate import location, such as a custom group and click on **Import** to retrieve your saved references.

See our new **LibGuide** for the best methods for transferring references from individual resources into EndNote -


libguides.ioe.ac.uk/content.php?pid=312099&sid=2554558.

Transfer with EndNote

EndNote libraries can easily be exported/imported between the desktop and web applications using either of these methods –

- Export references from desktop EndNote as a text file in ‘**EndNote Export**’ format and import as above using the ‘**EndNote Import**’ filter.
- Use the **EndNote Web > Transfer** command in **EndNote X3** or later to transfer references to and from the desktop and web versions. Note you need to configure your web account in the desktop version first.
- This function now includes the option to attach files within **EndNote X5** by checking the ‘**Include File and Figure Attachments**’ option. See above for details of how to ensure you [activate](#) this option.
- URL links within reference fields **can** also be copied between the two applications using the **transfer** process described above.

Finding Full Text

If your retrieved or input references are electronic journal articles from subscribed to titles or freely available online resources, you can often link to the full text article or document. Simply highlight your chosen reference(s) and click on the **IOE Find it!** icon in the reference  for full text and further search options.

*Please observe the usual **copyright restrictions** when downloading and using such sources.*

Managing References

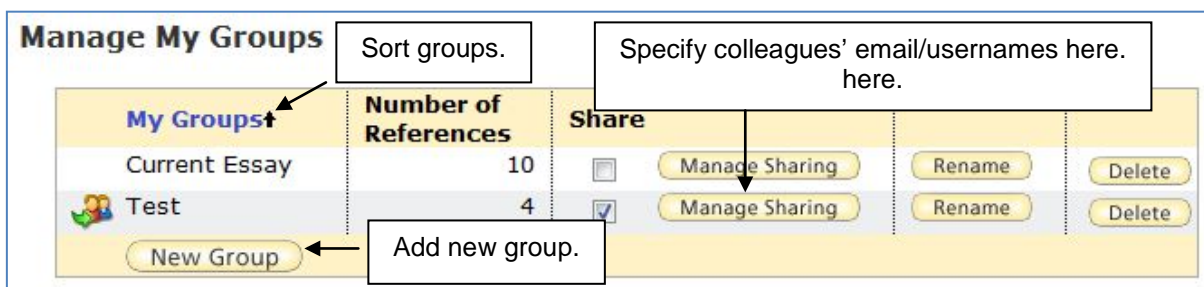
The **My References** tab shows the contents of your EndNote Web library in the centre of the page. There are various ways to find, select, edit or delete references

and navigate within a library. Some are common or similar in theory to desktop EndNote but the following are specific to EndNote Web.

- **Quick lists** - References copied to the Quick List remain during your active session. Once you log out of your library or your session expires, the quick list is cleared. Perhaps most useful for immediate actions such as exporting references or creating independent bibliography.
- **Groups feature** - allows you to create clusters and subsets of references within your library and includes a unique **sharing** option to allow fellow EndNote Web users to collaborate. You can view libraries shared with you via the **Groups Shared by Others** listing or via **Organize > Others' Groups**.

Important commands –

- To show all references in a library select **My References > All My References**.
- To show selected references in the library window, tick the '**All**', '**Page**' or **individual check boxes** next to your chosen reference(s), select the **Copy to Quick List** button and then view these selections via the **quick list** subgroup.
- Simply delete references using the steps above with the **Delete** button.
- To **view/edit** a references click on the **hyperlinked** article title.
- To **create, rename, delete** or **share** a new subgroup of references select the **Organize > Manage My Groups** command. Use the **Manage Sharing** option to specify your collaborators.



- Simply add references to your custom groups using the check boxes as above in combination with the **Add to group...** dropdown at the top of the reference list.
- The **[Unfiled]** group stores references that have not been copied to a group in your library. Also note –
 - You cannot delete or rename unfiled.
 - You can only copy references to it from groups shared with you, online search and the **import** and **capture** reference tools.
 - A reference is automatically moved to unfiled when you delete the reference from all personal groups.
 - Imported are stored in unfiled automatically.
 - References collected using **capture** are stored in unfiled unless one or more groups are specified before saving.

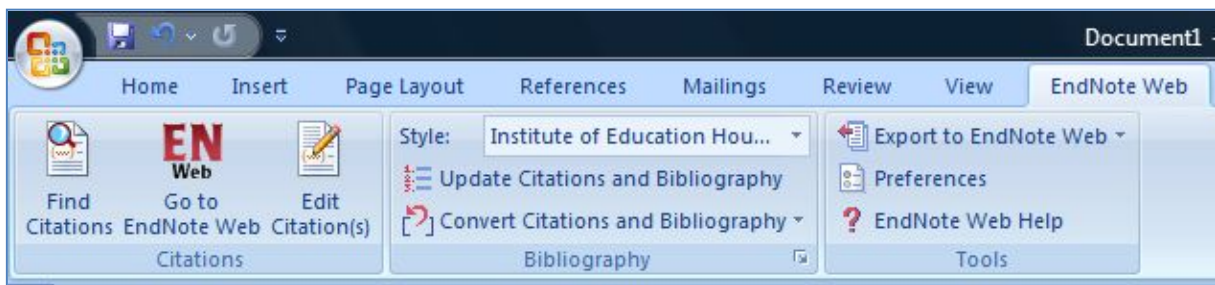
- To sort references select the Sort by command (top right) choosing the appropriate fields or simply click on the appropriate heading within the library window to dynamically sort that field.
- To open or edit a reference select the appropriate reference and click on the hyperlinked title. **Return to List** takes you back to the full listing.
- The **Go to URL** option will open the URL specified in the reference.
- To browse through a library use the **arrows** displayed above an open reference ◀ Record 3 of 86 ▶
- To search for duplicate entries choose **Organize > Find Duplicates**. Any duplicates found are displayed with a **yellow** background. You can quickly check the **Duplicates** checkbox to delete those references, or move or copy them to your Quick List.
- Use the **quick search** box to **search** your references or shared groups. Enter term(s) and they will be returned highlighted in **red** in whichever reference field they appear. Possible variations include –
 - Specific search operators such as an * at end of a word to find all variations. **Educ*** finds **education, educating, educator** etc.
 - A **space** between terms acts as an **OR** operator returning references containing any of the words.
 - A **+ sign** in front of a word will find references containing that word or words.
 - A **- sign** will return references that do not contain that word so **+truancy +boys -girls** will find all references containing **truancy and boys but not the word girls**.
 - Parentheses can be used to group search terms together. **Truancy (+boys +absence)** will find references containing **truancy or those containing both boys and absence...**
 - Double quotes (“ ”) will return references than contain the exact phrase quoted.
 - Clicking on the **hyperlinked author** listing will search for all occurrences of that author in your library.

Cite While You Write (CWYW)

Having established your EndNote library you can now easily add references to your Word document. Remember you first need to configure Word to work with EndNote Web (see **getting started** above).

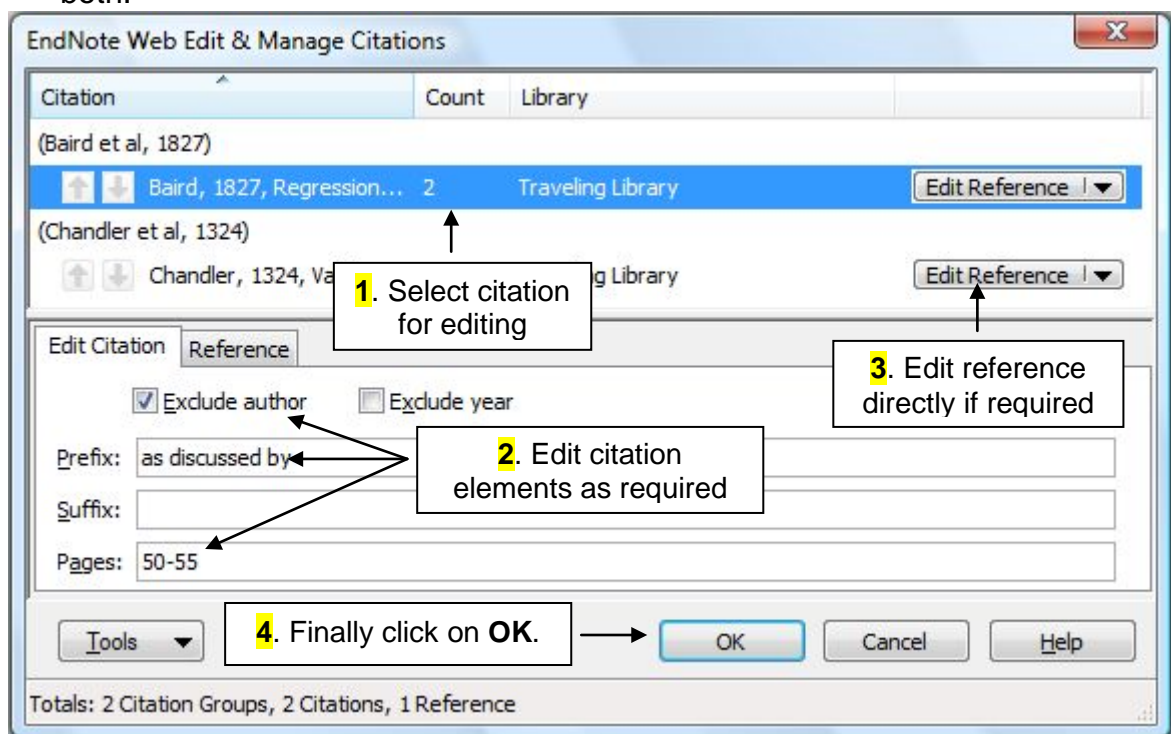
Once configured, the **EndNote Web tab** (see below) will display in Word 2007. This replaces the CWYW toolbar in previous versions. The tab is subdivided into three groups with commands that focus on **Citations, Bibliography** and other **Tools**. Most of the commands are self-explanatory and new functionality includes the ability to integrate Word's own referencing options into EndNote.

The **IOE House Style** and hundreds of other styles for you to choose from can be applied to your citations and bibliography. You can maintain a list of favourites as with the connection files above. See the '**content files**' section below for more information.



To cite a reference –

1. Start Microsoft Word and open the paper you are writing.
2. Open EndNote Web using the **Go to EndNote Web** prompt on the tab.
3. Position the cursor in the text where you would like to insert the citation(s).
4. Choose the **Find Citations** option from the tab and search for a relevant author name, keyword or other combination of terms.
5. To insert your selections click on **Insert** in the **Find Citations** dialogue window.
6. There are various optional editing functions available at this point using the **insert dropdown** menu to insert the citation(s) but exclude author, date or both.



7. The **Edit Citation(s)** command on the toolbar gives additional options to edit existing individual or multiple citations. For example adding page numbers if your chosen output style supports this, or additional data inside the brackets and excluding an author name or date (see below). Right clicking on a citation will offer these editing options also. Simply typing or altering text within the brackets, **will not work** as EndNote controls what appears here.
8. If your citations are not automatically formatted but appear as **{Taylor, 2003 #228}** for example or a bibliography is not updated each time you insert a citation select **Update Citations and Bibliography** from the tab choosing the

appropriate output style. A complete bibliography will be created at the end of your document.

9. **Instant Formatting** can be enabled via the **Preferences** option on the **Tools** tab.
10. You can toggle between linking Endnote and EndNote Web to Word for referencing via the **Preferences > Application** option on the **Tools** tab and entering your EndNote Web credentials there.
11. Other useful commands include –
 - **Convert Citations and Bibliography** to unformat citations, produce a plain text copy of the document without embedded EndNote code and convert Word citations into EndNote citations
 - **Export to EndNote** to create/export a **travelling Library** of only those references used in the document or export Word citations to EndNote Web.

Content Files (Connections, Filters and Styles)

Endnote Web comes preloaded with a range of content files to retrieve and format references. The most important files for IOE users include the **IOE House Style** and the **IOE Library Catalogue** connection file but please note that these are available **only if you create your account using the Web of Knowledge**.

See our new **LibGuide** for the best methods for transferring references from individual resources into EndNote -

libguides.ioe.ac.uk/content.php?pid=312099&sid=2554558.

See the '**help and advice**' section above for more sources of information on using EndNote.

For further eLibrary Resource Guides see libguides.ioe.ac.uk/home