

Managing your References with



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Setting up EndNote Web in Mozilla Firefox

First open up Mozilla Firefox:

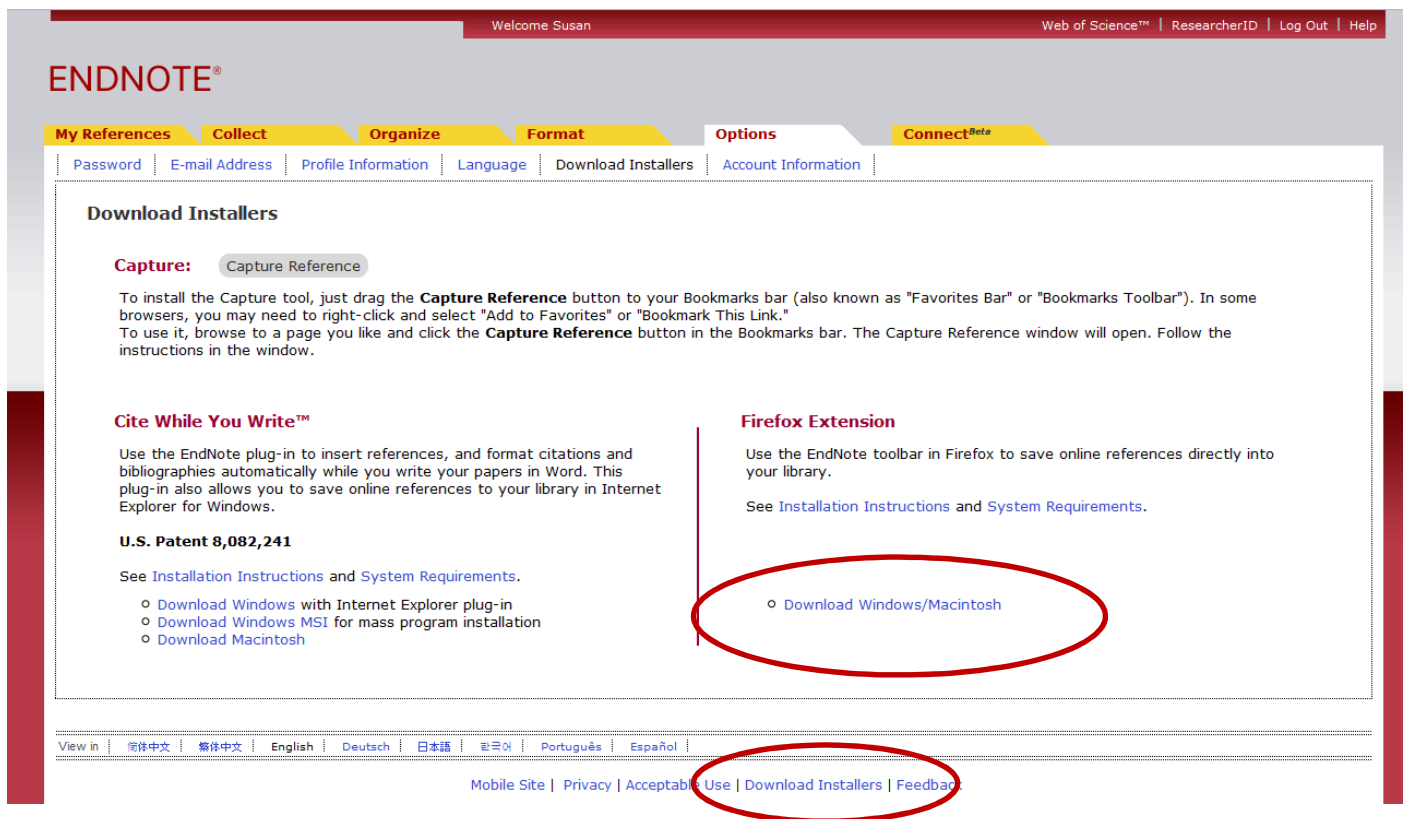
- Start
- All Programs > Mozilla Firefox > Firefox
 - If Firefox is not installed:
 - Cardiff Apps
 - Browsers & Plugins
 - Mozilla Firefox Installer

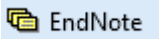
Signing up to EndNote Web:

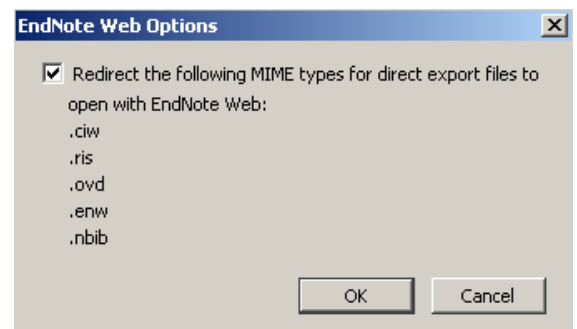
- Go to www.myEndNoteweb.com
- Click **Create an account** and fill in your details to register or **Sign in** if you already have an account

Download Installers:

- Click on **Download Installers** (at bottom of page)
- Download Firefox Extension



- Install the extension and restart Firefox
- Tick the box in the EndNote web options window and click OK.
- You may need to re-open EndNote web – open up www.myEndNoteweb.com again or click on  in the FireFox browser



Databases which can export references directly to EndNote Web

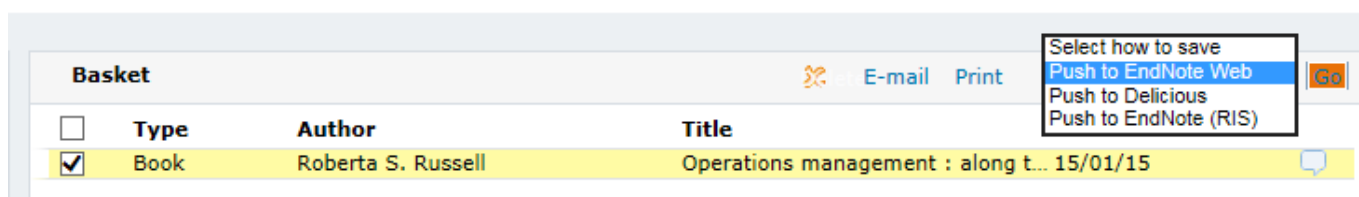
Exporting from LibrarySearch and ArticleSearch

- Access Library Search via the Library tab in the Cardiff Portal. Make sure you are signed in. By using the Portal you should automatically be signed in to LibrarySearch, and your name should appear in the top right corner of the screen. If it doesn't appear, click on the **CU staff/students** link in this corner to log in.
- The search box defaults to Library Collections and will search for books and journals. Click on the tab for ArticleSearch if you want to search journal articles by subject.
- Run a search related to your subject area.
- Add a book /s or article/s to your e-shelf by clicking on the stars

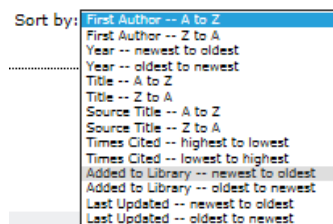


★ **Operations management : along the supply chain**
Roberta S. Russell ; Bernard W. Taylor III.
Hoboken, N.J. : Wiley|c2009|6th ed.
● **Available at** Aberconway : Main Collection : Classmark: 658.5 RUS

- Access your e-shelf by clicking the link at the top of the page
- From your e-shelf select the books/ articles to export and choose "Push to EndNote Web" from the drop-down menu. Log in to EndNote web if prompted.



- You will then be taken to the EndNote web homepage - You should receive a message confirming the number of records imported
- To see the records you have just imported, click on **My References** at the top of the page then alter the sort order to **Added to Library – newest to oldest**, to see your new references appear at the top of the list.





Accessing Subject Databases

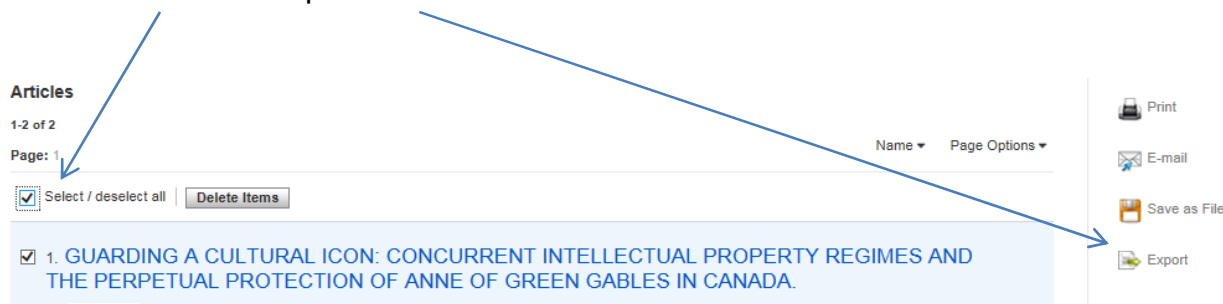
Log in to the **Cardiff Portal** at **Portal.cf.ac.uk**

- Click on the Library tab and select **Subject Resources**
- Select **Business, Economics and Transport** from the drop down menu and click **Go**.
- Click on **Search** to access Business databases

Or the direct URL is: <http://www.cardiff.ac.uk/insrv/libraries/subjects/business/index.html>

Exporting from EBSCO Business Source Premier

- Run a search on your topic. Select results by clicking on the folder icon 
- Select  Folder at the top of the page to see your list of results.
- Click on Select all then export.



- Select **Direct Export to EndNote web** and then **Save**

Number of items to be saved: 2

☐ Remove these items from folder after saving

Save citations to a file formatted for:

☐ Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)

☒ Direct Export to EndNote Web

- Log in to EndNote web if prompted. You should receive the message:

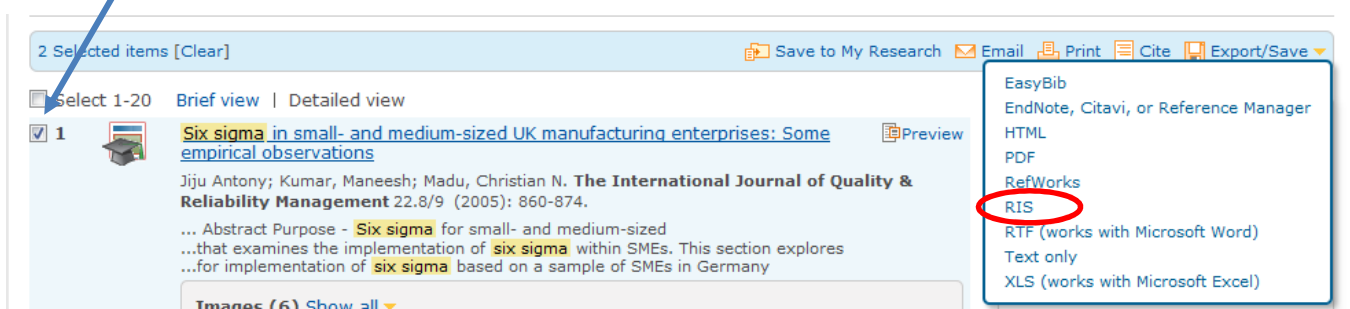
EBSCOhost Import Results
Number of records imported: 2

- To see the records you have just imported, click on **My References** at the top of the page then alter the sort order to **Added to Library – newest to oldest**.

Databases which require text files of records to be saved and imported into EndNote Web

Exporting from ABI

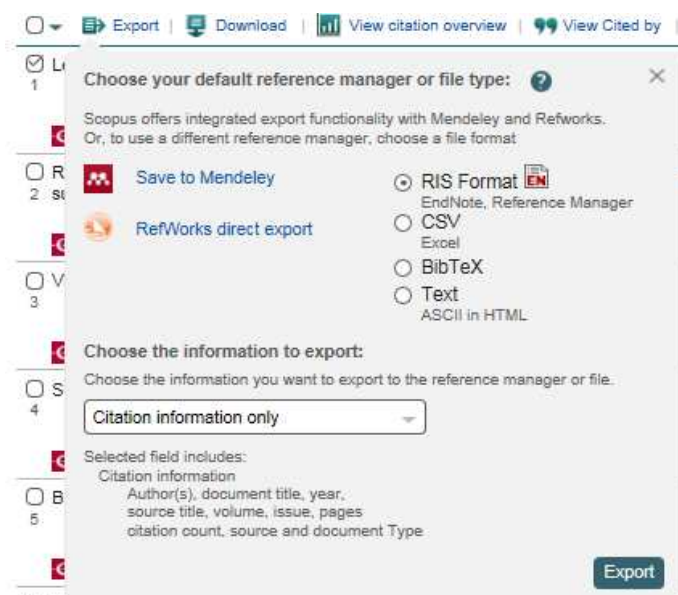
- Run a search and select relevant records by clicking in the tick boxes next to them.



- Click on **Export/Save** (above the list of results) then use the drop down menu below **Export** to select **RIS**. In the export window which appears click on **Continue** and when prompted save the file.
- Follow the instructions overleaf on 'Importing text files into EndNote web' to import these references into EndNote Web.

Exporting from SCOPUS

- Run a search and select relevant records by clicking in the tick boxes next to them.
- Select **Export** and then select **RIS format (Reference Manager, ProCite, EndNote)**.
- Click on **Export**.
- Another window will open, click on **Save**.



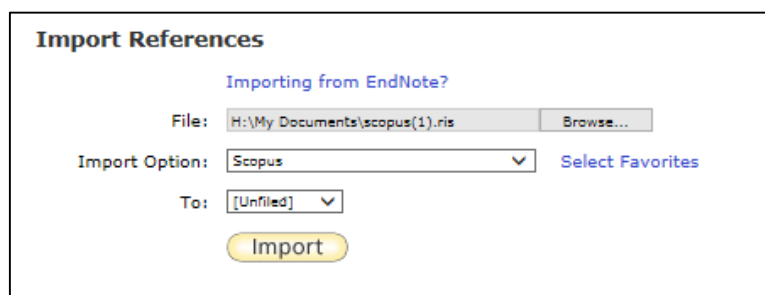
Importing Text Files into EndNote Web

For each text file of references from the databases above you will need to import the text file of references into EndNote Web as follows:

- Go to EndNote Web and click on **Collect** and then **Import References**.
- Click on **Browse** then navigate to find the file you saved. Highlight it and click on **Open**.
- For each text file you will need to select the correct **Filter**, to make sure EndNote Web displays the imported references correctly, according to the particular database they came from.
- Select the **Filter** you need from the drop down menu, referring to the table below:

Database	Filter name
ABI - Proquest	RefMan Ris
Scopus	Scopus


- Select 'unfiled' in the 'To' drop down box and click on **Import**.

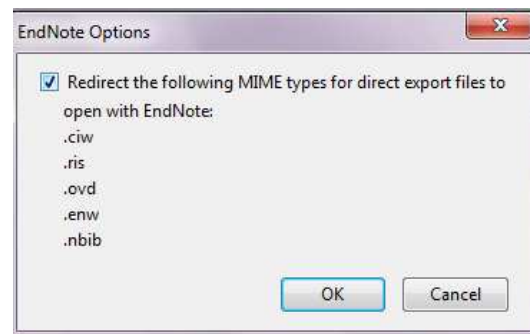


- To see the records you have just imported, click on **My References** at the top of the page then alter the sort order to **Added to Library – newest to oldest**.

Using EndNote Web Capture: Troubleshooting Firefox Extensions

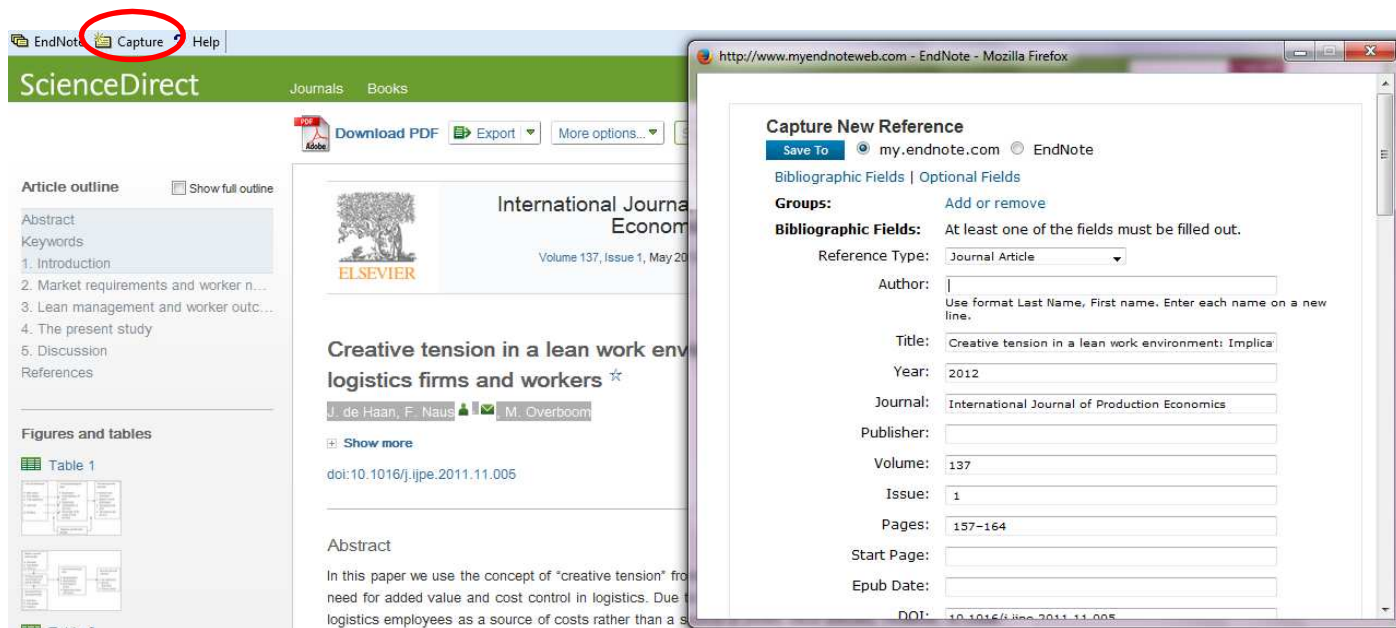
If you want to use the capture tool, check the settings:

- Click on the menu button  in Firefox, and select the **Add-ons** option. Click on **Extensions**.
- Next to **EndNote Web**, click the **Options** button.
- Tick the checkbox in EndNote Options window which appears and click OK:



Using EndNote Web Capture to import References

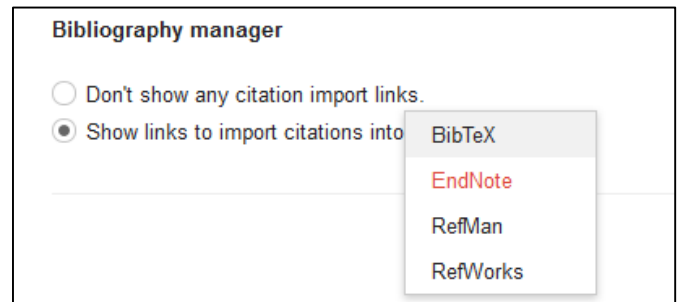
- You can use the EndNote Web Capture tool to save a reference from the following places:
 - An authoritative website e.g. BBC
 - A Journal website (e.g. a journal on Science Direct).
- Open the record for an article or a web page that you would like to add to EndNote Web. Click on the Capture button at the top of the browser.
- Fill in any blanks that EndNote Web has failed to pick up by copying and pasting the information over.



- Click on **Capture New Reference**   my.endnote.com  EndNote

Importing References from Google Scholar

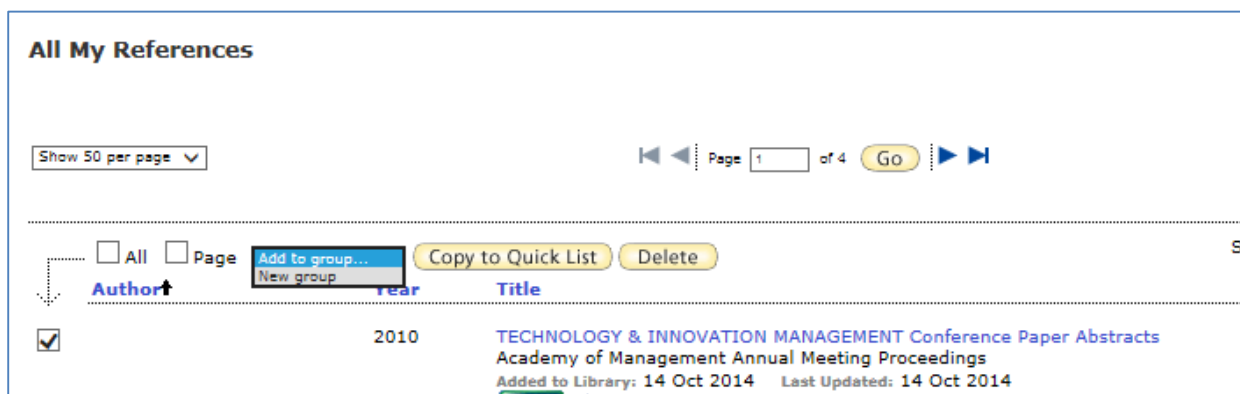
- There are some settings to change in Google Scholar to enable export to EndNote.
- First click on Scholar Settings from the Google Scholar search page.
- Look for Bibliography manager and click in the box beside 'Show links to import citations into' and Select EndNote from the drop-down list
- Click on **Save Preferences**
- Do a search and you will now see "Import into EndNote" under each result.
- Try Importing some references from Google Scholar



You could also use the "Capture" tool for Google Scholar references but the import option tends to be more reliable.

Setting up EndNote Web Groups

- Once you have imported your references you can keep them organised in EndNote by using groups. Select the references you have imported by ticking the boxes to the left of the reference and select new group from the **Add to group** drop-down menu.



- Give your group a name and click **OK**
- Once you have created groups you can follow this same process, and can move references to whichever group you prefer.

Sharing Groups

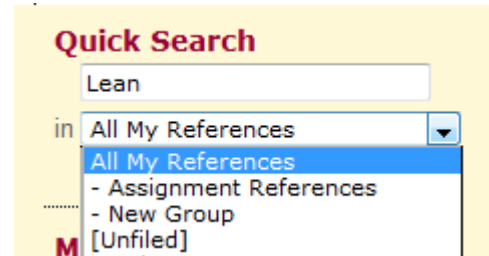
- To share a group of references with another EndNote Web user, first click on the Organize tab then "Manage My Groups"
- Click on the "Manage Sharing" button for the group you want to share
- Click on "Start sharing this group"
- Add the email addresses for the people you want to share the group with
- Select Read only or Read & Write access and click **Apply**

Editing a reference

- All references can be edited - to edit a reference click on the title of a reference.
- References are made up of a number of fields e.g. author, title, keywords etc. You may have to click **Show Empty Fields** on the right to show the full range of fields. Click on the fields you want to edit, and make your changes e.g. try adding keywords into the keyword field.

Searching References

- Search your references using the Quick Search box on the left of the screen. **Select All My References** or a particular group to search.
- Click on **Search** and your result will appear.



Manually Adding References

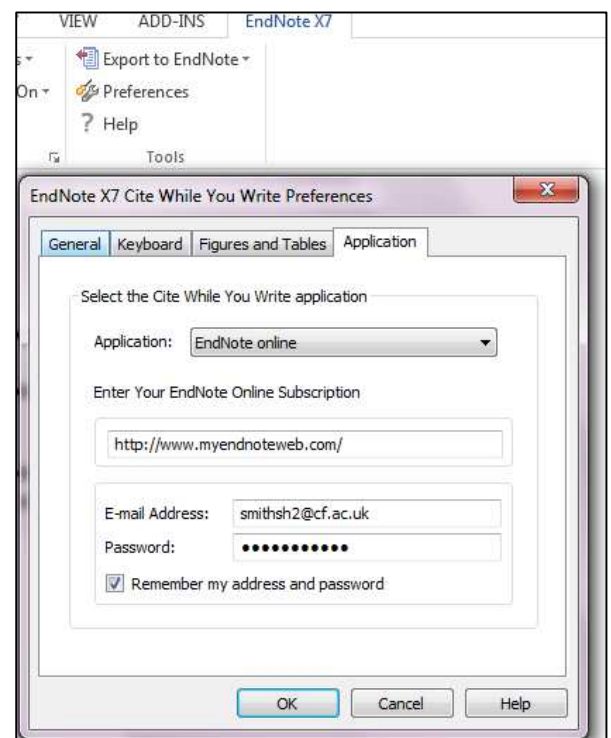
- From the **Collect** tab, click the New Reference link.
- Change the 'Reference Type' by selecting the appropriate type from the Reference Type drop-down menu (for example, book, journal).
- The page will redisplay with the relevant fields for that reference type, and you can then add the necessary information
- You can add the reference to any groups you may have set up (details of setting up groups are below) by clicking on the Groups arrow at the bottom of the page and selecting a group, then clicking 'Save'



Setting up the Microsoft Word Plug-in

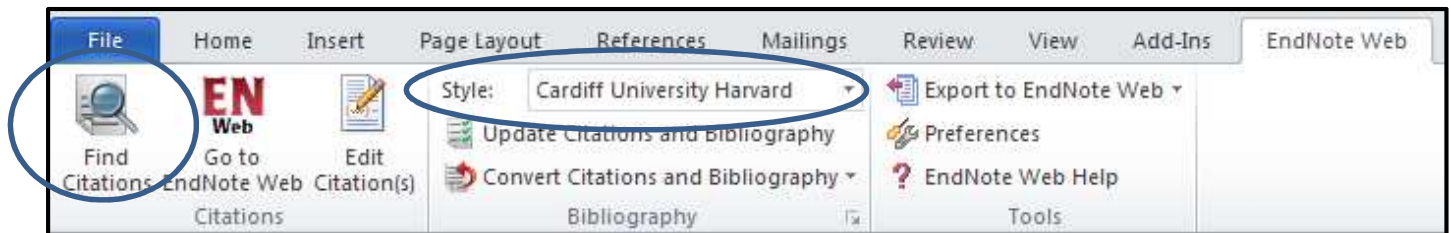
Open a Word document

- **On your own laptop/computer** you can download the "Cite While You Write" plug-in from EndNote Web via the Download Installers link.
- **On-campus** the plug-in should be installed already.
- If the plug-in does **not** appear in Word, close down the Word document. Click on the **Start** button on the bottom left of the screen. Click on **All Programs** then **CardiffApps** then **Statistics & Databases**. Click on **EndNote X71**. This will open the desktop version of EndNote, and install the plug-in.
- You will need to change the preferences so it links to EndNote Web rather than EndNote.
 - In the EndNote tab click on preferences.
 - Select EndNote Online from the drop-down menu
 - Enter your EndNote Web email and password and Click OK



Inserting References into Microsoft Word

- To insert a citation place your cursor where you want the citation to go, then click on **Find Citations**.



- Search for an author or keyword you have in your references. Select the reference you require and click on **Insert**.
- **Changing the style:** try changing the style of your citations and references to Cardiff Harvard by selecting the style from the drop-down alongside **style**.
- To remove a reference correctly you must click on the citation, in the body of the text, then click on **Edit Citation(s)** in the toolbar. Click on the arrow beside **Edit Reference** and select **Remove citation** from the drop-down menu then on **OK**.

N.B. You should **not** simply delete the text of the citation for reference from your document – if you do this, EndNote's invisible formatting codes will remain in the background and the reference may reappear next time you open the Word document.

Modifying Citations

When you use the Cite While You Write function, references appear in a standard, non-editable format, like this: **(Jones 2003)**.

You may wish some of your citations to appear in different formats, for example including page numbers or excluding the author name from the citation if this already appears in the body of your text.

- Edit some of the citations you have added. Right click on the citation in Word and select **Edit Citation** – you will be offered three options – **Exclude author**, **Exclude year** or **More...** . If you click on **More...** you have the option to change the display options, add prefixes, suffixes or page numbers as well as the option to exclude years or authors.
- When you have made all the changes, click on **OK**.

Modifying Citations: Desired result	Action	Appearance in Cardiff Harvard style
Remove the author	Select Exclude Author	(2003)
Remove the year	Select Exclude Year	(Hall)
Remove author and year: no citation appears in the text but the reference still appears in the bibliography	Click on More... from the edit citations menu and select Exclude Author and Exclude Year	No citation appears

Modifying Citations: Desired result	Action	Appearance in Cardiff Harvard style
Add a page number	Click on More... from the edit citations menu then Enter the page number into the Pages: box	(Hall 2003, p. 4)
Add text before the citation, e.g. 'see'	Click on More... from the edit citations menu then enter the text into the Prefix: box	(see Hall 2003)

Creating a Separate References list or Bibliography

- In EndNote web go to the Format tab, click the **Bibliography** link.
- Select the group of references you want to create your bibliography from the **References** drop-down list box.
- Select the output style from the **Bibliographic style** drop-down list box.
- Click the **Preview & Print** button
- Click on **Preview and print**. Your bibliography will be displayed. You can cut and paste it from here into a Word document, or print it out. You also **Save** or **Email** options.

Sources of further help

1. **University Library Service PDF guide to EndNote Web:**
<http://www.cardiff.ac.uk/insrv/resources/guides/but027.pdf>
2. **Citing and Referencing in the Cardiff University Harvard Style – for Business Students** PDF guide
<http://www.cardiff.ac.uk/insrv/resources/guides/abc055.pdf>
3. **Cardiff University Harvard Citing References Tutorial**
<https://ilrb.cf.ac.uk/citingreferences/tutorial/>
4. **University Library Service EndNote Web FAQs**
<http://www.cardiff.ac.uk/insrv/educationandtraining/guides/EndNote/EndNotewebfags/index.html>
5. **Email assistance:** Abcyliby@cardiff.ac.uk