EndNote Online quick start guide
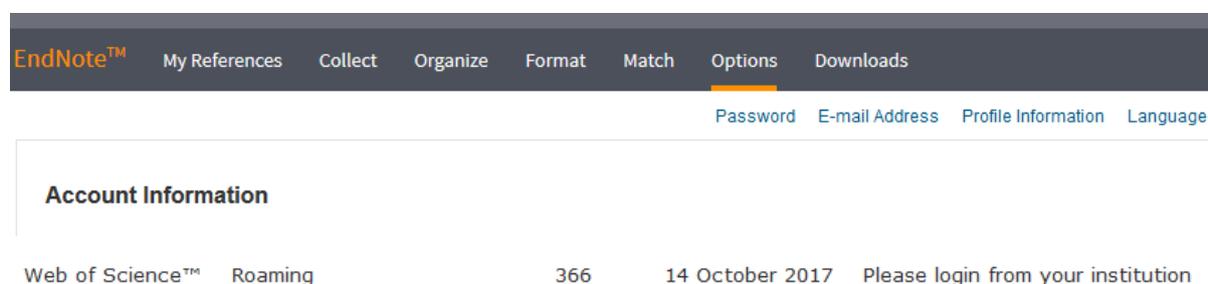
Contents

1   Introduction

EndNote Online (Web) is software available over the internet for the organisation and management of bibliographic citations and references. It enables users to:

- save, organise and edit references in an EndNote Online library – My References
- link to Word to cite references and create bibliographies

2   Registering for an EndNote Online account

Go to www.myendnoteweb.com and **register** for an account. If you are **off campus** or using your **own device** you need to click **Sign in via your institution/Shibboleth login**, selecting UK Federation and Lancaster University before you create an account. Make sure you create a password that meets the guidelines. Subsequently come to the same URL and sign in to your account – it will say EndNote basic, but has more functionality than a free EndNote basic account.

If you only use EndNote Online off campus, your account will expire after a year and will become a free basic account with less functionality. You will still be able to use the account, but will have no Lancaster-specific features and access to a restricted range of styles, though including an author-date style. For increased functionality, you will need to reactivate it by logging in on campus. You can check the status of your account in the Options tab under account information
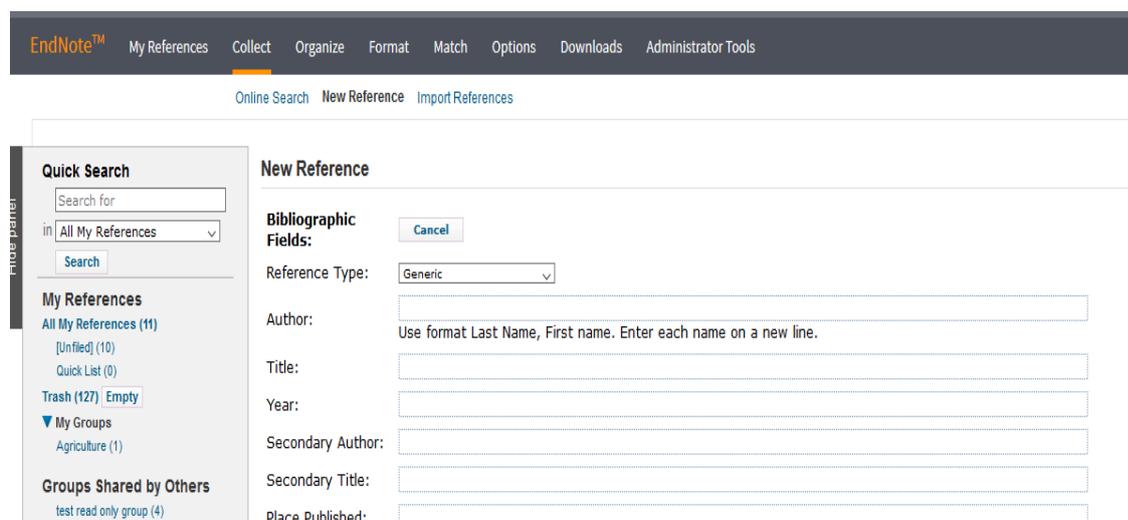

3   Creating an EndNote Online Library of References

3.1   Entering references manually
1 Click on the Collect tab

2 Click on **New Reference**.

3 Select the relevant reference type from the drop down list; the default is generic, but choose journal article, book, book section, web page etc as needed. The fields available depend on the reference type chosen. Remember to enter names in the format Last name, First name, or initials if only those are given in the source, and to put a comma at the end of a corporate author, eg Child Soldiers International,.

4 Enter the reference information. The information is saved automatically through Autosave. If you are not sure what information is needed for a particular reference, see the citing references tab at http://lancaster.libguides.com/c.php?g=541427&p=3709087

3.2   Connecting to online catalogues and databases

You can search online catalogues and some databases through EndNote Online.

1 Click on **Collect - Online Search.** The first time you do this you need to click on **Select favorites**. Select the required database or library catalogue connection from the list and click **Copy to favorites**.

You could select the Lancaster University Library catalogue and the British Library catalogue to access book references; and Web of Science Core Collection to access a large journal article database. Subscription databases like ABI Inform are not available via this method. Access to Web of Science off campus is only available via the VPN.

2 Select the connection required from the drop down Select... list which displays your Favorites and click **Connect**.

3 Enter your search terms and click **Search**. Search in a way which only brings up one or two responses, changing the field names as necessary.

Online Search

Step 2 of 3: Connecting to eu.alma.exlibrisgroup.com : Bibliographic

howarth		in:	Any Field ∨	And ∨
agriculture		in:	Any Field ∨	And ∨
		in:	Any Field ∨	And ∨
		in:	Any Field ∨	

- ⦿ retrieve all records
- ○ select a range of records to retrieve

Search

4 Check the box for the the required reference, select the destination group from the Add to group…drop down list (Unfiled is the easiest) and the search result will be added to your EndNote Online library. See below for more information on groups.

Online Search Results

eu.alma.exlibrisgroup.com 1 - 1 of 1 results

((howarth) in Any Field) and ((agriculture) in Any Field)

Show 50 per page ∨   ◄◄ ◄ | Page 1 | of 1 | Go | ► ►►

□ All □ Page Add to group… ∨

	Author	Year	Copied	Title
☑	Howarth, William	1993	-	Agriculture, conservation and land use : law and policy issues for rural areas
				⊘ Find It

3.3   Exporting references directly from online databases

It is possible to export references directly from OneSearch and Web of Science to EndNote Online. Other databases support export indirectly via a text file – see section 3.4.

3.3.1   OneSearch
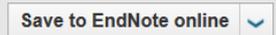
1 Search OneSearch. For records you wish to save to EndNote web click on the Citation symbol then on EndNote Web.

REFWORKS   ENDNOTE WEB   CITATION
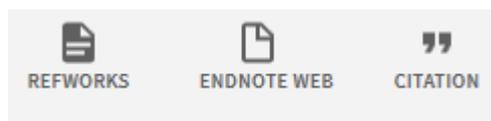
You will be prompted to sign in to your EndNote online account if necessary.

3.3.2   Web of Science

1 Search Web of Science as normal and mark the records you wish to save in EndNote Online.

2 From the marked list, click on the **Save to EndNote online** ⌄ button.

3 If you have EndNote Online open, the reference will be exported directly to your library of references; otherwise you will be prompted to sign in to your account. It will be in the All My References and Unfiled groups (see below for more details of groups).

3.4   Importing references from online databases via text files

Most databases allow you to save references in a text file in a format which can then be imported into EndNote Online.

1 Search the database as normal and mark the records you wish to save in EndNote Online.

2 From the marked list or folder, click on the **Export** or **Save** button and save the references to a text file using, for example, Notepad. If required to select the format, choose RIS or EndNote.

3 In EndNote Online, click on **Collect,** then **Import References.**

4 Select the text file, choose the relevant import filter - the name of the originating database, RefMan RIS if the database name is not listed or EndNote import (Google Scholar), select the destination group (eg Unfiled) and click **Import**.

If you are using Google Scholar, go into Settings and Bibliography manager and edit the default setting to link with EndNote:
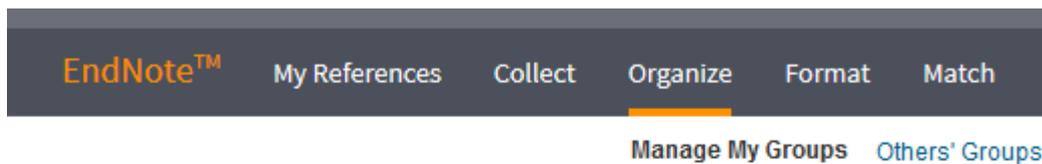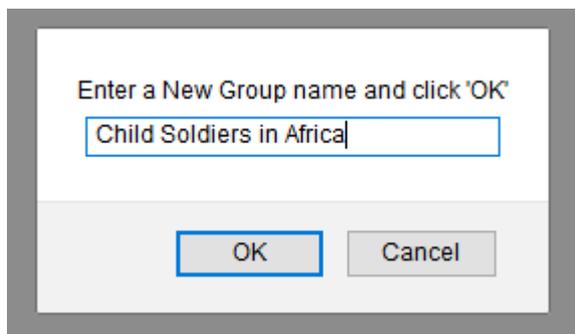

4   Managing References

4.1   Creating groups of references

References can be arranged into custom groups which contain copies of the record in the All My References group:

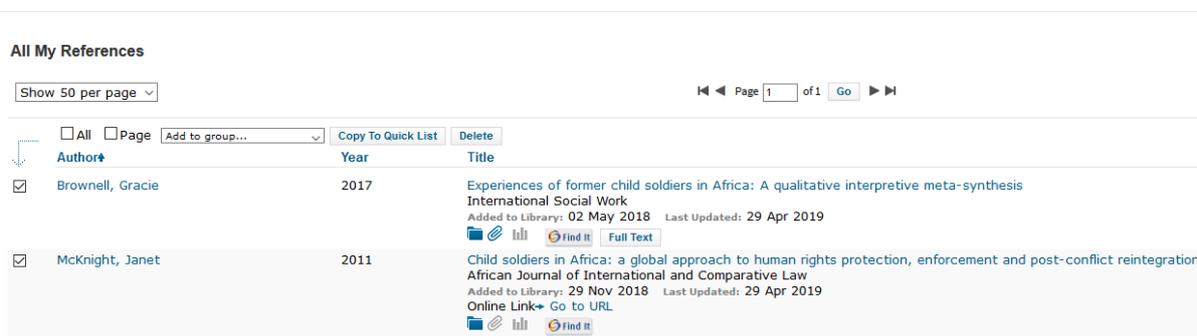1 Click on **Organize**, **New Group**.

2 Name the new group and click OK.

3 In All My References check the references to include in the group.

4 Select the group required from the drop down Add to group... list and the references will be copied to the group.

4.2   Sharing references

You can also share references with researchers at other institutions who use EndNote online. Both researchers can then cite sources from the same library of references.

1 In Manage My Groups, click on Manage Sharing for the relevant group.


2 Click on Start sharing this group

3 Enter the e-mail addresses (EndNote log in names) of your colleagues. You can allow them to access the group (Read only) so that they can cite from it, or to use the references and also add material to the group (Read and Write).

4.3   Adding files

You can attach files to your references, for example a pdf of a journal article. Click on the paperclip symbol and then on Attach files
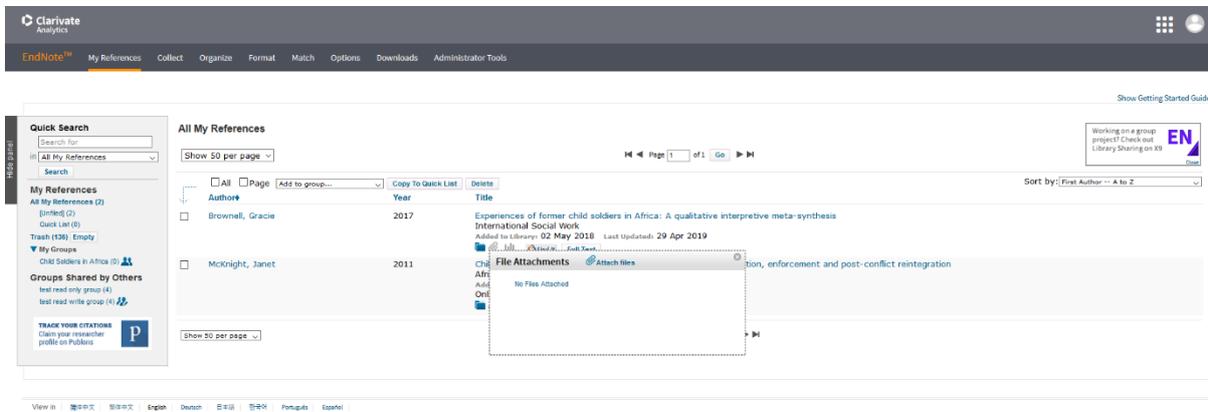
Browse for the files you need (they must be saved on your device) and then click Upload
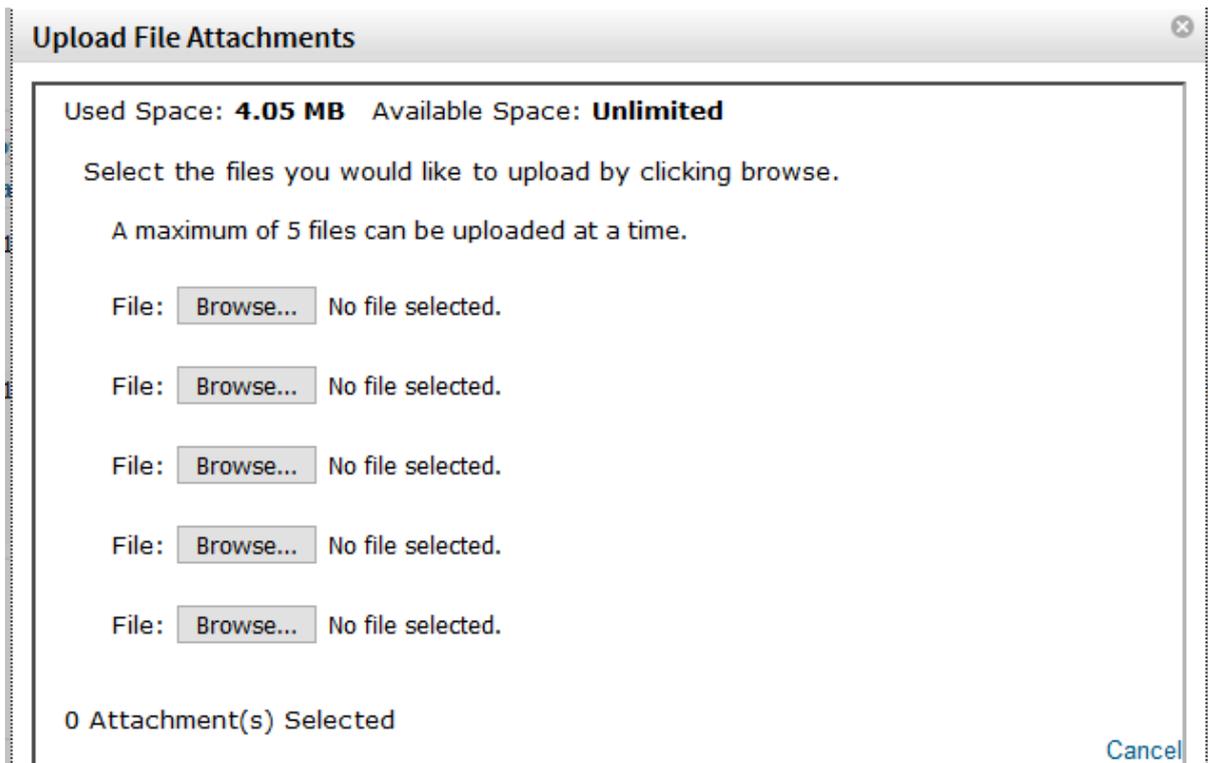
You can now view the files online by clicking the paperclip symbol which has become blue. You have 2 GB of cloud storage with your EndNote Online account.

5   Creating Citations and Bibliographies

5.1   Accessing the link to Word

You can link to Word using EndNote's Cite While You Write function. On your **own device** you first need to download the plug in from EndNote Online. Select **Downloads** and follow the instructions there. Remember to do this with Word closed. Make sure you select Cite While You Write at the appropriate point; there is also the option to download a plug in for IE which allows you to create references from web pages. You should now have the EndNote Online toolbar available in Word.
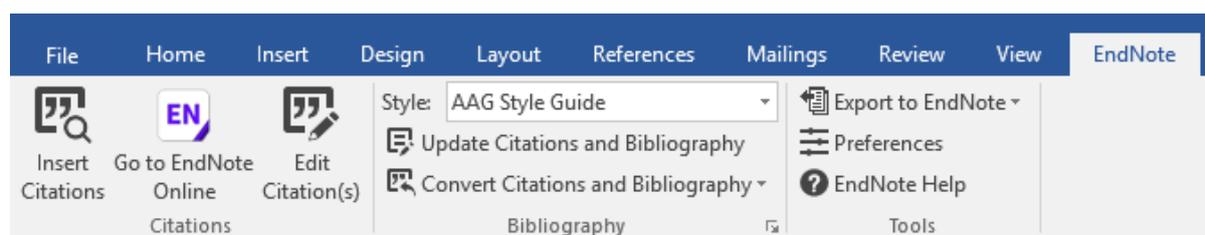
If the tab says EndNote X9, use the Preferences, Application option to change this to EndNote Online.
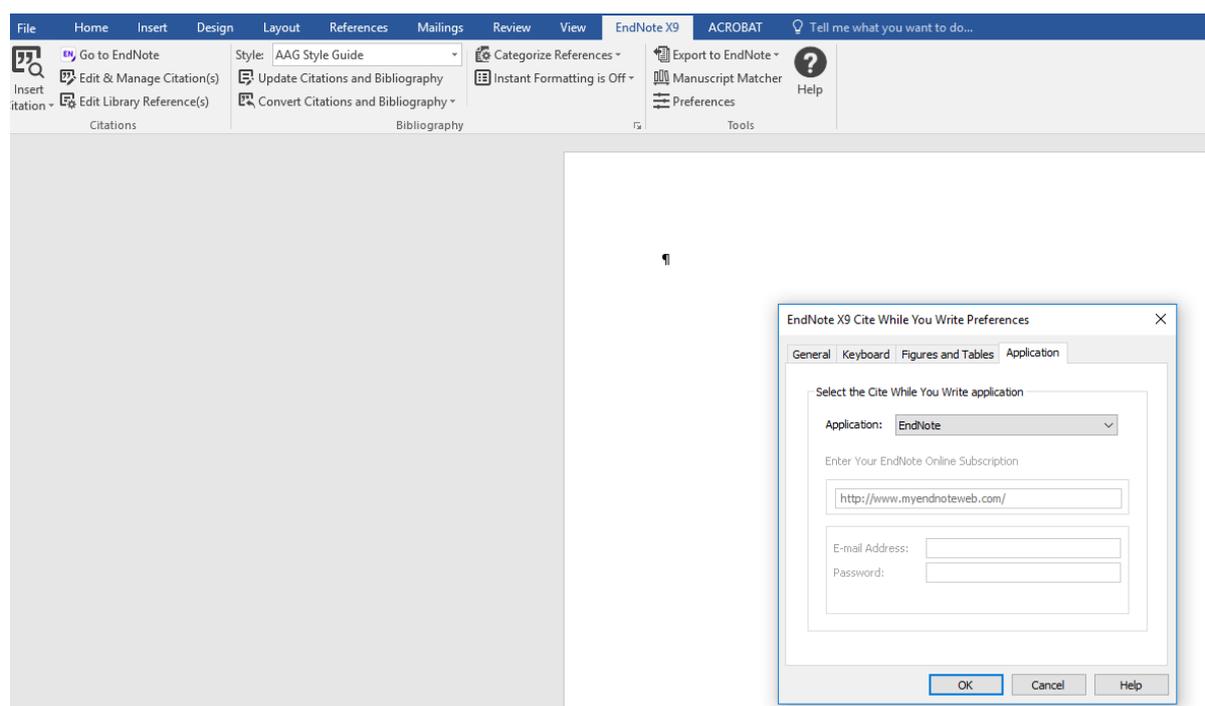
If you are using EndNote online on a **library/computer lab pc**, you must launch EndNote desktop (X9) via AppsAnywhere at https://apps.lancaster.ac.uk/ before you open Word. Minimise all EndNote X9 windows that pop up. Change the application as described above.

5.2   Selecting a style

EndNote can display the information in your library in a range of different bibliographic styles. You can select the style you need:

1 Click on the **Style** drop down list, then **Select another style...** at the top of the list.
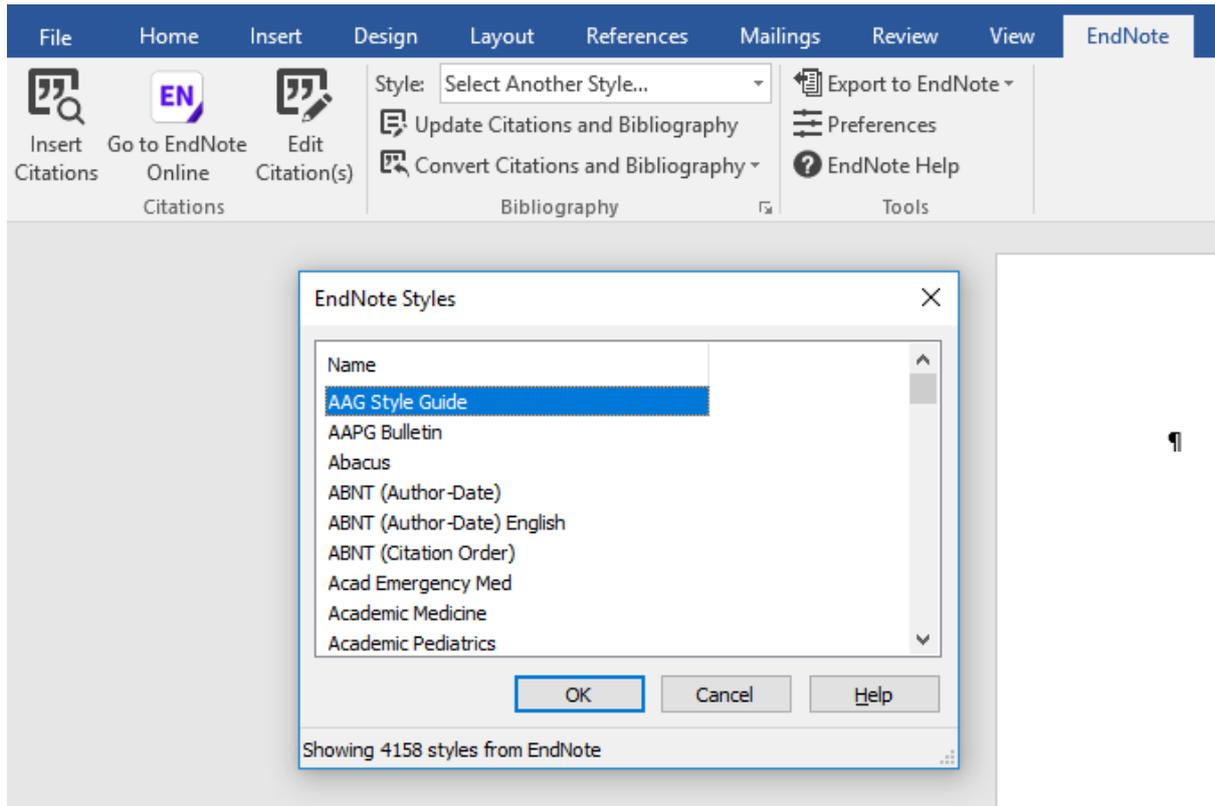
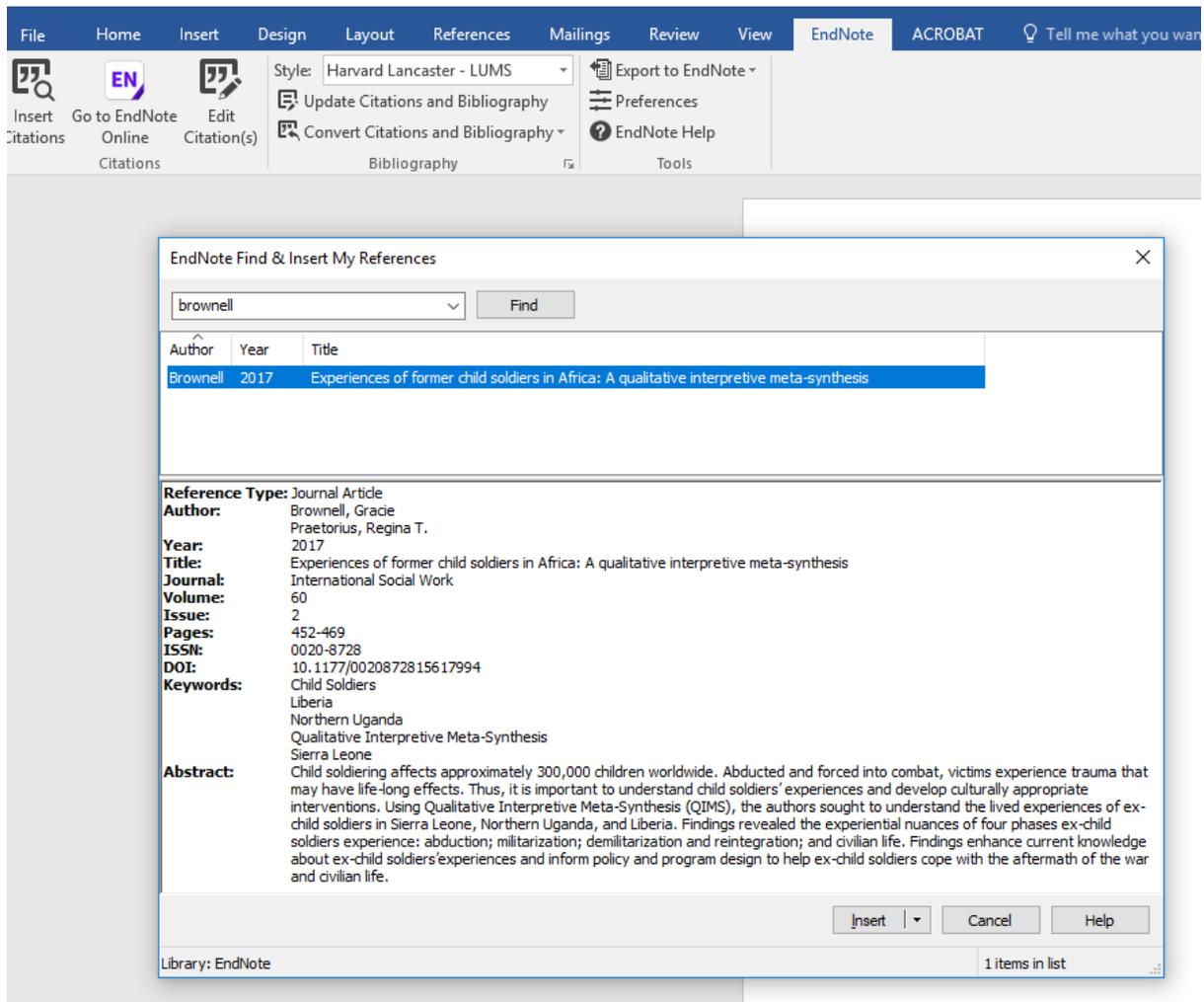2 Select the desired style, choosing from thousands of possible styles produced by journal editors and professional bodies. If you are a student, your department will tell you the style you need to use; the information is often in your departmental handbook.
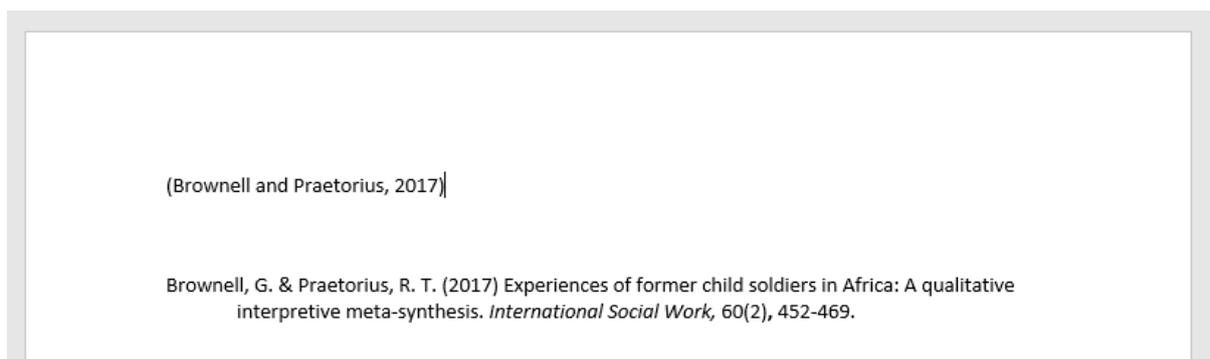
5.3   Inserting citations

1 In the Word document, position the cursor where you wish to insert a citation.

2 On the EndNote Online tab, click on **Find Citations**.

3 Search for your reference and when it is displayed on screen, click on **Insert**.

As well as inserting the citation, EndNote builds the bibliography at the end of the document:

(Brownell and Praetorius, 2017)

Brownell, G. & Praetorius, R. T. (2017) Experiences of former child soldiers in Africa: A qualitative interpretive meta-synthesis. *International Social Work,* 60(2), 452-469.
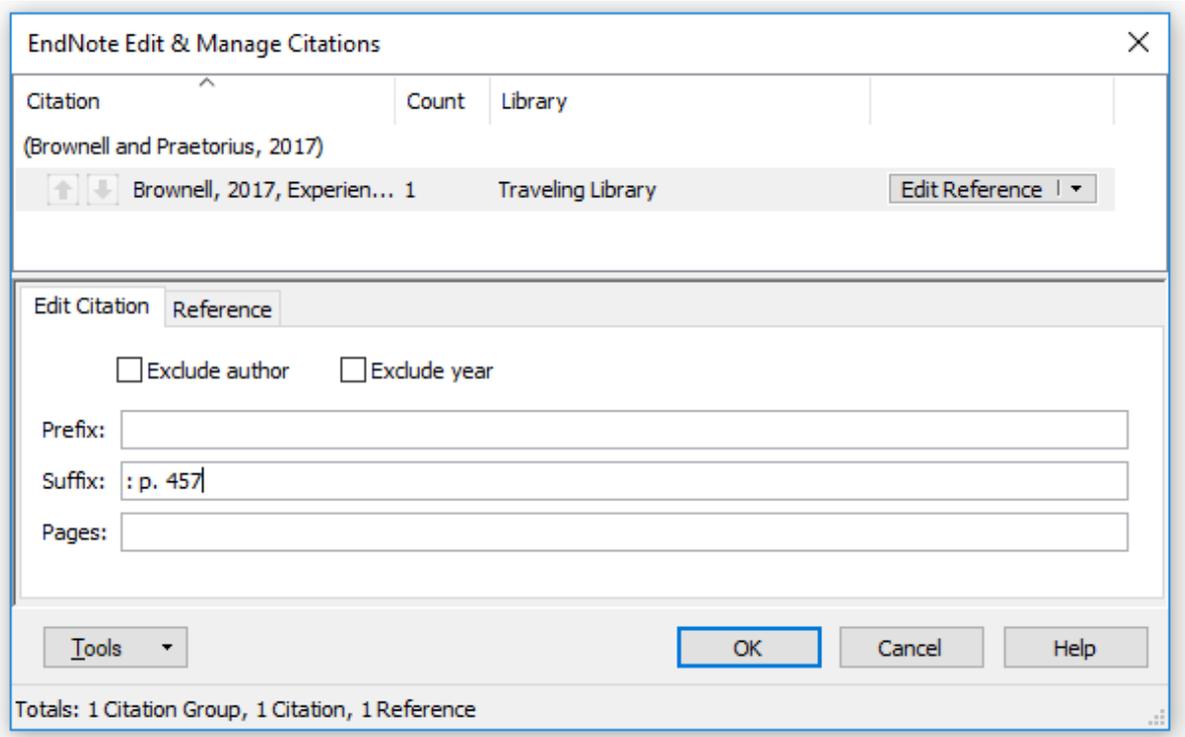
5.4   Editing citations

Any amendments to the citation or bibliography must be made using EndNote Online, not in Word, or the changes will be lost when any new citations are added. Click on the citation then

1 Click on **Edit Citation(s)**.

2 Make the required changes, for example excluding the author or adding page numbers, then click on **OK**.

3 Page number information is added in different places depending on the style. In the Harvard and APA styles, the information goes into the suffix field; you need to add the necessary spacing and punctuation manually, eg ": p. 67". In footnoted styles like Chicago and OSCOLA, the information goes into the Pages field and punctuation is supplied by the style.


5.5   Editing the bibliography

Changes to the bibliography need to be made in the EndNote library first and then pulled through to the document. After editing the reference in your EndNote library, click on the citation in your document, then

1 Click on **Edit Citations**

2 Click on the **Edit Reference** drop down list and select **Update from My Library**
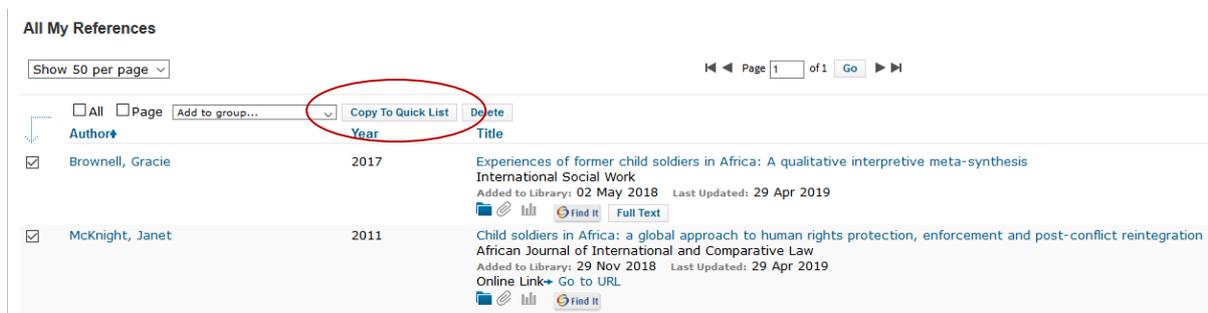
3 Select the reference and click **Insert** and **OK**
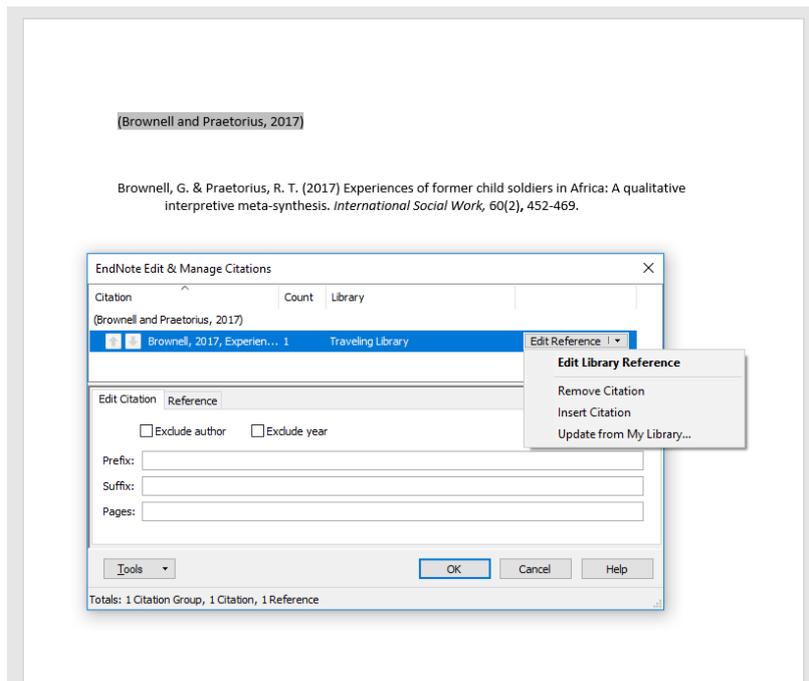
5.6   Creating an independent bibliography

You can also create an independent bibliography to add to a document.

1 Copy the required references from All My References to the Quick list – check and click Copy to quick list.

2 Click **Format** and **Bibliography**.

3 Select **Quick List**, the required bibliographic style and the file format you need.

4 Click on **Save** or other output option.