# EndNote Online.

**Contents**

**For further information, including more detailed handouts and workbooks, go to:** http://libguides.ncl.ac.uk/endnote.

# Section 1: Getting started with EndNote Online.

## 1.1 Overview.

EndNote online is a web-based reference management tool which allows you to collect, organise and format references and in-text citations using several different styles.

It can work in conjunction with EndNote desktop software or independent of the desktop version. The URL for EndNote online is: www.myendnoteweb.com/.

You can access it anywhere - on your desktop, online, or on your iPad. Benefits include:

- Reference storage.
- 5,000+ bibliographic styles.
- File storage.
- Online search.
- Automatic generation of in-text citations and reference list.

## 1.2 Creating an EndNote account online.

If you have access to the University desktop version of EndNote, we recommend using this to create your account as doing so will provide you with unlimited records, unlimited file storage and 2 years roaming access.

Press the windows key on your keypad to summon the start menu or alternatively point your mouse in the screen's bottom-left corner and then click on the windows symbol. EndNote should be listed under E. If you can't see the EndNote program press the **Windows Key + X and select Search**.
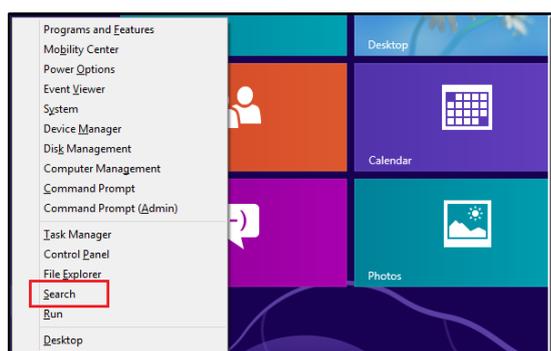


The first time you use EndNote you may see a screen inviting you to sign up to EndNote online or synchronise your library:
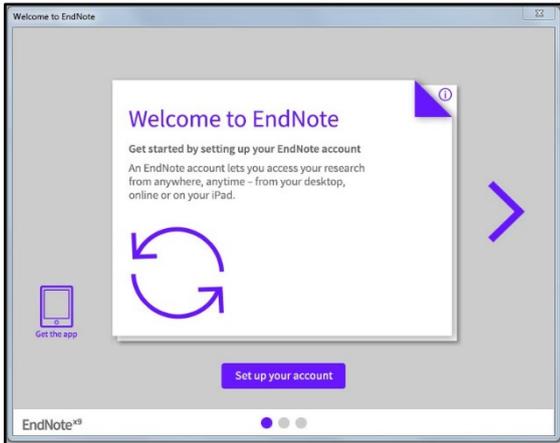
Skip this step - close this box using the cross in the top right corner.

There may also be other 'pop up' boxes. **Close these boxes using the cross in the top right corner of the pop up or by selecting 'ignore this'.**

Select **Edit.**
Select **Preferences from the drop-down list.**
Select **Sync.**
Select **Enable Sync.**
Select **Sign Up**



Follow the on-screen prompts to set up your EndNote online account (make a note of your username and password. If you have used your NCL email address make sure you make a note of whether you have put your.name@ncl.ac.uk or your.name@newcastle.ac.uk as they do not work interchangeably).

You now have an EndNote online account that is synchronised with your EndNote desktop account.

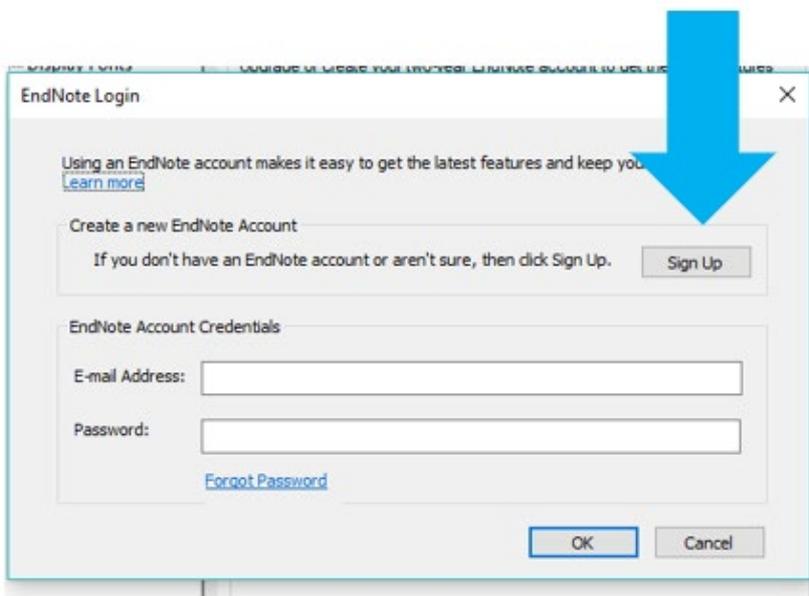## 1.3 Opening up an existing EndNote Online account

Go to EndNote Online (https://access.clarivate.com/login?app=endnote) and log in with your new username and password.

# Section 2: Adding manual references to your EndNote Library.

To add a manual reference into your online library: -

Select **'Collect'**.
Select **'New Reference'**.
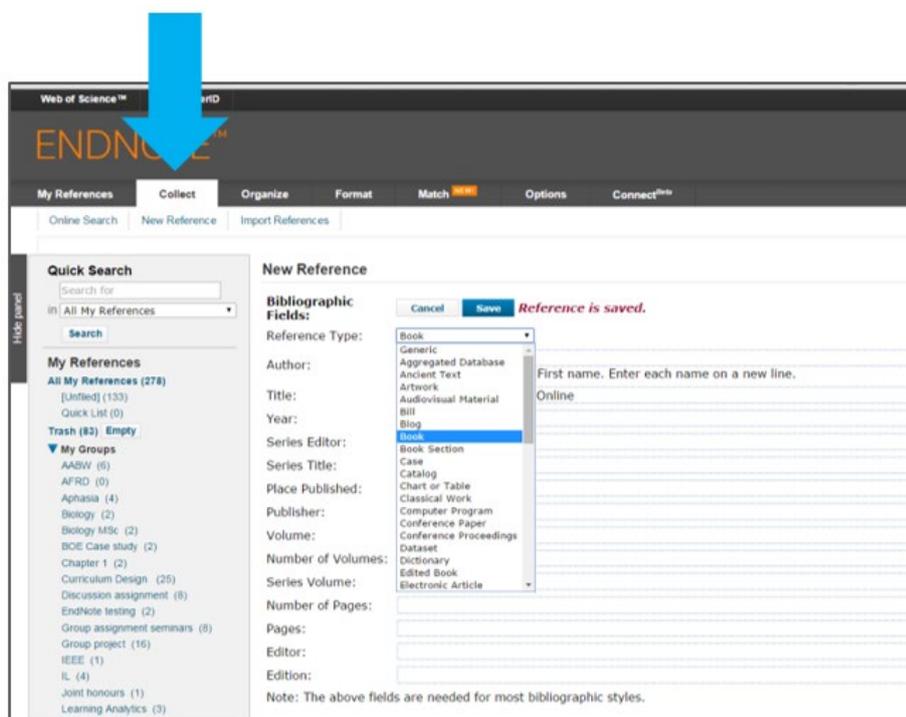


At the **'Reference Type'** drop down section, scan the list of possible formats. It's important to choose the correct reference type as this will determine what details can be input and how they are formatted in the reference list.

As an example, **select 'Book'**

**Fill in some book details** and save to your newly created group or experiment with creating a new group.

You can use the following as an example - Pears, R. (2015) Cite them right. Pear Tree Books: Oxford.

**Please note:** If your source has a corporate author, in the author field type a comma after the corporation/organization name e.g. (**National Institutes of Health,**). Otherwise EndNote will format the author's name into last name/ initials format e.g.  Author: Health, N.I.o.

If your source already includes a comma, type a second comma after the first one e.g. **Royal Holloway,, University of London**

# Section 3: Exporting references from Library Search

We recommend you export from Library Search when you are looking for books, eBooks and titles found in 'everything except articles' search option.

Log into **EndNote web** on your Internet browser.

In another tab in the same browser **go to Library Search** (libsearch.ncl.ac.uk) and into the search box, **type in the keywords** you wish to search for e.g. "essay writing".

Click on search. You should see a list of results.
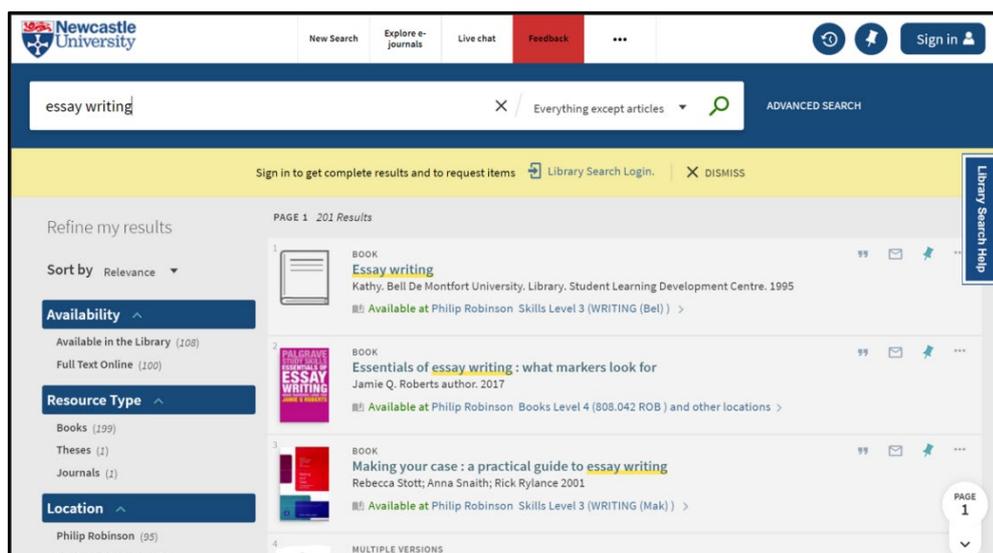
Click on the title of the book that you wish to export to EndNote. Scroll to the bottom of the item record, where you will see some **Send To** options. Click on **EndNote Web.**



You should then see the following message in your EndNote web browser:



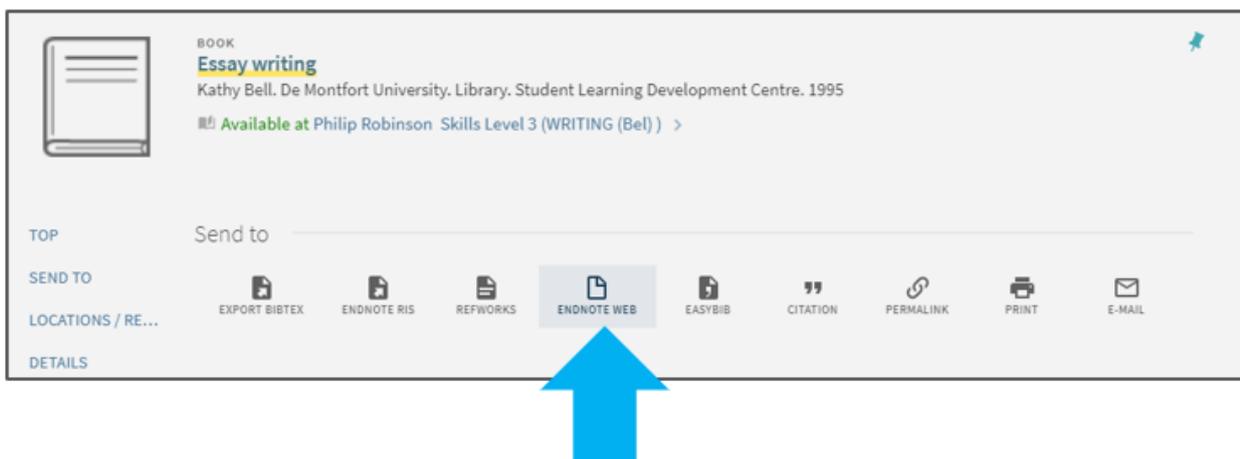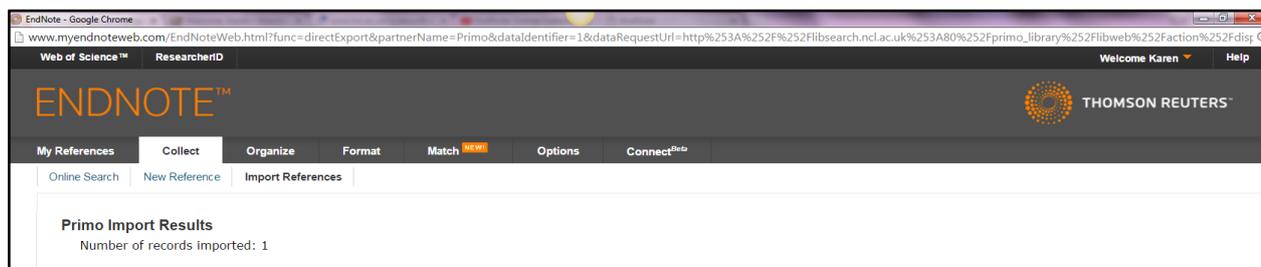The reference will be shown in the 'unfiled' folder under My References in EndNote online.  You can add the reference to a group if you wish (see Section 6 for creating and managing groups).

**Please note:** When exporting from Library Search please check in your EndNote online library that the 'author' and 'reference type' fields are correct. Sometimes the information is brought over incorrectly.

# Section 4: Exporting references from Online Databases

You can use this option to export journal articles, conference papers, eBooks and many other references that are found in academic databases.  Each database will have a slightly different way to export references into EndNote. Use the help section within each subject database you are using to find guidance on exporting to EndNote Online.

Make sure you open your EndNote Online library in the same browser as the database you want to export from before you begin.
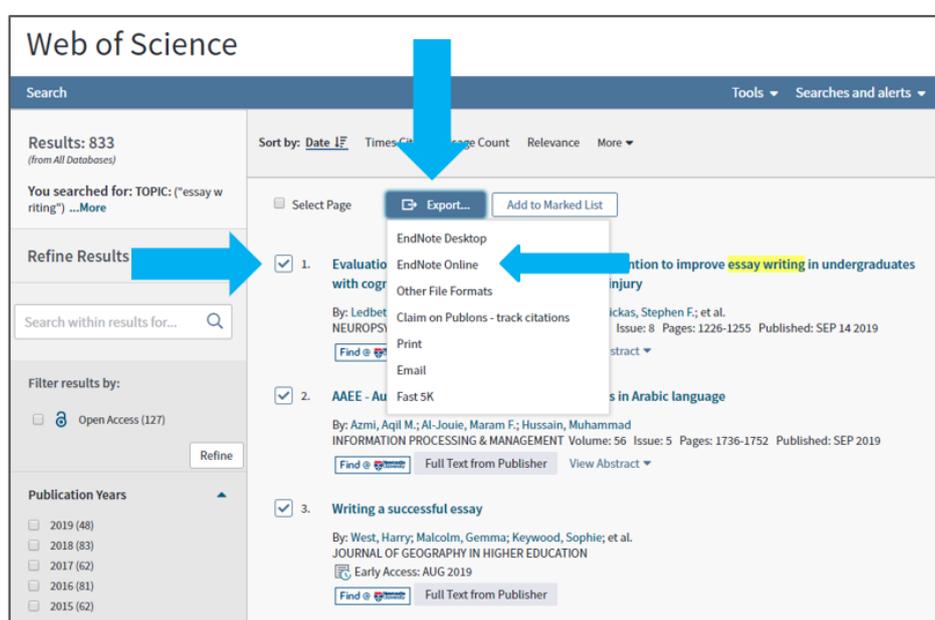
## 4.1    Exporting references from Web of Science

Open **EndNote web** in your internet browser.

**Open a new window** in the same browser and go to the **Library Search** homepage [ncl.ac.uk/library/](ncl.ac.uk/library/). In the Library Search box, type **Web of Science** and click on the search icon. Locate the database in your results list and **click on the database title** and then the **blue 'Web of Science button'** under '**View online'.** This will open Web of Science in a new tab.

In the Web of Science search box type **"essay writing"** and click on search. Mark some of the records by ticking the checkboxes.

At the top of the list select **'Export'** and then click on **'EndNote Online'**.
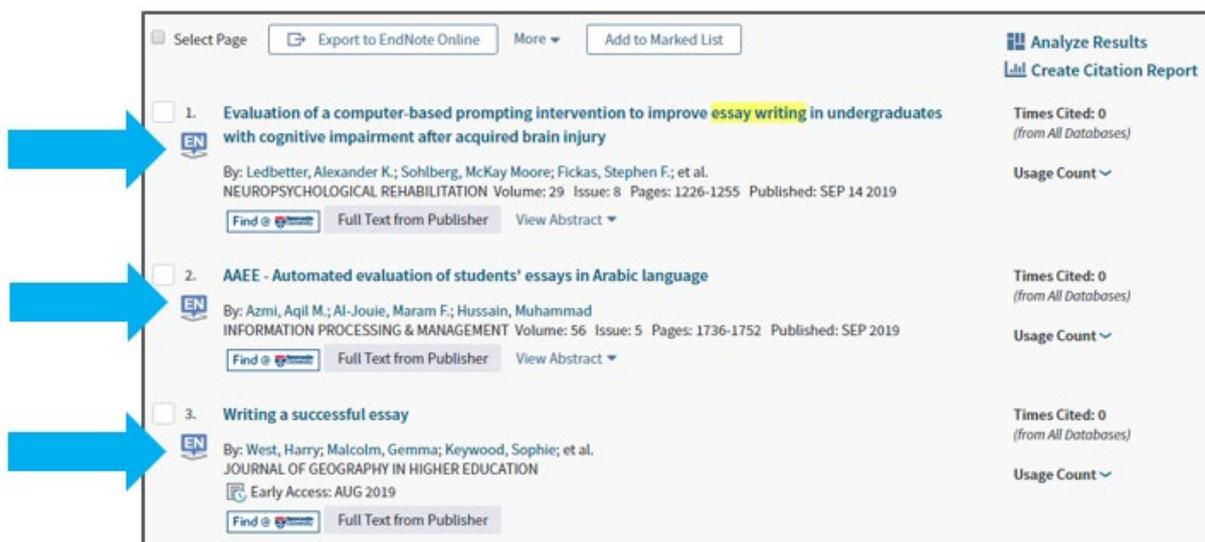


A box will appear. Check that the correct records are selected and use the **record content drop-down box** to select the information you wanted brought into your EndNote library.



Click on **Export**.

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The reference(s) will be sent to your EndNote online library. In Web of Science you will then see the EndNote indicator next to the references you have exported.



## 4.2    Exporting references from Scopus.

Open **EndNote web** in your internet browser.

**Open up a new window** in the same browser and go to the **Library Search** homepage ncl.ac.uk/library/. In the Library Search box, type **Scopus** and click on the search icon. Locate the database in your results list and **click on the database title** and then the blue **Scopus** button under '**View online'.** This will open Scopus. in a new tab.

In the database search box type **"essay writing"** and click on search. Mark some of the records by ticking the checkboxes. From the menu at the top select the export link (RIS export). A window will pop up providing export settings, ensure RIS format is selected then choose the information you wish to export (our advice would be to export all the information) and click **Export.**
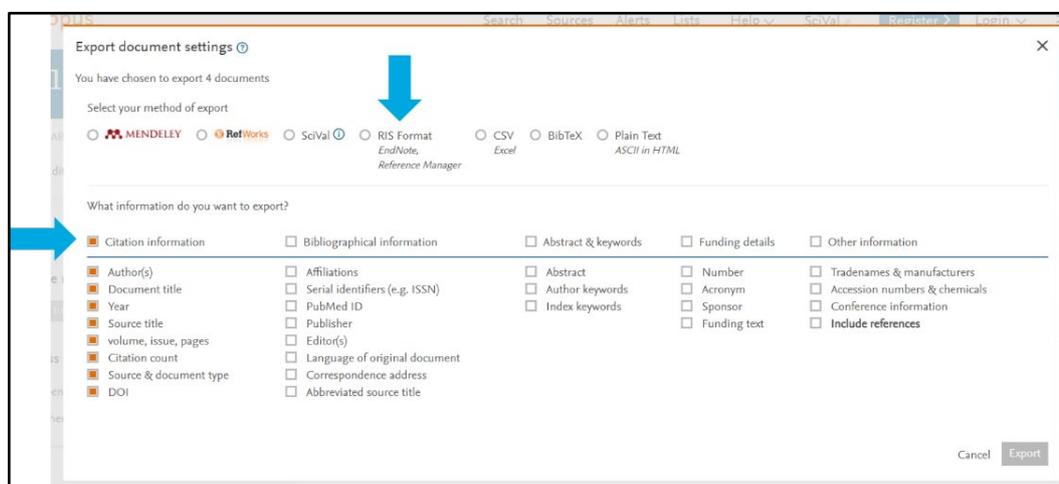
The download will start and in Google chrome a file will appear to say your references have been downloaded. You do not need to click on the file.


scopus (1).ris

Go to EndNote Online and click on **'Collect'**, then **'Import References'.**

Click on **'Choose File'** or **'Browse'** and go to your **'Downloads'** folder on your PC. You should see the file you have just downloaded from Scopus.

In EndNote online under 'Import option' select 'RefMan RIS'.

In EndNote online under 'To' select one of your groups to import your reference(s) to.

In EndNote online click on 'Import'.  Your reference(s) should now be in your EndNote online library.
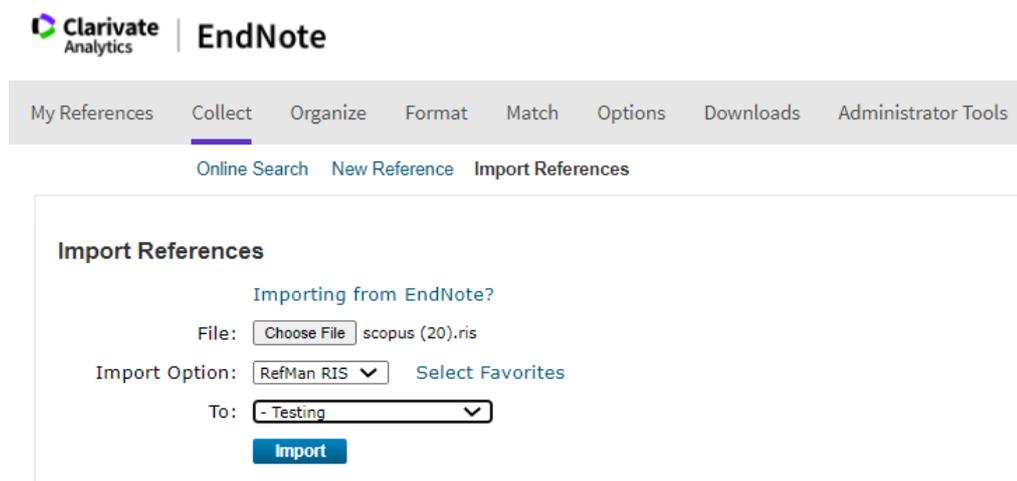


# Section 5: Exporting references from Google Scholar.

Go to Google Scholar https://scholar.google.com/.

Perform a search in Google scholar for **"essay writing"** and click on the menu button, (three vertical lines).
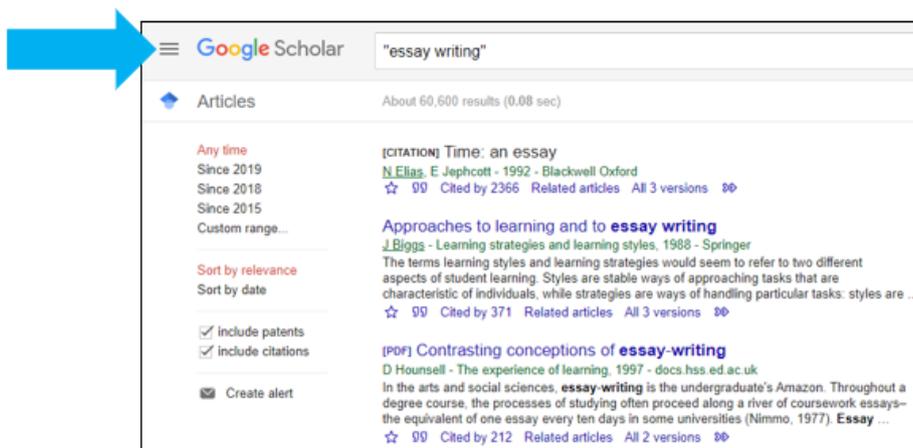
Click on '**settings'** and under Bibliography manager click on **'show links to import citations into'**. Next select **'RefMan'** (not EndNote) from the drop-down menu and then click on save.
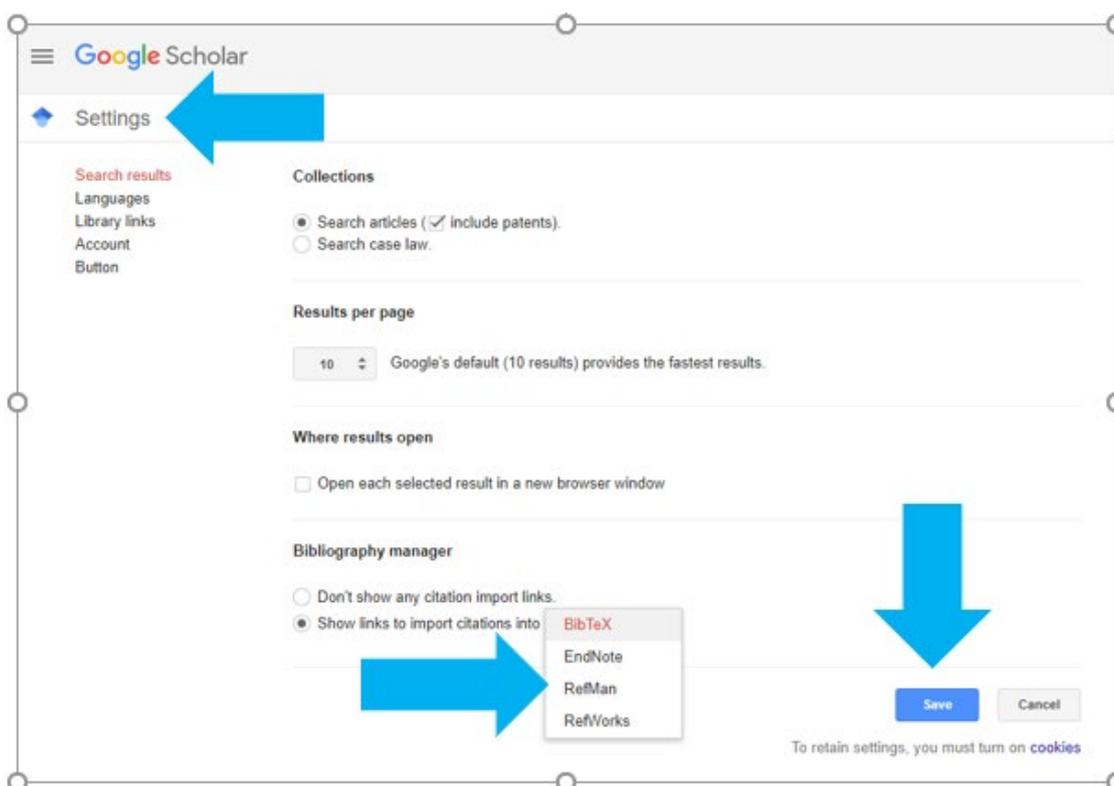


You will then see that 'Import to EndNote' option is available under your search results. Click this link to import the required reference.
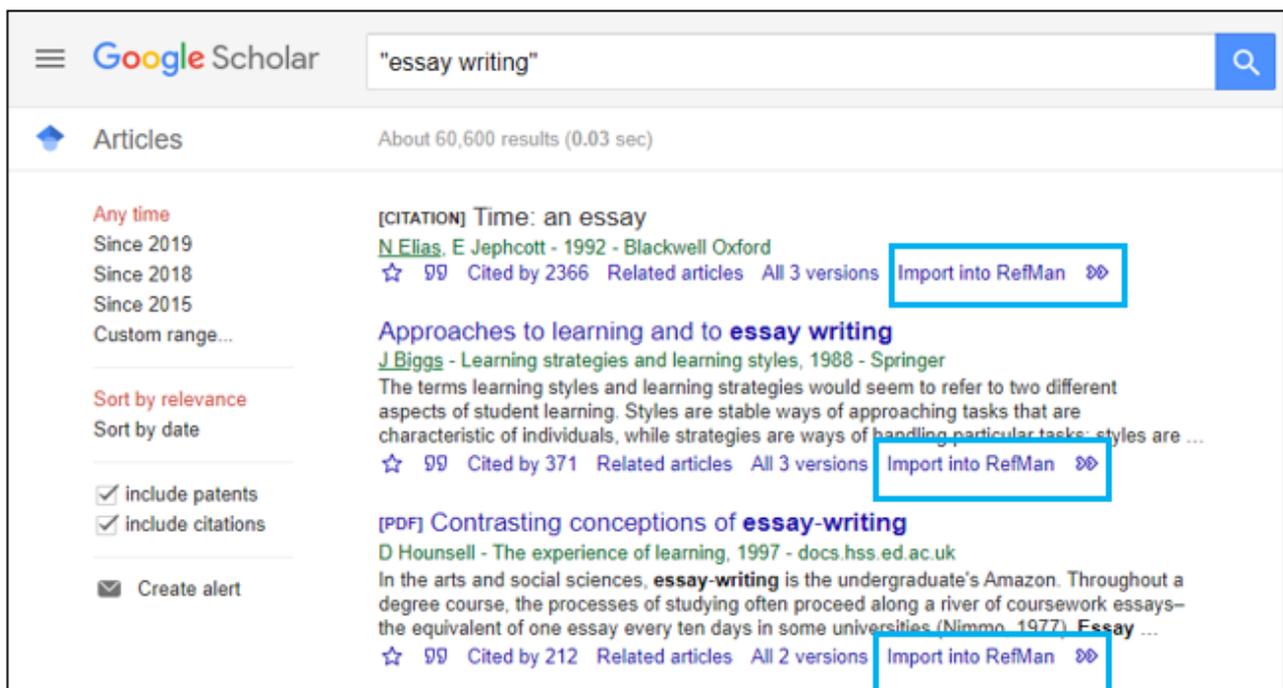
A file will download in the bottom left corner of your browser (Scholar RIS). Don't open it yet.

Go to EndNote online and select **'Collect'** then **'Import references'**

Click on **'Choose file'** or **'Browse'** and look for the Scholar file in the downloads folder on your PC.

For Import Option choose **RefMan RIS** and then select the group in which you wish to save the reference from the drop-down menu. Then click on **'Import'.**
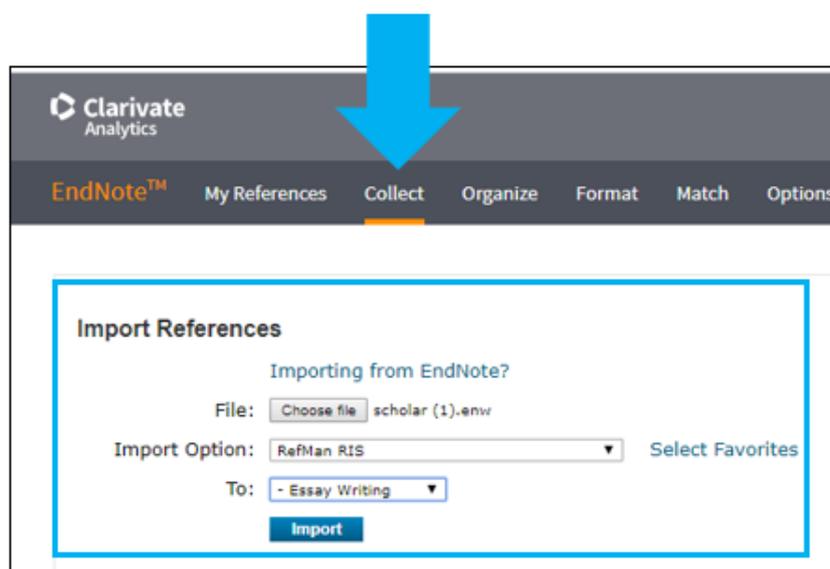
# Section 6: Creating and managing groups.

We recommend using groups to manage your references within EndNote. If you also use EndNote desktop any groups you have created in the desktop version will be transferred to EndNote online when you sync your library.

To create and manage your groups in EndNote online, select **'Organize'** then **'Manage My Groups'** from the menu bar.
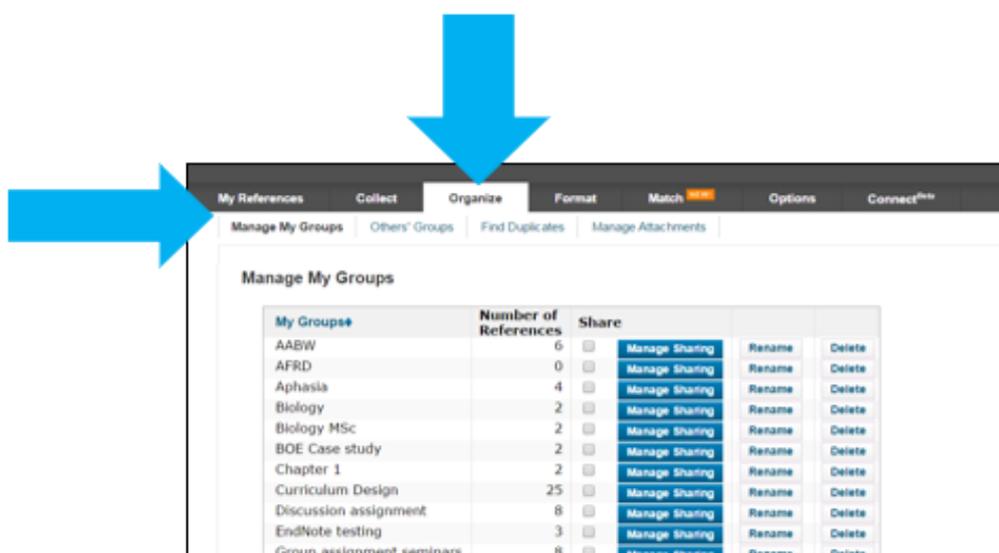


From here you can create new groups, share, rename or delete them.



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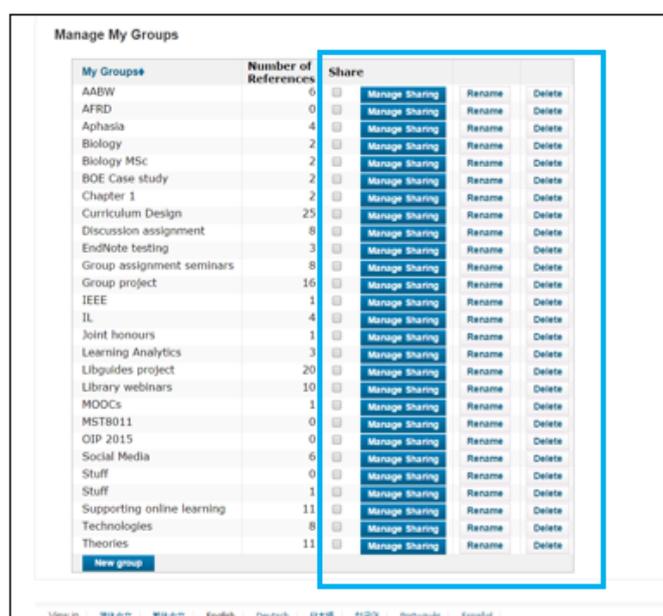
# Section 7: Attaching PDFs in EndNote Online.

You can also attach PDF files to references that you have saved in EndNote online. This involves the following:

- Once you have saved the PDF go to EndNote online.
- **Find the record** to attach the PDF to e.g. you can search on the author surname or browse in the 'Unfiled' folder (if you have not moved your records from here to another group).
- Click on the paper clip icon then 'Attach files'.
- From the 'Upload File Attachment' box, click on **choose file** and browse for the saved PDF.
- Click Open and Upload.
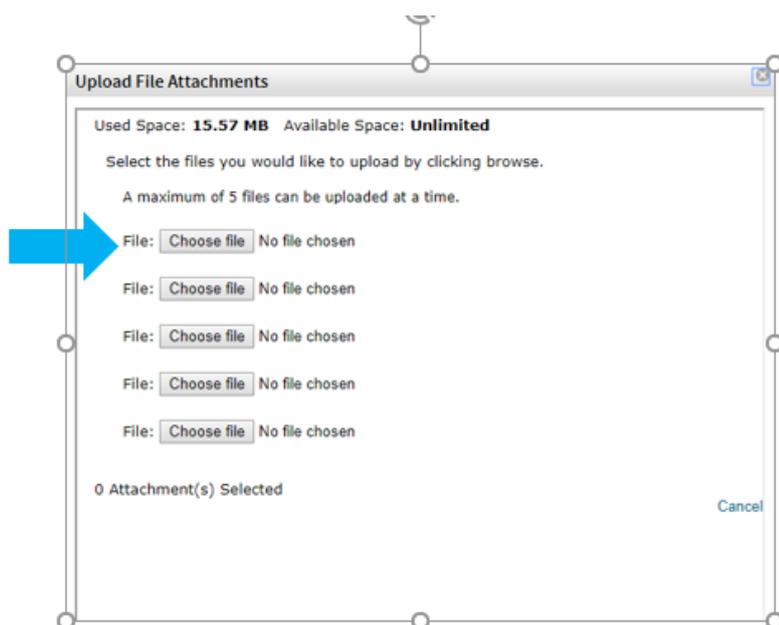
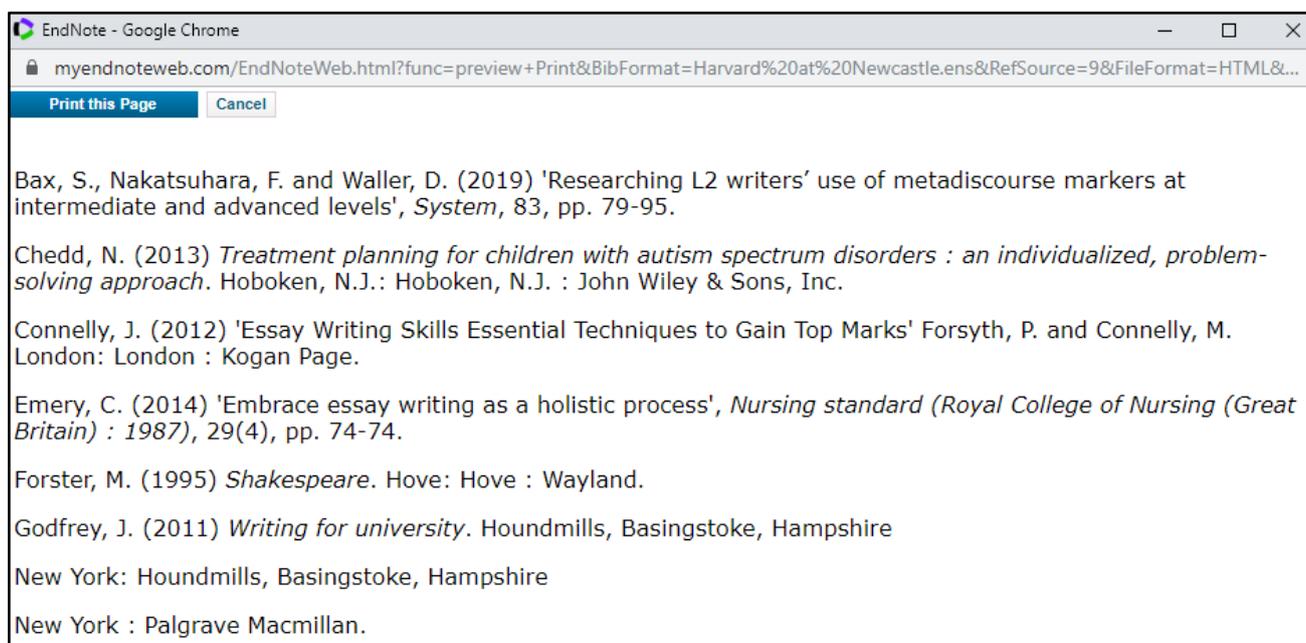# Section 8: Creating a bibliography.

Once you have some references in at least one group: -

- In EndNote online, click on the **'Format'** tab.
- Click on 'Bibliography'.
- Use the dropdown lists to select:
    - a group of references.
    - a bibliographic style e.g. Harvard at Newcastle.
    - a file format e.g. HTML to view easily on screen.
- Select 'Preview & Print'.

A formatted bibliography / reference list appears in your chosen style. You could copy and paste in this into your document. However, you need to always make sure that you double check it for referencing accuracy. EndNote is only as good as the information that is put into it.



# Section 9: Cite While You Write.

Like the desktop version, EndNote online integrates with Microsoft Word so that you can insert citations and create a bibliography when you are writing up your paper.

## 9.1 Cite While You Write (CWYW) off campus

You can use Cite While You Write with EndNote online by installing a plug-in from your EndNote online account (see below).

**Please note**: you **do not install the plug-in when you are working on campus** as the online option already exists within Word (see instructions below for using EndNote online on campus).



## 9.2 Using CWYW on campus

When EndNote is installed on the campus network it includes an option in Word to use EndNote online as well as the desktop version.

To use EndNote online and Word on campus:

- In Word select the **EndNote 20** tab (You may be asked to login again).
- Click on **'Preferences'** in the toolbar.
- Click on **'Application'** and in the drop-down menu select **'EndNote online'**.
- Click on **'OK'**.



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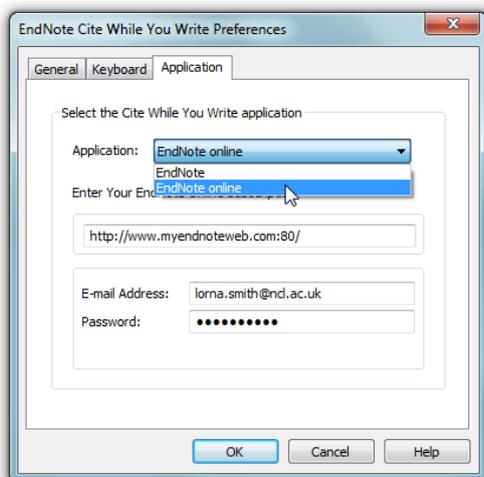
Your Word document is now linked to your EndNote online account and you will now see the EndNote online icon on your toolbar.
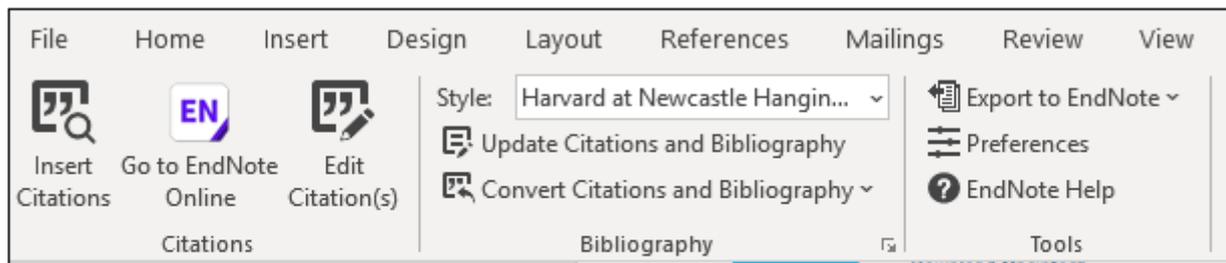


## 9.3 Inserting citations with CWYW and EndNote Online

It is recommended that you log into EndNote online before you start using Cite While You Write  with Word, however you can open your online library by selecting 'Go to EndNote Online' in the Word toolbar (see image above in 9.2).

To insert citations:

- Click on **'Insert Citations'** on the toolbar.
- A pop-up box will appear, type in a keyword from the author, title, year of the reference you wish to cite and click on **'Find'**.
- **Select the reference** you wish to cite and click on 'insert'.



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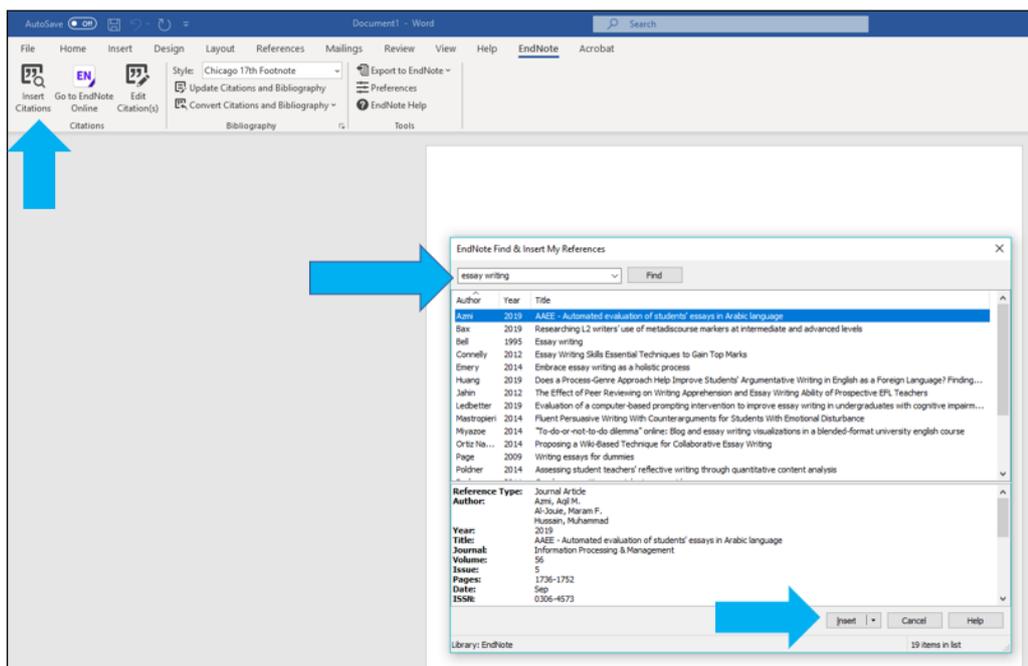
The citation should now appear in your Word document and the reference will be added to a bibliography in the same document.

Within Word you can also edit or remove citations by clicking on **'Edit Citations'** on the toolbar.  Here you can add page numbers and exclude the author or year. See our EndNote Guide (below) for further instructions.

# Section 10: EndNote help.

There are lots of different ways you can get further help with EndNote, but we suggest you do the following in this order:

- Go to **Newcastle University EndNote Library Guide**: https://libguides.ncl.ac.uk/endnote.
- See if there is **an FAQ which answers your question** (simply type in the search box or click on 'Endnote' in the word cloud and browse through the FAQs): https://libhelp.ncl.ac.uk/.
- If you are still struggling please **contact us through Library help** by summiting a question, taking part in a live chat or emailing us at libraryhelp@ncl.ac.uk. All the details can be found on the Library Help page: https://libhelp.ncl.ac.uk/.