The University Library
EndNote Online

www.myendnoteweb.com/

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GETTING STARTED WITH ENDNOTE ONLINE

Overview
EndNote online is a web-based reference management tool which allows you to collect, organise and format references and in-text citations using a number of 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 lists

Creating an EndNote Online account
This option includes unlimited records, unlimited file storage and 2 years roaming access. If you have access to the University desktop version of EndNote, this is the recommended route to creating an account.

1. From a University managed network PC, Click on Start > All Programs > Database Software > EndNote X8

⚠️ If you are working in Windows 8 there is no Start button, you can summon the Start screen any of these ways:

Mouse: Point your mouse in the screen's bottom-left corner and then click when the Start icon appears.

Keyboard: Press the Windows key.

You should then see the Start screen, bringing a screen full of tiles representing many of the available apps and programs.

If you can't see the EndNote program Press the Windows Key + X and select Search
2. Create a New Library or open an existing Library

The first time you use EndNote you may see a screen inviting you to sign up to EndNote online or synchronise your library (see below).

Skip this step; close this box using the cross in the top right corner (do not select the checkbox - wording may differ depending on your version of EndNote).

3. Select 'Edit'

4. Select 'Preferences' from the drop-down list

5. Select 'Sync'

6. Select 'Enable Sync'

7. Select 'Sign Up' and follow the on-screen prompts to set up your EndNote online account.
ONLINE SEARCH (COLLECT)

The 'Online Search' option allows you to search some of the Library’s databases and freely available catalogues from within EndNote online. While convenient, the search features in this type of search are limited compared to those available when searching the databases directly and from where you can export to EndNote online.

1. Select Collect tab>Online Search

2. As an example, select 'Newcastle U' from the drop down list and click 'connect'

3. Enter details for what you want to find and click 'search'. e.g. book title: Mathematics author: Campbell

4. Select the relevant title from the results screen.

5. You will need to create a group in which to save your reference. Open the 'Add to group' drop down list. Select an existing group to add your record to or select New group' to create a new one (see image over the page).
MANUAL ENTRY (COLLECT)

1. Select ‘Collect’
2. Select ‘New Reference’

3. At the ‘Reference Type’ drop down – 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.

4. As an example, select ‘Book’

5. 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.

⚠️ If your source has a corporate author, in the author field type a comma after the corporation/organization name e.g. BBC,
If your source already includes a comma, type a second comma after the first one e.g. Royal Holloway,, University of London
EXPORTING BOOK AND EBOOK REFERENCES FROM LIBRARY SEARCH

1. Log into EndNote web on your Internet browser.

2. In another tab in the same browser go to Library Search and find the reference you wish to export, e.g. Essay Writing.

3. Click on the title.

4. At the bottom of the page you should 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 page 14 for managing your groups).

⚠️ When exporting from Library Search please check in your EndNote online library that the ‘author’ and ‘reference type’ fields are correct.
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. Open up the database using the same browser as your EndNote online library.

Example from Web of Science – direct export

After searching for resources in the database using your keywords you will see a list of results like the one above.

1. Select the article(s) that you wish to export using the check box next to the title.
2. At the top of the list select ‘Save to EndNote online’. (You may be asked to login again at this point.) You can then choose which information you wish to export.
3. Select ‘send’

The reference(s) will then be sent to your EndNote online library. In Web of Science you will also see the EndNote indicator next to references that you have exported.
Example from ProQuest – 2 step import
After searching for resources in the database using your keywords you will see a list of results like the one below.

1. Select the article(s) that you wish to export using the check box next to the title.

2. Hover your mouse over ‘Save’ (near the top of the page) and click the RIS link.

3. Click the Continue button. (You might get a ‘download blocker’ message at the top of the screen. If this happens, right-click on it choose Download File.)

4. In the browser window, click on the file (ProQuest Documents RIS) to open it.
5. In EndNote online click on 'Collect' then 'Import References'

6. 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 ProQuest.
7. In EndNote online under 'Import option' select 'ProQuest'.
8. In EndNote online under 'To' select one of your groups to import your reference(s) to.
9. In EndNote online click on 'Import'. Your reference(s) should now be in your EndNote online library.

⚠️ Some EndNote online users may see the screens below when they try to open the RIS file in step 4 above. This step allows you to do a direct export rather than using steps 5-9 above.

Select EndNote online in the grey pop up box.
You will then be prompted to enter your EndNote online email address and password. Do this and then select ‘OK’. 

The references should now be in your EndNote online library.
1. Go to scholar.google.com/scholar
2. Click on the Settings link or the ‘cog’ icon at the top of the screen.
3. Select RefMan from the Show links to import citations into menu (see below).
4. Select Save.
When searching Google Scholar, you will now see an Import into RefMan link next to each reference. Click this link for the reference you want.

A file will download in the bottom left corner of your browser (Scholar RIS). Don't open it yet.

5. Go to EndNote online and select 'Collect' then 'Import references'
6. Click on 'Choose file' or 'Browse' and look for the RIS Scholar file in the downloads folder on your PC.
7. For Import Option choose RefMan RIS and then select the group in which you wish to save the reference from the drop down menu.
8. Click on ‘Import’.

The reference should now be in your EndNote online library.
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.
ATTACHING PDFS IN ENDNOTE ONLINE

You can also attach PDF files to references that you have saved in EndNote online.

1. Once you have saved the PDF go to EndNote online.
2. 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)
3. Click on the paper clip icon then 'Attach files'
4. From the 'Upload File Attachment' box browse for the saved PDF.
5. Click Open and Upload
Bibliographic Entry:
- **Title:** Comparison of uncertainty sources for climate change impacts: flood frequency in England
- **Year:** 2009
- **Publisher:** Springer
- **Journal:** Climatic Change
- **Pages:** 1-12

Additional Notes:
- **Upload Notes:**
  - **File:** KeyholeChange.pdf
  - **Figure:**

EndNote™
**Quick Start**
- **My References**
- **Search**

**References**
- **Article**
- **Book**
- **Book Section**
- **Conference Proceedings**
- **Journal**
- **Note**
- **Patent**
- **Soft-ware**
- **Technical Report**
- **Thesis**
- **Webpage**
- **Wikipedia**
- **Conference Paper**
- **Database**
- **Meeting Paper**
- **Other**

**Quickly Search for References**
- **Add References**
- **Copy to EndNote**
- **Auto-Search**
- **Add Reference**
- **Update Reference**
- **Remove Reference**
- **Sort Reference**
- **View Reference**
- **Sort Reference by**
- **EndNote Options**
- **Help**
- **About EndNote**

**View Reference in EndNote search**
- **Record 1 of 3**
- **Add to Library**
- **Copy to EndNote**
- **Basic**
CREATING A BIBLIOGRAPHY

Once you have some references in at least one group:

1. In EndNote online, click on the 'Format' tab

2. Click on 'Bibliography'

3. Use the dropdown lists to select:
   a) a group of references
   b) a bibliographic style e.g. Harvard at Newcastle
   c) a file format e.g. HTML to view easily on screen

4. Select 'Preview & Print'

5. A formatted bibliography / reference list appears in your chosen style. You could copy and paste in this in to your document
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.

Using Cite While You Write online off campus

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

⚠️ 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).
Using Cite While You Write 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:

1. In Word select the EndNote X8 tab (You may be asked to login again)
2. Click on ‘Preferences’ in the toolbar
3. Click on ‘Application’ and in the drop down menu select ‘EndNote online’
4. Click on ‘OK’

Your Word document is now linked to your EndNote online account and you will now see the EndNote online icon on your toolbar.
Inserting Citations with Cite While You Write 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.

To insert citations:

1. Click on ‘Insert Citations’ on the toolbar
2. 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’.
3. Select the reference you wish to cite and click on ‘insert’
The citation should now appear in your Word document and the reference will be added to a bibliography in the same document (see below).

(Feles, 2015)


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.
GETTING HELP

Lots of FAQs and tips available on the EndNote Library Guide: http://libguides.ncl.ac.uk/endnote

Email helplines:
libraryhelp@ncl.ac.uk (HaSS and SAgE)
medliaison@ncl.ac.uk (FMS)

http://libguides.ncl.ac.uk/endnote
Icons by http://dryicons.com