

Reference management using Endnote Online

The logo for Endnote, featuring the word "ENDNOTE" in a bold, red, sans-serif font with a registered trademark symbol (®) to the upper right of the "E".

What is EndNote Online?

EndNote Online, (also known as *Endnote Basic*), is web-based reference management software. Use it to build a personal collection of references and create reference lists in your university's recommended citation style.

It can help take the stress out of referencing by letting you:

- import references directly from databases and library catalogues, or manually add them.
- store article PDFs, images and objects beside your references.
- organise and search for references in your personal library.
- add citations to your word-processed document as you write
- create your reference list in a range of citation styles.

Endnote Desktop

The full version of Endnote, known as *Endnote Desktop*, is available too, but from on campus computers only. This version has greater storage [5MB of files; 2MB in the online version]; an unlimited number of references can be stored [50,000 in the online version]; and more styles, filters and connection files are available.

A table comparing each version of Endnote - **Desktop** and **Basic** - is available at:

<http://endnote.com/support/faqs/endnote-compare>

Access Endnote Desktop from : Start > All programs > Applications > Core > Endnote X7 (on campus only)

There is a separate user guide for *Endnote Desktop* on the university library web pages. The remainder of this guide refers to the use of *Endnote Online* alone.

The supplier also has various Endnote Online and Endnote Desktop videos on YouTube <http://www.youtube.com/user/EndNoteTraining>

Get Started – Register for an Endnote Online account

Register On Campus:

- Go to <http://www.myendnoteweb.com> . Click on **Create an Account**
- Use any email address when registering.
- This creates an Endnote online account associated with your institution. It will include access to Endnote customisations made by Edinburgh Napier, eg local referencing styles.

Register Off Campus (1):

- Go to <http://www.myendnoteweb.com> . Click on **Create an Account**
- Use any email address when registering.
- This creates an **Endnote Basic** account. This will **not** have access to any local Endnote customisations made by Edinburgh Napier.
- The **Basic** account is free and has no time limits. It will remain at this basic level unless it is “synced” with another version of Endnote, eg Endnote Desktop at your institution, or a personally purchased copy of Endnote Desktop. Following syncing it will remain as a full Endnote account for two years after which it must be synced again with a full version of Endnote or it will revert to a Basic account.
- If you create a Basic account from off campus and then log onto Endnote Online on campus, [or via the VDS (Virtual Desktop Service) or VPN (Virtual Private Network)] your account will become a full Endnote account associated with your institution. It will include access to Endnote customisations made by Edinburgh Napier eg local referencing styles.

OR

Register Off Campus (2):

Register via your university’s subscription to ISI Web of Science database

- Go to <http://wok.mimas.ac.uk> . Log in with your student ID and password and connect to Web of Science.
- Choose **EndNote** from the top menu. Follow the **Register** button to set up an account.
- This creates an Endnote online account associated with your institution. It will include access to Endnote customisations made by Edinburgh Napier eg local referencing styles.
- The account will remain as a full Endnote account for 366 days. Users will then need to login again via their institution’s Web of Science subscription or the account will revert to an Endnote Basic account.

Set Up Storage Areas for your References

Endnote uses **libraries** and groups. It is recommended that you only create one library for all your references (a **.enl** file), especially if you wish to sync data between Endnote Online and Endnote Desktop. However, within that Endnote library you can have many groups.

Collections of references in Endnote Online are known as **groups**. References can belong to more than one group. Start by setting up one or more groups to store your references.

To create a group:

- Click the **Organize** tab. This will display the **Manage Groups** page.
- Within **Manage My Groups**, click **New Group** at the bottom.
- Enter a name in the New Group dialog box and click OK
- The new group is listed in the group table. Alternatively, choose the **My References** tab to see the new group on the list.

Add References to your Library

You can add references to your library in the following ways:

- Import references (directly or indirectly) from an online database.
- Import references from Edinburgh Napier's LibrarySearch.
- Use EndNote itself to directly search and import references from an external database.
- Manually enter references.

1. Manually adding references

- From the **Collect** tab, click **New Reference**.
- Choose which format of reference you are entering (book, journal article, web page etc) and change the **Reference Type** drop down box accordingly. The page will redisplay with the appropriate fields.
- Enter data in the fields e.g. *Author, Year, Title*. When assigning keywords, try to be consistent to ensure you can retrieve the references easily from your groups. You do not have to complete all fields.
N.B. Enter Corporate authors with a comma after the name e.g. *Edinburgh Napier University, - otherwise it will file as *University, E.N.**
- At the bottom of the screen, put the new reference in a group of your choice using the check boxes.
- Click **Save**.

2. Importing records from Edinburgh Napier Library Catalogue

You can use Endnote Online itself to search the Edinburgh Napier University online library catalogue. Search results will be imported directly into your EndNote library.

- Click on **Collect** tab and choose **Online Search**
- Select **Edinburgh Napier U** from the list and click **Connect**. Perform your search. Make it as specific as you can, as you cannot edit the results list.
- Import the results directly into Endnote Online using the **Retrieve** button
- Add the results to the group of your choice, or the **Unfiled** group for editing and decision making.

3. Importing references from Edinburgh Napier's LibrarySearch

Single records

- Go to LibrarySearch <http://librarysearch.napier.ac.uk> and log in. Search as normal.
- Click on title of chosen result and view the full record.
- Click on the **Send To** option:
 - choose the **Endnote** option to save your record to Endnote Online/Endnote Online.
 - choose the Export RIS option to save the file. Import this file into Endnote Desktop on campus.

OR

Multiple Records

- Click on the ☆ icon to save multiple articles to your **e-shelf**.
- View your e-shelf.
- Select the items to export and select:
 - **Push to Endnote** for addition to Endnote Online
 - **Push to Export RIS** to save the file. Import this option into Endnote Desktop on campus

N. B. Always check your records after importing to ensure that the information you require is present and in the correct fields.

4. Export references from a bibliographic database into Endnote

You can export references from a wide range of databases. Depending on the database, records either export directly to Endnote or search results require to be saved as a text file and then the text file is imported into Endnote using the relevant import filter.

If you experience problems in using import filters, try using the generic Endnote import filter **RefmanRis**.

N. B. Always check your references for accuracy and completeness after importing! You can add or amend any information in a reference by clicking the Edit link

The table below lists the export/import instructions for all major database suppliers that Edinburgh Napier uses. Follow the instructions for the service you are using.

Major Database Service Providers and Import Filters - examples

Database / Service Provider	Instructions
ACM Digital Library	<ul style="list-style-type: none"> • <i>ACM records have to be downloaded individually.</i> • Click on the title of the article you wish to save • Choose Tools & Resources then Endnote • Download and save the record to your computer as a .enw file • Open EndNote Online. Choose Collect > Import references • Import the .enw file into the unfiled group within Endnote using the import filter ACM Digital Library • Move your references from the unfiled group into your own group(s).
EBSCO (CINAHL, Medline, PsycInfo, SportDiscus, CAB Abstracts, Art & Architecture)	<ul style="list-style-type: none"> • <i>EBSCO has a direct export option for Endnote Online</i> • Open Endnote Online first. • Search your EBSCO database and select required records by clicking on the 'Print/Email/Save' folder to the right of each reference. • Click on the yellow Folder on the top menu. Select the items that you wish to export. • Click on Export • Select Direct Export to Endnote Web • Click Save • References download directly into the unfiled group within Endnote Online • Move your references from the unfiled group into your own group (s).
EI Engineering Village	<ul style="list-style-type: none"> • Mark the articles you wish to save • At top of results list choose Downloads • Choose Content = Citations and Abstracts; Export Format = RIS. Click Download. • Save the file to your computer as a .ris file • Open EndNote Online. Choose Collect > Import references • Import the .ris file into the unfiled group within Endnote using the import filter RefManRIS • Move your references from the unfiled group into your own group(s).
Emerald (Emerald Journals)	<ul style="list-style-type: none"> • View search results. Choose to view a specific type

	<p>of reference eg book, journal from the top of the results list.</p> <ul style="list-style-type: none"> • Check boxes to select results. Click on Add to the marked list/Session Marked list and Go • View chosen references from the Marked List menu on the left of the screen. • Check references for export and select Export options • Save the file to your computer as .ris file. • Open Endnote Online. Choose Collect > Import references • Import the .RIS file into the unfiled group within Endnote using the import filter RefmanRIS • Move your references from the unfiled group into your own group(s).
Gale Cengage (Expanded Academic, Gale Ref Library)	<ul style="list-style-type: none"> • Mark the articles you wish to save. • Click View All from the Saved Docs box to the right of the results list • Select Citation Tools and Endnote • Save file to your computer as a .ris file • Open Endnote Online. Choose Collect > Import references • Import the .ris file into the unfiled group within Endnote using the import filter RefManRIS • Move your references from the unfiled group into your own group(s).
Google Scholar	<ul style="list-style-type: none"> • Click on Settings on Scholar home page and scroll down to Bibliography Manager • Choose Endnote from the drop down menu and save Preferences • Return to searching Google Scholar. Each result should now have an Import to Endnote option at the end of each reference. • Click on this option and choose Save • Save the file to your computer as a .enw file • Open Endnote Online. Choose Collect > Import references • Import the .enw file into the unfiled group within Endnote using the import filter Endnote Import • Move your references from the unfiled group into your own group(s)
Ingenta	<ul style="list-style-type: none"> • Mark the articles you wish to save. • Click Export Options to the right of the results list • Select Endnote option • Save file to your computer as a .ris file • Open Endnote Online. Choose Collect > Import references • Import the .ris file into the unfiled group within

	<p>Endnote using the import filter RefManRIS</p> <ul style="list-style-type: none"> • Move your references from the unfiled group into your own group(s).
<p>JSTOR (Arts & Sciences II Collection; Biological Sciences ; Business Early Journal Content; Ireland Collection ; Language & Literature Music; Plant Science)</p>	<ul style="list-style-type: none"> • NB JSTOR requires registration on their site for a <i>MyJSTOR</i> account before you can download references into Endnote. • Login to your MyJSTOR account first. • Search for and mark the articles you wish to save • Click on Save Citations. • Click Saved Citations at top of screen. • Click on Export citations. Choose EndNote option. Click Save • Save the file to your computer as a .ris file. • Open Endnote Online. Choose Collect > Import references • Import this .ris file into the unfiled group within EndNote using the import filter JSTOR • Move your references from the unfiled group into your own group(s)
<p>OVID (Transport database; OVID journals full text)</p>	<ul style="list-style-type: none"> • Mark the items you wish to save. • At top of results list, click Export • Select Reprint/Medlars from the Export To box. • Select the option for complete reference • Click export citations • Save the file to your computer as a .txt file • Open Endnote Online. Choose Collect > Import references • Import the .txt file into the unfiled group within Endnote using the import filter Medline OVID SP • Move your references from the unfiled group into your own group(s)
<p>Proquest (ABI-Inform; ANTE; ASSIA, Biological Sciences; Br Education Index; Br Humanities Index; Social Services Abstracts; Sociological Abstracts etc)</p>	<ul style="list-style-type: none"> • Mark the articles you wish to save. • Click on Export/Save at the top of the results list • Select RIS option and click continue • Save file to your computer as a .ris file • Open Endnote Online. Choose Collect > Import references • Import the .ris file into the unfiled group within Endnote using the import filter RefManRIS • Move your references from the unfiled group into your own group(s).
<p>Pubmed (free version of Medline)</p>	<ul style="list-style-type: none"> • Mark the articles you wish to save. • At top of results list select Send To and choose Citation Manager • Save the file to your computer as a .txt file

	<ul style="list-style-type: none"> • Open Endnote Online. Choose Collect > Import references • Import the .txt file into the unfiled group within Endnote using the import filter Pubmed (NLM) • Move your references from the unfiled group into your own group(s).
Science Direct	<ul style="list-style-type: none"> • Mark the article(s) you wish to save • At top of results list choose Export • Choose Export Format = RIS. Click Export. • Save the file to your computer as a .ris file • Open EndNote Online. Choose Collect > Import references • Import the .txt file into the unfiled group within Endnote using the import filter RefManRIS • Move your references from the unfiled group into your own group(s).
Web of Science	<p>Web of Science has a direct export option for Endnote Online</p> <ul style="list-style-type: none"> • Open Endnote Online first. • Search Web of Science and select required records • At top of results list choose Save to Endnote Online • References download directly into the unfiled group within Endnote Online • Move your references from the unfiled group into your own group (s).
Wiley Online Library (Cochrane Library ; Wiley Online Journals)	<ul style="list-style-type: none"> • Mark the articles you wish to save • At top of results list choose Export Citations • Choose Format = Reference Manager and Export Type = Citation & Abstract and Submit • Save the file to your computer as a .ris. file • Open EndNote Online. Choose Collect > Import references • Import the .txt file into the unfiled group within Endnote using the import filter RefManRIS • Move your references from the unfiled group into your own group(s).
Zetoc	<ul style="list-style-type: none"> • Mark the articles you wish to save. • Click Download. Choose Short labels, Just Tagged and Send File • Save the file to your computer as a .txt. file • Open EndNote Online. Choose Collect > Import references • Import the .txt file into the unfiled group within Endnote using the import filter Zetoc (MIMAS) • Move your references from the unfiled group into

	your own group(s).
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Attaching PDFS / Files to References

Click the **file attachment button**  to open the File Attachments window. Then click **Attach Files**.

The Upload Files window allows you to upload up to five files at a time. Click Browse to find the file you want to upload. When you have selected the file(s), click Upload.

- There is no restriction to the size of a file attached to a reference. However, the total storage capacity for one account (references + attachments) is 5GB or 2GB for an Endnote Basic account
- You may attach an unlimited number of files to a reference.
- You may transfer file attachments between EndNote Desktop and EndNote Online if synchronisation has been enabled via Endnote Desktop

Sharing Groups with another EndNote Online user

You can share groups with colleagues in EndNote Online. Colleagues that have access to your shared groups will see them in their **Groups Shared by Others** section of the left navigation pane.

You can share groups with EndNote Online users at any institution. You can also share groups with individuals who have not yet created their EndNote Online account. The shared group will automatically appear after they've registered and logged in. You can give Read only access to some users, and Read & Write access to other users for the same group. However, file attachments cannot be shared among users in a group.

To share groups

- Click on the Organize tab.
- Under **Manage My Groups** click **Manage Sharing** next to the group you want to share.
- Click on **Start sharing this group**.
- Enter the email address of the person you want to share the group
- with and click **Apply** (a message will confirm the account has been shared).
- Click **Close** to return to your account.
- An icon appears next to groups that have been shared.

Producing Reference Lists or Bibliographies

Endnote Online can be used to create a “stand alone” reference list after you have completed your assignment.

OR

As Endnote is linked with MS Word , you can “cite while you write” (CWYW) , i.e. insert references into your assignment , directly from Endnote, as you write.

1. Generating a Stand Alone Reference List or Bibliography

- From the **Format** tab, click **Bibliography**
- Select the group of references to format,
- Select an output style from the Bibliographic style drop-down list box e.g. APA or ENBS Dissertation,
- Choose a File Format (.txt, .rtf, .html) - use .rtf if inserting into Word docs
- Choose **Save**, **E-mail** or **Preview & Print**. Copy and paste the results into your document.
- **Check the reference list for accuracy!**

2. Inserting Citations in Word – “Cite While you Write” (CWYW)

You can insert references into papers, and format citations and bibliographies automatically, while you write papers in MS Word.

Off campus

To use EndNote Online in conjunction with Microsoft Word you must first download a plugin and install it on your own computer. This is available from Endnote Online. Go to the **Options** tab and choose **Download installers**. Choose the **Cite While You Write** installer for your computer’s operating system. Once installed, the plugin will run directly from within Microsoft Word - look for the Endnote option on the top toolbar within MS Word.

On campus

The Endnote plug-in is already installed within Word but defaults to working with Endnote Desktop on the university network.. To set up Word to work with Endnote Online ,do the following:

- In Word, go to the **References** menu. Click the **Use Endnote/CWYW** option. This will take 2-3mins while Endnote and Word synchronise across the network. Endnote Desktop will try to open. Cancel this and close down the Endnote Desktop version.

- On the Word toolbar choose **Endnote X7**. Click **Preferences** and choose the **Application** tab. Choose **Endnote Web** from the drop down menu.
- Enter your **Endnote Online email and password**. **Login** to Endnote when requested and the bibliographic styles associated with this institution will be automatically downloaded.
- You are now ready to use **Cite While you Write**.

To Cite-While-You-Write

- Open a Word document. Ensure the **Endnote** option is visible on the MS Word toolbar. Type your text.
- When you wish to insert a citation, click on **EndNote Web** on the toolbar. **Login** to Endnote Online when prompted, using your Endnote username and password. This may take a minute or two as Word synchronises with the Endnote server.
- Use the **Insert Citation** option on the Endnote web toolbar to retrieve the required reference. Enter your search terms into the **Find** box eg. the surname of the author or the year. All references meeting your criteria will be shown.
- Highlight the reference(s) you want to insert and click **Insert**.
- EndNote online will place the reference(s) into your Word document and instantly format them in your chosen bibliographic style.
- Select your reference. To insert multiple references in one citation, click each reference while holding the Ctrl key. Click the Insert button.
- The citation appears at the cursor location, formatted according to the bibliographic style specified. The reference information is also automatically added to the bibliography.

Changing the bibliographic style

- Click on the **EndNote Web tab** on the Word toolbar.
- Set the **Style drop-down box** to the style you want. If the document does not update, press **Update Citation and Bibliography**.
- If you don't see your style in the list, click **select another style** and choose from one of the 5000+ bibliographic styles

To delete or modify a citation in your Word document

- To **delete a citation**, use **Edit Citation(s)**
- To **add** page numbers, suffixes and prefixes or to change the order of authors for multiple references, use **Edit Citation(s)**

NB You cannot delete Endnote citations in Word by simply using the delete key. As the citation and the final reference list are tied together, this will leave behind all the Endnote coding which will corrupt your Word document. The correct method for deleting Endnote citations is given above.

Backing up Endnote Online references

As Endnote Online references are held on an external website it is advisable to maintain a copy of your data. The easiest way to do this is to export your references from Endnote Online and save the file.

- From Endnote Online, Choose **Format** and **Export References**.
- Select the group of references you wish to export.
- On the **Export Style** menu choose **Endnote Export**.
- Save the file as a **.txt** file to a safe storage area

To import references to Endnote Online

- From Endnote online, Choose **Collect** and **Import References**.
- Browse for the saved file.
- From the import option select **Endnote Import**.
- Save your references into the **unfiled** group or another group of your choice. Check the references once you have made the import.

Syncing References between Endnote Online and Endnote Desktop

Syncing references between Endnote Online and Endnote Desktop allows you to manage and access your library from any computer. Syncing is always initiated from Endnote Desktop.

NB You can only synchronise ONE EndNote desktop library with ONE EndNote online library.

The full syncing process and guidelines are available from:

Chapter 2 .6 Syncing your Desktop Library with Your Online Account.

<http://endnote.com/training/mats/enuserguide/eng/endnote7/enguide-full.pdf>