

EndNote

Introduction to

EndNote Online

Contents

Introduction to EndNote Online	1
Section 1: Setting up an EndNote Online account	1
Exercise 1: Creating an online account.....	1
Section 2: Adding references to your EndNote library	2
Exercise 2.1 Adding references from Summon	2
Exercise 2.2: Adding references from Scopus	3
Exercise 2.3: Manually adding a reference.....	5
Section 3: Managing your references	5
Exercise 3.1: Creating a group of references.....	6
Exercise 3.2: Formatting a bibliography	7
Exercise 3.3: Editing references.....	7
Section 4: Using Word with EndNote Online	7
Exercise 4.1: Connecting Word with your EndNote Online account.....	8
Exercise 4.2: Selecting a referencing style	8
Exercise 4.3: Adding citations and creating a reference list/ bibliography.....	8
Exercise 4.4: Editing citations	9
Section 5: Organising your references	10
Exercise 5.1: Adding attachments	10
Section 6: Saving and synchronising	11
Exercise 6: Synchronising with desktop	11
Section 7: The final edit.....	12
Exercise 7: Converting to plain text.....	12
Section 8: Leaving the University	13
Section 9: Additional help	13

Introduction to EndNote Online

This is a basic introduction to the key elements of EndNote Online, further support/ training can be found at <https://www.hud.ac.uk/library/borrowing/endnote/> and from your Subject Librarian.

Section 1: Setting up an EndNote Online account

The University of Huddersfield has a licence for the desktop version of EndNote. You can download a desktop version on to your own device for the duration of your course or employment at the University.

This workbook looks at the alternative EndNote Online which can be synchronised with the desktop version, the advantages to using EndNote Online are:

- It is hosted on the internet (cloud-based) so it accessible 24 hrs a day on the web.
- Once you have finished your studies/ employment, you can revert to an EndNote Basic account by changing your email address so you can continue to use it (NB. There is limited functionality with this free version).
- We recommend setting up your EndNote Online account whilst on a University computer. This allows EndNote to recognise the IP address and associate your account with the University. This gives you the enhanced version of EndNote.

Exercise 1: Creating an online account

- Go to <https://my.endnote.com> and click on Register.
- Use your University email address (e.g. u1234567@unimail.hud.ac.uk for students or b.kahn@hud.ac.uk for PGRs and staff).
- Your password needs to be at least 8 characters long, and include a letter, number and special character.

NB. If you are using your own computer, you will need to download the Cite While You Write toolbar for use in Word. Log into EndNote Online and click on **Downloads** and follow the instructions for installing **Cite While You Write™**.

Cite While You Write™

Find out why EndNote is the industry leader in bibliographic formatting.

Download our patented* Cite While You Write tool to insert references, and format citations and bibliographies automatically while you write your papers in Word.




See [Installation Instructions and System Requirements](#).

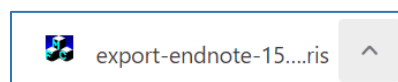
- [Download Windows with Internet Explorer plug-in](#)
- [Download Windows MSI for mass program installation](#)
- [Download Macintosh](#)

Section 2: Adding references to your EndNote library

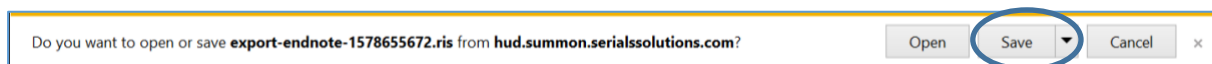
Summon and most research databases allow you to export references into EndNote. The following exercises demonstrate how to do this using Summon and Scopus.

Exercise 2.1 Adding references from Summon

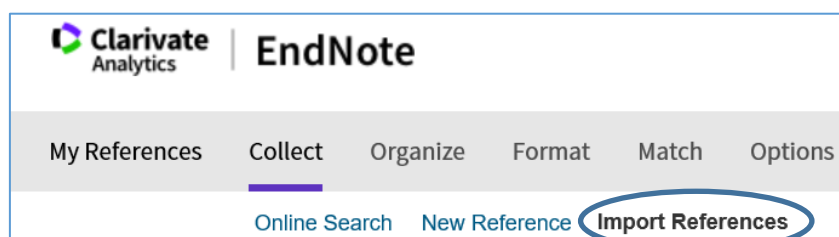
- Open Summon via the university web pages or by typing **http://library.hud.ac.uk/** into the web browser.
- Perform a search in Summon and save at least 3 books and 3 journal articles by clicking on the save this item icon  on the right hand side so it changes colour .
- After saving a number of results click on the saved items folder  in the top right hand corner and a list of all items saved will be displayed.
- From the **Export To...** drop down menu choose **EndNote**.
- A file download box will appear (each browser will differ in its display)
- The download box will appear at the bottom of the screen in Google Chrome or Microsoft Edge. Do not click on the box.



- Click on **Save** in Internet Explorer and then close the next pop up box with the **x**.



- Return to EndNote Online and click on **Collect** and select **Import References**



- Click on **Choose File** and navigate to your **Downloads** folder and select the file you have exported (NB. These always begin with the words export-endnote-).
- Click on **Select Favorites** and select **RefMan RIS** from the left hand list. Click on **Copy to Favorites** so you can always see this import option when you use EndNote Online. Click on **Hide** in the top right hand side of the box.
- Select **RefMan RIS** from the **Import Option** drop down menu.
- Select **Unfiled** in the **To** dropdown menu.

Import References

Importing from EndNote?

File: C:\Downloads\export-endnote-1578657884 Browse...

Import Option: RefMan RIS [Select Favorites](#)

To: [Unfiled]

Import

- Click on **Import** and a message will appear in red to show your import is successful.

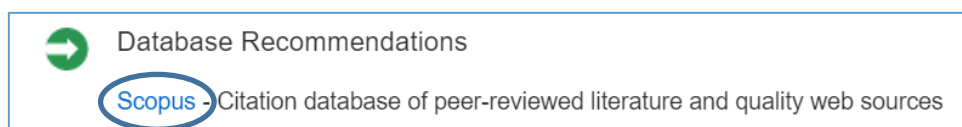
Import References

6 references were imported into "[Unfiled]".

Each resource works in the same format of selecting items and creating a download file, but will have slight variations. The next exercise demonstrates exporting from Scopus, which is a key multi-disciplinary resource available at Huddersfield. For help with exporting from other resources (full list at <http://hud.ac/ges>), contact your subject librarian.

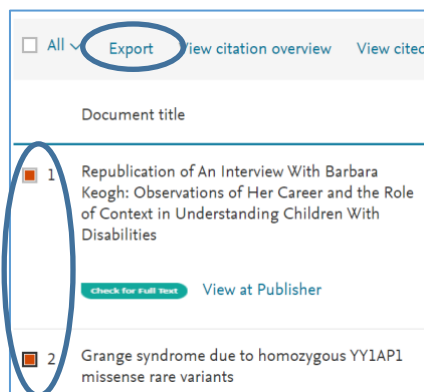
Exercise 2.2: Adding references from Scopus

- Return to the Summon homepage <http://library.hud.ac.uk/> and type **Scopus** into the search box.
- Select the link to **Scopus**

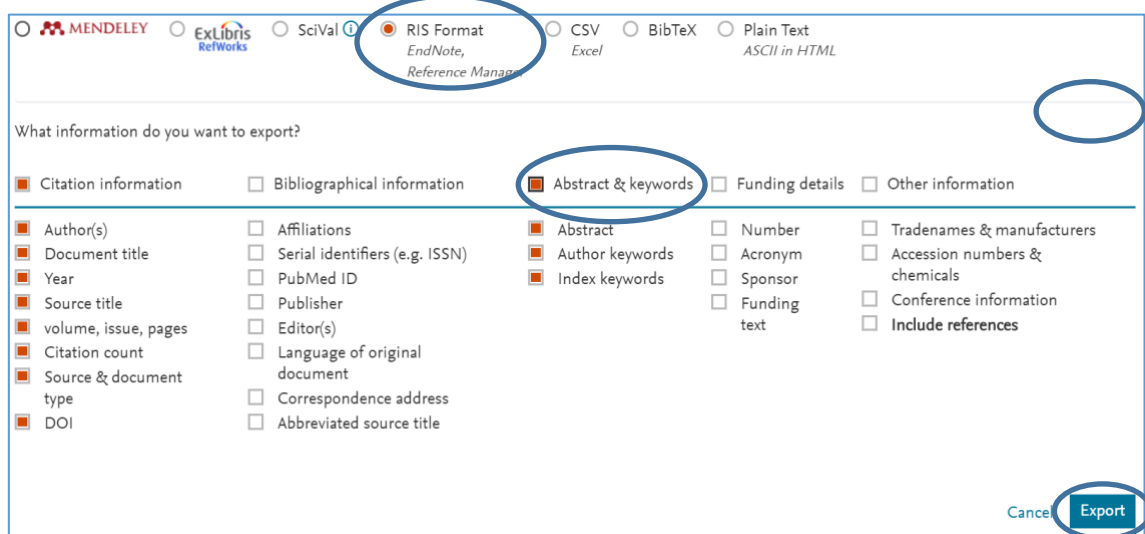


- If prompted to log in, use your university username and password.
- Do a search in Scopus and click in the boxes next to the relevant title to select 6 items to export.

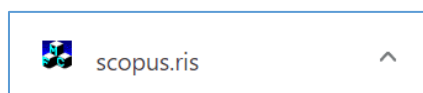
- Click on **Export** from the top menu.



- Select **RIS format** and **Abstract & keywords** then **Export**.



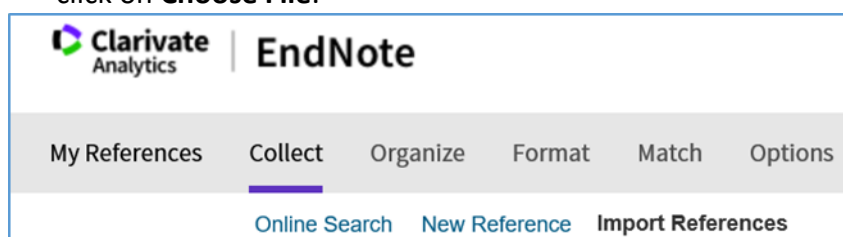
- The download box will appear at the bottom of the screen in Google Chrome and Microsoft Edge. Do not click on the box.



- Click on **Save** in Internet Explorer and then close the next pop up box with the **x**.



- Return to EndNote Online and click on **Collect** and select **Import References**, then click on **Choose File**.



- Navigate to your **Downloads** folder and select the Scopus file you have downloaded (NB. These always begin with the word scopus).
- **Select Favorites** and select **Scopus** from the left hand list. Click on **Copy to Favorites** so you can always see this import option when you use EndNote Online. Click on **Hide** in the top right hand side of the box.
- Select **Scopus** from the **Import Option** drop down menu.
- Select **Unfiled** in the **To** dropdown menu.

Import References

Importing from EndNote?

File: C:\Downloads\scopus.ris Browse...

Import Option: Scopus Select Favorites

To: [Unfiled]

Import

Exercise 2.3: Manually adding a reference

Sometimes you might have a reference you cannot locate in Summon or Scopus, e.g. a website, a live performance or a printed leaflet. EndNote Online has a number of templates from which to choose.

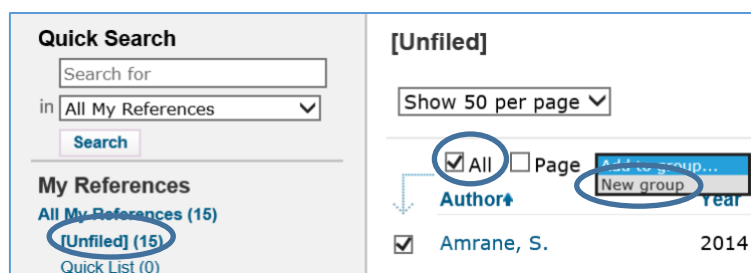
- Click on **Collect** then **New Reference**.
- Choose **Web Page** from the dropdown list of **Reference Types**.
- Create an entry for the following website:
 - Author: **Friends of Beaumont Park**
 - Title: **Beaumont Park Huddersfield**
 - Year: **2018**
 - URL: **http://www.fobp.co.uk/**
- Click on **Save**.
- It will then appear in your **[Unfiled]** folder.

Section 3: Managing your references

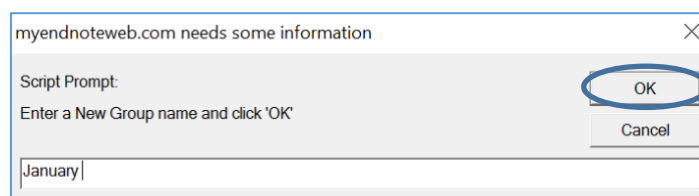
EndNote Online allows you to sort your unfiled references into groups of your choice, e.g. by topic or assignment.

Exercise 3.1: Creating a group of references

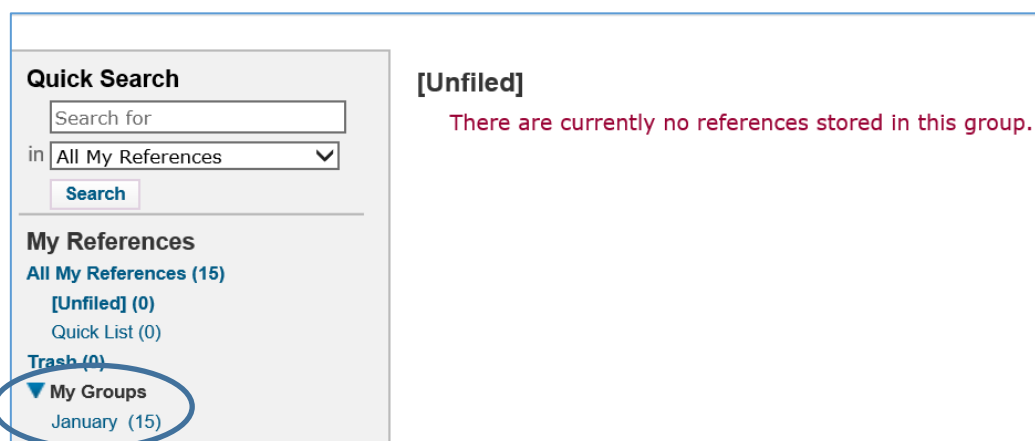
- Click on **My References** from the top toolbar.
- Click on **[Unfiled]**.
- Check the tickbox **All** to select all your imported references.
- Select **New group** from the **Add to group** dropdown menu.



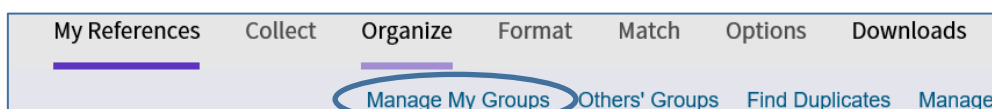
- A pop up box will appear in the top left of the screen, type in a name for your group and click on **OK**.



- You will see the [Unfiled] references folder is now empty and your new group will be populated with your recently imported references.



- Click on **Organize** then **Manage My Groups** from the top menu to edit or delete the groups at a later date.



Exercise 3.2: Formatting a bibliography

This exercise shows you what your references will look like in a given style. It can help you identify any errors or missing information in your imported references. Also, you can use it as a standalone list to cut and paste into another document, e.g. a presentation or email.

- Click on **Format** then **Bibliography** from the top tool bar in EndNote Online.
- Select the group of references you have just created, from the **References** drop down menu.
- Select **APA 7th** for the **Bibliographic style**.
- Select any of the **File format** options.
- Click on **Preview & Print**.
- Identify any missing or incorrect information in the reference list to assist you in the next exercise.

Exercise 3.3: Editing references

It is important to proof-read all imported references, as there can often be missing data or errors in the original input process.

- Click on **My References** on the top toolbar and click on the group you have just created to see the imported references from Summon and Scopus.
- Choose a reference to edit by clicking on the title.
- Click on the field you need to edit (see example below).
- Click on **Show Empty Fields** to add any missing data (example below shows Part/Supplement).
- Once you have edited the field, you will be prompted to save the reference by clicking on the **Save** button.

Bibliographic Fields:

Reference Type: Journal Article

Author: Anna, Parpala; Sari, Lindblom-Ylänne; Erkki, Komulainen; Topi, Litmanen; Laura, Hirsto

Title: Students' approaches to learning and their experiences of the teachinglearning environment in different disciplines Click here to edit the field

Year: 2010

Journal: British Journal of Educational Psychology

Place Published: Leicester

Publisher: British Psychological Society

Volume: 80

Part/Supplement:

Issue: 2

Hide Empty Fields

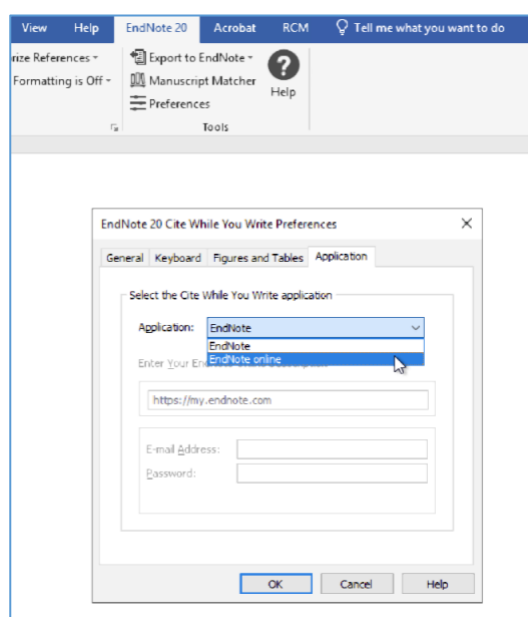
Section 4: Using Word with EndNote Online

This section looks at using Word with EndNote Online to format a document with citations and a reference list/ bibliography.

If you are using your own computer, you will need to download the Cite While You Write toolbar for use in Word. See Section 1 for the instructions.

Exercise 4.1: Connecting Word with your EndNote Online account

- Open Word on your computer/ device.
- Click on the **EndNote 20** tab on the top toolbar.
- Click on **Preferences**, then the **Application** tab.
- Choose **EndNote Online** from the Application dropdown menu.
- Type your EndNote Online email and password into the boxes provided.
- You will notice that the Word tab is now renamed EndNote rather than EndNote 20 to indicate you are linked to the online account.



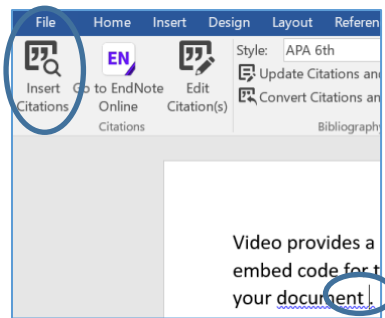
Exercise 4.2: Selecting a referencing style

EndNote provides a list of different referencing styles in which to format your document. The University of Huddersfield standard is APA 7th but check with your department for any alternative styles.

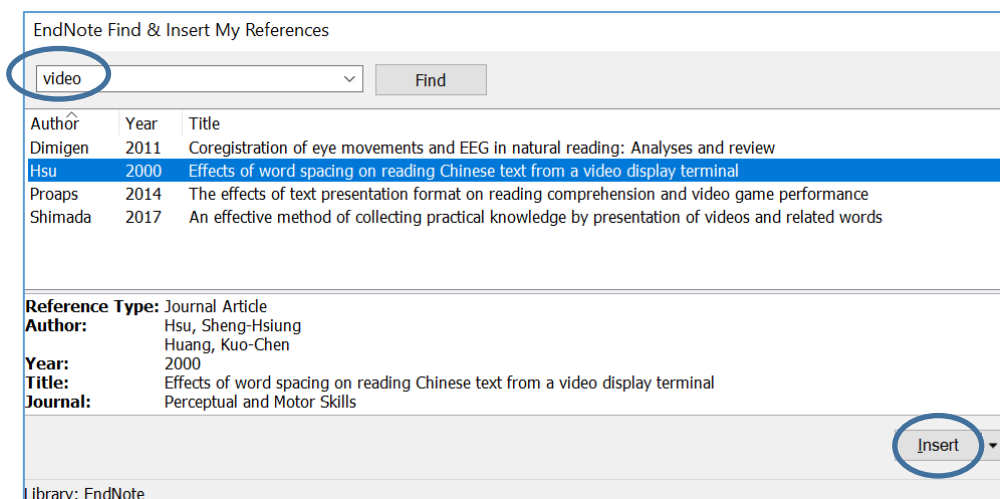
- From the **Style** dropdown menu, either select **APA 7th** if visible or click on **Select Another Style** and locate APA 7th from the list.

Exercise 4.3: Adding citations and creating a reference list/ bibliography

- Place your cursor in the text where you want the citation to appear and press the space bar.
- Click on **Insert Citations** from the EndNote toolbar in Word.



- A pop up box will appear. You can either search for your reference by author, keyword or if you type the letter **a** in the box, all your references will be listed from which to choose.
- Type in the letter **a** and click on **Find**.
- Select the reference you require by clicking on the title.
- Click on **Insert** to add this to Word.



- The citation will appear in text and the full reference appears at the end of the Word document.
- Try adding three references to your Word document.

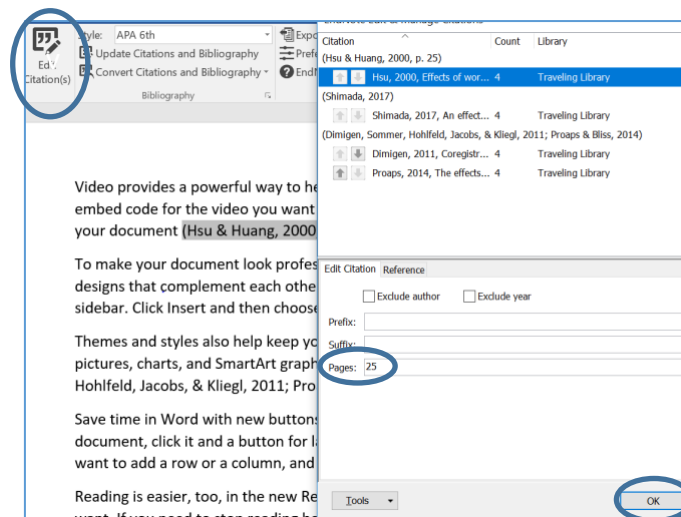
If you need to add more than one reference to support your argument, you can highlight multiple references to insert into the text. Hold the **Ctrl** button and click on the required references.

Exercise 4.4: Editing citations

You may need to edit a citation to include page numbers or exclude the author or year if they have already been mentioned in the sentence.

- Click on the citation in Word so it turns grey.

- Click on **Edit Citations(s)**
- A pop up box appears with the references listed from your Word document, your selected reference is highlighted.
- Choose the relevant tick box to exclude parts of the citation or add page numbers (just the numerals, no p. required) for a direct quote.
- Then click on **OK**.



Section 5: Organising your references



This section looks at some additional tools in EndNote Online that can help you manage your references.

Exercise 5.1: Adding attachments

You have the option to save PDFs or related documents to a reference in EndNote Online. This is a good way of managing your files, and allows you to access them easily through the website.

- Click on **My References** on the top toolbar.
- Choose one of the journal article references and click on **Go to URL**.
- You may be prompted to log in to see the journal article, using your university login and password.
- Look for the Download PDF option on the journal website, and save it to your Downloads folder as normal. (*Not all the references you have imported will have a full text download available. If this is the case, just choose a different article from your list.*).
- Return to the EndNote Online website and click on the grey paperclip underneath the article you chose.
- Click on **Attach files**.
- Click on **Choose file** and locate the PDF you have just downloaded.
- Click on **Open**.
- Click on **Upload**.

- A message will appear to say your upload is complete, and you can close the pop up box and the File attachment box.
- The paperclip will have changed from grey to blue.

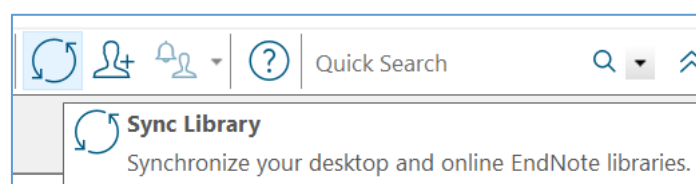
<input type="checkbox"/>	Min, Seoha	2018	Role power dynamics within the bridal gown selection process Fashion and Textiles Added to Library: 14 Feb 2019 Last Updated: 13 Jan 2020 Online Link → Go to URL 
<input type="checkbox"/>	Mukherjee, M.	2006	NMR solution structure and backbone dynamics of domain III of flavivirus suggests a potential site for molecular recognition Protein Science Added to Library: 14 Feb 2019 Last Updated: 13 Jan 2020 Online Link → Go to URL 

Section 6: Saving and synchronising

EndNote Online is a cloud-based application so it automatically saves your references on the web. You have the option to synchronise your online account with the full EndNote desktop version too.

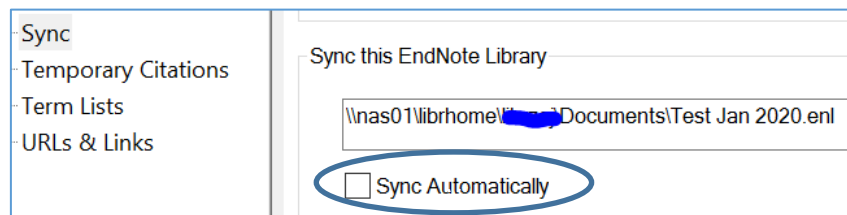
Exercise 6: Synchronising with desktop

- Open EndNote desktop (either on a University PC from the Windows button in the left-hand corner, or from your own device if you have downloaded your own copy).
- Click on the **Sync Library** icon from the top toolbar



- If you have previously created a library using EndNote desktop, then a warning may pop up to say that you are about to sync a library that is different from the last library that you synced and checking that you want to go ahead. If you are happy to merge these two libraries, click **Yes**.
- A pop up window will prompt you to enter your EndNote Online email and password to link the desktop and online accounts or you may just be asked to accept the terms and conditions.
- EndNote will retrieve the references from your online account so they appear in the desktop version.
- Next click on **Edit** then **Preferences** then **Sync** to see your email/ password details.

- We recommend you untick the **Sync automatically** checkbox so you have control over when the desktop syncs to the online version.



Each time you return to EndNote Desktop, just click on the **Sync** icon on the top toolbar so it collects any references you've added to EndNote Online.

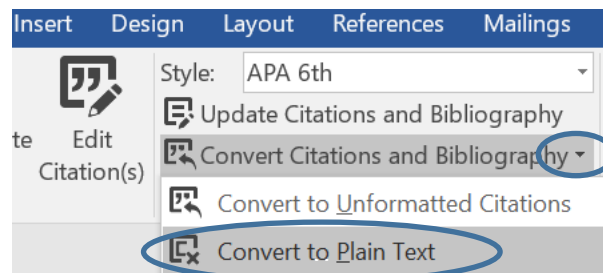
Now you have a copy of your references in the EndNote Desktop version as well as the EndNote Online cloud version. If you have saved the desktop version on your K drive on the University network, it will be backed up every night.

Section 7: The final edit

When using EndNote you must always remember to proofread all references, as the software will always have some limitations. Once you have completed your Word document, you can detach the text from EndNote and tidy up any small edits.

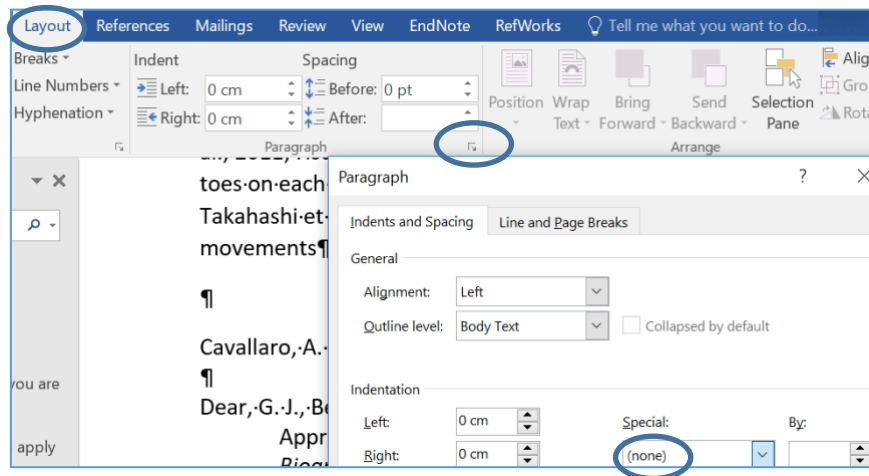
Exercise 7: Converting to plain text

- In Word, go to the EndNote toolbar and click on the small arrow next to **Convert Citations and Bibliography** and then click on **Convert to Plain Text**.



- A pop up window will appear explaining a new document will be created. Click on **Yes** to save the new file.
- You can edit both citations and the reference list manually in the new document, without any changes to your EndNote library. Do remember to save this new file with a different name.
- One useful edit would be to remove the hanging indents and add a line between each reference on the reference list.
- Click on **Layout** from the Word toolbar, then the small arrow next to word **Paragraph**.

- Change the **Special** box from Hanging to **None**, then click return after each reference to space them out.



Section 8: Leaving the University

If and when you leave the University of Huddersfield, you may want to keep your EndNote references. You can convert your university licensed account to an EndNote Basic account easily, transfer it to another institution as needed, or just keep it for personal use.

- You will need to change the email address associated with your EndNote Online account.
- From the **Options** tab, click the **Change E-mail Address** link.
- Type your password in the **Password** field.
- Type your new e-mail address in the **New e-mail address** and **Confirm e-mail address** fields.
- Click the **Save** button.

When converting to EndNote Basic, the attachment storage will be limited to 2GB and there will be only 21 reference styles available.

Section 9: Additional help

For further help you can contact your subject librarian by email library@hud.ac.uk

There is also online guidance available from EndNote at <http://hud.ac/gp5>