

EndNote Online

IT

Essential EndNote Online

EndNote Online is a free web application, accessible from any internet-connected PC or Mac, and members of the University qualify for an enhanced account.

All University of York classroom PCs include the Microsoft Word plug-in to allow inserting citations from EndNote Online. To use on University of York office/staff PCs you will need to download Endnote X9 from the Software Centre to enable the Microsoft Word plug-in.

The plug-in is a free download for personal use.

For online help and guidance please see:

<https://subjectguides.york.ac.uk/reference-management>

Please note: *EndNote Online* used to be called *EndNote Web*; the two names are synonymous.

This material has been written to be used with EndNote Online on a University of York PC. Every attempt has been made to ensure the accuracy of the information provided, however you may find some minor differences when working with personalised systems.

Last Updated: August 2019

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1 ~ Overview

EndNote Online is a web application designed to help with referencing at all stages:

- recording citation information
- managing references
- creating personal reading lists and annotated bibliographies
- sharing references for collaborative projects
- inserting and formatting citations and reference lists

References are stored in a personalised online EndNote Library and a freely downloadable plug-in creates an additional tab in MS Word to insert citations.

EndNote Online is a free application, but members of The University of York (UoY) qualify for an enhanced account, giving access to a wider range of custom reference styles.

1.1 - Registering

- The EndNote Online account is not managed by the University so you cannot simply log on using your University username and password
- You can register using any email address, however to make use of the collaborative tools it will help other users if you register using your UoY email address
- To register you will either need to be on a campus PC or use the Virtual Desktop Service to access a virtual Windows 10 desktop which acts like a campus PC.

To register:

1. On a campus PC or using the VDS, go to <https://www.myendnoteweb.com> (it will redirect to a Clarivate page).
2. Choose Register and sign up using your University email address
3. Complete the registration form, making sure that you read the Password Rules before choosing a suitable password (for security reasons, do not use your UoY password).

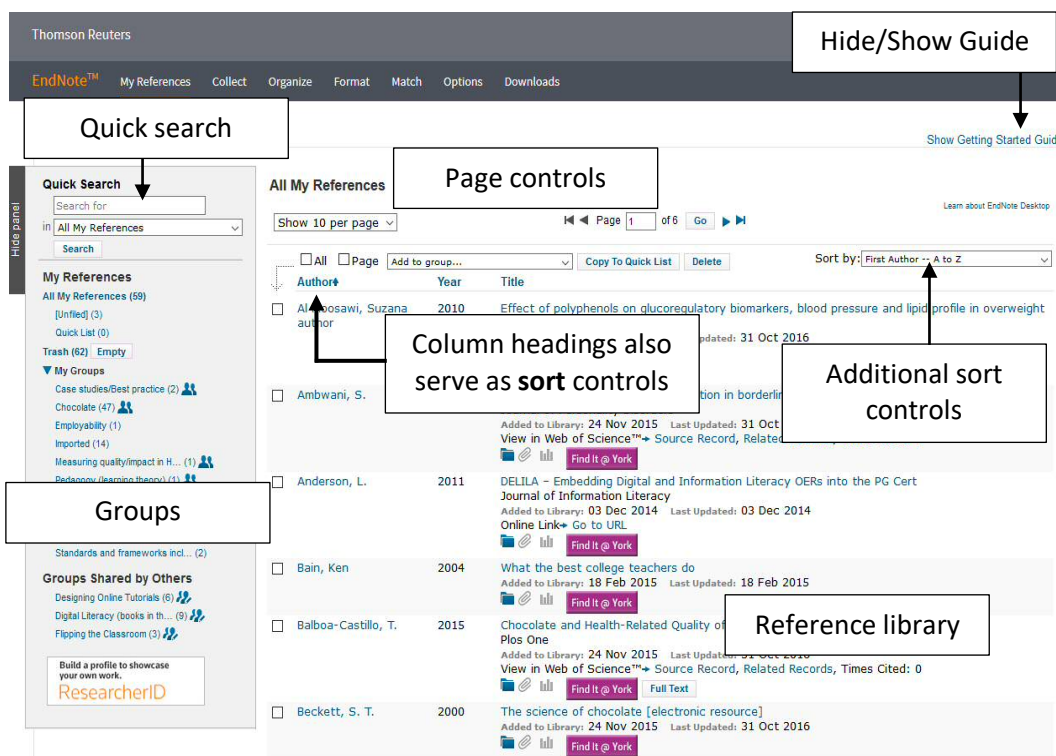
Note: To check you have the enhanced version, go to the person icon in the top right hand corner of EndNote Online, choose **Account > Subscription**. An enhanced account should show 'Web of Science' under 'Account', with an expiration date of when you'll need to log in again from a campus PC to keep the enhanced account.

- With an enhanced account, you should see York specific styles such as UoY - Harvard when you go to **Format > Bibliography** and view the bibliographic style list (see later).

If you do not have 'Web of Science' under the Account Information and you do not see the UoY styles, try logging in from a campus PC or through the VDS. You can also try accessing Web of Science through the University subscription and then choose the EndNote tab at the top of the screen to access EndNote Online.

1.2 - EndNote Online 'home' view

After logging on to EndNote Online (and hiding the Getting Started Guide if necessary) the primary view includes a paged list of all your references and the tools for searching and organising these:



Summary:

Hide/Show Guide	When first logging on, a Getting Started Guide is displayed including links to support
Page controls	By default, 10 references are displayed at a time. The page controls allow you to navigate the pages
Reference library	All references are listed together in the library. The sort order can be changed using the column headings as sort buttons
Additional sort controls	In addition to using the column headings for sorting, the Sort by control provides other useful alternatives (Added to Library – newest to oldest helps locate newly added items)
Groups	Each reference can be assigned to one or more groups, making it simpler to manage references for multiple projects or papers Groups may also be shared with other EndNote Online users
Search panel	References can be located using the search feature
Reference title	Choosing a reference title will open the individual reference
Author name	Choosing an author name will show all references for this author

2 ~ Collecting references

The aim is to collect as many references as possible electronically, and only use manual entry when no alternative is available. Reference data can usually be acquired from:

- Bibliographic databases
- Google Scholar
- YorSearch
- Library catalogues

Generally there are three different approaches that may be required:

- A one-step transfer into EndNote Online
- Export a file from a bibliographic source, followed by import into EndNote Online
- Linking directly to an electronic catalogue and importing

2.1 - YorSearch

After you have located items through YorSearch you can import references one at a time, or use the **Saved Items** facility to import several at once.

Single Reference

- 1 Choose to view **Details** for the required item
- 2 From the **Send to** drop-down list select the option to Send to **EndNote Online**

Multiple References

- 1 For each reference select the bookmark symbol next to the item title
- 2 View your **Saved Items**, select the references to export, and from the drop-down list choose **EndNote Online**, then **Go**



The YorSearch system will usually export direct into EndNote Online and you should receive confirmation:

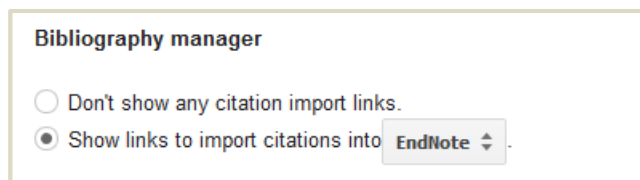
Note: As with other reference exports, always check the data has exported correctly. On occasion YorSearch does not export Author details in full.

2.2 - Google Scholar

Scholar can be configured to include a reference export link with each result:



- 1 On the Scholar search page, choose **Settings** (gear-wheel icon) you
- 2 On the **Search Results** settings page, configure the **Bibliography manager** to **Show links to import citations into EndNote** and **Save** the change.



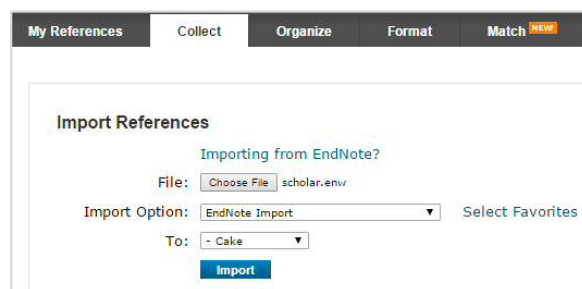
2.2.1 - Importing Scholar References to EndNote Online

This is usually a two-step process, and references must be imported one at a time.

- 1 After searching select the **Import into EndNote** link
- 2 Don't choose 'Open', but **Save** the reference file and follow this with an import (don't use the **Refman RIS** format here, see the following instructions).

Importing

- 1 Once you have saved your Endnote citations file, switch to EndNote Online and select **Collect > Import References**
- 1 Locate and select the downloaded **.ENW** file
- 2 Choose the **EndNote Import** option, the group to import into and select **Import**



You can set 'Favorite' Import options if you tend to import there same kinds of file or from the same databases. It is advisable to have 'EndNote Import' and 'Refman RIS' as favourites, as they are some of the most common import options you'll need to use.

2.3 - Bibliographic databases

The best time to collect reference information is when carrying out a literature search. Most bibliographic databases include the ability to export references, but unfortunately there is no agreed standard, so the method varies considerably.

What to look for

Most systems will include the ability to select several references for export and a link/button to begin the export, illustrated in these examples:

The first screenshot shows the 'Results Tools' interface of a database. The 'Export' button is circled in black. A box labeled 'Ovid' points to the 'Export' button. The second screenshot shows the 'Web of Science' interface. The 'Save to EndNote online' button is circled in black. A box labeled 'Web of Science (Thomson Reuters)' points to the 'Save to EndNote online' button.

2.3.1 - Direct Export

- 1 If **EndNote Online** is available on the export list, select this option.
- 2 If you have a choice between citation/reference only and full reference (including abstract) then choose **full reference**.
- 3 During export, you may need to choose *Open* or *Save* – try **Open** first

If direct export won't work for you, try the export-import approach.

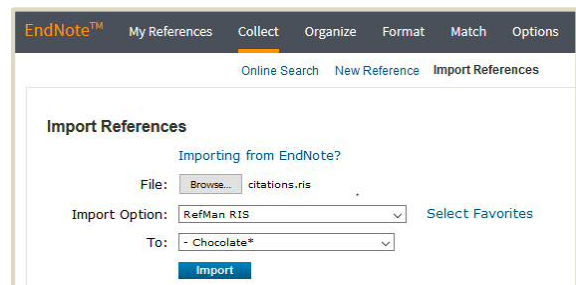
2.3.2 - Export-Import

- 1 Even if an EndNote option is available, choose an **RIS export option**
- 2 If asked to choose Open or Save, always choose to **Save** the reference file on your computer

Import Choices

If you have saved a RIS file locally, you will need to import it:

- 3 Switch to EndNote Online and select **Collect > Import References**
- 4 Find and select the downloaded **RIS** file
- 5 Choose the **Reference Manager (RIS)** import option, the group to import into and select **Import**



2.4 - Manual Entry

If it is not possible to acquire a reference electronically, add it manually so you can still make use of the management and citation features. To enter a new reference manually:

- 1 Choose **Collect > New Reference**
- 2 Select the appropriate **Reference Type** (to ensure the correct fields are shown)
- 3 Complete the fields needed for citations/reference lists as a minimum
- 4 The reference usually auto-saves, but the status is shown clearly so you can save it if you need to
- 5 After the reference is saved, return to the reference list using the usual navigation controls

Note Authors must be entered **Surname, Forename** with multiple authors on separate lines. Add a comma on the end of an institutional author eg **NHS,**

New Reference

Bibliographic Fields:

Reference Type: Book

Author: Dunn, Mike
Smith, John

Title:

Year:

Series Editor:

Series Title:

Place Published:

Publisher:

Volume:

Number of Volumes:

Annotations:

- Select the correct reference type
- authors on separate lines
- Enter details as appropriate
- Do not attempt to format entries to match a particular bibliographic style

2.5 - Library Catalogues

From within EndNote Online you can connect to a remote library online catalogue. Although you would not use this for the purposes of literature search, it can be a useful method for obtaining the reference of a book you have on your desk.

- 1 In EndNote Online select **Collect > Online search...**
- 2 Select the connection – it will be easier in the future if you nominate favourites (the University of York is listed as **U York**)
- 3 Choose **Connect**

My References Collect Organize Format

Online Search New Reference Import References

Online Search

Step 1

Select database or library catalog connection.

U York Select Favorites

Connect

Searching

Once the connection is created, use the search tools to locate records in the Library Catalogue. Unless your search is very specific, don't choose to retrieve all records.

My References Collect Organize Format Match Options

Online Search New Reference Import References

Online Search

Step 2 of 3: Connecting to University of York : Library Catalogue

moss in: Author And

chocolate in: Title And

in: Any Field And

in: Any Field

retrieve all records

select a range of records to retrieve

Search

Step 3 of 3: Connecting to University of York : Library Catalogue

((moss) in Author) and ((chocolate) in Title)

Found 1 results:

Retrieve 1 through 1

Retrieve

Only retrieve when you have found a small number of records

Search controls

Use these links to refine the search if necessary

Retrieved records must then be added the relevant group (or unfiled) as appropriate. You can use the **Add to Group** dropdown for this. Any unassigned references will be lost when you switch to a different view.

3 ~ Managing References

The principal feature for managing references is **My Groups**. Each reference may be assigned to one or more groups to help manage references for multiple projects/papers. Groups may also be shared with other EndNote Online users.

3.1 - Managing Groups

Choose **Organize > Manage My Groups**. From here you can:

- Add, remove and rename groups
- Manage sharing of groups

Manage My Groups

My Groups	Number of References	Share		
Cake	14	<input checked="" type="checkbox"/>	Manage Sharing	Rename Delete
Chocolate	20	<input type="checkbox"/>	Manage Sharing	Rename Delete
Pie and Peas	27	<input type="checkbox"/>	Manage Sharing	Rename Delete
New group				

Add, delete, rename and share groups

Sharing

When sharing a group, you can choose to grant other people *read-only* or *read and write* permissions. For collaborative work, when several people want to 'pool' references, all will need both read and write.

To share a group with someone you need to know the email address they use to access their EndNote Online account.

Manage Sharing for 'Cake'

1 E-mail Address

E-mail Address	Read only	Read & Write	Edit	Delete
yc647@york.ac.uk	<input checked="" type="radio"/>	<input type="radio"/>	Edit	Delete

[Add More](#)

[Delete All](#)

Shared References

If other EndNote Online users have shared one or more groups with you, these are listed in **Organise > Others' Groups**. You can decide whether this group is listed on the home page, and whether they are available when inserting citations in Word.

Others' Groups						
Access	Show	Use for Cite While You Write	Groups Others Share with Me	Number of References	Owner	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Books	0	bc707@york.ac.uk	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Case studies/Best practice	0	yc647@york.ac.uk	
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Measuring quality/impact in H.E.	1	lyurcay@gmail.com	

3.2 - Adding References to Groups

You can assign existing references to groups or assign new references when importing:

Existing references Tick the references and select the group in the Add to group... drop-down control. From here you can also create a new group.

All My References

Whilst importing references Select the group to import into. From here you can also create a new group

3.3 - Duplicates

Searching several bibliographic databases may result in acquiring the same reference more than once. To prevent any related issues when inserting citations, EndNote Online can locate duplicates for you to delete.

- 1 Choose **Organise > Find duplicates**
- 2 EndNote will compile a list of duplicates with one copy of each left un-ticked.
- 3 Select **Delete** to remove all the (ticked) duplicates

Find Duplicates

Duplicates

4 ~ Styles, Reference Lists and Citations

EndNote Online includes style definitions for generic referencing styles, such as APA, MLA, Harvard, and also for styles relevant to a wide range of academic journals.

The list of styles is extremely long, so it is recommended you use the **Favourites** feature to create a more manageable list. The **Annotated** style is useful to include for reading lists or annotated bibliographies, as it displays the abstract for journal articles.

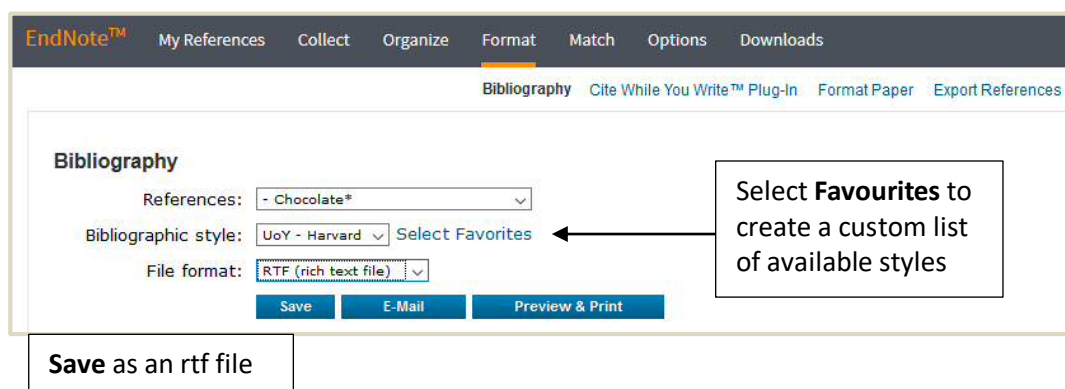
Notes The style list includes some developed specifically for use at the University of York. These are named using the prefix **UoY**.

If you have a limited list of styles available and it does not include the UoY styles, you are using a **Basic** account. Follow the instructions for an institutional Log in (p1) to upgrade to the enhanced version.

4.1 - Creating a Reference List/Annotated Bibliography

A list of references can be exported in an editable form, ideal for reading lists or an annotated bibliography.

- 1 If the references in question do not already comprise a specific group, select the references and add them to the **Quick List** group
- 2 Choose **Format > Bibliography** and select the reference group (or **Quick List**)
- 3 Select the bibliographic style (the **Annotated** style includes abstracts, and the style **UoY Annotated Notes** also includes any notes you have entered in the Notes field)
- 4 Choose the **RTF (rich text file)** format
- 5 To create a working document, **Save** the file and open it in MS Word.



Note: The style **Favourites** configured in EndNote will also customise the list of styles available in the Word 'Cite While You Write' plug-in – see next section.

4.2 - Citations in MS Word

EndNote Online includes the (free) **Cite While You Write** 'plug-in', creating an extra Word tab for working with EndNote Online citations – this is installed on all University classroom machines and *can be freely downloaded for personal use*. Citations may be inserted from within Word and a reference list is automatically constructed.

4.2.1 - Configuring the Classroom Plug-in

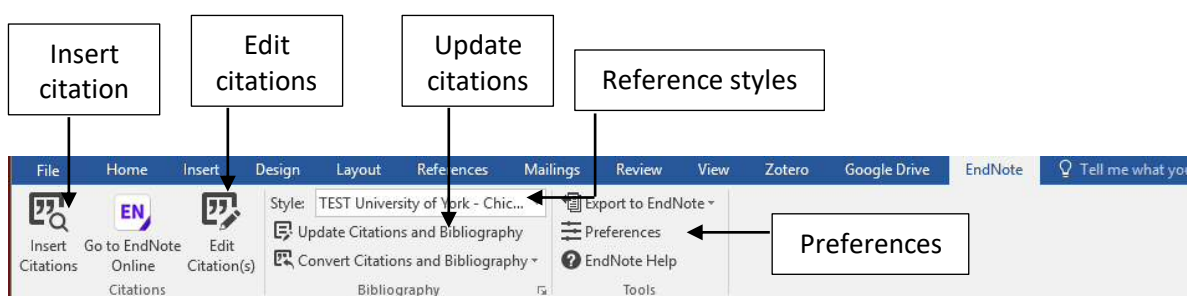
Classroom PCs also have access to the desktop version of EndNote, and the additional tab will need to be set to work with the Web version:

- 1 In Word choose the **EndNote** tab and select **Tools > Preferences**
- 2 In the dialogue box select the **Application** tab and change the **Application** from **EndNote** to **EndNote Online**
- 3 Enter the email address and password used on your EndNote Online account. Tick **Remember my address and password** to avoid having to enter these each time, and choose **OK**.

The plug-in will connect to your EndNote Online account and retrieve your 'favourite' styles.

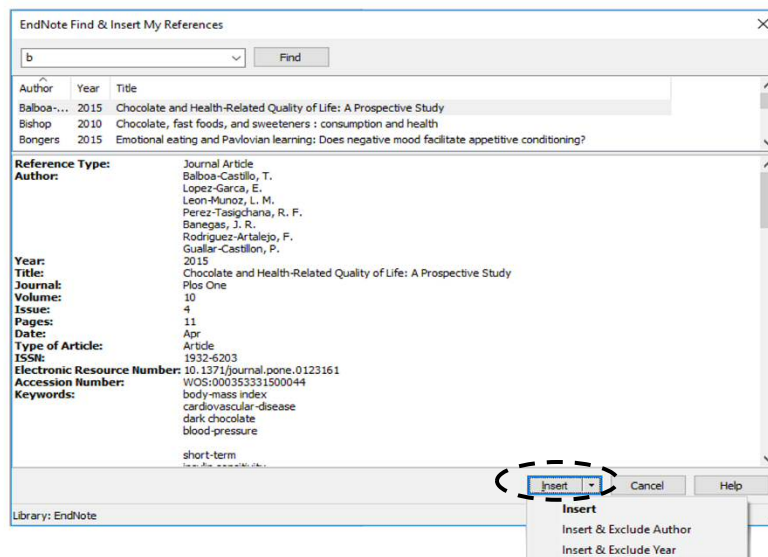
4.2.2 - Inserting Citations

The EndNote Online plug-in provides the tools you need to insert, format and manage citations and a reference list.



To insert an in-text citation in Word:

- 1 Position the editing cursor where you want the citations to appear
- 2 On the **EndNote** tab choose **Insert Citation**
- 3 Use the **Find** control to locate the reference (by author is simplest)
- 4 Select one or more references (CTRL for multiple selections) and choose **Insert** or use the drop-down if you need to omit the author or year



4.2.3 - Inserting Citations as Footnotes

Some bibliographic styles require citations to be entered as footnotes. To do this you must use the Word footnote feature first:

- 1 Position the editing cursor where you want the footnote indicator to appear
- 2 Select **References > Insert Footnote**
- 3 This adds a footnote number and leaves the editing cursor in the footnote position. Insert the citation as normal using one of the methods above

Note If the chosen style is not intended for footnotes it may not work as expected

4.2.4 - Reformatting Citations and Reference List

Selecting an alternative style on the Word EndNote tab will reformat both the citations and reference list in the new style.

If this doesn't appear to take place, from the **EndNote** tab choose **Update Citations and Bibliography**.

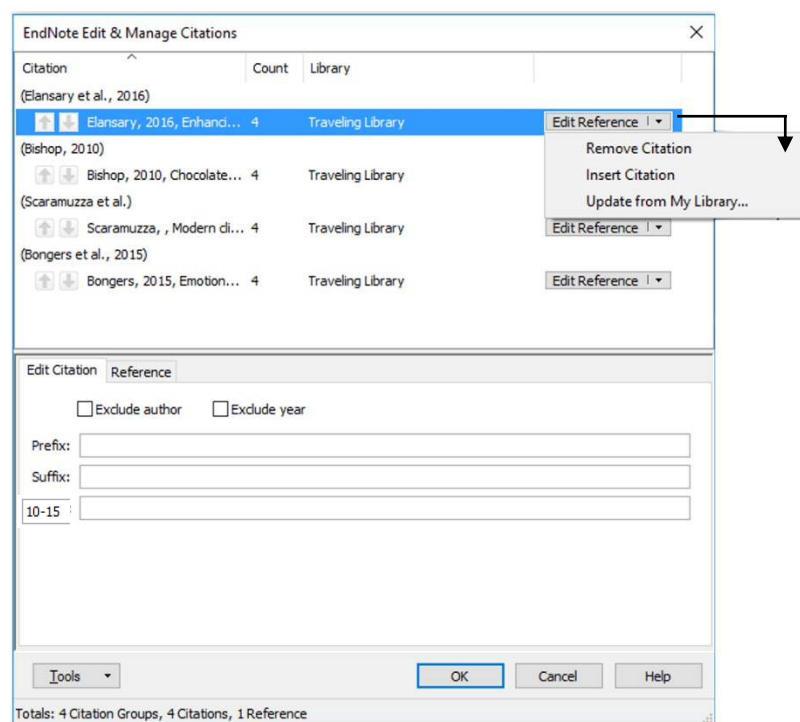
4.2.5 - Editing Citations

The citations and reference list are populated using Word fields. One consequence is that you cannot edit their content directly, but must use the tools provided.

- 1 Place the editing cursor in the citation to be edited
- 2 On the **EndNote** tab choose **Edit Citation(s)**

The dialogue box enables you to:

- Add/Remove citations
- Show/Hide Author or Year from a citation
- Add pages numbers or other text to a citation



Note If the output style is not configured to display page numbers they may not appear when inserted in the **Pages** section. In this case put them in the **Suffix** but begin with a space and include any necessary abbreviations such as **pp**.

Tip After making changes, on the EndNote tab choose **Bibliography > Update Citations and Bibliography** to ensure the reference list is updated.

Editing the Reference List

Don't attempt to edit the reference list. Its content is derived from the citations so any changes will revert following an update. If you spot mistakes in a reference list you may need to correct the original reference in EndNote.

Note To delete a reference, always remove **citations** (using the **Edit citation/s** option), not entries in the reference list.

4.3 - Mac users

The free Word plugin can also be installed on a Mac, but in this case an extra tab is not added to the ribbon.



Setting the application

- 1 Choose **Tools > EndNote > Cite While You Write Preferences**
- 2 Select **Application**, choose **EndNote online**, enter your details and **OK**

To use insert and manage citations use the options from the **Tools > EndNote** menu.

Note The plug-in also adds an EndNote toolbar (**View > Toolbars > EndNote**)

5 ~ Additional Features

The previous sections summarise the essential features you will need to use when working with EndNote Online. Other useful features are described below.

5.1 - EndNote Online and PDFs

Many references include the URL for the online source, allowing you to view the source directly, but you can also attach a PDF to a reference if one is available. You will need to download and save it first:

- 1 In the list of references locate the relevant reference.
- 2 Select **View file attachments** (the paperclip symbol).
- 3 In the **File Attachments** dialogue select **Attach Files**.
- 4 Check you have sufficient space available, select **Choose File**, navigate to the PDF document and select **Open**.
- 5 Choose **Upload** and the PDF is attached to the reference (**Close** when complete).

To view the PDF, select the paperclip again and choose the attached file.

5.2 - Plain Text

Word **fields** are used to generate the content of citations and reference lists; fields generally display content acquired from another source and so do not contain directly editable text. Fields are essential for many features (including page numbers, captions, cross references tables of contents and the functionality of the EndNote plugin).

After inserting citations, however, you may want a fully editable document; this could be for several reasons:

- Some citations or references do not display correctly and need minor edits
- You may want to send the document and wish to avoid any risk of a reviewer's reference management application changing your citations/references
- You want to check the document using *Turnitin*

To create a 'fixed' version of a document, converting your citations and references to editable text:

- First make sure you have saved the latest version of your document
- Choose **EndNote tab > Convert Citations and Bibliography > Convert to Plain Text**

This creates a copy of your document, which you should save with an alternative file name so as not to lose the 'original' containing the Word fields – you'll need that to make any additional changes.

5.3 - EndNote Desktop

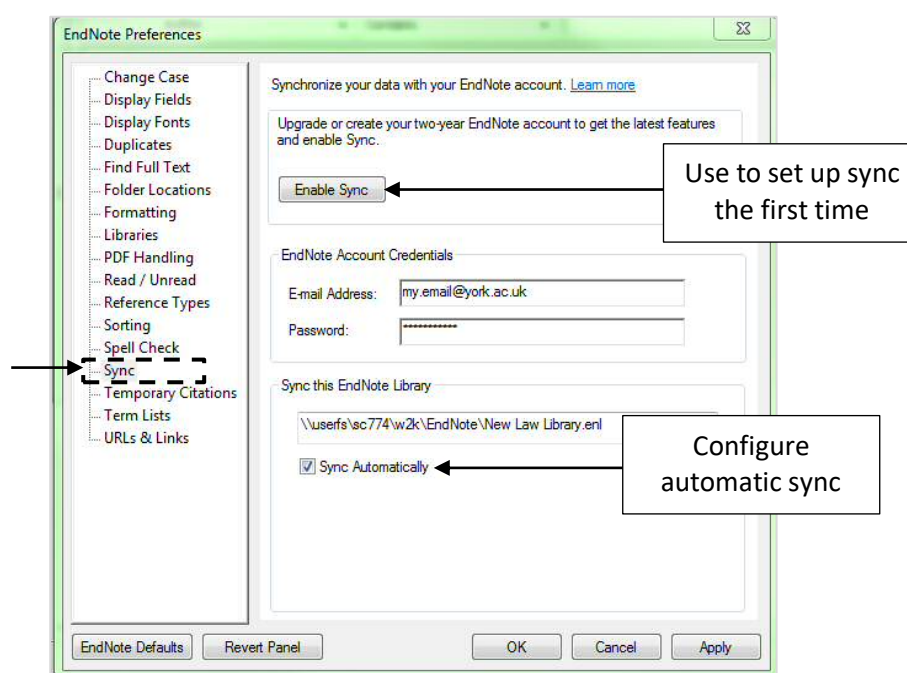
The Desktop version of EndNote is available on all University of York classroom and office PCs, but for use on personal equipment a copy must be purchased.

The reference library is stored in the **Documents** folder on a Classroom PC, or wherever you choose on personal equipment.

Online and Desktop versions of Reference Libraries are fully compatible and it is possible to synchronise references between them, giving considerable flexibility.

Setting up synchronisation

This must be done from EndNote Desktop.



- 1 On a classroom PC (or your own equipment) Launch EndNote (desktop) and create or open the local library you wish to synchronise.
- 2 Select **Edit > Preferences...** and choose the **Sync** category.
- 3 Select **Enable Sync**, enter your EndNote Online Account credentials and choose **OK**.
After authorising your account, you will be asked to complete some registration details. EndNote may also recommend you create a library backup. It doesn't take long so is worth doing.
- 4 Return to the **Preferences** dialogue box, check your credentials are correct and that **Sync Automatically** is checked.
- 5 Synchronisation happens automatically, but to force it choose **Tools > Sync** or the **Sync with EndNote Online** button on the toolbar.



5.4 - It's also useful to know...

- 1 The process of inserting a citation includes many steps so it is not possible to use Word's **Undo** feature. Instead you must delete the citation.
- 2 All the reference information is stored in hidden form in the citations (referred to as the **Traveling Library**):
 - a) You can delete and reconstruct the reference list as often as you like without breaking anything – a good way to fix a badly-formatted reference list
 - b) The embedded references can be extracted from a Word document and added to EndNote Online (**EndNote tab > Export to EndNote > Export Traveling Library**)
 - c) Editing a Word document containing embedded citations on a computer that does not have the EndNote plug-in installed does not result in the loss of the citations
 - d) Editing a Word document containing embedded citations using an application other than Word **is extremely likely to corrupt your citations** (avoid Open Office)
- 3 If/when you cease to be a member of the University of York your account will continue to be available to you but will be downgraded to a Basic account (unless you join another institution with an EndNote subscription).

If you log in with your University email address, you'll need to change to an alternative email address; choose **Options > E-mail Address** to make this change.
- 4 Alternatively you can export your library in a format that can be imported into other bibliographic applications (**Format > Export References**).
- 5 Reference libraries generated with other applications can usually be imported into EndNote Online. Export from the other application in **RIS** format.