



The Web-based Research & Writing Tool

Library and Knowledge Services

2019

Contents

Getting Started	3
Collecting References	4
Importing References	5
Viewing references	6
Groups	7
Creating a Bibliography in EndNote Online	8
Using the Cite While You Write plug-in	9
Unformatting Citations in Word	10
Deleting Citations in Word	11
Capturing References using the Web Capture toolbar	12
Transferring references/groups between EndNote Online and desktop EndNote X5	13
Useful resources	15

Getting Started

Go to myendnoteweb.com. If this is your first time in EndNote Online (formerly EndNote Web), choose 'Register' on the right to set up your account. Sign in if you have already set up an account – you will need a separate username and password for EndNote and will not be able to use your Athens details.

Pay attention to the password requirements that will be shown on the right hand side of the page and ensure your chosen password meets complexity requirements.

Once registration is complete, you will need to log on to your email and click the link in the email from EndNote in order to activate your account.

You can now sign in at myendnoteweb.com with your email address and password. If you need help at any point, the '**Show Getting Started Guide**' link on the right will open the online help.

Follow the instructions to install the **Cite While You Write** plug-in (accessed via 'Downloads' if the Getting Started Guide is not shown), a toolbar that lets you access your EndNote Online library when using Word. If you want to install this toolbar on your Papworth desktop computer, you will need to call IT while on-site and have them do it remotely. The help desk number is ext. 4241

Getting Started



Find

Collect references by searching online databases or importing your existing collection.

- Search an online database
- Create a reference manually
- Import references
- **NEW!** Find your best potential journal



Store & Share

Organize and group references in any way that works for you. Then share your groups with colleagues.

- Create a new group
- Share a group
- Find duplicate references



Create

Use our plugin to **format** bibliographies and cite references while you write.

- **Cite While You Write™ Plug-In**
- Create a formatted bibliography
- Format a paper

Collecting References

Searching databases in EndNote Online:

We advise that you search using a dedicated database interface and then export your results to EndNote Online, rather than searching the database via EndNote Online.

You can search databases including Pubmed by clicking on the white 'Collect' tab, then selecting the 'Online Search' option.

Choose the database you wish to search from the alphabetical list, and click 'CONNECT'. Pubmed appears as 'PubMed (NLM)'. You can save your favourite database(s) by clicking the 'select favourites' link and selecting your preferred choices. This means that the next time you search the database, you can just click on 'select favourites' instead of scrolling through the big list.

After selecting a database, you will be taken to the 'Online Search screen'. Type in your search terms in multiple fields as you would on Pubmed's Advanced Search in order to find articles of interest.

If you want to limit your search by date, click on the 'Select results from a range' button and choose how many of your search results you want to see. Pubmed organises results from most recent-oldest, so choose from '1' to 'XXX' to show the most recent papers.

When your results are downloaded you can choose which group (see Groups, p7) to add them to.

Adding a reference manually:

If you want to add a reference for an unpublished article or report etc., go to the white 'Collect' tab and choose 'New Reference', where you can manually enter information in all the different fields.

Click the 'Save' button when you are finished, and this will send the new reference to the '[Unfiled]' group, which you can access from the 'My References' tab on the left of the screen.

It is best to keep manual entries down to a minimum to ensure the uniformity of your library.

Importing References

Importing from NHS Evidence's *Healthcare Databases Advanced Search (HDAS)* [hdas.nice.org.uk]:

In HDAS, check the tick boxes by the references you want to export. Save the results, and then click on 'Export Options' and choose to save the results as a RIS file.

Note: please contact the library if you require more extensive training on literature searching or have any HDAS queries. If requesting a mediated literature search from the library, let us know if you require the results in RIS format as well as PDF.

In EndNote Online, go to the white 'Collect' tab then 'Import References'. Click 'Choose File' and find the file you saved from HDAS. In the 'Import Option' drop-down menu, Select 'RefMan RIS' and then choose which group to put your references in (you can save this setting as a favourite to save you scrolling through the menu every time). Click the 'Import' button to finish.

Importing from PubMed:

In PubMed, check the tick boxes by the results you want, and then click on the 'send to' link at the top right of the screen. In the drop-down menu select 'File' as the destination and 'Medline' as the format, and save it somewhere memorable.

In EndNote, go to the white 'Collect' tab then 'Import References'. Click 'Choose File' and find the file you saved from PubMed. In the 'Import Option' drop-down menu, select 'PubMed (NLM)' and then choose which group to put your references in (you can save this setting as a favourite to save you scrolling through the menu every time). Click the 'Import' button to finish.

Importing from desktop EndNote:

Go to the white 'Collect' tab and click on 'Import References'.

N.B. the 'Importing from EndNote?' link provides instructions for this.

Exporting references to other sources

Go to the white 'Format' tab and click on the 'Export References' link.

Choose which group you want to export and select which file type to save it as. RIS is a common shared format and this format is recommended if you want to export results to a desktop version of EndNote.

Viewing references

Select 'My References'. You may also need to click 'Hide Getting Started Guide' on the right hand side. The panel on the left here lets you view all the references (your library), browse your different groups (subsets of your library), and search for a specific reference. When you add references to your library, you can choose how they are displayed:

Click on the Author or Title links at the top of the references list to organise them by ascending/descending alphabetical order, or click on the Year link to display them in chronological or reverse chronological order. Choose from the drop-down 'Sort By:' menu at the top-right of the list if you would like to arrange them differently.

You can change how many references are displayed per page, and navigate between pages through the arrow buttons at the top and bottom of the table.

Click on the author of a result to see all references of that author in your EndNote Online library.

Click on the title of a result to see the abstract and details of the article. Click the 'Return to list' button to navigate back to the references list.

Be advised that the 'Full Text' buttons displayed under results do not necessarily refer to FREE full text access – they only link to the journal's website where you can pay for access, or login with your Athens details to see if we have access. If you do not seem to have access after logging in with your Athens details, contact the library and request that we find the full text article for you.

The 'Go to URL' links displayed under some references will take you to the article's record in the database where you retrieved it (i.e. if you searched PubMed, it will take you to that record's PubMed page).

If you have put a reference into a group or groups, a blue folder icon at the foot of the reference will tell you which group(s) it is a part of when clicked.

Groups

EndNote Online organises your library into groups. Think of groups as a way of saving similar references together: if you want to save all the references that you are citing in a particular essay or research paper together, put them into the same group.

To save references to a group:

On your results page, check the tick boxes next to the references you want. Use the 'All' or 'Page' buttons at the top of the table to quickly tick every result, or every reference on the current page.

Open the 'Add to group...' drop-down menu at the top of the reference list and choose which group to add them to, or start a new group with them (you will be asked to name this group). You can save a reference to multiple groups by repeating this process.

The references will be copied into that group, and if you chose 'New group' the title of that group will appear in the 'My Groups' tab on the left side of the screen. Click on a group's title to open it up and see all the references in it.

Organising groups:

To change the name of a group in your library, go to the 'Organize' white tab and click the 'Manage My Groups' link. Here you can rename a group, delete it, and control how you share it. You can also see how many references you have in each group.

Sharing groups:

In EndNote Online you can share groups with other EndNote Online account holders and, if you wish, allow them to edit and add or delete references in the group(s).

To share a group go to the 'Organize' white tab and click the 'Manage My Groups' link, then click on the blue 'Manage Sharing' button for the group you want to share.

Type in the email address of the person(s) you want to share it with, **but make sure you are using the address that they have registered with EndNote Online.**

Choose whether you would like them to be able to edit the group by ticking the 'Read only' (no editing) or 'Read & Write' (editing allowed) button. **If you allow editing, any changes made to the group will apply to everybody's copy of the group.**

Click 'Apply' to finish.

When this is done, the person(s) you share the group with will see that group displayed beneath their other groups in the My References panel under the heading 'Groups Shared by Others', and they will be able to view the references like they can view all their others.

When you see the group in your own EndNote Online My References panel, you will notice a blue icon showing two heads has appeared by the group's title to let you know it is being shared.

If someone has shared a group with you, it will appear in your My References panel in the 'Groups Shared by Others' section. You will see the icon with two faces and a pencil by the group's title if you are allowed to edit the group.

If you later decide to add/remove people to the group, go back to the group's 'Manage Sharing' button and add or delete email addresses accordingly.

Creating a Bibliography (reference list) in EndNote Online

If you are writing an essay/paper etc., the best way to create a bibliography is to use the Cite While You Write feature with Microsoft Word (see p9).

To quickly create a bibliography of the references in a group click on the white 'Format' tab and choose 'Bibliography'.

In the 'References' field select the group you want from the drop-down menu, then choose which bibliographic style you want the references to be presented in (contact your module coordinator, the journal you wish to publish, or the library if unsure about appropriate referencing styles).

Choose any file format and you can save or email your bibliography. Choose 'HTML' format and 'Preview & Print' if you want to quickly copy and paste the bibliography straight into Word or other programs.

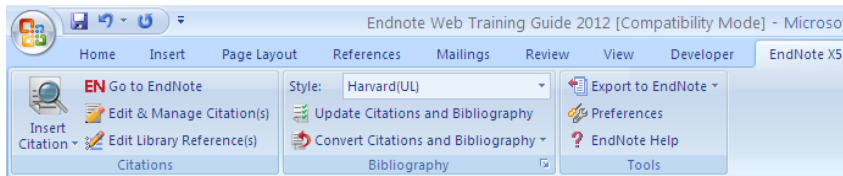
Using the Cite While You Write plug-in

The **Cite While You Write** plug-in is a toolbar that lets you access your EndNote Online library when using Word. It cites references accurately and creates a bibliography as you go along.

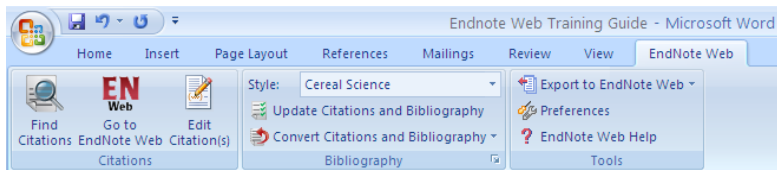
To install the toolbar, in EndNote Online, click on 'Show Getting Started Guide' at the top-right of the screen, or click 'Format' and then 'Cite While You Write Plug-In' and follow the instructions to install.

N.B. If you want to install this toolbar on your Papworth desktop computer, you will need to call IT Helpdesk while on-site and have them do it remotely. The help desk number is ext. 4241.

The CWYW toolbar appears at the end of the options toolbar in Word 2010 (below):



It appears at the end of the options toolbar in Word 2007 (below left):



It appears as a floating toolbar in Word 2003, (above right). If you cannot see it, go to 'View', then 'toolbars', and make sure there is a tick next to 'EndNote Online' in the drop-down menu.

Whenever you wish to use CWYW, make sure you open EndNote Online in your browser, before you open Word!

Click on 'Find Citations' to insert a reference from your EndNote Online library. You can search your library by title/author etc.

To delete a citation you have added to your document, or change the information included in any citation, use the 'Edit Citation(s)' icon.

The 'Style' box lets you choose from a limited number of output styles for your citations and bibliography from the drop-down menu. To choose from ALL the available styles go to Edit Citations, then in the 'Tools' menu at the bottom-left of the dialogue window,

choose 'Format Bibliography' and select your output style from the full selection of styles.

Click on 'Update Citations and Bibliography' if you change the output style or move citations/change the order of citations in your document to instantly update the bibliography at the end of your document.

Unformatting Citations in Word

To avoid the possibility of your Word document becoming corrupted, you may wish to work on your document with unformatted (temporary) citations.

Unformatting reverts formatted citations to temporary citations, removes the bibliography, and turns off instant formatting.

Word 2003: From Word's Tools menu, go to the EndNote X5 submenu and Unformat Citation(s).

Word 2007 and 2010: On the EndNote tab, in the Bibliography group, click Convert Citations and Bibliography and select Convert to Unformatted Citations. If you are unformatting the entire document, this unformats all of the in-text citations and removes the current bibliography.

You can tell when a paper is unformatted because the citations appear in the temporary citation format (such as "{Smith, 1999 #25}").

Unformatted citations are temporary placeholders that do not reflect final output. You can format the paper again at any time.

Note: When you unformat citations, Instant Formatting is disabled. To format your paper:

Word 2003: Go to the Tools menu, then the EndNote X5 submenu, and select Format Bibliography.

Word 2007 and 2010: On the EndNote tab, in the Bibliography group, click the corner arrow. From the Format Bibliography dialog, you can enable Instant Formatting again on the Instant Formatting tab.

Deleting Citations in Word

It is recommended that you safely delete citations from a Word document individually in the following way:

To delete an **unformatted** citation, simply highlight the entire citation (including delimiters), and press the Backspace or Delete key.

N.B. **Do not** highlight a **formatted** citation you wish to delete in the text. While it is possible to highlight a formatted citation and simply press the delete key on your keyboard, it is not recommended that you do that. If you do not completely delete the citation and all associated codes, you could corrupt your document.

To safely delete a formatted citation:

1. In Word, highlight the citation you want to delete.
2. **Word 2003:** From the Tools menu in Word, go to the EndNote X5 submenu and select Edit & Manage Citation(s) to display the EndNote X5 Edit Manage Citations dialog.

Word 2007 and 2010: On the EndNote tab, in the Citations group, click Edit Manage

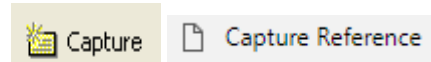
3. In the Edit & Manage Citations dialogue window, ensure that the citation you want to delete is highlighted. If the citation is part of a multiple citation, make sure you select just the citation you want to delete.
4. From the Edit Reference menu, click Remove Citation.
5. Click OK.

Capturing References using the Web Capture toolbar

EndNote Online's Capture toolbar lets you export a reference from a website page to your library, at the touch of a button.

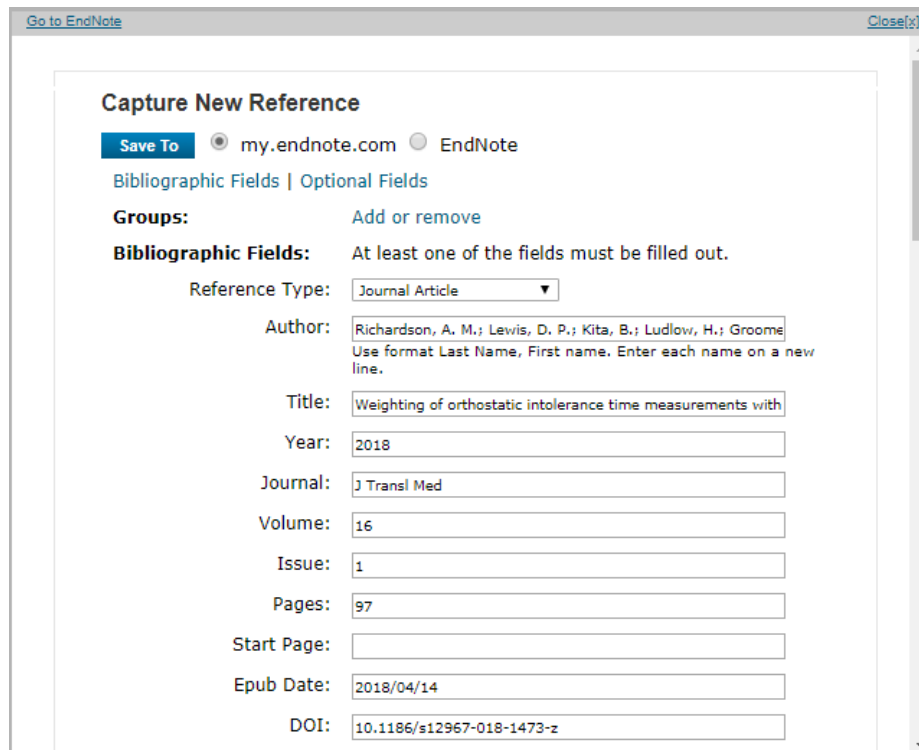
To install the toolbar, go to the white 'Downloads' tab from the home screen.

Follow the on-screen instructions on the right to save the toolbar (drag and drop into bookmarks bar as per instructions), which will appear on your browser's display:

 **You may need to go into your browser's settings first to toggle the bookmarks toolbar as visible**, e.g. on Chrome, click the three dots to the right of the URL bar, select 'Bookmarks', and then 'Show bookmarks bar'.

Now, whenever you go to the page of an article on a journal's website or in a database, you can create a reference for that paper in your library, just by clicking the 'Capture' button on your browser's display:

EndNote Online will open a window where you can edit the reference it will add to your library. You can choose which groups to add the reference to as well.



Go to EndNote Close[x]

Capture New Reference

Save To my.endnote.com EndNote

Bibliographic Fields | Optional Fields

Groups: [Add or remove](#)

Bibliographic Fields: At least one of the fields must be filled out.

Reference Type:

Author:
Use format Last Name, First name. Enter each name on a new line.

Title:

Year:

Journal:

Volume:

Issue:

Pages:

Start Page:

Epub Date:

DOI:

If you do not choose a specific group, EndNote Online will add the reference only to your 'All My References' group.

Transferring references/groups between EndNote Online and desktop EndNote X5

Transferring from desktop EndNote X5 to EndNote Online:

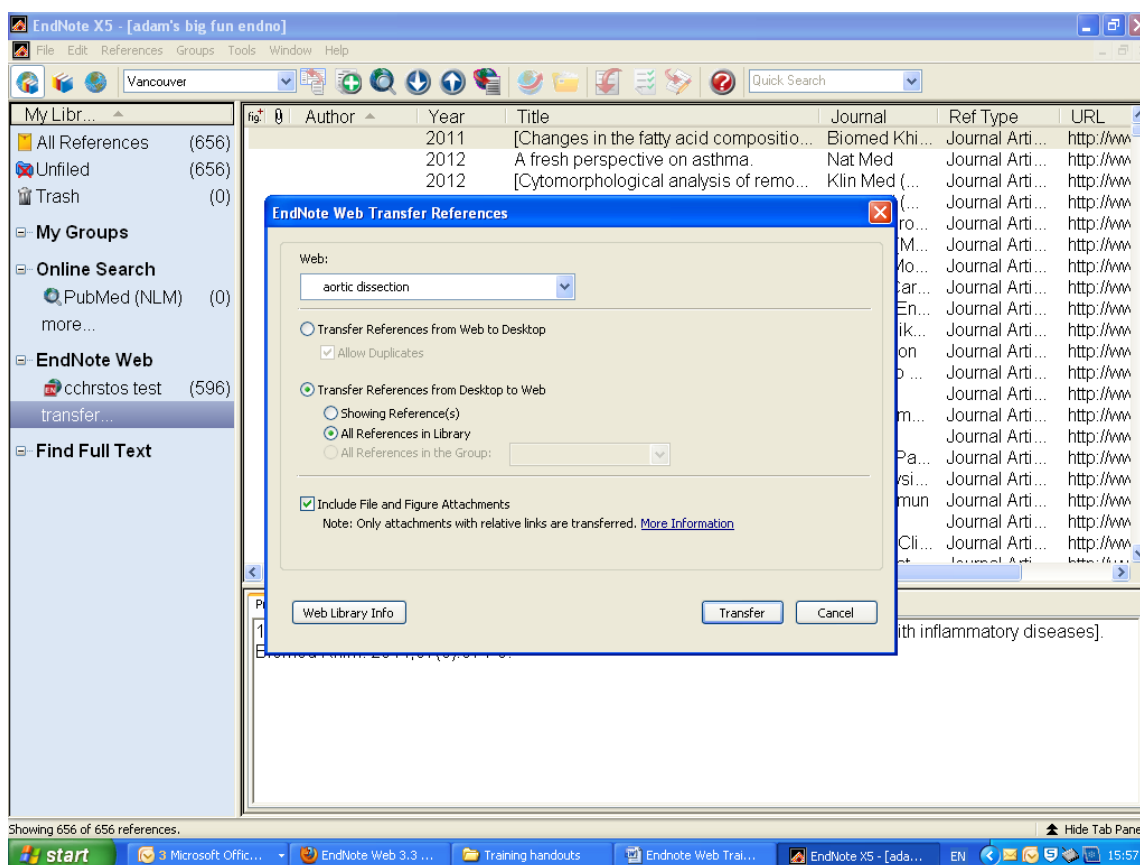
Make sure your EndNote Online library is open in a browser.

In desktop EndNote X5, go to Transfer from the panel on the left.

In the dialogue window that appears, choose which of your EndNote Online groups you want to send the references/group to, by selecting from the dropdown menu under 'Web:'

Tick the 'Transfer References from desktop to Web' button and choose which group you want to transfer, or select All References to copy everything to EndNote Online.

Uncheck the 'Include file and figure attachments' button and click on 'Transfer'.



Transferring from EndNote Online to desktop EndNote X5:

Make sure your EndNote Online library is open in a browser.

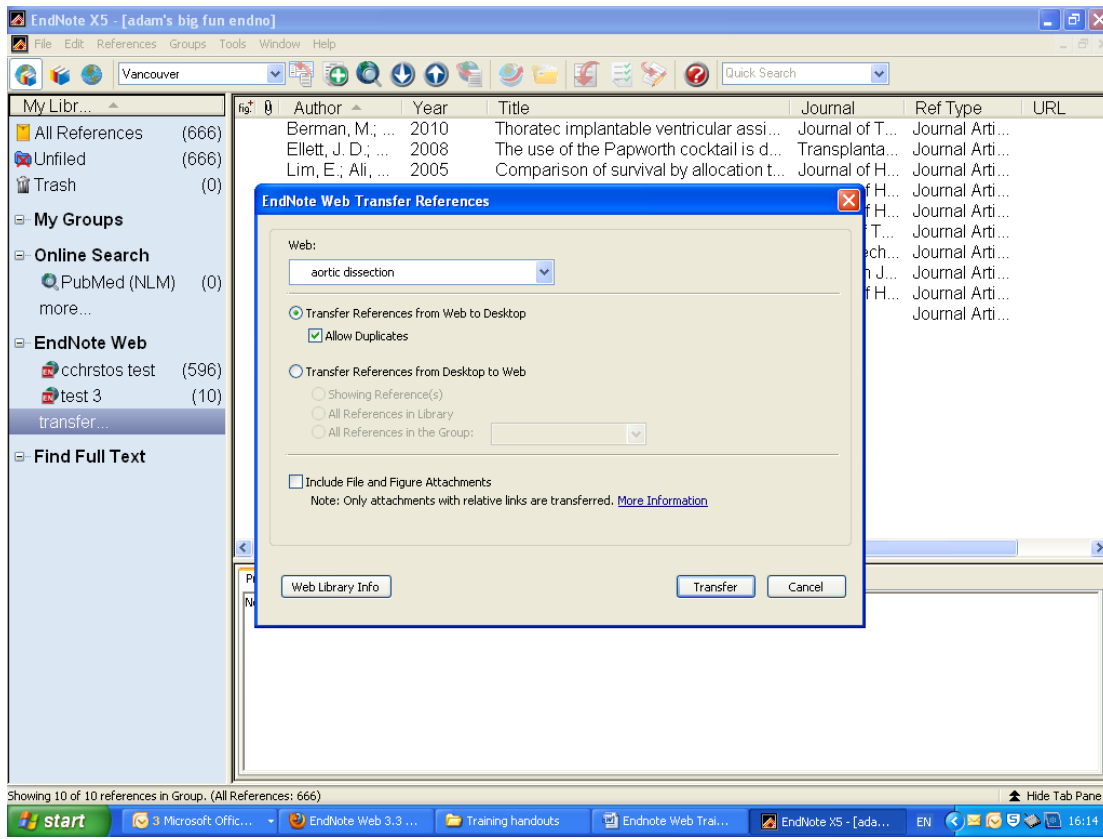
In desktop EndNote X5, go to Transfer from the panel on the left.

In the dialogue window that appears choose which group you want to transfer by selecting from the dropdown menu under 'Web:'

Tick the 'Transfer References from Web to desktop' button.

Uncheck the 'Include file and figure attachments' button and click on 'Transfer'.

The group will appear in the panel on the left.



If you want to transfer file and figure attachments between EndNote Online and your desktop EndNote, you need to upgrade your EndNote Online account. To do this, in desktop EndNote go to 'Edit', then choose preferences from the bottom of the drop-down menu. Next, click on Activate in the dialogue window and follow the on-screen instructions.

Useful resources

Online tutorial videos: <http://www.youtube.com/endnotetraining>

The official EndNote Online Quick Start Guide:

<http://endnote.com/sites/en/files/m/pdf/en-online-grc.pdf>

For assistance, please contact the library:

papworth.library@nhs.net ext. 4699