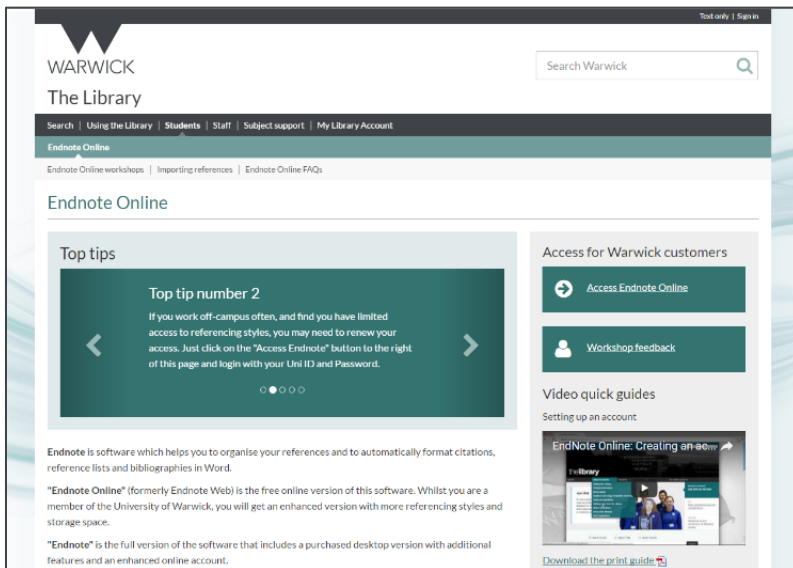


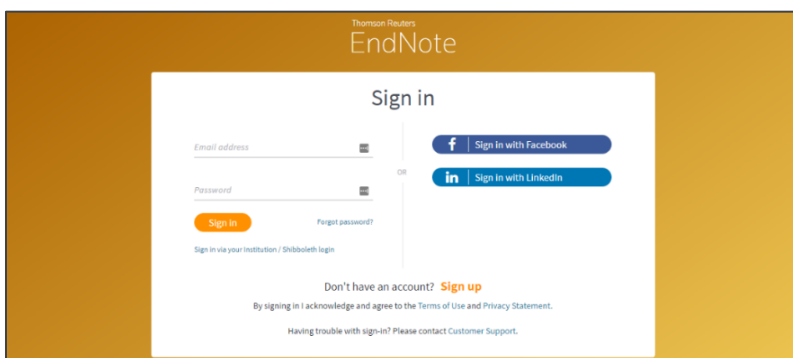
# Introduction to EndNote Online

## Creating an EndNote Online account

1. Go to [EndNote Online](#).



2. Click on the **Access EndNote Online** button and, if prompted, enter your Warwick username and password to confirm you are a member of the University.
3. On the EndNote homepage, click **Sign Up** and type in the email address you want to use for your EndNote Online account.



4. Complete the **Password, First Name** and **Last Name** fields and then click the **Sign Up** button. **Note:** Your password should be a minimum of 8 characters long and contain at least one letter, one number and one special character (!@#\$%^&\*()~`{}| \&\_).
5. Check your email for a confirmation message and click on the link to validate your account.

Your EndNote Online account is activated for 12 months. This gives you access to number of enhanced features that are not available with a standard EndNote Basic account, including

additional referencing styles and the ability to connect directly to Library Search from within EndNote Online. Each time you log in from the Library's EndNote page your account will be renewed for a further 12 months.

Alternatively, once you have created an account you can [login](#) to EndNote Online directly at [myendnoteweb.com](http://myendnoteweb.com). This will not renew your account and after 12 months you will notice that the range of styles available to you will be limited. To re-activate your account, log in to EndNote Online via the Library website.

## Creating and Sharing Groups

You can use Groups (or folders) to help you organise your references. Up to 5000 groups can be created.

1. Click on the **Organize** tab, then click **Manage My Groups**.
2. Click on **New Group**.
3. Type a group name in the box and click **OK**.
4. Your new group will be created and displayed in the list (there may be a short delay).

### Quick Tip

You may need to override the pop up blocker and click on **New Group** again to create a group.

## Collecting references

### Manually entering references into EndNote Online

1. Click on the **Collect** tab at the top of the screen, then click on **New Reference**.
2. Click on the box labelled **Reference Type** and select the type of material you want to reference from the dropdown list (e.g. Book, Journal article, Book Section, etc.).
3. Type in the details of the item. **Note:** You do not need to complete all the fields, but you should enter enough information to create a complete reference in your chosen style (e.g. for a book reference in Harvard, you will need author, date, book title, place of publication and publisher).

4. If you want to add a reference to a particular group, go to the bottom of the screen. Click on the arrow next to **Groups** to display them and select the group you want to send the references to.
5. EndNote Online will automatically save your reference or will prompt you if the reference needs to be saved.

### Quick Tips

*Entering Authors:* Enter each author on a separate line with the surname first, followed by a comma and then the first name(s) or initial(s), e.g. **Smith, John**.

*Corporate Authors:* When entering a corporate author, you need to add a comma at the end of the organisation's name, for example: **University of Warwick,**

This will ensure that the organisation's name is formatted correctly in your final reference list.

## Importing references into EndNote Online from a database

Many databases allow you to import references into your EndNote Online account without having to type them in.

There are two main methods of transferring references:

1. Directly export your selected references from the database to EndNote Online.
2. Save your selected references as a text file and then import them into your account.

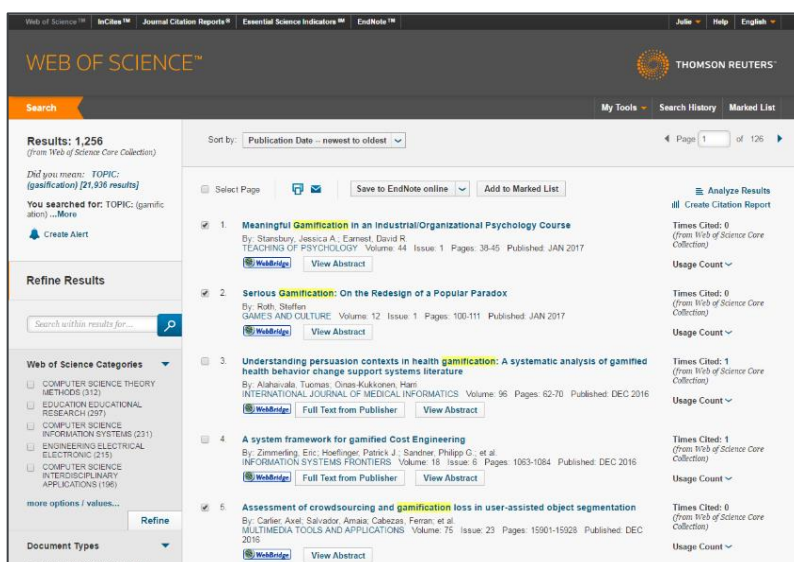
### Quick Tip

*Importing References:* The way in which you import references will vary, depending on which database you are using. Further information about how to import from that various databases and platforms that the Library subscribes to are available from [importing references](#) on the Library website.

## Direct export from Web of Science

As Web of Science and EndNote are owned by the same company, transferring references between the two can be done very simply using a one step process.

1. Search Library Search for Web of Science. (You may be prompted to log in using your Warwick username and password.)
2. Run a **Basic Search** on the topic of your choice.
3. Select some references by ticking the checkboxes (to the left of the search results) and then click on the **Save to EndNote online** option at the top of the page.



4. Decide on the level of detail you want to import and click **Send**. In Web of Science, the recommended option is Author, Title, Source and Abstract. **Note:** Full Record sends full bibliographic information for the selected article, rather than the full text.
5. Open your EndNote Online account. Click on the **My References** tab. You should see your exported references in the **Unfiled** folder. If you cannot see them, refresh your screen and they should appear.
6. If you want to add the references to a particular group, select them using the checkboxes and click on the **Add to group...** dropdown at the top of the page. Then choose the group you want to send the references to.

## Importing references from databases and e-journals without a direct import option

To import references from databases and electronic journals without a direct export option you will first need to save your selected references as a file. See [importing references](#) on the Library website for full instructions on how to save references in different databases.

To import a saved file, go to EndNote Online and click on the **Collect** tab at the top of the screen.

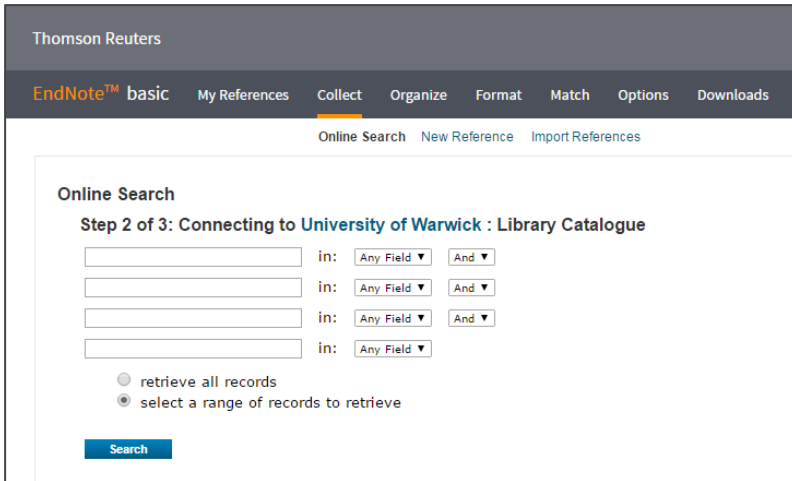
1. Select Import References.
2. Choose the file that you have saved.
3. Use the **Import Option** dropdown to select a filter. Although the specific journal or database you are using may appear in the list, you will usually need to select one of two generic import filters: **EndNote Import** or **RefMan RIS**. You may need to test them both to see which one works.
4. Choose which group (if any) you want to add the references to. (The default is Unfiled.)
5. Click **Import**.
6. You should see a message towards the top of the screen confirming that the references have been imported. If you get a message saying no references or the wrong number of references have been imported, go back and try the other generic filter.

## Importing references from Library Search from within EndNote Online

Importing references from Library Search must be done from within EndNote Online.

1. Click on the **Collect** tab at the top of the screen.
2. Click the drop down menu under **Online Search** and choose **U Warwick**. You can also save U Warwick as a favourite, to avoiding scrolling through the list each time.

3. Click the **Connect** button.
4. On the next screen, type your keywords into the search box. **Note:** You can search for up to four words at a time. You can also choose just to search for information in a particular field (e.g. Author, Title, Subject) by selecting the relevant option from the drop down box.



The screenshot shows the Thomson Reuters EndNote Online interface. The top navigation bar includes 'EndNote™ basic', 'My References', 'Collect', 'Organize', 'Format', 'Match', 'Options', and 'Downloads'. Below this, there are links for 'Online Search', 'New Reference', and 'Import References'. The main content area is titled 'Online Search' and shows 'Step 2 of 3: Connecting to University of Warwick : Library Catalogue'. It features four search input fields, each with an 'in:' label and a dropdown menu set to 'Any Field'. Below the fields are two radio button options: 'retrieve all records' (unselected) and 'select a range of records to retrieve' (selected). A blue 'Search' button is located at the bottom left of the search area.

5. Click the **Search** button.
6. Once the search is complete, the number of items found is displayed.
7. Alternatively, you can opt to retrieve only a selection of the references (e.g. the first 50) by typing the number range into the boxes.
8. You now need to review the references found and tick the ones you wish to add to your EndNote Online account.
9. Once you have done that, use the **Add to group** drop down menu and select which of your groups you would like to store the references in.
10. The marked references will be added to the selected group.

# Cite While You Write: Using EndNote Online to format a list of references in Word

## Downloading Cite While You Write (CWYW) from on-campus

Cite While You Write should already be installed on ITS-managed machines on campus, but may be set to connect to EndNote desktop. To switch to EndNote Online:

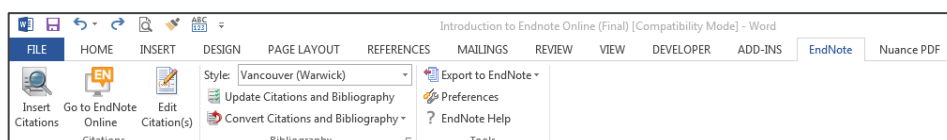
1. Open up Microsoft Word as normal.
2. Click on the EndNote X7 or X8 tab and select **Preferences**.
3. Click on the **Application** tab and select EndNote Online from the drop-down menu. Click **OK**.  
**Note:** If you are using a shared machine, leave **Remember my address and password** unchecked.
4. The correct EndNote tab will now be displayed and you can start to add references using the instructions below.

## Downloading Cite While You Write from off-campus

1. Close all Microsoft programs (e.g. Word and Outlook).
2. In your EndNote Online account click on the **Downloads** tab.
3. Select the appropriate version for your operating system.
4. Click **Run** to download the file when prompted and accept all of the default options.
5. Once the installation is complete, click **Finish**.

## Using Cite While You Write

Once Cite While You Write has been installed, the EndNote tab should appear in the Ribbon every time you open Word. Click on it to view the CWYW options. (You may be prompted to login to your EndNote Online account.)



## Choosing a referencing style

It is a good idea to set your referencing style before you start work on your document.

1. To see a complete list of all the available referencing styles, click on the arrow in the bottom right hand corner of the Bibliography group.
2. Click on the drop down menu and choose the output style (or format) for your bibliography.
3. Click on **OK** to apply the style to your document.

### **Quick Tip**

You can change the referencing style at any point and CWYW will reformat the references you have already inserted. Select the style you want to use and then click on the **Update Citations and Bibliography** icon (in the Bibliography Group) to apply it to your document.

## Inserting references

1. Type a sample sentence into your Word document and make sure that the cursor is at the point where you want to insert the citation.
2. Click on the **Insert Citations** icon to the far left of the Ribbon and search for the reference you want. You can search for references by author, keyword or year of publication.
3. Highlight the reference you want to use, then click **Insert** or double click on the selected reference.

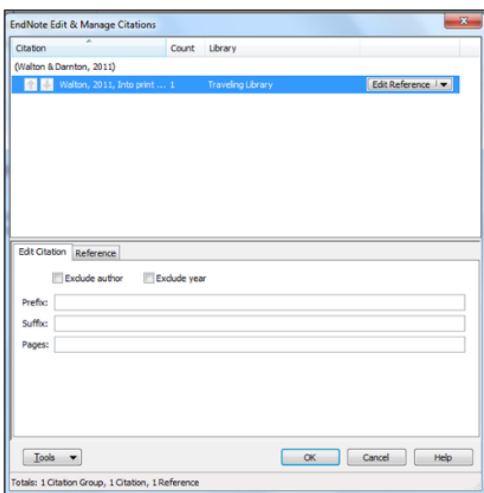


4. A citation will appear in the text and a list of references will automatically be created at the end of the document.

## Editing references

### Adding a page number

1. Open up your document in Word.
2. Click on the citation that you want to edit.
3. Click on the **Edit Citation(s)** icon in the toolbar. The Edit & Manage Citations box appears.



4. In the **Suffix** box, enter the page number in the format required by your style, including any punctuation. For example, to format your citation as (Smith, 2017, p.5) type a **comma** followed by a **space** then **p** then a **full stop** then your **page number**. **Note:** Page numbers should **always** be entered into the **Suffix** box and **not** the **Pages** box.
5. Click **OK**. Your citation will be updated to include the page number.

### Hiding an author

1. Click anywhere within the citation you want to hide the author for.
2. Click on the **Edit Citation(s)** icon in the toolbar. The Edit Citation box appears.
3. Tick the box labelled **Exclude author** then click OK. **Note:** There is also the option to exclude the publication year, if you need to do this. Click **OK**.

## Deleting a reference

If you want to delete any of the citations in the document, you should use the **Edit Citations** icon to ensure that the reference is properly deleted. If you use the Delete or ← (backspace) keys to delete a reference in Word, it may reappear in your document at a later date.

1. Select the citation you want to delete.
2. Click **Edit Citation** to open the Edit & Manage Citations box. The selected citation should be highlighted.
3. From the Edit Reference dropdown, select **Remove Citation**.
4. This will delete the citation and full reference from the bibliography. It does not remove the reference from your EndNote Online account.

## Manually editing your document

You still need to proof-read your document. If you spot any errors, you have two options:

1. Re-find the reference in your EndNote online account, edit it as necessary and re-insert the reference.
2. Convert the document to a plain text version (see below) and make the necessary changes manually.

## To convert your document to plain text

1. Click on Convert Citations and Bibliography and select Convert to Plain Text.
2. A message appears telling you that a new version of your document will be created. Click **OK**.
3. This will create a completely new file. Save this as normal. This is the one which should be submitted electronically.

**Note:** if you want to make any further changes to your assignment, you must do this in the original version of your document and then repeat the process above to get a new, final version for submission.

## Creating a standalone bibliography from a list of references

1. In EndNote Online, click on the **Format** tab and select **Bibliography**.
2. From the **References** dropdown, select the group you would like to create your bibliography from, or to include all reference in your account, select **All References in My Library**.
3. Under **Bibliographic Style** select the citation style you wish to use.
4. Under **File Format**, select RTF (rich text file).
5. You can now choose to **Save, Email or Print** your bibliography. If saved, you can now open the file in Microsoft Word as normal and view your bibliography.

## Preparing to submit your assignment electronically

If you have to submit your document electronically, including emailing it to a tutor or colleague, you will need to remove the field codes that EndNote Online uses to format your document. The easiest way to do this is to convert your document to a plain text version or a PDF file. Converting your document to a plain text file will allow your reader to use the Track Changes feature.

## Further help

- [Email](#) the Library
- [Find](#) further EndNote Online materials from the Library
- [View](#) our EndNote Online videos
- [Sign up](#) for one of our EndNote Online workshops at the Library