

Introductory guide to setting up and using an Endnote basic account

As you carry out your research you will find many useful sources of information and it is helpful to think about how you wish to organise these. One option is to use a reference management tool such as Endnote Online, which will allow you to store information about the sources you find and create references for those that you have used in your work.

This is an introductory guide to using the Online version of Endnote, to get started you will first need to register for an account.

Step 1

Registering for an Endnote Online account

Go to: [MyEndNoteWeb](#) and register online. You will need to click on **Register** to get started where you will have the opportunity to set up an account with an email and password of your choice. A confirmation will be sent to the email address that you have registered with, but you may need to check the spam box as this is sometimes where it ends up. If you already have an account just sign in using your account details from this page. If you have an account but have forgotten your password it is easily retrieved.

EndNote basic users can create an online library with a maximum of 50,000 references and up to 2G of attachments.

Step 2

How you get your records/references into Endnote will depend upon where you currently search for literature. Some databases/search tools allow a direct export whereas others require you to save RIS files and import the files in. It is also possible to use a bookmarking tool for sources such as websites or add records manually.

Searching for information in Discovery or EBSCO databases

Go to the [Library Website](#) where you can carry out a Discovery search. This will allow you to send anything useful that you find directly to your Endnote account. Carry out a search on a topic of interest in either basic or advanced search.



EBSCO Discovery Service
Search the full content of our eresources - find articles, ebooks, reports and more

evolutionary biology in All Subjects Search

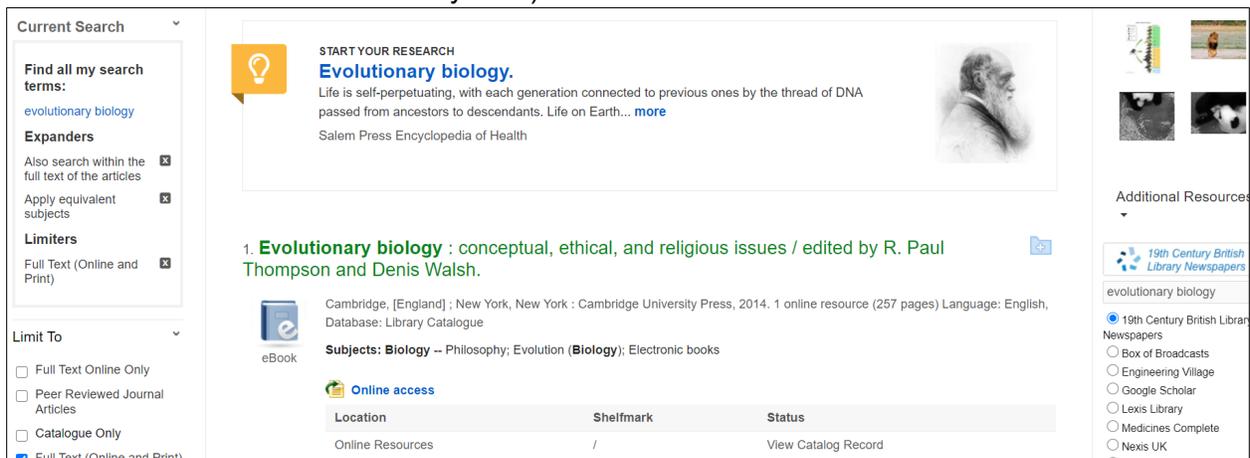
You can also search for [ejournals](#) covered in Discovery by title or browse by discipline.

More complex searches can be performed using Discovery's [advanced search page](#). For addi

Step 3

Selecting your records in Discovery

From your list of results select some of the records by clicking on the blue file icon to the right of each record, this will add them to the **folder**; this can be accessed on the top purple bar (the folder next to each record will turn yellow).



Current Search

Find all my search terms:
evolutionary biology

Expanders

Also search within the full text of the articles

Apply equivalent subjects

Limiters

Full Text (Online and Print)

Limit To

Full Text Online Only

Peer Reviewed Journal Articles

Catalogue Only

Full Text (Online and Print)

START YOUR RESEARCH
Evolutionary biology.
Life is self-perpetuating, with each generation connected to previous ones by the thread of DNA passed from ancestors to descendants. Life on Earth... [more](#)
Salem Press Encyclopedia of Health

1. **Evolutionary biology : conceptual, ethical, and religious issues / edited by R. Paul Thompson and Denis Walsh.**

Cambridge, [England] ; New York, New York : Cambridge University Press, 2014. 1 online resource (257 pages) Language: English, Database: Library Catalogue

Subjects: Biology -- Philosophy; Evolution (**Biology**); Electronic books

Online access

Location	Shelfmark	Status
Online Resources	/	View Catalog Record

Additional Resources

19th Century British Library Newspapers

evolutionary biology

19th Century British Library Newspapers

Box of Broadcasts

Engineering Village

Google Scholar

Lexis Library

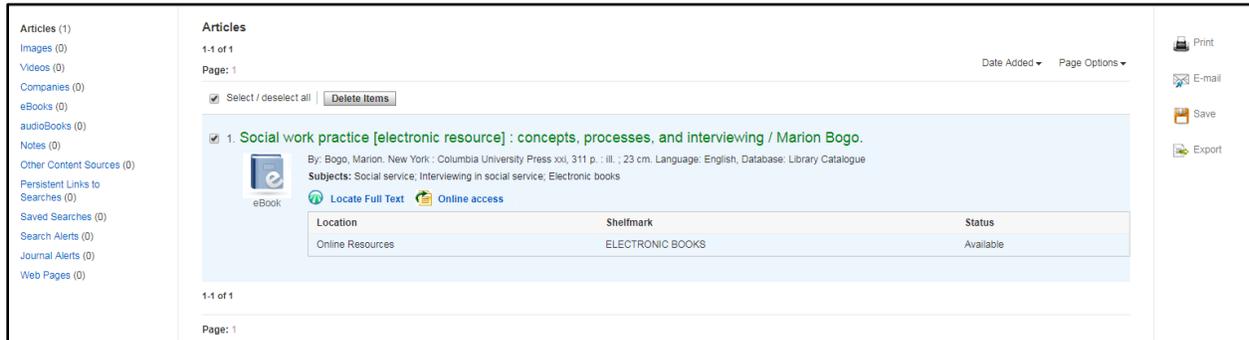
Medicines Complete

Nexis UK

Step 4

Sending records to Endnote online

Now go to your folder view on the top purple bar and from here select the records that you wish to transfer to Endnote. Click **Export** and select **Direct export to Endnote Online**



The screenshot shows a library interface with a sidebar on the left containing various search and filter options. The main area displays a list of articles. The first article is selected, and its details are shown below the list. The 'Export' button is visible in the top right corner of the interface.

Articles (1)
Images (0)
Videos (0)
Companies (0)
eBooks (0)
audioBooks (0)
Notes (0)
Other Content Sources (0)
Persistent Links to Searches (0)
Saved Searches (0)
Search Alerts (0)
Journal Alerts (0)
Web Pages (0)

Articles
1-1 of 1
Page: 1
Date Added ▾ Page Options ▾

Select / deselect all

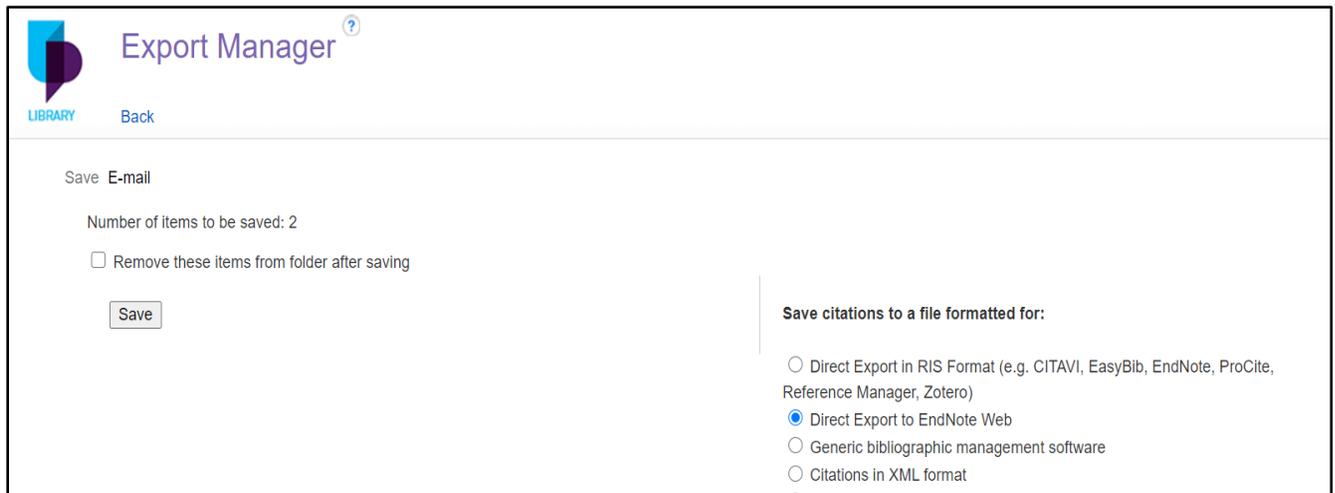
1. **Social work practice [electronic resource] : concepts, processes, and interviewing / Marion Bogo.**
By: Bogo, Marion. New York : Columbia University Press xxi, 311 p. : ill. ; 23 cm. Language: English, Database: Library Catalogue
Subjects: Social service; interviewing in social service; Electronic books
[Locate Full Text](#) [Online access](#)

Location	Shelfmark	Status
Online Resources	ELECTRONIC BOOKS	Available

1-1 of 1
Page: 1

Print
E-mail
Save
Export

From here click **Save**



The screenshot shows the 'Export Manager' interface. The 'Save E-mail' section is active, and the 'Save citations to a file formatted for:' section is visible. The 'Direct Export to EndNote Web' option is selected.

LIBRARY Back

Save E-mail

Number of items to be saved: 2

Remove these items from folder after saving

Save citations to a file formatted for:

- Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)
- Direct Export to EndNote Web
- Generic bibliographic management software
- Citations in XML format
- Citations in PDF format

Step 5

Viewing your references in Endnote Online

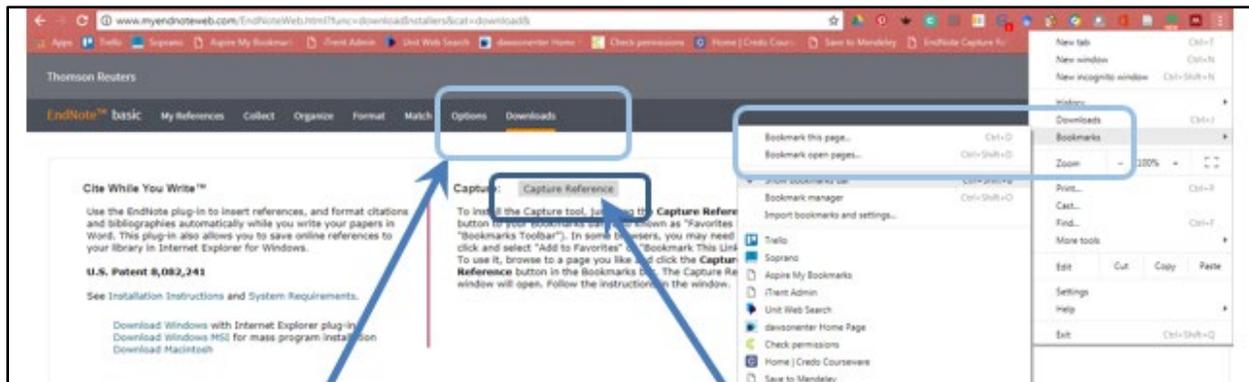
At this stage you may be asked to enter your email address and password for Endnote if not already logged in. Any references that have been exported to Endnote in this way will be stored in the **Unfiled** section. You can organise these into groups if you wish at a later stage (**see Step 10**)

It is important to look at your references carefully once they are in Endnote as you cannot assume that once they are imported that they will produce an exact APA 6th style format. Check to make sure you have all the details needed for your reference including author, title, date etc. **(See Step 8 for more information about editing)**

Step 6

Using the Capture Reference tool with websites

Go to the downloads tab in Endnote, from here you can drag and drop the Capture Reference tool to your bookmarks toolbar.



Go to a website that you are interested in and click **Capture Reference** on your toolbar to capture the record.

It is worth checking that the record includes the correct information such as reference type, author details, date etc. at this point.

If it is an organisation rather than an individual author you will need to put a comma after the organisation name:

e.g. **National Health Service,**

Use the [referencing](#) section of the library website to help you work out whether your references look correct, as tools such as these may not always import records correctly. You may need to edit records in Endnote (see Step 9)

If you are not using the APA 7th referencing format, it is possible to select an alternative referencing style within Endnote.

Step 7

Adding into Endnote in other ways

Manual entry

You might decide at some point to add a manual record to Endnote.

From the **Collect** tab in Endnote select **New reference**. Choose your resource type and then add information to the relevant fields that you need to create an APA 7th reference.

When using different databases you may not be able to export your references directly as is possible in a Discovery search. In this case, you will need to save your records as a file (often a RIS file) and then import them using the **Collect** tab and **Import references**.

Importing records using RIS files

Some databases such as Scopus allow you to select your search records and export them as a RIS file. You will need to save the RIS file to a suitable location on your computer for later retrieval. Within Endnote go to the **Collect** tab to open up the Import References window. Find the location of your chosen RIS file and select an appropriate Import Option (in this case Scopus) and where you wish the records to go. Click Import.

Adding PDF documents

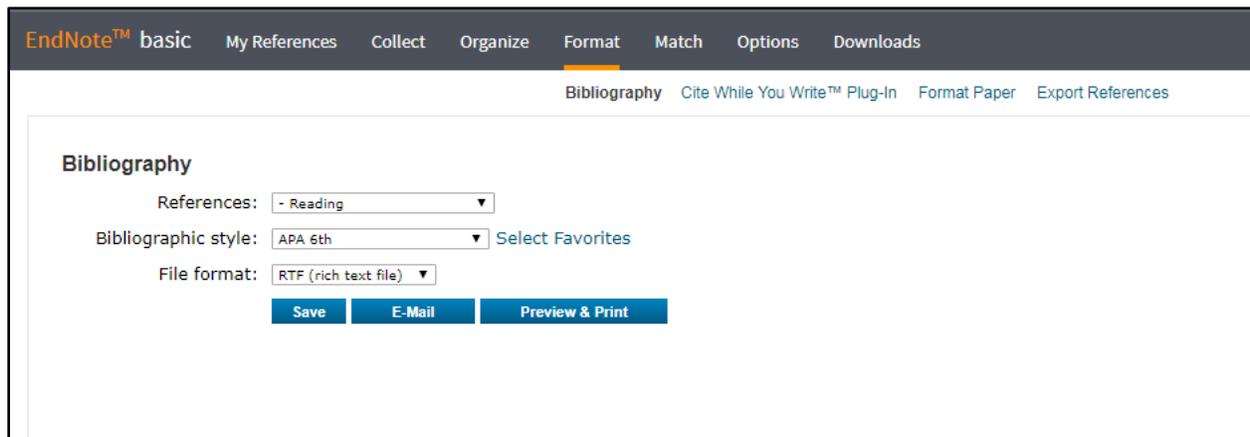
PDFs can be added to individual records using the paperclip icon beneath the individual record, click attach file and then select the location of the file to import it

Step 8

Creating a reference list or bibliography

To create a stand alone reference list or bibliography in Endnote basic go to **Format**, **Bibliography** and select where your references are coming from (you can select from groups that you have created - see step 10 for more information) and choose the **APA 7th file format** along with **RTF file format**. Next select **Print/Preview** (see image below) to download your list.

It is important to check the items contained in this list against the APA 7th guide and edit accordingly (step 9).



You can also use the **Cite While You Write** functionality by linking your Word documents using a plug in. This will allow you to cite sources in your work and create a bibliography at the same time as you write. You may wish to visit the [Endnote Online website](#) for more information.

Step 9

Editing references in Endnote Online

If any of your references look incorrect you will need to edit them yourself. To do this you will need to click on the blue title of the record in your Endnote Online account. You can see all of your references by clicking on the **My references** tab.

Choose the reference that you wish to edit and then correct or add information to the relevant fields. You will not need to add information to all of the fields listed, just the ones that are required for a reference in the desired style.

Step 10

Organising your references in Endnote Online

You can organise your references into groups by subjects of your choice. To do this select the **Organize** tab and create a new group with a name of your choice. To put records into your groups select your **Unfiled** references and then choose the references that you wish to move by clicking each record on the left. From here, choose the appropriate group from the **Add to group** drop down list.

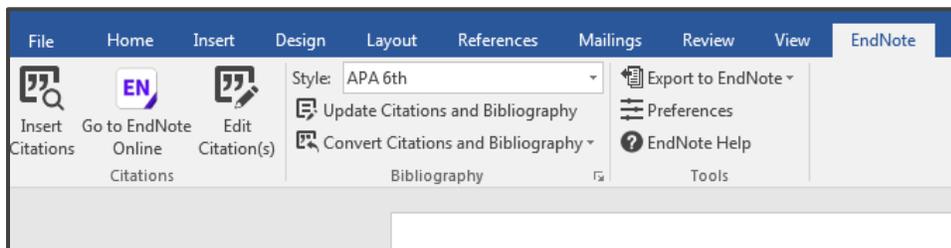
It is also possible to share folders with people that you are working with.

And finally.... Endnote installers and Cite While You Write

You can download **Cite While You Write** in **Word** onto your own PC or laptop. Instructions are found under **Options** in your Endnote account. Follow the installation instructions.

If you wish to install Cite While You Write onto a University PC you will need to use Apps Anywhere available from your Desktop. This will be listed as EndNote X6. Once launched open a Word document and you should see an additional EndNote X6 tab appear. Click this tab and select Preferences followed by Application. From the drop down menu choose Endnote Web and enter your usual Endnote login details. You should now be able to use Cite While You Write functionality whilst using Word.

After installing the plugin the EndNote tab will appear in the Word ribbon when you open a Word document, allowing you to insert citations and taking you to your EndNote library



In your document click Insert citations and search for the citation that you wish to insert. This will bring up a list of possible options and details of the article underneath. Click "Insert" to add the citation and the entry to your bibliography. The citation style is the default style you have chosen on first use of the plug-in and can be changed in the "Style:" drop down. It is also possible to produce a standalone Bibliography using the Format tab in EndNote.

Further help and support

Additional support is available from the Endnote site:

[Clarivate Libguides/Endnote](#)

[Clarivate Libguides 34785308](#)

Alternatively, you can contact us at sciencelibrarians@port.ac.uk (Sarah Weston / Ann Hindson)