Referencing	Getting started with EndNote Basic –the online version
University Library	

What is EndNote Basic?

EndNote Basic is an online reference management tool. This offers two services via the Internet.
1)   A central place to store all your references from a range of databases in one place, available for use on any computer with Internet access. Can hold up to 50,000 references.

2)   A "Cite While You Write" tool which integrates with Microsoft Office allowing you to correctly cite both your text and your reference list/bibliography.
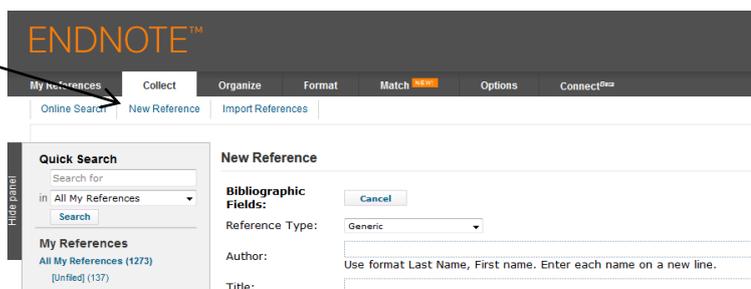
Please refer to separate guide on Registering with EndNote.

Building references
References can be entered manually or by importing records from other databases and services.

Adding manually
Click on the Collect tab then select new. Ensure you select the correct **Reference Type** from the drop down menu before entering data: book, book section for a chapter, journal etc.

Ensure you complete all fields needed for your reference style using the right fields. Other fields can be left blank.

Follow author advice carefully, use the comma to separate last name from forenames. For a corporate author use the comma to show end of full name e.g. University of Portsmouth, - otherwise your citation may appear to be written by University, O.P.
If you are using groups to organize your references this field appears at the bottom of the record. References are saved by clicking once on the Save button – note you will be informed that the record has been saved.

Online Search – *with most databases offering export facilities we recommend that this form of searching from within EndNote is not used – there are very limited working links and the search facility is very basic*.

Importing from databases
Most databases offer an export feature to work with EndNote. Sometimes having EndNote open will enable these downloads to run directly into EndNote (e.g. Ebsco Discovery and their other databases). For others the exported file will be saved on your computer and you will need to direct EndNote to find it and then import the reference.

Discovery tool and other Ebsco Databases

This covers the library default search, and databases such as CINAHL, Communication and Mass Media Complete, Business Source Complete, EconLit, SPORTDiscus, International Bibliography of the Social Sciences and PsycInfo.

This handout assumes that you have done a search and have some references you wish to transfer to EndNote.

At the side of each reference you will see a blue folder icon. Click on this icon for each reference you want to transfer to EndNote.

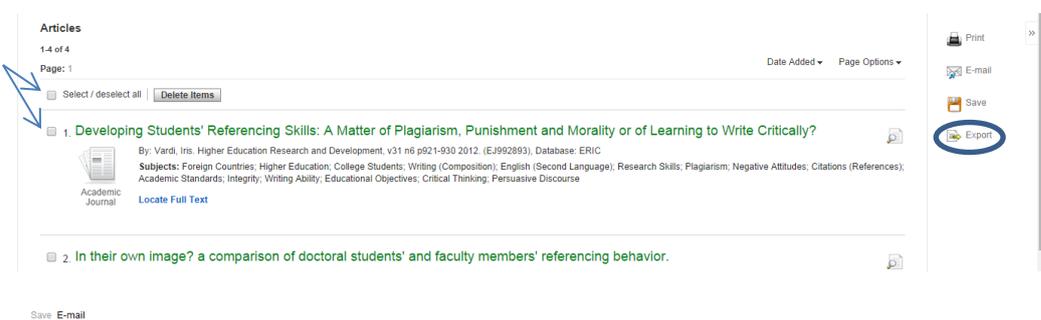You will see it change colour to yellow if saved successfully.

When you have selected all you want, click on the Folder on the purple bar at the top of the page.

You will now see the contents of the folder

Tick **select all** or the box next to each required reference if you decide to miss some out.

Then click on the Export logo on the right of the page.

Select **Direct Export to EndNote Web** and then click on save.

Note you can select to have items removed from folder but beware if the import fails you will have to reselect results into folder.

It is useful to have EndNote basic open while carrying out this process. You can see EBSCOhost Import Results on-screen, although it often opens a new window!

Note: When you look at My References the imported references will be found in the [Unfiled] group. You can move them into groups on this page.

Using Import Filter

If the database you are working with offers a file download rather than a direct export you will need to use the **Import References** feature. When downloading files you may be offered some choices about file types.

If EndNoteweb or EndNote Basic is offered select that.
If Refman is offered (as in Google Scholar) select that.
Use a RIS file option if offered as the next preferred file type.

If offered the option to enter your own filename make a note of your choice and also write down where the file is going to be saved. If this is not shown try looking in My Documents or in any downloads folder.

You need to retrieve these files by going to Collect tab and selecting Import References.

It is important to use the Import Option that matches the file type – click on the down arrow to see choices.

Remember you can also select a group at this point rather than the default Unfiled.

Once these are set, click on browse to find the file.
If you use a Windows based device and were not offered a choice of where to store your files try your My document/Download/Chrome downloads folder as the first place you browse. Then click on Import.
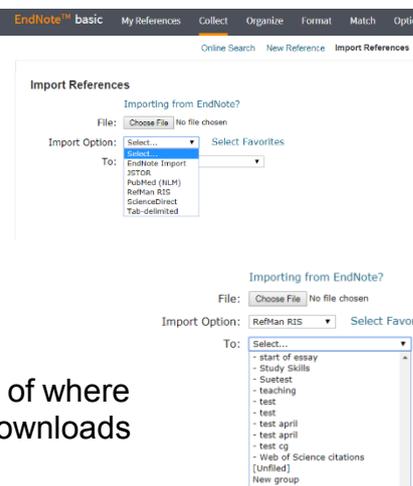
Groups
References can be added to many different groups. Groups can be created on the fly when importing references or working with My References. The Organize tab offers a central place for managing groups.
Click the Organize Tab, then Manage My Groups – a list of your current groups will appear and underneath there is a New Group button – click the Button and enter your new group name.
Note it is possible to share groups with other EndNote Users.

Editing References
Importing references transfers them as they originally appear complete with faulty presentation, e.g. article titles given in capitals, shortened journal titles, books may have authors transferred within title field. Edit these items before you are under the stress of typing up your work. Identify reference as listed in My References tab and click on the title which will open the edit tool.
To see exactly how a group of references will look in an APA list use the Format tab to select Bibliography and then select appropriate references and preview them in APA style – if you look at these you will have a list you can scan for obvious errors – this will help you identify any reference you need to edit manually so that it imports correctly into Word when you use Cite While You Write. Some users find this service good enough to use to append to their work as their Reference List. They then do their own citing within the body of their work.

Cite While You Write
To be able to work with EndNote and Microsoft Word you need to download the correct plugin and install it. Do this ensuring Word/All Office applications are closed. If using a UoP computer use **Apps anywhere** application.

Using your own devices try this:
Click on the Format Tab and then select the correct plugin to download (Note the "Download installers" is an option that is also listed at the foot of every page) and install.

The plugin enables both the full PC version of EndNote or EndNote Basic. You should see an extra tab appear in your Microsoft Word ribbon. Check that your tab says EndNote Web. If it does not click on Preferences. From the pop-up select application and then EndNote Web:
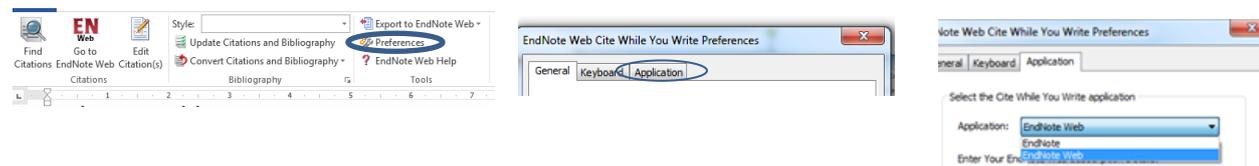
When using these two packages together you must be methodical about using the EndNote tab to insert your references and to edit them – this includes removing references – do not use the Word delete key.

Look closely at the EndNote Web tab

To insert citations and references into a word document open the document, check under style that you have the required format selected – click on arrow to change it.
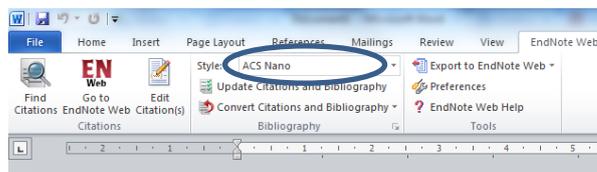

Place your cursor where you wish to insert a citation in your text and click on **Find Citations** button. You will be asked to login the first time you do this. When the search box opens search for the citation you want. Highlight the required item and click on **Insert**. EndNote will insert your citation in the selected style and automatically generate the bibliography at the end of your paper.

If you want to change the layout of the citation highlight the citation and click on Edit Citation –The bottom half of the edit Screen allows you to edit the layout of the citation e.g. if using APA remove the author from the bracketed citation so you can use it in your text, add a page reference for a direct quote etc.

If the citation or end reference is incorrect **do not edit this in Word**. Go to your EndNote library, find the reference and correct it at source. Return to Word. You can then highlight the citation, select Edit citation and from the menu click on "Update from my library" to resolve just one problem. If you have multiple citations to correct, edit them all at source and then select Update Citations and Bibliography from the Central panel:
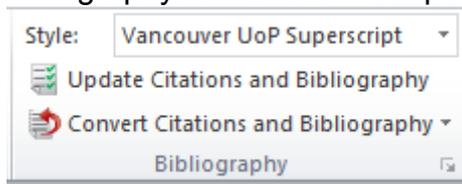
If you wish to alter the layout of your bibliography (e.g. add title or remove hanging indent) click on the expand button of the Bibliography box:
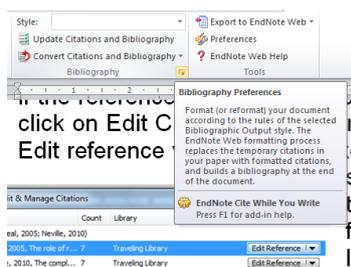
This will bring up this dialogue box. Click on the layout tab to make your changes.
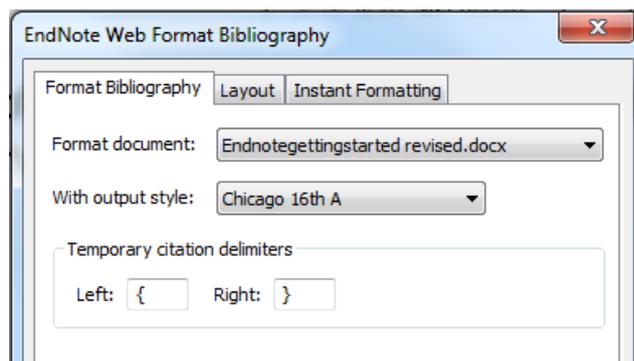
If this guide does not cover all your queries do take a look at the help pages on the EndNote web site:
http://www.myendnoteweb.com/help/en_us/ENW/help.htm

There are also many EndNote Web or EndNote Basic/Online YouTube videos to watch.