

# An introduction to EndNote Online

## A guide for healthcare students

### Section 1: About EndNote

**EndNote Online** is a service which allows you to collect, store and manage your own collection of references. It's free and can be accessed online from anywhere. It can be referred to as EndNote Web as well.

**For help** with EndNote Online, check the Library's EndNote help pages. On the Brookes Library home page [www.brookes.ac.uk/library/](http://www.brookes.ac.uk/library/) select 'How To.' from the grey toolbar and select 'Use EndNote'. Alternatively go straight to [www.brookes.ac.uk/library/how-to/use-endnote/](http://www.brookes.ac.uk/library/how-to/use-endnote/)

EndNote Online allows you to create your own database of references, known as a 'Library'.

- You can add references manually or transfer them from many databases and library catalogues. Your EndNote Library will be fully searchable and you can annotate your references e.g. to add your own notes or keywords.
- You can insert your EndNote references into Word documents in the form of citations and bibliographies, formatted in the style of your choice. We have made the local Brookes Harvard style available on EndNote Online.

#### EndNote desktop

There is also a software version known as EndNote desktop, which has the same key functionality as the Online version with some additional features. You can also transfer references between the two versions. Further information is on our EndNote help pages.

### Section 2: Setting up your EndNote Online Library

#### 2.1 To access EndNote Online

1. Go to the EndNote webpages [www.brookes.ac.uk/library/how-to/use-endnote/](http://www.brookes.ac.uk/library/how-to/use-endnote/) and select the "Get started section".
2. Select the heading, 'Create an EndNote Online account' and click, 'Go to EndNote Online'. You may be prompted to log in with your Brookes username and password.

**You will be taken to the EndNote sign in page.**

#### 2.2 Create your EndNote Library account

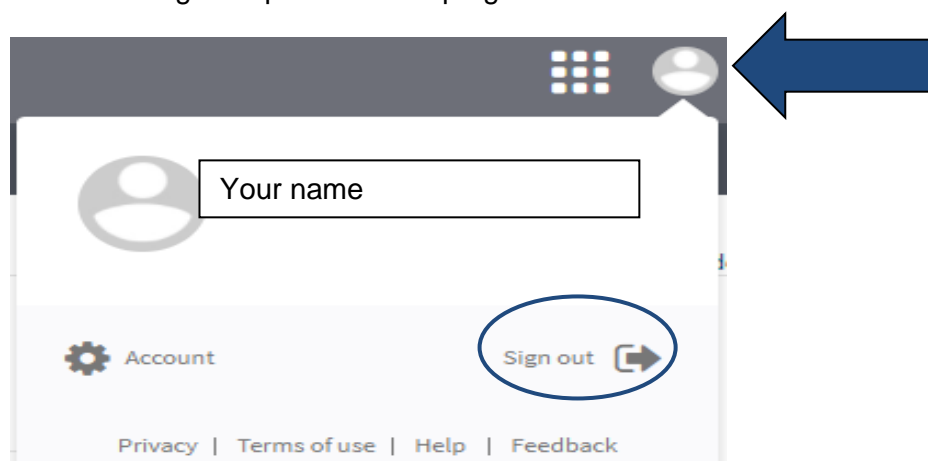
To set up your EndNote Web account, or 'Library':

1. At the EndNote sign in page, don't sign in. Instead, click on '**Register**' middle right of screen.
2. Type in your email address to start the registration process. You will be prompted to choose a new password for your EndNote Online account.
3. Once the registration process is complete, you'll be able to sign into your EndNote Online account in future with your email address and chosen password.

## 2.3 Check you have 'roaming access' – eg to the BrookesHarvard style

As a member of Brookes you can get access to added features such as the Brookes referencing styles through 'roaming access'. When you first create your account, we recommend that you check whether you have roaming access activated:

1. Sign in to your EndNote account.
2. In EndNote, select 'Options' top menu bar and 'Subscription'. If this shows you have roaming access for a year, you don't need to do anything further.
3. If it tells you to activate your roaming access, sign out of your EndNote Online account using the option at the top right of the screen.



This will take you back to the EndNote sign in page.

4. Open up a new tab. Go to the Library homepage. Locate the search box.
5. Select the 'Databases' option and select 'W'. Select Web of Science
6. The entry for Web of Science will be shown. Click on the link that says 'Search Collection Directly at the Provider' (right of screen). If prompted, sign in with your Brookes ID and password.
7. Click the 'Access Now' button.
8. Click on the 'EndNote' option on the black toolbar.
9. You will be returned to the EndNote sign in page. Sign in to your EndNote account. Choose 'Options' from the top menu bar and 'Subscription' to check roaming access has been activated. You are now set up.

## Section 3: Building your EndNote Online Library

You can add references to your Library manually or transfer references and PDFs from electronic resources such as databases or library catalogues.

### 3.1 Adding a reference manually

1. In EndNote Online, click on the 'Collect' tab and select 'New Reference'
2. Select the reference type you require from the drop-down list of options e.g. book/journal article/web page.
3. Type the details of your reference into the relevant fields. EndNote automatically saves each field as you add information.
4. If copying from Word, EndNote may copy the formatting of the text. Copying text from Notepad or WordPad will work better.
5. You can add your own notes to the 'Research Notes' field.

Try this yourself:

1. In EndNote Online, click on the 'Collect' tab and select 'New Reference'.
2. Use the drop-down menu next to Reference Type to select 'Journal article'

3. Add the following reference:  
Author: Lyman, Bret  
Title of article: Organizational learning in hospitals: a realist review  
Title of Journal: Journal of Advanced Nursing  
Source details: Year: 2019 Volume: 75 Issue: 11 Pages: 2352-2377
4. EndNote will automatically save each field as you add information.

### 3.2 Transferring references from LibrarySearch

An easy way to add references to your Library is to export them from LibrarySearch on the Brookes Library home page. Follow the steps below to add one reference or a batch of references to your EndNote Library:

On the Library home page [www.brookes.ac.uk/library/](http://www.brookes.ac.uk/library/) run a search on LibrarySearch. Tip: For book results, select 'Books & e-books' from the Format option, left-hand menu.

- If you want to just **transfer one reference**, click on the 'Cite' option next to the record details. Click on 'Export to EndNote'
- If you want to **transfer multiple references** in a batch, select each record that you want to transfer by clicking on the 'Save' option to the right of each. Click on 'My items' top right once you've finished selecting. On the 'My items' screen click on the 'Cite' option above the list of references. Click on 'Export to EndNote'.

When you click on '**Export to EndNote**', this will **download the file** to your PC.

#### **Import the file into EndNote Online:**

- Hover over the 'Collect' tab and click on the option 'Import references'
- Click on 'Choose', browse for your saved file and select it
- For 'Import option', select RefMan RIS from the drop-down A-Z list. You will need to scroll down to see RefMan RIS
- For the 'To' option, select the group in your library you would like the reference to go into. If you haven't made any groups, just add it to 'Unfiled'
- Click 'Import'.

### 3.3 Transferring references (and PDFs) from databases

Many databases allow you to transfer references into EndNote Online via an **import** or **direct export** feature. You can also save **PDFs** and store them in your EndNote library with the relevant reference.

Check the Library's EndNote help pages to see if the database works with EndNote Online and what options you will need to select:

1. Go to the Library's EndNote webpages  
<https://www.brookes.ac.uk/library/how-to/use-endnote>
2. Select the yellow button 'Add references'
3. Select the option 'Adding references from databases' to view further details, including a **link to a complete list of all databases** that work with EndNote.

### Exporting references from Cinahl into your EndNote Online library

Cinahl is an example of a database which allows you to export references directly.

**Run a search** on the database, then select records by clicking on the folder icon next to each.

**Click on 'Folder view'** to see selected references.

**Select references** you want to export and click the **Export option** on the right.

For EndNote Online: select the 2nd option **Direct export to EndNote Web** and Save. The references will be transferred to your EndNote Online library.

They will be added to the **'My references'** group, also to the **'Unfiled'** group. You can check the references have transferred correctly and add to the group of your choice.

### Transferring PDFs into your Library

EndNote Online also enables the storage of full-text files like PDFs. 2GB of file storage space is provided – a handy way to keep all your research together.

### Transferring a PDF from Cinahl

You will need to transfer the reference and PDF separately.

Transfer references as detailed above

**To save the PDF from Cinahl**, click on the PDF option to view and download the file to your computer.

**In your EndNote Library**, find the article you want to attach the PDF to. At the bottom of the reference details, click on the **paperclip icon**

**Click the 'Attach file' link**. This will open a dialogue box. Click on the 'Browse' button and locate the file you wish to upload.

Click the **'Upload' button** to save a copy of the PDF file in EndNote.

### 3.4 Organising your references into groups

EndNote Online allows you to organise your references into groups. For example, you might want to create groups of references relating to different subjects or modules you are studying. References can belong to more than one group. You can also share groups with other EndNote Online users (read only or read and write).

- **To create a group**, click in the check box next to the reference(s) you wish to add. Use the drop-down menu above the list of references to create a new group and give it a name.
- **To add references to an existing group**, click in the check box next to the reference(s). Use the drop-down menu above the list of references to add these references to the group. Note that you can add references to more than one group if you wish.
- **To share a group with another EndNote Online user**, click on the 'Organize tab' and select 'Manage My Groups'. Click on the 'Manage Sharing' button. Select read only or read and write, as appropriate.

### 3.5 Adding notes to your references

You can use the 'research notes' to add your own notes to a reference, to help you identify that reference. For example, you might want to note down the specific page or details of a quote within the reference. The 'research notes' field can be searched (see 3.6) but won't show up in your final reference list.

### 3.6 Searching for references

- To display all your references, click on the 'My References' tab.
- Use the Quick Search box to search through all of your references or those in specific groups.
- You can create a temporary list by selecting individual records and clicking on the 'Copy to Quick List' button.

## Section 4. Using EndNote Online with Word

References in your EndNote Online Library can be added to a Word document as in-text-citations and a bibliography, all formatted in the style of your choice.

### 4.1 Brookes Harvard referencing style

We have written the EndNote style 'Brookes Harvard' which follows the guidance set out in Cite Them Right Online. You will need to make sure you have 'roaming access' in order to see this style – check pages 1-2 of this guide.

NB Please note there are 2 versions of the Brookes Harvard style available on EndNote Online. The only difference between them is how they deal with multiple authors. Always check with your Department about their referencing requirements:

- **BrookesHarvard** style will use 'et al' for four or more authors.
- **BrookesHarvardAllAuthors** style will list all authors regardless of number.

### 4.2 Creating a stand-alone bibliography

If you just want a list of references, you can use EndNote Online to create a stand-alone bibliography. To do this:

1. Go to your EndNote Online library and click on the 'Format' tab and then 'Bibliography'.
2. Use the first drop-down menu next to 'References' to select either which references you want to include (specific group, 'Quick List', or all).

3. The second drop-down menu allows you to select a bibliographic style. The local styles 'BrookesHarvard' and 'BrookesHarvardAllAuthors' have been added to this list.
4. You can then choose the appropriate format for your bibliography (HTML, plain text, rich text) and can save, email or preview and print this bibliography.

### 4.3 Using EndNote with Word

If you want to use EndNote Online with Word on your own computer/laptop, you need to download the '**Cite While You Write plug-in**' from EndNote Online.

1. Sign in to your EndNote Online account and choose either the 'Format' or 'Downloads' tab.
2. Select the 'Cite While You Write plug-in' for Windows or Mac as appropriate and follow the on-screen instructions.
3. Once you have installed the plug-in the EndNote Online option will be displayed in Word in the top toolbar.

### Using EndNote Online on Brookes networked PCs

On pooled room PCs, both desktop and Online versions of EndNote are available, so you need to make sure Word is pointing to **EndNote Online**.

1. Open up Word.
2. Click on the 'EndNote' option in the top toolbar to display the EndNote toolbar. Click on 'Preferences' in the Tools box.
3. Click on the 'Application tab' in the dialog box.
4. Select 'EndNote online'. You'll be prompted to type in your EndNote Online account details (email address and account password).
5. The EndNote option in the top toolbar now points to EndNote Online.

### Inserting references

1. First check that the style you want is the one displaying in the EndNote Online toolbar. Use the drop-down menu to browse the styles and select the one you want. Remember there are 2 versions of the Brookes Harvard style:  
**BrookesHarvard** style will use 'et al' for four or more authors.  
**BrookesHarvardAllAuthors** style will list all authors regardless of number.
2. Position the cursor in the text where you would like to place your next citation – make sure you add a space after the last word of text. From the EndNote toolbar, choose 'Insert Citations'.
3. A new window will appear. Enter a search term to look up the reference in your EndNote Library. Highlight the reference you want and click 'Insert'.
4. The citation will appear in the text of your document and as a bibliography at the end. These should be formatted in the style you have selected. Continue adding further references and these will be slotted into your alphabetical bibliography in the correct place.

## Section 5. Help using EndNote Online

For help with EndNote Online, check the Library's EndNote help pages at:

[www.brookes.ac.uk/library/how-to/use-endnote](http://www.brookes.ac.uk/library/how-to/use-endnote)

EndNote Online also offers detailed help. In your EndNote Library, click on the option at the top right of the screen, then choose Help located at the bottom of the box .

Use the Library's EndNote email [lr-endnote@brookes.ac.uk](mailto:lr-endnote@brookes.ac.uk) for your queries.

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