

An introduction to EndNote Online

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.

- You can transfer references from many library catalogues and databases into your EndNote Library.
- You can also use EndNote to create in-text citations and bibliographies in Word documents, formatted in the style of your choice. We have made the local Brookes Harvard style available on EndNote Online.

For help with EndNote Online, check the Library's EndNote help pages. On the Brookes Library home page www.brookes.ac.uk/library/ choose 'Use EndNote' from the 'How to' menu, or go straight to:

www.brookes.ac.uk/library/how-to/use-endnote/

EndNote desktop

There is also a software version of EndNote, also known as EndNote desktop, which has been installed on all university networked PCs and is also available for home use. To check which version best fits for your needs - go the Library's EndNote pages and the details in the 'Get Started' section. You can 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

You can access EndNote Online through the Library Web site following the steps below, or go directly to www.myendnoteweb.com/:

1. On the Brookes Library home page www.brookes.ac.uk/library/ choose 'Use EndNote' from the 'How to' menu.
2. Scroll down to 'Get started' and click on 'Connect to EndNote Online'.
3. You may be prompted to log in with your Brookes username and password.

You'll be taken to the EndNote sign in page.

2.2 Create your EndNote Library account

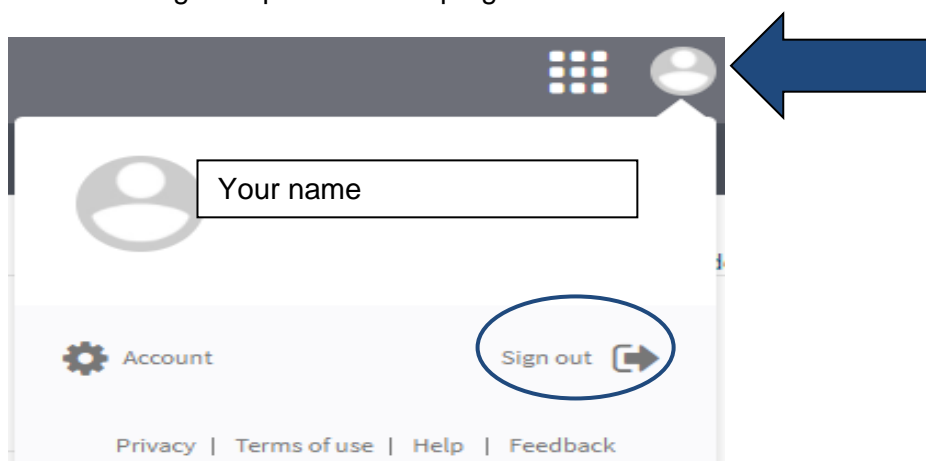
To set up your EndNote Online account, or 'Library':

1. At the EndNote sign in page, click on '**Register**' middle right of screen.
2. Type in your email address to start the registration process. You'll also 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 EndNote Online 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.



4. Open up a new tab. Go to the Library home page at www.brookes.ac.uk/library
5. Look for the search box and click on the 'Databases' tab
6. Click on the 'W' yellow box, as we need to look up Web of Science. Click on 'Web of Science' from the list
7. To the right of the screen, click on the link 'Search Collection Directly at the Provider'. If prompted, sign in with your Brookes ID and password.
8. Click the 'Access Now' button.
9. On the black toolbar, select 'Products' and EndNote Online
10. You'll then be returned to the EndNote Online sign in page. Sign back in with your email address and EndNote password. Choose 'Options' and then 'Subscription' (as above) to check your roaming access has been activated.

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: Foley, David C.
Title of article: Ivory Tower meets James Bond
Title of Journal: Naval War College Review
Source details: Year: 2009 Volume: 62 Issue: 4 Pages: 155-162
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/ 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'. This will download the file to your PC.
- If you want to **transfer multiple references** in a batch, select each record that you want to transfer into EndNote by clicking on the 'Save' option to the right of each.
- Carry on to the next page of results as necessary, clicking on the 'Save' option to the right of each record you want to transfer.
- When you've finished selecting records, scroll down to the bottom of the screen and select 'My items' under 'Account details'.
- On the 'My items' screen click on the 'Cite' option above the list of references. Click on 'Export to EndNote'. This will download the file to your PC.
- Go to EndNote Online and sign in to your account.
- 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 list - you'll have to scroll down quite a way to see RefMan RIS.
- For the 'To' option, select the group in your library you'd like the reference to go into. If you haven't made any groups, just add it to 'Unfiled'
- Click 'Import'. Your references will appear in the 'Unfiled' group

3.3 Adding 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.

If you wish to transfer references from a library database into your EndNote Online Library, we recommend you first check the Library's EndNote page to see if the database works with EndNote Online and what options you'll need to select:

1. On the Brookes Library home page www.brookes.ac.uk/library/ choose 'Use EndNote' from the 'How to' menu.
2. Scroll down to 'Add references' and open the item 'Adding references from databases'.
3. The major databases are covered in these instructions, but if the database you are using is not mentioned, look at the quick link on the right 'EndNote online: adding references from all databases' ([pdf or word](#))

Exporting references

Many databases allow you to export references directly into your EndNote Online Library, in a similar way to LibrarySearch. All the EBSCO databases work in this way.

Try this yourself:

Exporting references from Academic Search Complete

1. On the Brookes Library home page www.brookes.ac.uk/library/ choose 'Use EndNote' from the 'How to' menu.
2. Scroll down to 'adding references' and open the item 'adding references from databases'.
3. Academic Search Complete is in the Ebsco databases section. Right click on the title link and open in a new window. By doing this you can keep the instructions open on the Library EndNote webpage.
4. Log into Academic Search Complete if prompted and do a search for "James Bond" (with quotation marks).
5. Select around 6 results by clicking on the folder icon next to each. When you've finished, click 'folder view' to view your selected references.
6. On the 'Folder contents' page, select the references you want to export and click the 'export' option.
7. At the next screen, select 'Direct Export to EndNote Online' and click 'save'. Log into your EndNote account if you are prompted to do so.
8. In your EndNote Online library, your references have been added to the 'Unfiled' group' as well as 'My references'. Check that they have been exported correctly - you can amend/add information as needed.

Transferring PDFs into your Library

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

Try this yourself:

Transferring a PDF from Academic Search Complete

1. Search Academic Search Complete as above.
2. Find an article record which includes a Full Text PDF link.
3. You will need to transfer the reference and PDF separately. To save the PDF, click on the PDF option to view and download the file. NB Make sure you remember where you have saved it!
4. Next select the reference by clicking on the folder icon next to it. Click 'folder view' to view your selected reference.
5. On the 'Folder contents' page, select the reference you want to export and click the 'export' option.
6. At the next screen, select 'Direct Export to EndNote Web and click 'save'. Log into your EndNote account if you are prompted to do so.
7. In EndNote Online, select 'My references' to view your new reference. You can now attach the saved PDF file to this record.

8. Click on the paperclip icon in the row of icons at the bottom of the reference.
9. Click the 'Attach file' link. This will open a dialogue box. Click on the 'Browse' button and locate the file you wish to upload.
10. Click the 'Upload' button to save a copy of the file in EndNote.

Importing references

Some databases allow you to select your references and save them as a file. You then import them into EndNote using an "import filter".

Try this yourself:

Importing references from JSTOR

1. On the Brookes Library home page www.brookes.ac.uk/library/ choose 'Use EndNote' from the 'How to' menu.
2. Scroll down to 'adding references' and open the item 'adding references from databases'.
3. JSTOR is in the adding references by importing RIS files section. Right click on the title link and open in a new window. By doing this you can keep the instructions open on the Library EndNote webpage.
4. Log into JSTOR and do a search for "James Bond" (with quotation marks). Select around 6 results by clicking the check boxes next to each.
5. Go to the top of the list of search results and click on the option 'Export selected citations'.
6. From the drop-down menu, select the option 'Export a RIS file (For EndNote...)'.
7. Save the RIS file when prompted by the dialog box. Check your downloads if you can't find the file
8. You are now ready to import this file into EndNote Online. Go to your EndNote Online Library and from the 'Collect' tab, choose the 'Import References' option.
9. 'File: Choose File': Browse for your file of references and select it.
10. 'Import Option: Select': Click on the drop-down list of import filters and select 'RefMan RIS'.
11. 'To: Select': Choose where you want to save these references e.g. your 'Unfiled' group.
12. In your EndNote Online library, select 'My references' to view your new references. Check that they have been exported correctly - you can amend/add information as needed.

3.4 Online Search

The 'Collect' tab in EndNote Online also provides an 'Online Search' option which allows you to connect to remote databases & library catalogues. This does not usually work well with databases, but can be a useful way of searching library catalogues such as COPAC, The British Library, and Oxford University.

3.5 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're 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.

3.6 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 3.7) but won't show up in your final reference list.

3.7 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 Web 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 should now point 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.
Tip: If you can't see these styles, you will need to activate your 'roaming access'. See pages 1-2 of this guide.
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 Online toolbar, choose 'Insert Citations'.
3. A new window will appear. Enter a search term to look up the reference in your EndNote Library. From the results, 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, use our contact details on the Library's EndNote page at: www.brookes.ac.uk/library/how-to/use-endnote/
- EndNote Online offers detailed online help. In EndNote Online, click on the option at the top right of the screen, then choose Help located at the bottom of the box