Endnote Online Instructions

This guide will take you through the various aspects of using Endnote online.

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Setting up an Endnote Online Account

Endnote online is a web based software package that allows you to manage bibliographic references and create bibliographies easily and automatically.

Endnote is available through the Internet at http://www.myendnoteweb.com

In order to see features relating to MMU like the MMU Harvard style, you first need to login via the Institutional/Shibboleth option. Click Sign in via your Institution/Shibboleth login. Under the option for Institutional (Shibboleth) users sign in, choose UK Federation and click Go. Now type Manchester Metropolitan University and click Continue. Now enter your MMU username and password and click OK.

You can now register for your own account. Select Register and follow the on screen instructions. Your password must be eight characters long, include an uppercase letter, a lower case letter as well as a number and a symbol. This will enable you to use Endnote for as long as you are registered as a member of MMU.
The Reference Library

The file that holds your references is called a library. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc. This is the main screen for Endnote. The short records format is displayed and a Find It! link is provided so that you can link to full-text if available at MMU.

Manually adding references

To add a new reference select the Collect tab and click on New Reference then choose the type of reference you require from the drop down menu.

The fields will change to reflect the reference type, simply click in each field and type the details of the reference.
Tips for entering authors
When entering the names of authors or editors always use the following order, Last Name, First Name i.e. Smith, John. If the reference includes multiple authors/editors, each must be entered on a separate line.

If the reference includes the name of the organisation you will need to insert a comma after the name so that it will appear correctly in your reference list i.e. Manchester Metropolitan University.

When you have entered all the fields you want to use click on Save to add the reference to your library.
Organising your Library

Editing references
Each reference can be edited, if you need to add or subtract information. From the list of references, simply click on the title and click on the field that you need to edit. Once you have made the changes, click Save to update the record.

Deleting references
To delete any unnecessary records, click the tick box next to reference and click Delete. The reference will be moved to Trash. Records can be retrieved from Trash, so long as it hasn't been emptied. To delete reference from Trash select Empty.

Reordering the library
The library can be organised in a number of different ways. The default is to order by the name of the first author. However, by clicking on Sort by and selecting from the drop down menu on the right hand side of the screen you can change the order using the options given. This can be useful if you want to find items recently added to your library.
Removing duplicate references
If you are downloading many records from different sources, you may find that you end up with duplicate references in your library. Endnote has a handy tool to find these for you. Click on Organize and choose Find Duplicates. The duplicates are highlighted and can be reviewed and then deleted, by clicking on Delete.

Adding attachments to references
Endnote allows you to attach files such as PDF files to individual records. To attach, first click on the Paper clip icon for the individual record, click Attach files, now click on Browse and locate the file. Once you have found the file click Upload.

Once an attachment has been added, the paper clip will change colour to blue.

To remove an attachment, simply click on the paper clip, then hover over the name of the file and click the blue cross to remove.

If you wanted to see the total number of attachments in your library, choose Organize and click Manage Attachments. All the attachments will be listed as well as how much space has been used.
Grouping your references

Records are automatically added to All My References Folder – but you can also sort them into individual folders (up to 5000 personal folders). To create a new group, select the Organize tab, click on Manage My Groups and then click New Group and give the group a relevant name i.e. Research Methods, Chapter 1, etc.

![EndNote interface with Manage My Groups section]

Return to My References and tick the records you want to add to your group and then select the group from Add to Group drop down menu. References can be added to multiple groups as required.

Sharing your groups

Endnote also allows you to share your groups of references with other researchers who are using Endnote. You can choose to give your colleagues read only or editing rights. Click on the Organize tab, Manage My Groups, Manage Sharing and then click on Start Sharing this group. A new screen will appear, simply enter the email address for your colleague and choose the level of access allowed. They will now be able to see your references in their Endnote library.

![EndNote interface with Manage Sharing section]
Using Endnote and Online Search

Within Endnote you can connect to different databases such as library catalogues and download details of books directly into your own Endnote library.

For example - COPAC provides access to the merged online catalogues of many UK research libraries. It has over 35 million records from over 90 libraries, representing a wide range of materials across all subject areas.

Click on Collect, Online Search, click on the drop down arrow next to Select to see the list of different library catalogues. Scroll down and select COPAC and then click Connect.

To run a search, simply type your terms in the search box, choose to retrieve all the results or a specific range of records and click Search. Records will be retrieved from COPAC.

Once the results are displayed, simply check the tick box to select the records you want to add and choose where in your library to add them, either to a specific group or the Unfiled library. Once they are added to your library, you will be able to use them as citations.
Getting References from Databases

As well as using Endnote to connect to different catalogues, it is possible to search many of the library’s resources and then add records into your own Endnote library. On the library website you can find an A-Z listing (http://libguides.mmu.ac.uk/az.php) of our resources, click on the question mark next to an individual resource to access the help guide and click the Endnote tab to see specific instructions. The majority use a system called Direct Export.

Direct Export using Library Search

To use direct export, you need to leave your Endnote library running and open a new tab in your browser. Access Library Search from the library website (www.library.mmu.ac.uk) and run your search. When you retrieve results, you will need to select the ones you want to transfer into Endnote Online.

To do this click on the folder icon on the right hand side of each record.

Once selected, the icon changes colour and items will be added to the folder located next to the search box.

NB The selected records will disappear after 20 minutes. You can export up to 50 items at a time.

When you are ready to transfer your results to Endnote, click on the Folder icon at the top of the screen.
A new screen will appear, listing the records to be transferred. To transfer records click on the arrow next to Export To and choose Endnote.

Depending on which browser you are using, a dialog box will open (images below) – in Internet Explorer (left) click Open; in Firefox (centre) select OK; in Chrome (right) click on the button labelled export-endnote… which will appear in the left hand corner of the screen.

Next, a box called Choose Destination will appear, highlight Endnote Online, and click OK. You may be asked to enter the details of your Endnote Online account, simply type these in and click OK. A final message will appear confirming your records have been added to Endnote. Click OK.
Capturing Bibliographic Information from a Website

You can also save bibliographic information from web pages into Endnote. This is called Capture.

**NB** This function does not work in Internet Explorer. You need to use Firefox/Google Chrome to use this function.

To do this you need to install the tool on your browser. In Endnote, choose Downloads

You simply need to drag the grey Capture Reference icon onto the bookmarks toolbar. **(NB** If the bookmark toolbar is not already on screen, right click next to help and choose Bookmarks toolbar).

Open a new tab and go to the site you would like to add to your Endnote library. Click Capture Reference. A new screen will appear. You may need to enter the details of your Endnote Online account the first time you use the tool.

First check that the reference is correct i.e. reference type is set to web page, any other details such as author are added as well as the access date.

When you are happy with the reference click, Save to myendnote.com. A confirmation window will appear and the reference will be added to your library. Click Close and you can return to the webpage you were using.
Using Endnote and Word

Installing the toolbar

Endnote also allows you to work in Word and create in text citations which will automatically be added to a bibliography at the end of your document. This is called Cite While You Write. First you will need to install the Endnote toolbar into Word. Click on Downloads, choose the option for your computer and follow the on screen instructions. (NB On campus the Endnote toolbar is already available in Word on the student PCs, on staff PCs you will need to ask IT to install Endnote).

Once installed you will see an Endnote toolbar in Word.

Linking the document to your Endnote library

To Cite While You Write you will need to link the document to your Endnote library. Click on Preferences, then Application and enter the email address and the password for your Endnote online account, then click OK.
Inserting a citation

Once connected to Endnote, you can start writing your text. When you need to insert a citation, simply place the cursor, where you want the citation to appear. Next click on Insert Citations on the Endnote toolbar. Then search for the relevant citation, click to highlight and select Insert.

The citation will appear in the text and a bibliography will be created at the end of your document. You can continue to add citations and create your bibliography as required.

Changing the referencing style in Word

To choose how your citations and bibliography appear, you simply need to choose the relevant output style. Only a limited number of styles are listed on the drop down menu, if you click on Select Another Style, you can choose from the full list available.
A new box will open, scroll down to the style you require, highlight and click OK. Your citations and bibliography will be reformatted in that specific style i.e. Harvard MMU or MMU Harvard.

Deleting citations in Word
If you want to delete or change a citation you will need to click on Edit Citations on the Endnote toolbar.

To delete a citation click Edit Citation on the Endnote toolbar, highlight the citation you want to delete, click Edit Reference and then choose Remove Citation.
Excluding parts of citation

In some cases you may need to use an author’s name as part of the text, you can still insert your citation and then use Endnote to exclude the author’s surname. Select Edit Citation on the Endnote toolbar, highlight the citation you want to edit and then click in the box next to Exclude Author. Only the year will now appear in the text and the reference will remain in your bibliography. You can now use the name of the author as part of the text.

Including page numbers in a reference

If you need to include a page number as part of your reference, click on Edit Citations on the Endnote toolbar. Click to highlight the reference you want to edit and then type the page number in the field marked Suffix i.e. :15.
Editing citations/bibliography
If something is appearing incorrectly in a reference in Word, it is probably due to an error in the data in your Endnote library. To amend this in Word, click Edit Citation, choose the Reference and click on Edit Reference. This will take you back to Endnote, where you can locate the reference and amend the data. Once you have made any corrections, return to Word, choose Edit Citation, click on the drop down menu next to Edit Reference and click Update from My Library. The reference screen will appear, click Insert and the updated reference will now appear in your document.

Standalone bibliographies
Occasionally you might want to create a standalone bibliography from your library, without citing the references in a piece of work. In Endnote, choose the Format tab, click on Bibliography. You can choose All References in My Library or a particular group. Next select the correct output style, and then select RTF(rich text file). Click to Save the document, choose your location and your references can now be accessed as a list in Word.
Submitting documents electronically

If you are intending to submit a document electronically, you might find it necessary to remove the links between your Endnote Library and your Word document. On the Endnote toolbar in Word, simply select Convert Citations and Bibliography, choose to Convert to Plain Text. A message will appear telling you that a new version of your document will be created, click OK. This will create a new version of your document, which can be saved as normal. This document is no longer linked to Endnote and can then be submitted electronically. If you need to subsequently edit the document, you will need to return to your original, make the necessary changes and repeat the process above.

Further help on Endnote is available on the library website:

http://libguides.mmu.ac.uk/endnote