Using Endnote Online

What is Endnote Online?

To access an accessibility mode. You can use the three dots button in the top right to navigate contents and the arrows to flick between pages.

Endnote is a reference management tool with a free online version and a paid-for desktop version. While we have a license for the desktop version, which is installed on university machines, the desktop version is tied to the computer you’re using while the online version can be used anywhere. In addition, we get extra space with Endnote Online as a result of our license for the desktop version. Using Endnote Online instead of desktop does not limit your use of Endnote for referencing at your stage and I’d only really recommend the desktop version for PhD research and beyond.

You may be using an alternative tool such as Zotero, Mendeley or your own paper system to reference. For your research project you will be using many more resources than before so it is a good opportunity to try a reference management system such as Endnote. We can only provide support for Endnote and not for other tools because our license for Endnote gives us access to technical support that we do not get with the other, free tools.

Endnote Online is essentially an online database that you create and fill with bibliographic records that contain information about your resources that can then be used for referencing and citation. Each record needs to be filled with the information required to reference. In most cases you won't have to fill these out manually, but will be able to easily import these records as you are doing research in Primo or the databases.
An Endnote Library with records for references. You can organise the references with folders.

When writing your assignment or project you can then easily insert citations from your database from within Word using the Cite While You Write function of Endnote. It will format your references into the correct 'Plymouth-Cite Them Right' style that we have control over, or into one of many other styles as required.

You can search for the reference from your library...

...and it adds the citation to your work, places it into your reference list and formats it into the required style.
This guide will show you how to set up Endnote Online, create or import records, use the Cite While You Write function and prepare your work for submission or forwarding on to others. If you are already using another tool such as Zotero or Mendeley, please note that these are perfectly fine tools and if you wanted to use Endnote instead, you would have to completely uninstall these programmes and their plug-ins in order for Endnote to work correctly.

If you require any assistance with Endnote, please check the links to further assistance at the end of this guide. There is also a 'TLDR' section towards the end for those of you with little patience and a lot of confidence - this section contains things you may not work out unless told.

**TLDR: If you Read Nothing Else, Read This!**

- The University has a license for Endnote Desktop as well as using Endnote Online. Endnote Desktop is not the 'full' version of Online - to sync your Online to the Desktop programme is bit of a clunky process by today's standards. **Desktop does not hold any functionality that will be useful until you begin a research degree** and it saves all of your references to the PC.

- If you are using a similar tool that you are happy with, please don’t feel pressured to switch to Endnote Online. If you do decide to switch, ensure that you completely remove all of the programme and plug-ins from your other tool first.

- Please don’t start a trial for Endnote Desktop - this will lead to pain once the trial is over. Desktop is expensive too, although a subsidised offer is available via the University.

- As Endnote Desktop is installed on University machines, **when working on a University computer you will need to change the Endnote Tab in Word so that it links to Endnote Online**, not Desktop. Instructions for this are available in the Cite While You Write section of
this guide. If you are working on your own device, ensure you've installed the plug-ins and linked it to your library using 'Preferences' and this won't be a problem.

- **Do find out how to import references.** If you create all your references manually then you really are missing the point of this tool. Also, check the information in the references is correct otherwise your references will all look wrong, also check for duplicates before you start writing and delete any.

- **Before you submit your work you will need to remove the coding from your document.** Ensure you have a copy with the coding saved so that you can make edits afterwards and then follow the instructions in 'Preparing to Submit'. Failure to do this may mess up the formatting of your references when your lecturer goes to open your file. You cannot begin using Endnote in a document where you have taken the coding out so be warned!

- **Having said all this, Endnote Online is well worth getting to grips with.** the guidance is long but once you know what's what, you should find it pretty easy. If you are confident, perhaps just use this guide as reference for when you come across something you’re not sure about?

### Setting Up Endnote Online

#### Getting to Endnote Online

The first time you go to Endnote Online you need to go in via Web of Science as this will ensure that you get any benefits from our institutional license and also ensures that you get the Plymouth-CiteWhileYouWrite Harvard style. To do this, you need to:

1. Sign in to the DLE (this signs you in to Shibboleth)
2. Go to Primo via the 'library' button at the top of the DLE
3. Once in Primo go to 'Databases'
4. In 'Databases' find Web of Science in 'W' and click through to it
5. Use the 'Endnote' link in the top menu bar of Web of Science
After setting up your account you will not need to enter Endnote via Web of Science but will be able to use the link www.myendnoteweb.com.

Creating an Endnote Account
If you already have a Web of Science account then you will not need to create an Endnote account—just log in here with your Web of Science account.

Otherwise click on the option to create an account and fill out the information using your university email address. Ensure that it is spelled correctly either @students.plymouth.ac.uk OR @postgrad.plymouth.ac.uk (assuming you are an undergraduate/postgraduate student) as the main cause of problems at this point is a mis-typed email address.

After registering, make sure that you go to your email and look for the validation email to validate your account. You will not be able to progress without doing this. After validating, you will be able to use Endnote.

Now that you are registered you will be able to access Endnote via www.myendnoteweb.com.

Downloading the Cite While You Write plug-in
Note- if you are using Zotero, Mendeley or another piece of software with plug-ins for Word then you will want to completely uninstall the programme along with the plug-ins for Endnote to work. Simply disabling them does not do the trick in most circumstances.

To use the Cite While You Write function, you will need to install the plug-ins for your laptop or computer. University machines already have this installed along with Endnote Desktop, so on a university machine you will simply need to go to this tab in Word and use the 'preferences' button to change from Endnote X* to Endnote Online or Endnote Web. There are instructions on this when we come to the Cite While You Write guidance.

Once signed in to Endnote, go to 'Downloads' to find the plug-ins. You do need a reasonably up to date laptop but you can check the system requirements from this screen if you are not sure. Then
select either 'Windows' or 'MacIntosh' (not Windows MSI as this is for installing to multiple PCs at once).

The plug in has been known to take up to 10/15 minutes to install in some cases so please be patient with it.

Often it is only once you decide that it is broken that the installation completes. It is worth noting that newer machines are not necessarily any better than older ones when it comes to how quickly this installs... but you only have to do this once so perhaps make a cup of tea or coffee while you wait.
You can also add the 'Capture' bookmark to your browser by dragging it to your browser toolbar as per the on-screen instructions. This will help you to capture online material references. While the quality of the information it captures varies, it is certainly useful for quickly capturing a URL and allowing you to type in additional information for the reference as you are browsing online.

If you encounter any issues installing Endnote, check the further assistance links at the end of this guide.

Your Endnote Online Library

Records in Endnote

Endnote is essentially a database where you create/import references as records.

Click on a reference title to go into the record and edit the information in the fields, using the ‘show empty fields’ button to display fields with no information in them.

Tips for editing author field:
Organising your references

You can organise your references into groups in whatever way you prefer. For instance, you may choose to organise them by theme, author, module or assignment. You can add the same reference to multiple groups. Your groups display on the left hand side of your library.

To add references to a group you can select your references using the tick boxes, then use the drop down menu to either select a group or create a new group. This will create the group and move the references into it. You will always be able to see all references using the 'All my references' grouping and you can also search through references using the search in the top of the left hand menu.

You can also navigate to 'Organize' then 'Manage my Groups' in the menu bar at the top of Endnote to view your groups and manage them. This also gives you the option to 'Manage Sharing' so you can share references with others who have Endnote accounts. This might be useful for collaborative projects.
Creating a Record Manually

You will only need to create a record manually for items that are not discovered via the databases or Primo so you will possibly only need to do this for reports, web or video sources. I find that the Capture Reference Button isn’t necessarily much easier than creating a reference from scratch, so it really is down to personal preference as to which way you create a reference.

Using the Capture Reference Button

When you are on the web page where you would like to refer your reader to for the reference, click on the 'Capture Reference' button that you would have added to your toolbar in your browser during set-up. This will bring up a box on your screen where you can check the information that has been captured, change the item type and add details. You can also scroll down to select a folder to add your item to and then save.

It is recommended to create a system where all new references go into 'Unfiled' at first so you can verify the information before moving them into folders. This will help you in checking the accuracy of the references and is recommended when creating records or importing. It is easier to check methodically at this stage than to correct later while referencing.
Creating a New Record from Scratch

This option is good for physical resources that you cannot import as well as for online resources. I would recommend using this alongside the Cite Them Right database, so that you can check which fields need to be filled in for your resource. You have the option of many fields to use so this will ensure you enter the information that is necessary for referencing.
1. To create a manual record, select ‘Collect’ in the top menu and then ‘New Reference’.

2. Use the drop-down box to tell Endnote what type of resource you are inputting.

3. Fill out the relevant boxes according to your resource type and referencing style. For example, for a report in Cite Them Right harvard style, you need: Author, Date (Year), Title of report then either Place of publication, Publisher or URL, Access date depending on whether the report is physical or online.

4. Save reference - it will go automatically into ‘Unfiled’ and you can move it into a group.

13 - Use the drop-down box to select the resource type - this will tell Endnote how to treat it when referencing in Word.

Importing Records

You can import records from most databases. Here I am going to show you how to import from the databases that you are most likely to use: Primo, Web of Science, Scopus and Google Scholar (but only because I know you use it, not because I endorse it!).

If there are other databases you are using that are not covered, the library guide link in the last section of this guide has got instruction for more databases or you can contact your Information Specialist who can help.

Just to reiterate - it is a good idea to import records into your 'Unfiled' group, check the information in the fields and correct them, then move the reference into a folder. This helps to ensure that your references are correct - you don’t want to be trying to spot mistakes the night before a deadline!

Importing from Primo

You will need to use Primo for books and importing records from Primo is simple.

1. Click on the item to open the details and then scroll down to the 'Send It' section of the record.

2. Click on the 'Endnote Web' option

3. Your item will be sent to your Endnote Online library - you may need to sign in to Endnote as it does this, if you are not already.
14 - Use the 'Endnote Web' option in 'Send To'.

Book records in Primo in particular have a couple of flaws to watch out for, particularly in the 'publisher', 'place of publication' or 'edition' fields. **Check these records carefully before filing away into a group.**

Make sure that this information is in the field and delete any repetition e.g. of place within the 'publisher' field or the word edn or similar in the 'edition' field as this isn't necessary.

**Importing from Web of Science**

As Web of Science and Endnote are owned by the same company, they work very well together. Use your Endnote log-in to sign into Web of Science before beginning your research and this will make importing a little smoother.

You can export individual records or select multiple records in your search results and 'export' them. The 'export' option is always at the top of the item record in Web of Science, or at the top of your results.

As long as you are signed in to Web of Science, it will place an Endnote marker next to anything you have already got in your library.

15 - Exporting a single reference to 'Endnote Online'
16 - The pop-up box after selecting to export multiple records.

17 - Web of Science tells you when you have already imported records into your library (you need to be signed in to see this)

Importing from Scopus

Importing from Scopus is different to Web of Science. As Web of Science and Scopus are competitor products, Scopus has additional integration with Mendeley, not Endnote, so there is no direct connection to Endnote.

To send records from Scopus to Endnote Online, you essentially export a single file that contains the records you want. You then upload this into Endnote Online. However, this takes very little time to do once you know how.

The steps to export the file are:

1. Either go into your record and select 'Export' at the top, or select the references you'd like to export from your search results and then click 'Export' at the top of the results.

2. The option you need to select in the pop-up box is 'RIS'. This is a file type (like PDF, JPEG, MP4 etc.).
3. Ensure that citation information is selected and it may be a good idea to add the abstract too, although this won't affect the reference.

4. Then click 'Export' and your file will download into your downloads folder as 'Scopus.RIS'.

18 - Location of the Export button from search results

To import the file into Endnote:

1. Go to 'Collect' in the top menu bar of Endnote Online then 'Import References'

2. Click 'choose file' and select the 'Scopus.RIS' file that you've just downloaded.

3. For 'Import Option' choose 'Scopus' from the drop-down.

4. 'To' just wants to know where you'd like to send the references. I'd recommend 'Unfiled' so that you can check them before filing into a group.

5. You'll get a message to confirm that the references have been imported into your chosen folder.
Importing from Google Scholar

While the databases are far better search tools, a lot of people use Google Scholar. There are a few different ways to export Endnote references from Google Scholar.

The easiest way is to log in to Google Scholar with a Google account and change the settings, using the three lines symbol in the top left and clicking on the settings cog symbol.

Select the button to 'Show links to import citations into' and use the drop down to change this to 'Endnote'.

This will add an 'Import to Endnote' option next to your search results so that you can download the reference as a '.enw' file into your downloads folder. This is an Endnote file format.
To export multiple references from Google Scholar, you need to be signed in with Google and can then use the 'star' symbol next to records to add them to your library.

You then navigate to your library using the link in the top right of the screen and from there, you can select references and export them using the 'Download' symbol as shown in the image.

Select 'Endnote' as your Export option and this will export the records as a '.enw' file format.

23 - You can see the little star symbol here and the library option in the top right.

24 - Select your references then use the export button.

To upload your files into your Endnote Online library, go to 'Collect' and then 'Import References'. Choose the file you've downloaded as your file.

There is no option for Google Scholar here, but you have downloaded the file as an Endnote file type so you can select 'Endnote Import' as your 'Import Option'

Send the references to your 'Unfiled' folder to check before filing into a group.

25 - The settings for importing your Google Scholar references into Endnote Online.
Other Functions

De-duplicating Records
It is a really good idea to check for duplicate records before typing as this is a difficult problem to fix once you are halfway through an assignment. Luckily, Endnote Online has a simple function to do this for you.

Go to 'Organise' then 'Find Duplicates'.

This will run a duplicates check for you and automatically select the additional record. You can then click 'delete' to dispose of the duplicate.

It is also worth casting your own eye through your references to double check that this function hasn't missed any. If you use the drop down in the top right to sort by 'First Author - A to Z', this should make it easy to spot duplicates to delete.

Adding PDFs to Records
You can use Endnote to attach the PDFs to your references, as another way to backup your files.

To do this:

1. Click the grey paperclip underneath a record.
2. Select 'Attach files'.
3. Choose a file - you can upload up to 5 documents here.
4. Select your file and 'upload'
5. Once the upload is complete, your file will appear via the paperclip, which will have turned blue to indicate that files are attached.
Preparing to Cite While You Write

Connecting the Endnote Tab in Word to your Endnote Library

Assuming that you have downloaded the Endnote Plug-Ins for Word, you should see the Endnote tab when you open a Word document. You will need to ensure that the plug-in is connected to your Endnote Online Library.

If you are of a University computer, this tab may be labelled 'Endnote X8' or 'Endnote X9'. This means that it is currently connected to Endnote desktop and you will need to change this to Endnote Online.

To do this:

1. Click on the 'Preferences' button
2. Go to 'Application'
3. Use the drop-down to select 'Endnote Online'
4. Type your Endnote log-in credentials into the fields below and click 'OK'.

A green bar will show Endnote connecting to your library. This may take a little time the first time. If you are using your device, you shouldn’t have to do this again.
Selecting the Correct Referencing Style

In the Endnote tab you have the option to change the referencing style using a drop down menu. If you need to referencing in a Harvard style it is recommended that you use the 'Plymouth Cite Them Right' style, which we have control over. This is also a Harvard style, but one that we can guarantee is correct, whereas we occasionally have experienced issues with the other Harvard style.

If you cannot see this style, you have the option to 'Select Another Style' at the top of the drop-down. This will bring up a pop-up window for you to select the Plymouth Cite Them Right style and add it to your list.

Referencing with Cite While You Write

Inserting Citations

To insert a citation you will need to use place your cursor where you want to place the citation and then click the 'Insert Citations' button in the Endnote tab.

This will bring up a window for you to search for the citation and insert it.
Once inserted, Endnote will format the citation and add a reference at the bottom of the document. It is a good idea to add a title 'Reference List' or 'Bibliography' at this point and then insert a page break before this so that the references always appear on a separate page.

If you need to add multiple citations in the same brackets, insert one of the citations first and then click on the citation you want to add to so that it turns grey. Then click 'Insert Citation' and search for the other citation.
for/insert the additional citation. This will add the citation to those already there so that they appear in the same set of brackets, and adds the reference to the reference list.

Editing/Deleting Citations

If you need to make any alteration to a citation, this needs to be done through the 'Edit Citation' button.

Endnote citations in Word appear like normal text, but anything that turns grey when you click on it, such as a citation, is actually a bunch of code that appears to the user as text. If you make an edit or remove a citation by simply using the delete button, there is a strong chance that it will reappear the next time Word connects to the Endnote Library.

To delete a citation click on it and then 'Edit Citations'.

Check that the citation you want to delete is highlighted in the list. Then use the tiny drop-down arrow next to 'Edit Reference' to 'Remove Citation'. This will remove the citation, the reference and the coding neatly from your document.

34 - Deleting citations using the 'edit citation' button

Adding Page Numbers, Excluding Author Name and Secondary Referencing

You can also use the 'Edit Citation' button to make some changes to your citations.

Click on the citation you'd like to change and then 'Edit Citation'.

Here you can add page numbers in the 'Pages' field but simply typing the numbers in. Endnote will automatically put pp. for you to indicate 'pages'.

You can also click 'Exclude Author' to remove the Author name where you may have already typed their name in the body of your work and don't need it in the citation. You can do the same for the year of publication, if you have already typed this.
35 - Edit citations box with the boxes for excluding author or year, adding page numbers and prefix for secondary referencing.

Secondary Referencing

If you have read about a study (S1) in another piece of work (S2) and cannot source the original study, you may need to cite the work you have read (S2) and use secondary referencing to give acknowledgement to the study that you couldn't source (S1).

To do this:

1. Insert a citation for the source that you were able to source/read (S2), which contained the other study.
2. Then select this citation and 'Edit Citation'.
3. In the 'Prefix' field you can type the details of the study that you couldn't source (S1) as such: lastname,firstname, date as cited in

The full reference should place this before the citation for the work that you did read but within the same brackets, as per the Cite Them Right guidance on secondary referencing.

Only the work you could read/source should be in the references list, as you cannot claim to have read the original of the other study.

Preparing to Submit Work

To submit work you will need to ensure that the Endnote coding is removed from any document you submit or send for feedback.

This is because that coding will want to connect to a library and if you send it to someone else, it may attempt to connect to their Endnote library and will probably ruin the formatting of your references.

Always save a copy of your document with the coding intact. This will allow you to go back and make changes later.
To remove the coding from a draft, use the tiny drop-down menu next to 'Convert Citations and Bibliography' and select 'Convert to Plain Text'.

Word will then warn you that it will create a new copy of the document without any coding and you will have to agree to this.

You should then have a new document with no coding that is safe to send for feedback or submission.

If you wish to alter your references, you will have to do this in the other version of the document that you have saved, which still has the coding intact. To check this, just click on a reference. If the coding is there, it should turn grey.

36 - Using the tiny drop-down to access 'convert to plain text'

37 - The message that occurs when you convert- using One Drive may result in a slightly different message but do ensure that you will end up with a version without coding as well as the original with coding.
Congratulations for getting through this Endnote Online training! Hopefully, this tool will be a massive help in your studies. See below for some additional guidance and support.

Endnote Online Library Guide: For instruction and troubleshooting help
Contact Your Information Specialist