Tips and Tricks: Introductory EndNote training

Logging in/creating an account

If you have an EndNote Web/Basic account already then please log into it at **http://www.myendnoteweb.com.**

If not, navigate to the database Web of Science on the via the OU Library database page http://www.open.ac.uk/library/library-resources/databases and click on the EndNote tab at the top of the page and sign up for an account.

Downloading Cite While You Write

Once you have logged in, click on the **Download** link and either download the Windows or Macintosh version.

Importing references

Note - Please check the accuracy of data that you import, as it is not always perfect and you want to make sure it appears correctly when you cite it.

Direct import

Library Search

This is the simplest route to getting references into EndNote Web/Basic:

- Go to http://www.open.ac.uk/library and find an item in Library Search.

- Click **Add to My Bookshelf.**

- Go to **My Bookshelf.**

- Tick the item(s) you want to export to EndNote.

- In the **Select how to save** drop-down, click **Push to EndNote.**

    - *Note - A pop up will open to allow you to sign in/verify the export – make sure you have any pop up blockers turned off!*

Academic Search Complete

- Go to the database page on the Library website http://www.open.ac.uk/library/library-resources/databases and then to Academic Search Complete.
- Do a search.
- Add items to the folder and the go to the folder (top right).
- Click on the **Export** option.
- Click on the button by Direct export to **EndNoteWeb.**

- If you are already log into EndNoteWeb the export will happen automatically, if not you will be prompted to log in.

Import via file download

Google Scholar

This method is a bit more complicated and involves downloading a file of your references from the database/search engine and then uploading it to EndNote Web/Basic:

- Go to https://scholar.google.co.uk

- Click on triple bar menu

- Click on settings

- In **Bibliography manager** click on the radio button next to **'show links to import citations'** and select **EndNote** from the drop down menu. Then **save**.

- Find an item in Google Scholar.

- Click on **'Import into EndNote'.**

- This will download a file, save the file somewhere you will remember and rename the file, if needed.

- Go to your EndNote Basic/Web.

- Click **Collect.**

- Click **Import References.**

- Click **Choose File** and choose the file from Google Scholar that you saved.

- Under **Import Option** choose **EndNote Import.**

- Click the **Import** button.

Note you will need to attach any PDFs to the record separately. Click on the title of the reference in EndNote Basic/Web and scroll down to attach PDF in the record.

Scopus

- Go to the database page on the Library website http://www.open.ac.uk/library/library-resources/databases and then to Scopus.
- Do a search.
- Mark the items you want to save in your EndNote Library.
- Click on **Export** and select **RIS Format (EndNote, Reference Manager)** and select what fields you want to export. (Next time RIS Export will be showing as your default export option).
- Save the file.
- Go to EndNoteWeb.
- Click on **Collect** then **Import References.**
- Navigate to your file and open it.

- Select **Scopus** from the drop down by Import option.
- Select where you want to export to and click **Import.**

Web of Science

- Go to the database page on the Library website
  http://www.open.ac.uk/library/library-resources/databases and then to Web of Science.
- Do a search.
- Mark the items you want to save in your EndNote Library.
- Click on **'Save to EndNote Online'** and chose from the drop-down options what you want to save.
- Click on **Send.**
- If you are already logged into EndNoteWeb the export will happen automatically, if not you will be prompted to log in.

Manual import

Manual import is a last resort. If you can't get the information into EndNote Web/Basic any other way, then you'll have to type it in yourself:

- In EndNote Web/Basic, go to **Collect** and then **New Reference**.
- In the **Reference Type** drop down, select the type of item (e.g. journal, book chapter etc.) you're creating a record for.
  - *Note – it is important to select the right reference type as different types have different fields.*
- Enter the information (e.g. author, title etc.) in the fields supplied.
  - *Note – it is particularly important to work accurately if you're entering data manually, please refer to the item itself for guidance and check your work closely.*

Groups

Adding references to a new group

- From the default **All My References** page, tick the titles you want to group.

- In the **Add to group…** dropdown menu you can select **New group**, enter the title you want for this new group and click **OK** – you will see your new group appear under **My Groups** on the left-hand side.

Adding references to an existing group

- From the default **All My References** page, tick the titles you want to group.

- In the **Add to group…** dropdown menu you can select the name of an existing group to add the titles to that.

Accessing a group

- Under My Groups on the left-hand side, you can click any group name to see what's in that group.

Editing a group
- To rename, share or delete a group go to **Organize** > **Manage My Groups.**

EndNote Basic/Web and Microsoft Word

Setup
- Open Word.
- Click the **EndNote** tab > **Preferences** > **Application.**
- Select **EndNote online** from the **Application** drop down menu and enter your email address and password.
- Tick the **Remember my address and password** box.
- Click **OK.**

Adding a citation
- Go to the **EndNote** tab in Word.
- Go to **Insert Citations.**
- Search for the item you want to cite by entering keywords in the search box (words from the item title, the author name, the year of publication etc.) and clicking **Find.**
- Select the item you want to cite from the list of results and click **Insert.**

Choosing an output style
- Go to the **EndNote** tab in Word.
- Use the Style drop-down to select the style you want to use (e.g. Harvard, Author-Date or the name of a specific journal).
    - Note - if the style you want isn't listed in the drop-down, then click **Select Another Style…**, choose the style you want from the pop-up box and click **OK.**

Editing a citation
- In Word, click the citation you want to edit. The citation will become highlighted grey.
- Go to the **EndNote** tab.
- Select **Edit Citation(s).**
    - Tick **Exclude author** if you do not want the author name(s) to appear in the citation.
    - Tick **Exlude year** if you do not want the year to appear in the citation.
    - Use the **Pages** field to add pages to the citation.
        - Note - not all output styles show pages by default. If you have used the Pages field but no pages show up in your citation field, use the **Suffix** field instead and add a comma then a space before your page numbers:

Bibliography

You'll notice your bibliography is created automatically at the end of your document and kept in alphabetical order.

Tutorials and help

Use the Help function in EndNote Web/Basic to learn about its other functions.

- When you're logged into EndNote Web/Basic click on the profile icon (it looks like a grey person) and then on **Help.**

Check the Using EndNote Basic/Online YouTube playlist
https://www.youtube.com/playlist?list=PLAEGcPDviwLY_MePrJAum34xt8Nz9-Kub