

# EndNote Online Instructions

This guide will take you through the various aspects of using EndNote Online. A series of short videos are also available about this software.

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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 at <http://www.myendnoteweb.com>

## Registering for an account

If you register directly with EndNote you will only get access to a basic version of EndNote and a limited number of referencing styles. To get access to the enhanced university version you will need to register via the library. Use this link

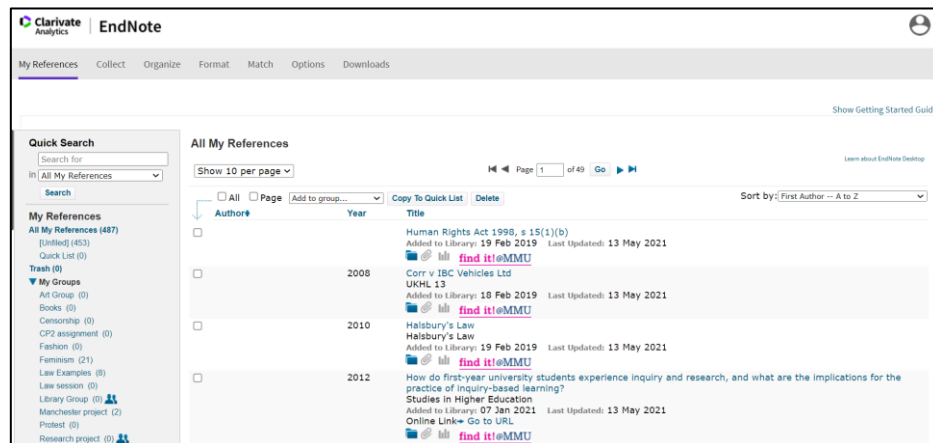
<http://mmu.idm.oclc.org/login?url=https://access.clarivate.com/login?app=endnote>

- This will take you to the MMU login screen.
  - Enter your MMU email address in the format given on screen, then click Next.
  - Enter your MMU password and click Sign In.
  - NB if you have already signed into any of the library resources or are using an on campus PC you may skip this stage.
  
- At the EndNote Online screen, click Register.
  - Enter an email address. It is recommended that you use your university email address
  - Choose a password for your EndNote Online account. NB This must be at least 8 characters long, include at least 1 number, 1 letter as well as a special character such as an exclamation mark - !
  - Enter your name and the code visible on screen and click Register.
  - A confirmation message will appear, click OK.
  - To activate the account, access your email account and locate an email from clarivate.com. Click the link to activate. A confirmation message will appear on screen, click OK.
  - This will return you to the EndNote Online screen, where you can use your account details to access EndNote. The first time you access your account you will need to click I agree to comply with license agreement. You can now start to enter references.

Once you have created an account you can access it directly by going to [www.myendnoteweb.com](http://www.myendnoteweb.com)

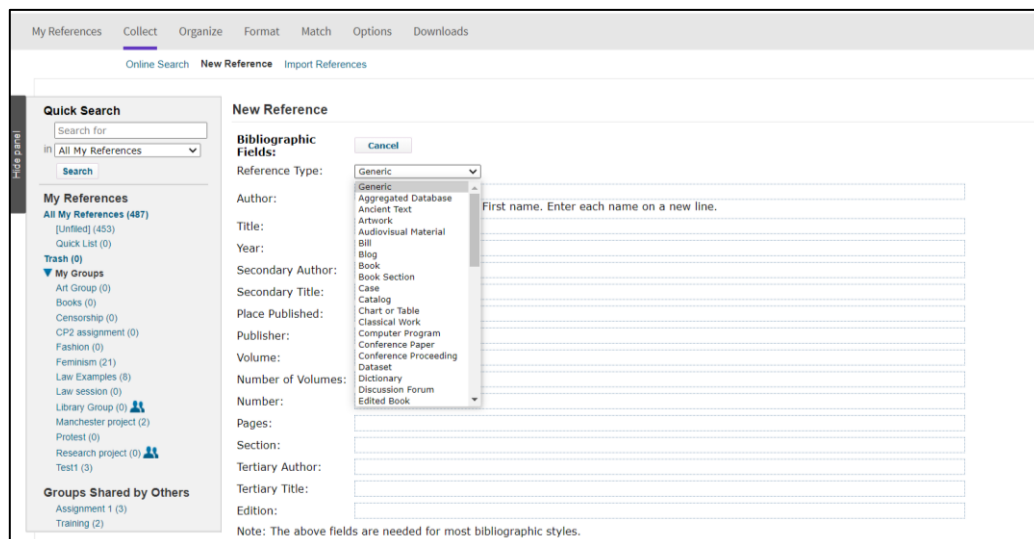
## The Reference Library

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 relevant 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.

**Quick Search**  
Search for  
in All My References  
Search

**My References**  
All My References (307)  
[Unfiled] (273)  
Quick List (0)  
Trash (76) Empty  
▼ My Groups  
Chapter 1 (10)  
Chapter 2 (7)  
Chapter 3 (6)  
Chapter 4 (1)  
Project (11)  
Project 2 (1)  
Research Methods (0)  
Research project (1)  
Groups Shared by Others  
Assignment 1 (3)  
Build a profile to showcase your own work.  
ResearcherID

**New Reference**  
Cancel Save *Reference needs to be saved.*

**Bibliographic Fields:**  
Reference Type: Book

Author:  
Smith, Paul  
Peters, Mark

Use format Last Name, First name. Enter each name on a new line.

Title:  
Year:  
Series Editor:  
Series Title:  
Place Published:  
Publisher:  
Volume:  
Number of Volumes:

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.

**Quick Search**  
Search for  
in All My References  
Search

**My References**  
All My References (307)  
[Unfiled] (273)  
Quick List (0)  
Trash (76) Empty  
▼ My Groups  
Chapter 1 (10)  
Chapter 2 (7)  
Chapter 3 (6)  
Chapter 4 (1)  
Project (11)  
Project 2 (1)  
Research Methods (0)  
Research project (1)  
Groups Shared by Others  
Assignment 1 (3)  
Build a profile to showcase your own work.  
ResearcherID

**New Reference**  
Cancel Save *Reference is saved.*

**Bibliographic Fields:**  
Reference Type: Book

Author:  
Smith, Paul  
Peters, Mark

Use format Last Name, First name. Enter each name on a new line.

Title: Research methods  
Year: 2016  
Series Editor:  
Series Title:  
Place Published: London  
Publisher: Sage  
Volume:  
Number of Volumes:  
Series Volume:  
Number of Pages:  
Pages:  
Editor:  
Edition:

## 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.

The screenshot shows the EndNote desktop application interface. On the left is a sidebar with 'Quick Search', 'My References' (All My References (209), [Unfiled] (180), Quick List (0)), 'Trash (22) Empty', and 'My Groups' (Chapter 1 (8), Chapter 2 (0), Chapter 3 (0), Dissertation (3), Introduction (1), Project (17), Project Work2 (2), Research (2)). Below the sidebar is a 'ResearcherID' section. The main area is titled 'All My References' and shows a list of references. The 'Delete' button is circled in red. The checkbox next to the reference by Baker, M. J. is also circled in red.

Author	Year	Title
<input type="checkbox"/>	Armstrong, C.	2010 Access to knowledge: the role of copyright Added to Library: 05 Dec 2014 Last Updated: 20 Mar 2015 Online Link → Go to URL
<input checked="" type="checkbox"/>	Baker, M. J.	2002 Research Methods The Marketing Review Added to Library: 04 Dec 2014 Last Updated: 22 Dec 2014 Online Link → Go to URL
<input type="checkbox"/>	Bell, Judith	2009 Research methods for researchers Added to Library: 20 Dec 2011 Last Updated: 12 Nov 2014
<input type="checkbox"/>	Berger, John	2008 Ways of seeing Added to Library: 23 Oct 2013 Last Updated: 12 Nov 2014
<input type="checkbox"/>	Berry, Ralph	2000 The research project: how to write it Added to Library: 06 Sep 2014 Last Updated: 12 Nov 2014 Online Link → Go to URL

### 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.

The screenshot shows the EndNote desktop application interface. On the left is a sidebar with 'Quick Search', 'My References' (All My References (294), [Unfiled] (258), Quick List (0)), 'Trash (59) Empty', and 'My Groups' (Chapter 1 (11), Chapter 2 (8), Chapter 3 (5), Chapter 4 (4)). Below the sidebar is a 'ResearcherID' section. The main area is titled 'All My References' and shows a list of references. The 'Sort by' dropdown menu is open, showing various sorting options.

Author	Year	Title
<input type="checkbox"/>	Bell, Judith	2009 Research methods for first time researchers Added to Library: 20 Dec 2011 Last Updated: 18 Dec 2015
<input type="checkbox"/>	Berger, John	2008 Ways of seeing Added to Library: 23 Oct 2013 Last Updated: 23 Mar 2016
<input type="checkbox"/>	Bishop, Matthew	2003 Computer security : art and science Added to Library: 16 Apr 2015 Last Updated: 23 Mar 2016

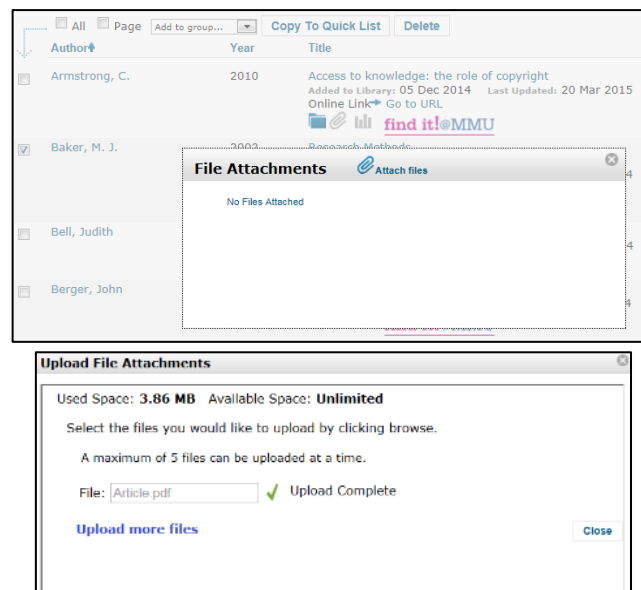
Sort by: First Author -- A to Z, First Author -- Z to A, Year -- newest to oldest, Year -- oldest to newest, Title -- A to Z, Title -- Z to A, Source Title -- A to Z, Source Title -- Z to A, Times Cited -- highest to lowest, Times Cited -- lowest to highest, Added to Library -- newest to oldest, Added to Library -- oldest to newest, Last Updated -- newest to oldest, Last Updated -- oldest to newest

## Removing duplicate references

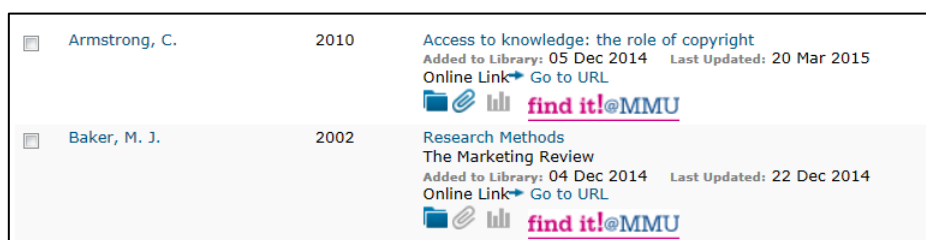
If you are downloading many records from different sources, you may find that you end up with duplicate references in your library. EndNote has a handy tool to find these for you. Click on Organize and choose Find Duplicates. The duplicates are highlighted and can be reviewed and then deleted, by clicking on Delete.

## Adding attachments to references

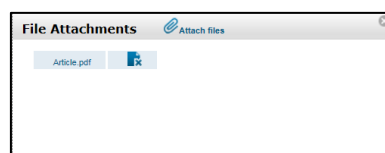
EndNote allows you to attach files such as PDF files to individual records. To attach, first click on the Paper clip icon for the individual record, click Attach files, now click on Browse and locate the file. Once you have found the file click Upload.



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



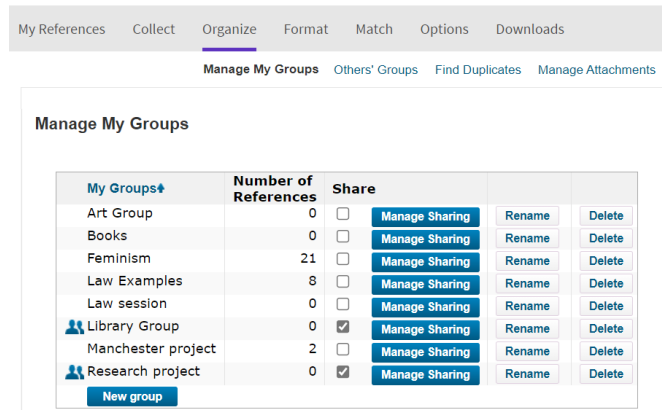
To remove an attachment, simply click on the paper clip, then hover over the name of the file and click the blue cross to remove.



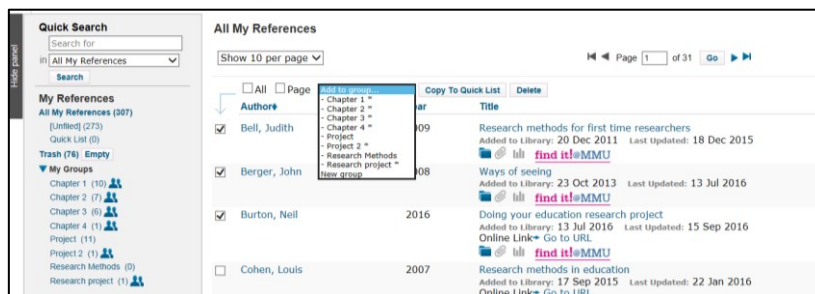
If you wanted to see the total number of attachments in your library, choose Organize and click Manage Attachments. All the attachments will be listed as well as how much space has been used.

## 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.

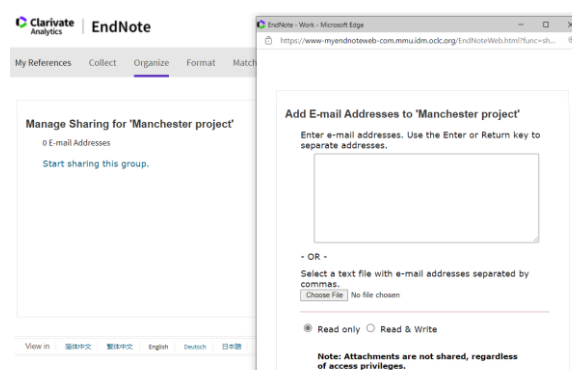


Return to My References and tick the records you want to add to your group and then select the group from Add to Group drop down menu. References can be added to multiple groups as required.



## 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.



## 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.mmu.ac.uk/library](http://www.mmu.ac.uk/library)) and run your search. You can select multiple records to transfer into EndNote Online.

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



Once selected, the icon changes and items will be added to the Saved Items folder located above the result list.

Manchester Metropolitan University LIBRARY

"research methods" Hello Sign In

Advanced Search Resources

Retain Filters | Clear Filters 251,125 results in MMU Library

Sort: Best Match

Group This Search  
Group Related Editions

Refine This Search  
Expand Search with Related Terms

Held By Library  
Libraries Worldwide  
MMU Library  
All Saints  
Manchester Poetry Library  
Special Collections Museum

1

Research methods for public administrators

Authors: Gall Johnson 1947-

eBook ©2002  
Westport, CT: Quorum Books, ©2002.

Summary: A simple, straightforward presentation of the concepts, methods, and tools of research in the public... text in such courses as research methods, program evaluation and Introduction to applied statistics, usually found in public administration programs at the undergraduate and graduate levels.; And for people already in jobs outside the academic

Show More

Subjects:  
Public administration Research Methodology.

Cite Share Saved

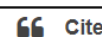
★ Saved Items (4)

Access Online

**NB** The selected records will disappear when you close the session, unless you have signed in to Library Search and chosen to save them to a folder.

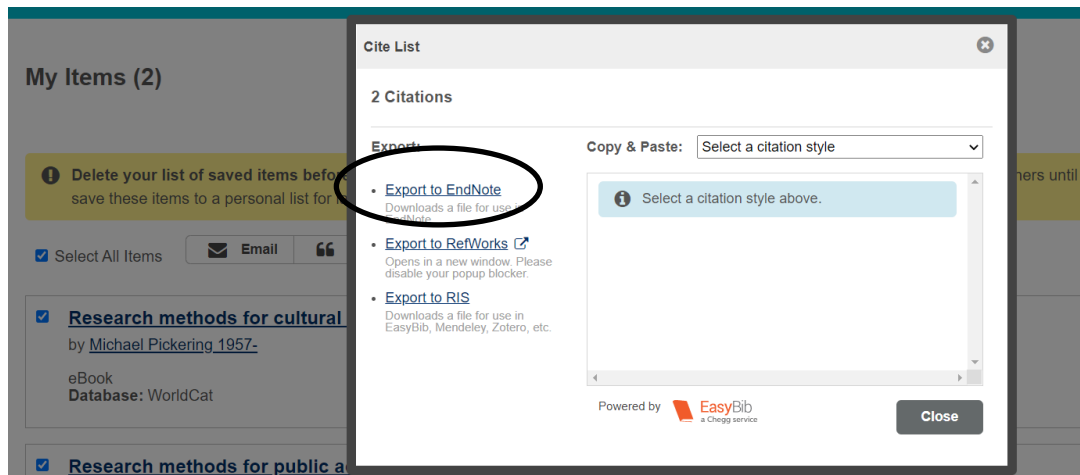
When you are ready to transfer your results to EndNote, click on the Saved Items above the result list.

A new screen will appear, listing the records to be transferred. To transfer click on

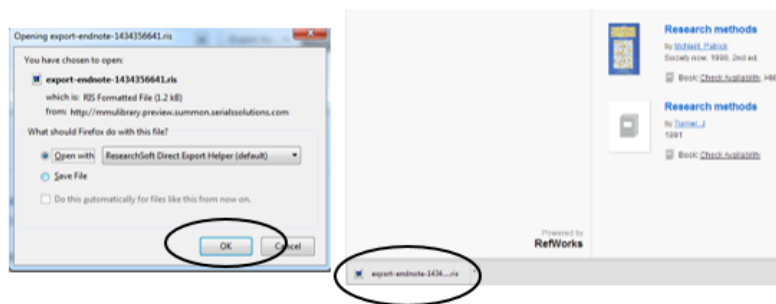


A new box will appear. Choose Export to EndNote.

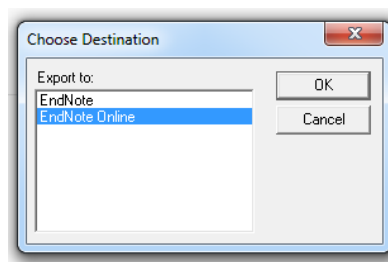




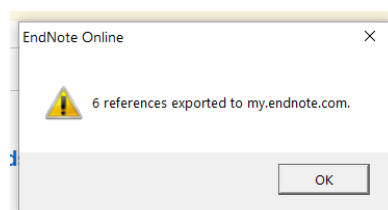
Depending on your browser, you may first need to click Save then either double click on the downloaded file or select open file near the bottom of your browser or select open with, then click OK.



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.



**NB** If Direct Export is not working, it is still possible to transfer information into EndNote, please use the instructions for importing references into EndNote Online.

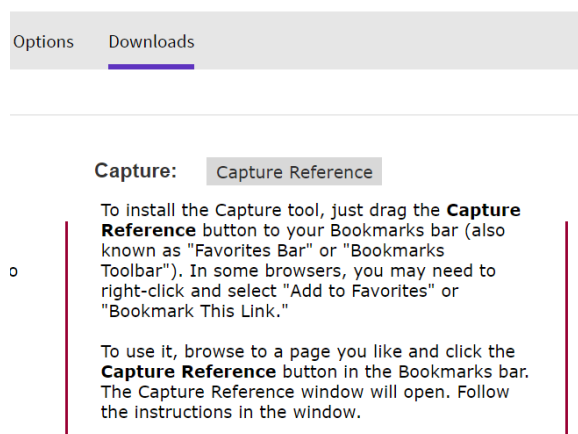
## Capturing Bibliographic Information from a Website

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

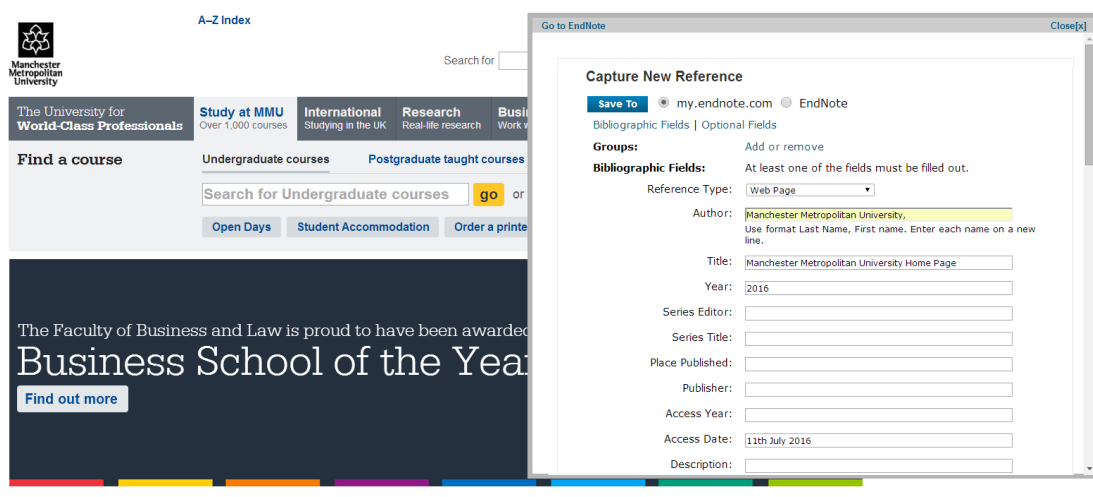
**NB** This function does not work in Internet Explorer. You need to use Firefox/Google Chrome to use this function.

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 on the Capture Reference button. 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 details 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).**

Clarithive Analytics | EndNote

My References Collect Organize Format Match Options Downloads

**Cite While You Write™**

Find out why EndNote is the industry leader in bibliographic formatting.

Download our patented\* Cite While You Write tool to insert references, and format citations and bibliographies automatically while you write your papers in Word.

See [Installation Instructions and System Requirements](#).

- Download Windows
- Download Windows MSI for mass program installation
- Download Macintosh

\*Patented technology. Australia Patent 2014318392; U.S. Patents 10002116, 9588955, 9218344, 9177013, 8676780, 8566304, 8201085, 8082241, 6233581; China Patent: 201380034689.3; Japan Patent: 5992404.

**Capture:** Capture Reference

To install the Capture tool, just drag the **Capture Reference** button to your Bookmarks bar (also known as "Favorites Bar" or "Bookmarks Toolbar"). In some browsers, you may need to right-click and select "Add to Favorites" or "Bookmark This Link."

To use it, browse to a page you like and click the **Capture Reference** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window.

Once installed you will see an EndNote toolbar in Word.

File Home Insert Design Layout References Mailings Review View Help EndNote 20

EN Go to EndNote

Edit & Manage Citation(s)

Edit Library Reference(s)

Style: MMU Harvard

Update Citations and Bibliography

Convert Citations and Bibliography

Categorize References

Instant Formatting is Off

Export to EndNote

Manuscript Matcher

Preferences

Help

Citations Bibliography Tools

## 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.

EndNote 20 Cite While You Write Preferences

General Keyboard Figures and Tables Application

Select the Cite While You Write application

Application: EndNote

Enter Your ID: http://my.endnote.com

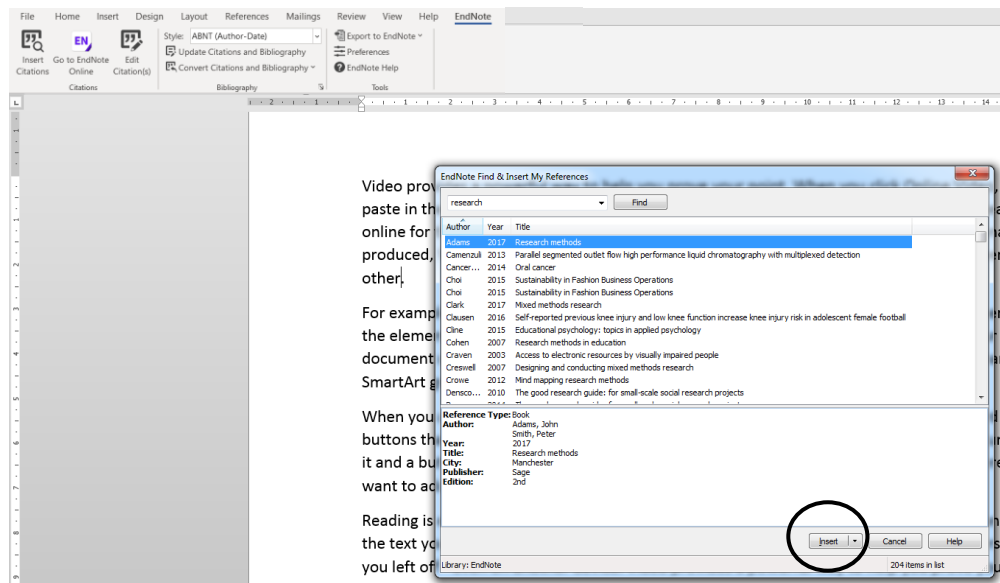
Email Address:

Password:

OK Cancel Help

## Inserting a citation

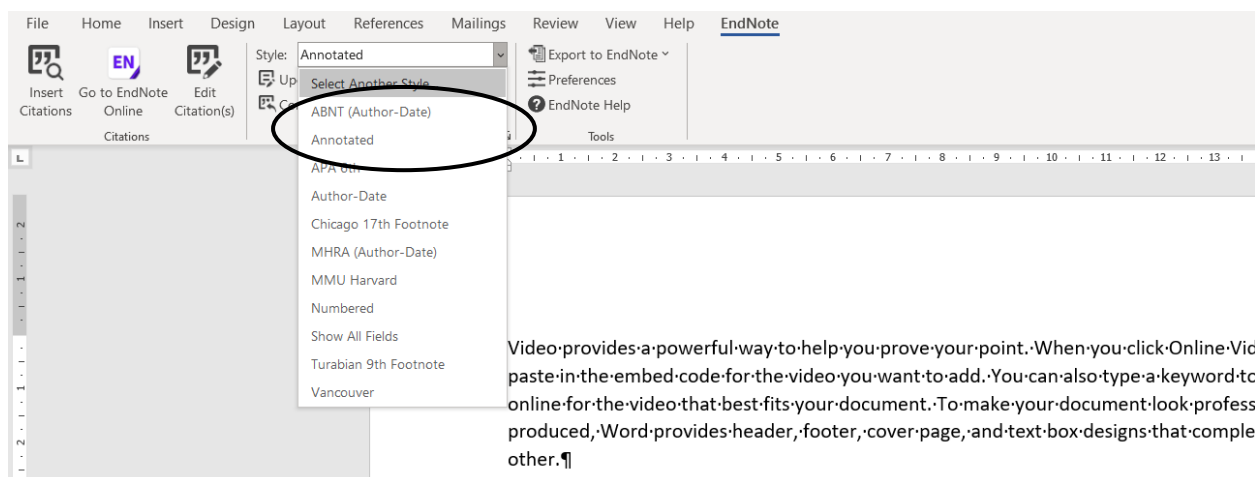
Once connected to EndNote, you can start writing your text. When you need to insert a citation, simply place the cursor, where you want the citation to appear. Next click on Insert Citations on the EndNote toolbar. Then search for the relevant citation, click to highlight and select Insert.



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.

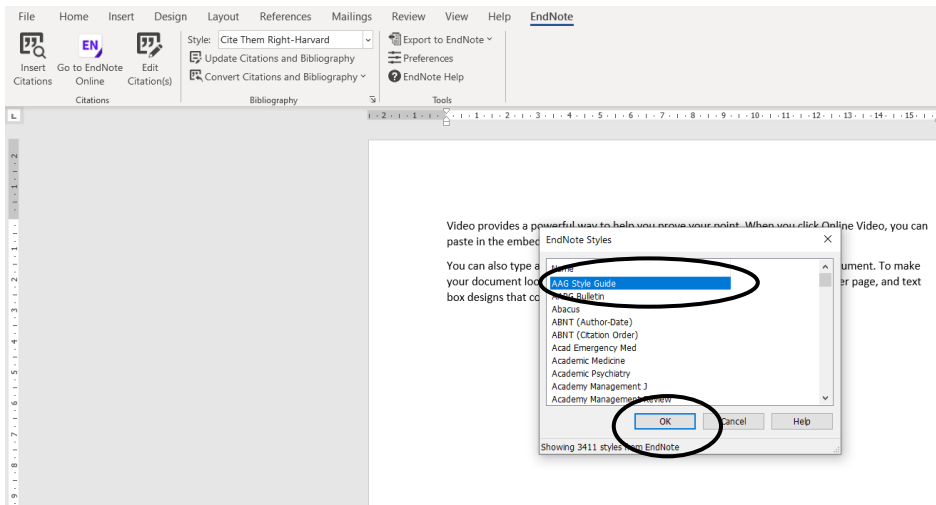
## Changing the referencing style in Word

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.



Video provides a powerful way to help you prove your point. When you click Online Vid paste in the embed code for the video you want to add. You can also type a keyword to online for the video that best fits your document. To make your document look profess produced, Word provides header, footer, cover page, and text box designs that comple other.

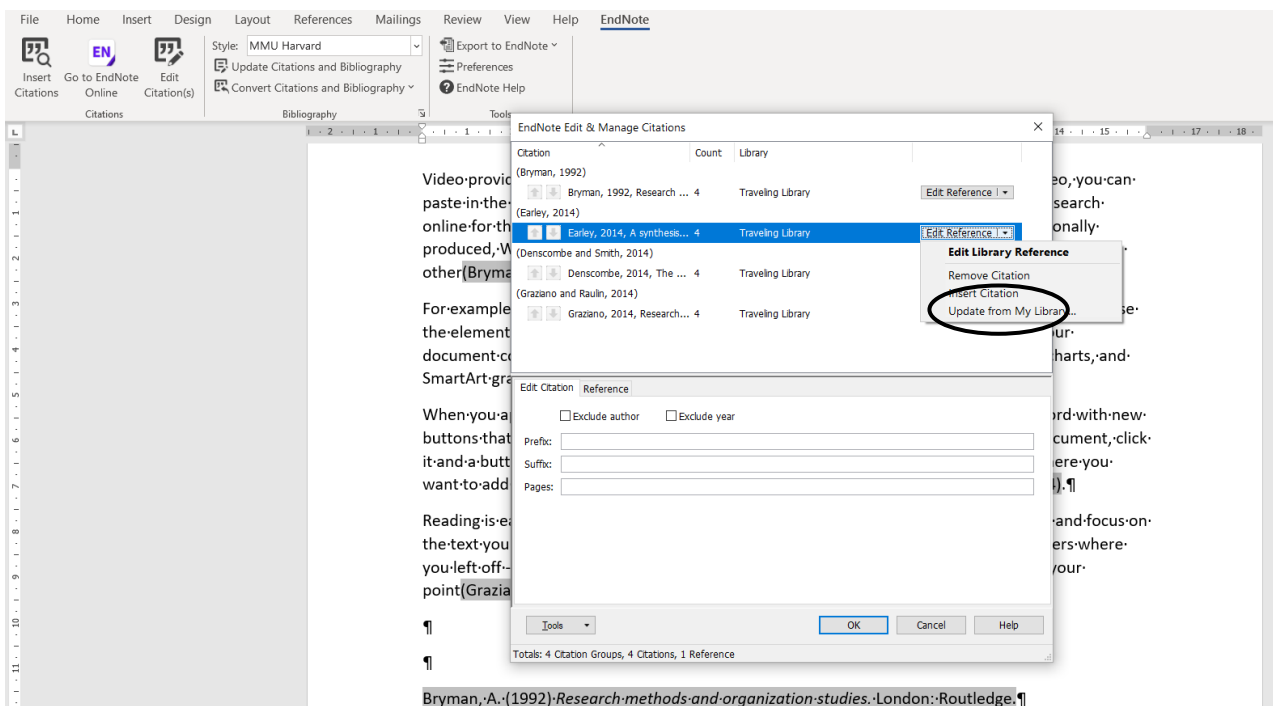
A new box will open, scroll down to the style you require, highlight and click OK. Your citations and bibliography will be reformatted in that specific style



## 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.

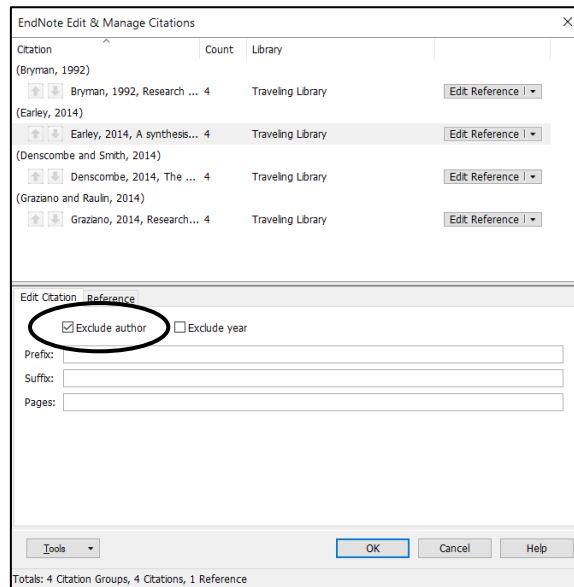
To delete a citation click Edit Citation(s) on the EndNote toolbar, highlight the citation you want to delete, click Edit Reference and then choose Remove Citation.



## Excluding parts of citation

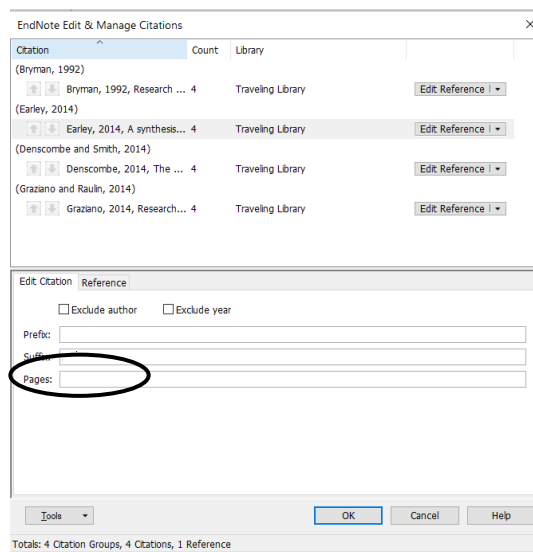
In some cases you may need to use an author's name as part of the text, you can still insert your citation and then use EndNote to exclude the author's surname. Select Edit Citation(s)

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.



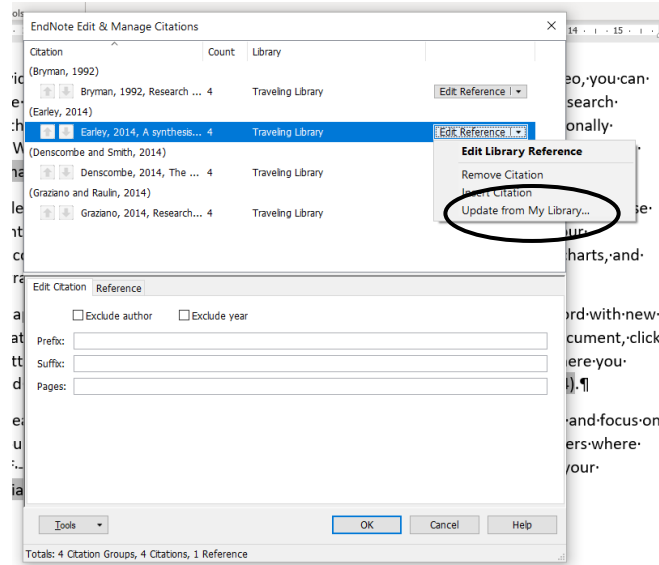
## Including page numbers in a reference

If you need to include a page number as part of your reference, click on Edit Citation(s) on the EndNote toolbar. Click to highlight the reference you want to edit and then type the page number in the field marked Pages e.g. 45.



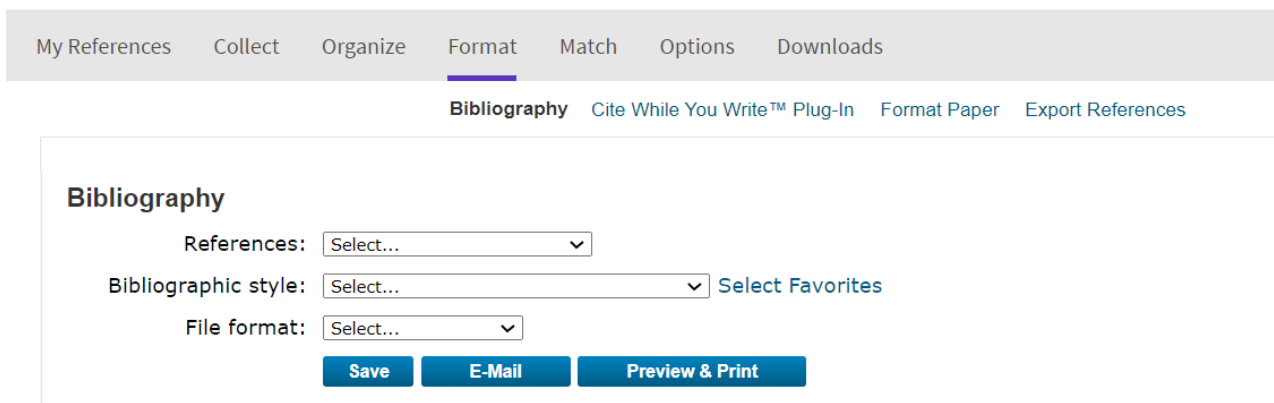
## Editing citations/bibliography

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.



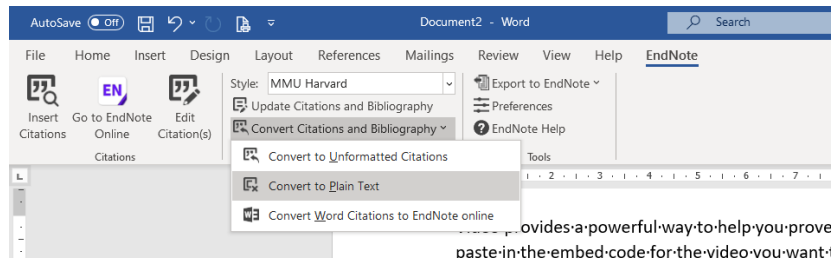
## Standalone bibliographies

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:

<https://www.mmu.ac.uk/library/referencing-and-study-support/endnote>