Get started with EndNote Online

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EndNote Online is a free web-based version of the Endnote software that allows users to create an account and download the relevant installers so that they can use EndNote Online on their own PC.

1.1 Creating an EndNote Online account – Activity 1

1. Open a web browser and go to www.myendnoteweb.com
2. Select create an account
3. Complete the form, paying particular attention to the requirements of the password
4. Once you agree to the terms and conditions, your Endnote Online account will be ready to use

1.2 My References

EndNote Online defaults to the My References screen. This allows you to see the references in your library over a number of pages. You can also search and add groups to your library from this screen

1.3 Adding new references

Your references may be to books, journal articles, theses, etc. EndNote Online offers you different reference types for the different types of publication.

1. Click on the Collect tab and select new reference
2. The default reference type is Generic. If you want to change the reference type choose another one from the drop-down list at the top of the box, e.g. Book or Edited Book.
3. Enter the bibliographic data in the appropriate fields. To move between fields click with the mouse in the required field
4. *The Title field should be entered with normal capitalisation and with no full stop at the end*
5. *Do not enter any special formatting, such as bold or italics as EndNote Online will do this for you later.*
6. When you have finished entering information click the Save option.

Tip: Authors
- Names should be entered with the last name followed by a comma and the first name/initials e.g. Smith, John or Smith, J
- The above is the only format allowed via Endnote Online
- If a reference is to more than one author each name must be entered on a separate line. (Activity 3)

- If the author is an institution it should be followed by a comma and there should be no other commas within the name e.g. World Health Organization,

Activity 2 **Create a new Journal Article reference**	Author: Peden, G. C. Year: 2010 Title: Sir Horace Wilson and appeasement Journal: Historical Journal Volume: 53 Issue : 4 Pages: 983-1014
Activity 3 **Create a new Book reference**	Author: Massey, Douglas Sanchez, Magaly Year: 2010 Title: Brokered boundaries Place Published: New York Publisher: Russell Sage

1.4 Adding references from Library Search – Activity 4

Adding references from Library Search uses the Direct Export method. This means that results are downloaded into your Endnote desktop library without having to save a separate file or choose the correct import filter.

1. Go to http://www.lse.ac.uk/library/home.aspx
2. Enter a search term that is relevant to your and click Search
3. Review your results and click the star next to the title for each result that you wish to download. This adds the item to the e-Shelf
4. Click the link to the e-Shelf
5. Select the results you wish to download from the basket
6. From the Select how to save drop down menu choose: Push to Endnote Online

7. This will open a small window either prompting you to log into Endnote Online or stating how many references have been imported

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Tip: Refining using Library Search

- For books choose Available in the Library
- For articles choose either Peer-review Journals or Full text Online
- Results can also be refined using other options that appear down the left hand side of the screen e.g. topic, author

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1.5 Adding new references from EBSCO – Activity 5

EBSCO is a platform that is home to a number of databases that LSE subscribes to. Some of these can be searched using the EBSCO option on Library Search. For this activity we will be using the EBSCO platform. A similar process to the one described below is available for most other databases that LSE subscribes to.

1. Search for Business Source Complete
2. Select view online and click the link. You should then see the screen below:

3. Enter your search terms and click search
4. When the results appear you can add your chosen items to the Folder via the *Add to Folder* icon

5. Click on the *Folder view* option on the right hand side of the screen or the Folder icon at the top of the screen
6. The Folder List will appear-you can now choose which items you wish to download-click in the Select All box to include all your chosen results
7. Click on the *Export* icon
8. Choose the *Direct Export to EndNote Web* and click on *Save*
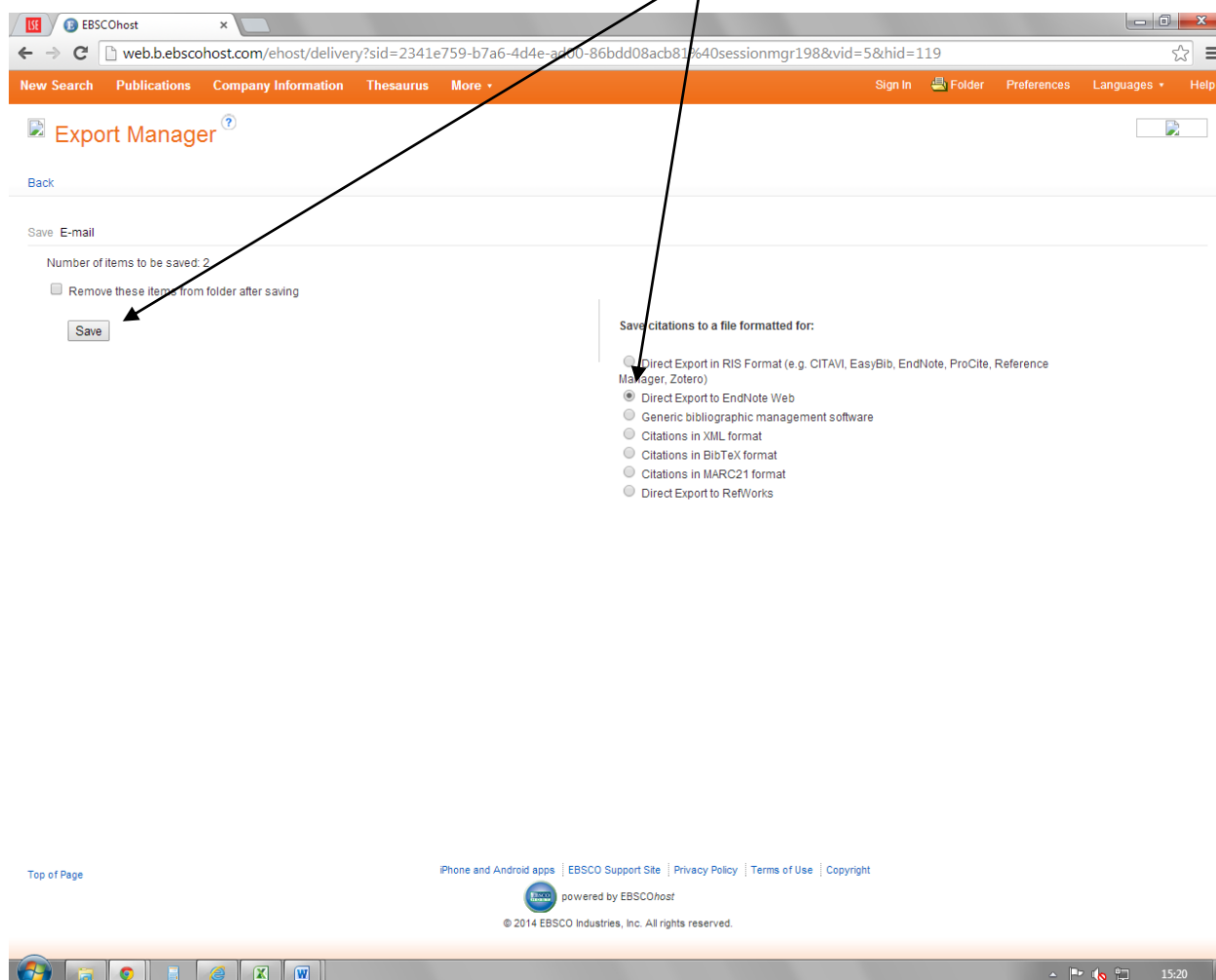
9. This will open a small window or a new tab, either prompting you to log into Endnote Online or stating how many references have been imported

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Tip: No option to export to EndNote Web/Online
Some databases do not provide the option to export to EndNote web/online. When this occurs look for the option to save to .RIS format. You will then need to import the file to EndNote Online using the instructions below:
1. Under the collect tab, go to Import References
2. Locate the relevant RIS file using the Browse option
3. Select the RefMan RIS option from the Import Option drop down menu
4. In the To option, select where you want to import the reference to e.g. unfiled,

The above also applies to your own machines and if you are using Firefox on an LSE PC

1.6. Grouping your references – Activity 6

Grouping references can be useful as a way of organising your references be particular topics such as theses chapter or research topic.

Creating new groups	- Go to the organize tab and select Manage My Groups - Select new group - Enter a name for the group - You can now add references to this group
Adding references to a group	- Go to the my references tab - Tick the references you wish to add to a group - From the drop down menu, select a group to add them to - Your references will be added into your group. References can be in more than one group
Deleting Groups	- Go to the organize tab and select Manage My Groups - Click delete on the group you wish to delete - You will see a prompt asking you to confirm if you wish to delete the Group
Sharing Groups	- It is possible to share groups - Go to the organize tab - Click manage sharing on the group you wish to share - Enter the email address of the people you wish to share the group with. - You can select to give them read only rights or read and write rights - Attachments cannot be seen by other members of the group

1.7 Formatting – Activity 7

- EndNote Online uses a range of bibliographic styles to format your citations and bibliographies automatically in Word. These have been created to conform to recognised standards. The available styles have been selected by the site administrator.
- In EndNote Online you can choose the style that you would like your bibliography to appear in. Go to Format > Bibliography to select which references, style, and the file format. Once done, this can be saved, emailed or printed.
- For use in Word, use the Cite While You Write Plug-in.
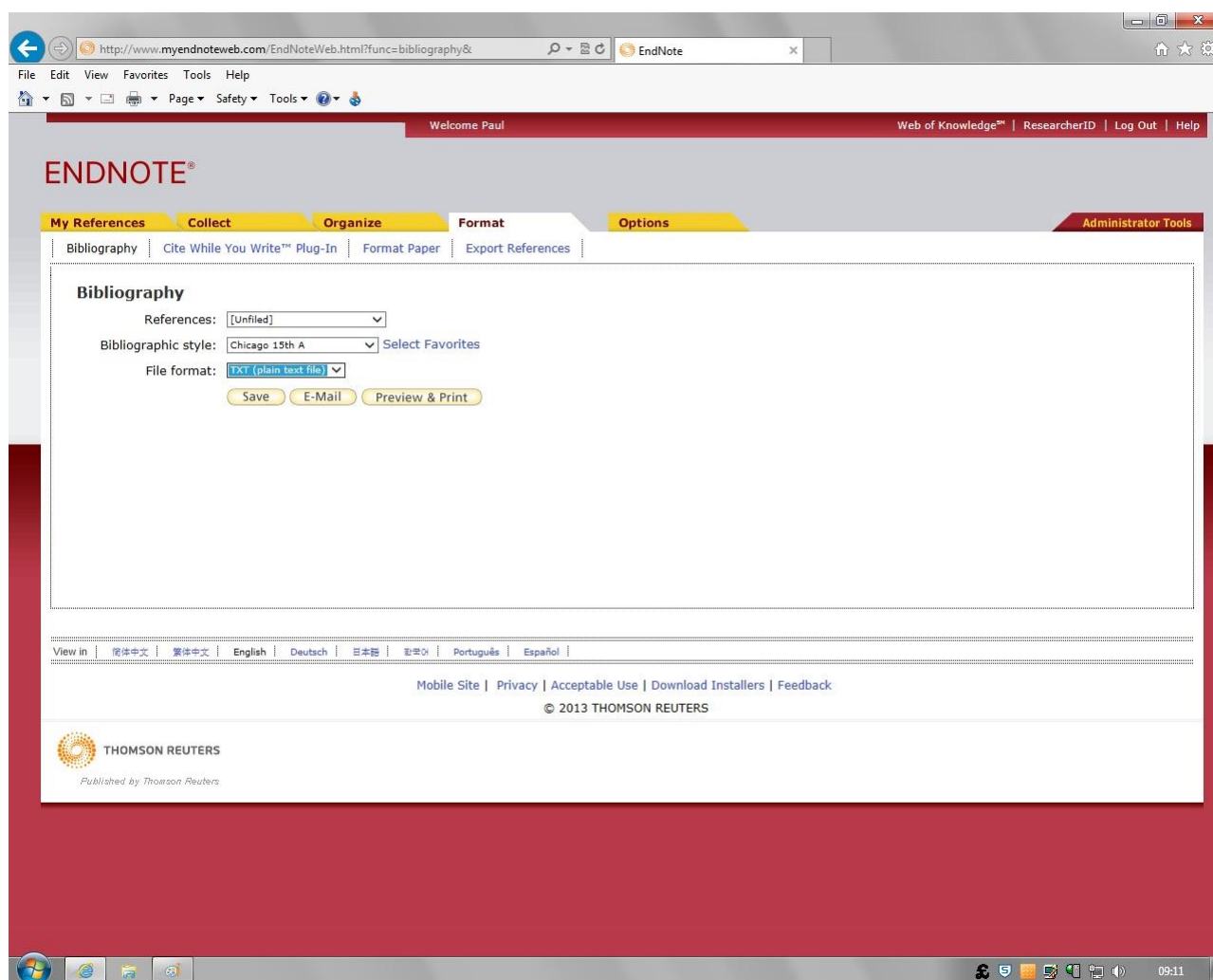
Part 2: Working in Word

Activity 8	
Open The Rolling Stones.docx Word document from your EndNote X7 folder in your H space	• In Word choose File/Open and navigate to your EndNote X7 Folder in your H space. • From here select the The Rolling Stones.docx document and open this. • We will use this in the class to practice adding citations into Word

2.1 Loading the Endnote Online ribbon – Activity 9

1. In Word, go to the Endnote X7 ribbon and select preferences.

2. In the dialog blog, go the application tab and change it from Endnote to Endnote Online. Ensure that the email and password boxes are clear, and then remember my details box is unchecked. Click OK

3. You should then be prompted for your Endnote Online login details. Enter these details and log in.

4. If you are able to login successfully then a style should have appeared in the style box in the bibliography part of the Endnote Online tab.

5. You are now ready use Word and Endnote Online on an LSE PC
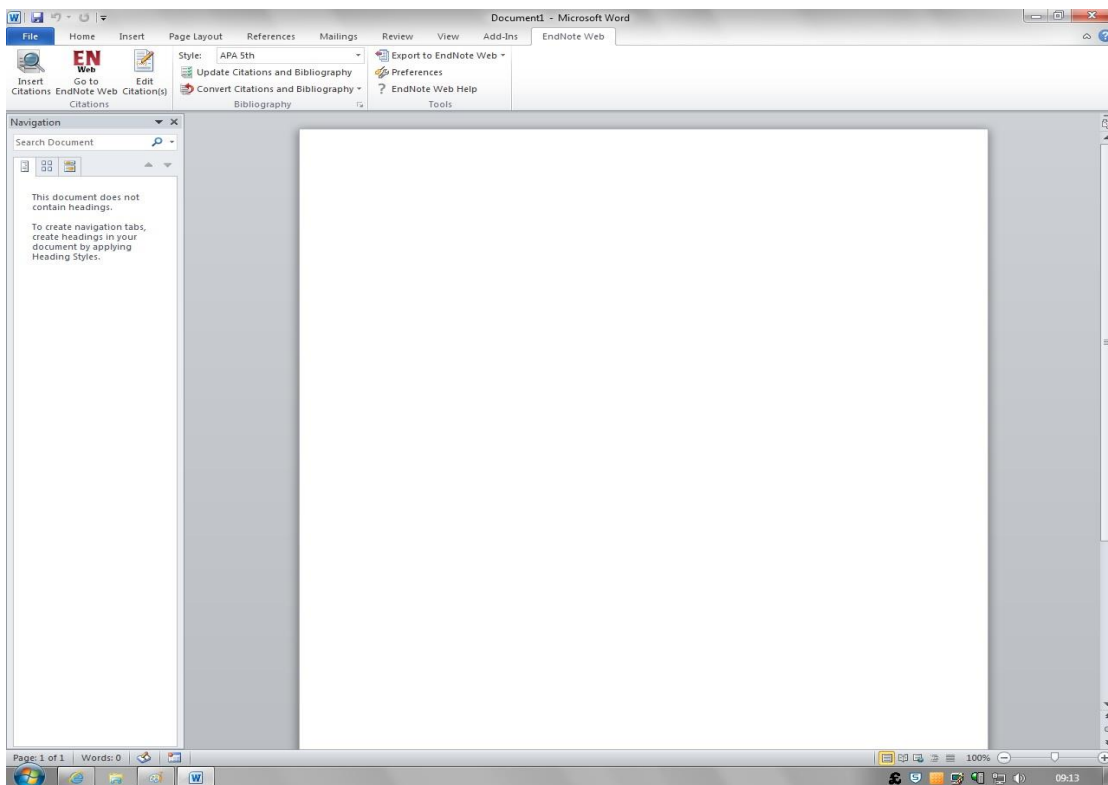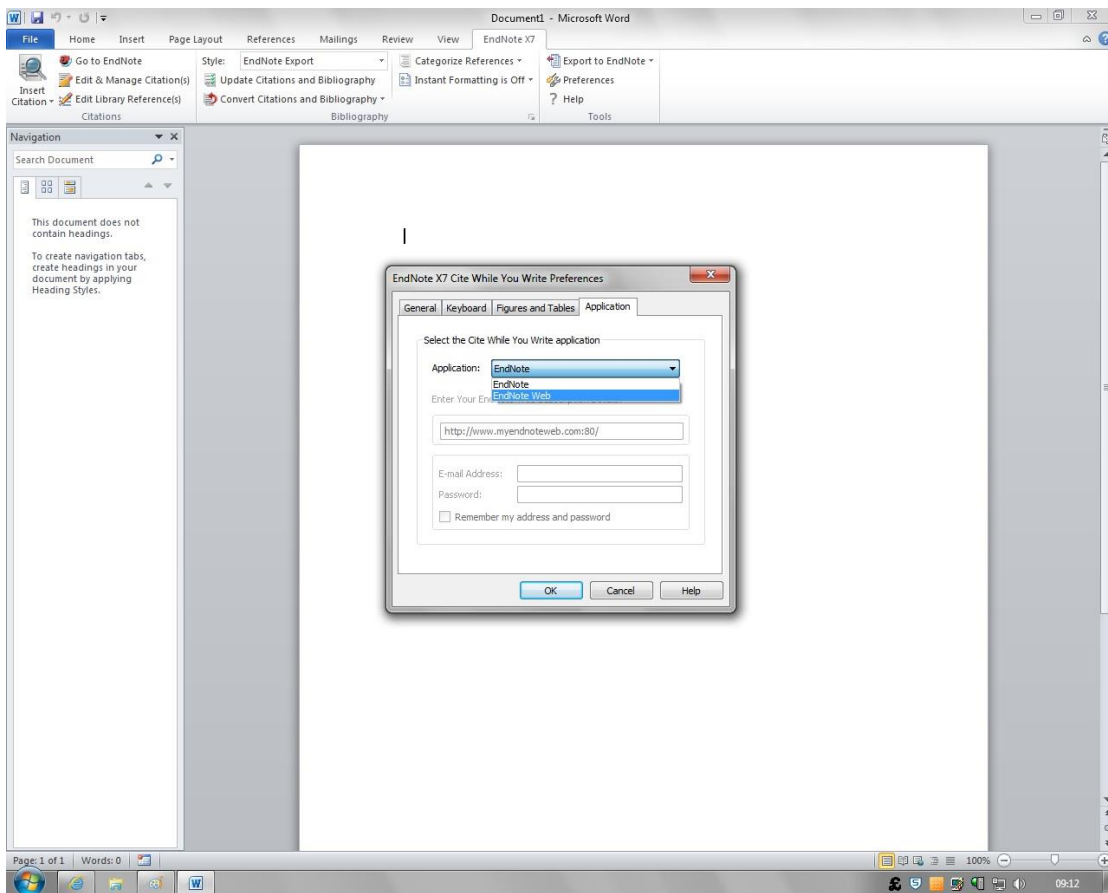
2.2 Adding formatted in-text citations – Activity 10

1. Set the style box to APA6th

2. In Word place the cursor at the first point in the text where you want a citation.

3. Click on the *Insert Citation(s)* icon. *The EndNote Online Find and Insert My Reference box will open*
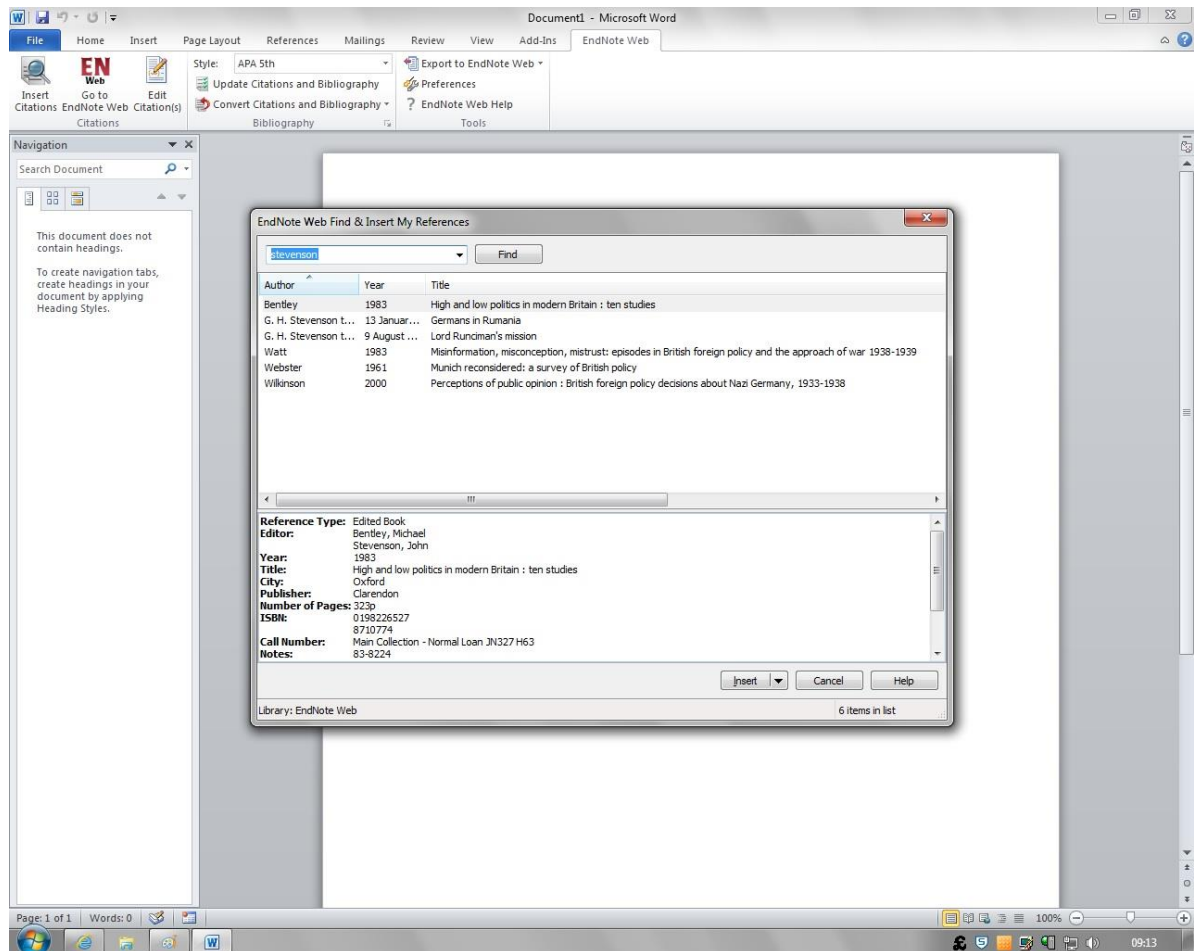
4. *In the Search for box enter the author of the work you wish to cite, or a keyword. Matching references will be displayed*

5. Select the reference(s) required.

6. Click on Insert. The citation(s) will be inserted in the text and a bibliography started at the end of the document.

Tip: Footnotes
The procedure for footnotes has on addition step. You first of all need to create an empty footnote in Word **(References/Insert Footnote)**

2.3 Editing & deleting citations and adding page numbers – Activity 11

> **Don't Forget! Editing Citations**
> If you need to correct a typing mistake in one of your references then you MUST do this in the original EndNote reference **Manual changes will not be saved**

- Highlight the citation in the document
- Click on the Edit Citation(s) icon
  - o To delete a citation click on the Edit Reference button and choose Remove Citation. Your citation will be deleted from the text and the bibliography, unless it appears multiple times in the text
  - o You can easily add page numbers if using APA 6th (Chicago 16th for footnotes) by entering the numbers as required in the pages field. You do not need to add e.g. p or pp

> **Not using APA 6th or Chicago 16th?**
> Then add your page details into the suffix field as not all styles read the pages box.
> You will need to be consistent and add any pagination as required.

2.4 Unformatted citations

EndNote citations in Word can appear as either formatted or unformatted. This can be done by going to Convert Citations and Bibliography > Convert to Unformatted Citations

To change unformatted citations into formatted ones, select Update Citations and Bibliography

Hints:
- Enables you to see quite clearly where your citations are
- Enables you to **delete them manually** without corrupting your document
- Enables you to copy chunks of text including your citations and move them around in Word without corrupting your document
- If using a bibliographic style which recognises the pages field e.g. APA6th then you can VERY easily add page numbers manually by adding the @ symbol before the numbering required e.g. {Baker, 2009 #22@13}
- Makes for a shorter document as no bibliography included – uses less filespace.
- To reformat choose Update Citations and Bibliography.

2.5 Bibliographies – Activity 12

As citations are added in Word, a bibliography is automatically built of cited references.You may which to make additions to this, in order to make your bibliography complete. This method allows you to reformat your bibliography in Word e.g. change the style or layout of the bibliography.

> **Tip: Changing the layout of your bibliography**
>
> 1. Click on small arrow in the bottom right on the Bibliography section of the Endnote ribbon. This will open the Configure Bibliography dialog box
> 2. Check that the style is correct
> 3. Click on the layout tab
> 4. Give the bibliography a title
> 5. Set the font and size
> 6. Ensure the line spacing is set to single
> 7. Set the space after to 1.5. This helps to tidy up the appearance of your bibliography in Word
> 8. Click OK

2.6 Creating clean documents – Activity 13

This will remove ALL EndNote coding from your document and so creates a 'safe' copy for you to send on to your supervisor especially if they are going to use the Word track changes feature. You would also need to do this if submitting your thesis online, or if submitting your work to a publisher

1. From the EndNote Online toolbar in Word on Convert Citations and Bibliography and then choose the Convert to Plain Text option
2. You will see a message informing you that a fresh uncoded copy of your document will be created. Click on OK.
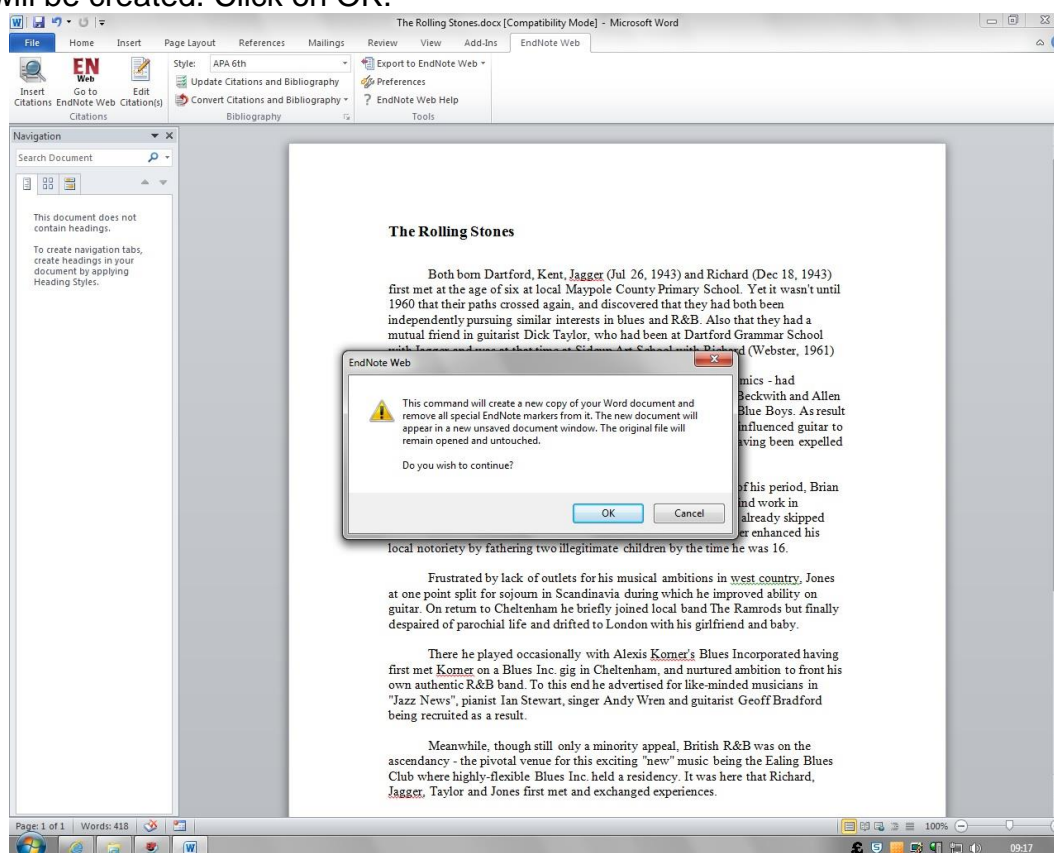
3. A new document will be created – you must save this. I recommend using a filename that includes 'uncoded' or 'nocode' so that you can distinguish it from your original document
4. Your original document will be unchanged – **retain this in case you need to return to it.**

ℹ️ **Hint:** The uncoded copy is text only and contains none of the EndNote coding. This means it's safe to make manual changes to your text if you need to do so at this late stage.

Part 3: Synchronisation

One of the features of Endnote desktop is the ability to sync with your Endnote Online account. To do this:

1. Click the Sync with Endnote Online icon (blue circle with two white arrows) from within EndNote desktop programme.
2. Log in with your Endnote Online account details.
3. Click on the icon again. You will be prompted with a message to create an archive copy. This is advisable when first syncing a library.
4. Once this has been done then the sync should begin.

Part 4 Further Help

Further help is available via a number of channels should you require it. This can be done by emailing one of the Endnote tutors listed below, asking at the Help Desk or by attending Software Surgery.

Paul Horsler p.n.horsler@lse.ac.uk
Clive Wilson clive.wilson@lse.ac.uk

Software surgery is held Thursday lunchtimes from 1-2 in the Library Training Room LRB.R08, when one of the Endnote trainers will be in attendance. This is booked via the Training and Development Portal.

1-2-1 appointments may also be available to discuss specific problems.

There is an Endnote channel on YouTube, which contains a series of videos from the product owner, Thomson Reuters.