

# ENDNOTE WEB

## Getting started guide

This guide will take you through the basics of using EndNote Web to store and use references.

Consult the EndNote information on the Library website for further help:

[www.reading.ac.uk/library/endnote](http://www.reading.ac.uk/library/endnote)

## WHAT IS ENDNOTE WEB?

EndNote Web (also known as EndNote Online) is an online service you can use to:

- store and organise useful references you find whilst researching topics
- insert references in your Word documents
- automatically build and format your bibliography in a style of your choosing

It is a cut down version of the desktop EndNote software.

## Setting up an EndNote Web account

To use an enhanced version of EndNote Web, which is linked to the University of Reading, you will need to register for an account via the Web of Science.

1. Open your web browser.
2. Go to the Library's home page at [www.reading.ac.uk/library](http://www.reading.ac.uk/library)
3. Click on the **Databases a-z list** link.
4. Use the A-Z list to find **Web of Science** and click on the on- or off-campus link as appropriate.
5. If you are on-campus and the 'Authentication Preference Selection' screen is displayed, select **IP Authentication**.
6. Once connected click on the **EndNote** option at the top of the screen, then the '**Sign up**' link.
7. **Enter your email address** (it doesn't have to be your University one)
8. **Create a password** for your account.
9. **Enter your first and last names**.
10. **Click 'Sign up'**
11. You will be sent an email containing an activation link. **Click on this link to activate your account**.
12. You'll then be taken to the Sign in screen to login with the email address and password you used when creating the account.
13. You can now use this same username and password to access EndNote Web at <https://my.endnote.com>

# MANUALLY ADDING A REFERENCE TO YOUR LIBRARY

Typing in a reference will show you how the information is stored in EndNote Web.

1. Click the 'Collect' tab.
2. Then select 'New Reference'.
3. For this example the following journal article is being entered into the library:

Marvin, Simon (2000). Understanding urban futures: between science and science fiction. *Foresight* 2, no. 6 pp 559-577.

4. Click the down arrow next to the 'Reference Type' box and choose the reference type for the item you are adding (for this example choose journal article)

Reference Type:

5. Type in the details of the item you are adding. You do not have to enter something in every box, but you should complete as many as possible in the top section, labelled 'Bibliographic Fields'.

Always input any authors in this way: surname, firstnames/initials

Where you have more than one author put each author on a separate line in the Author box.

Your entry should look like this:

## New Reference

### Bibliographic Fields:

Cancel

Save

Reference is saved.

Reference Type:

Journal Article

Author:

Marvin, Simon

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

Title:

Understanding urban futures: between science and science fiction

Year:

2000

Journal:

Foresight

Volume:

2

Issue:

6

Pages:

559-577

Start Page:

Epub Date:

Note: The above fields are needed for most bibliographic styles.

6. Click the 'Save' button to save the reference.
7. Click on the 'My References' tab and then 'All my references' to see the reference in the list.

# ADDING REFERENCES FROM A DATABASE

Some subject databases enable you to add references without having to type them in. There are two methods: direct export or importing a text file.

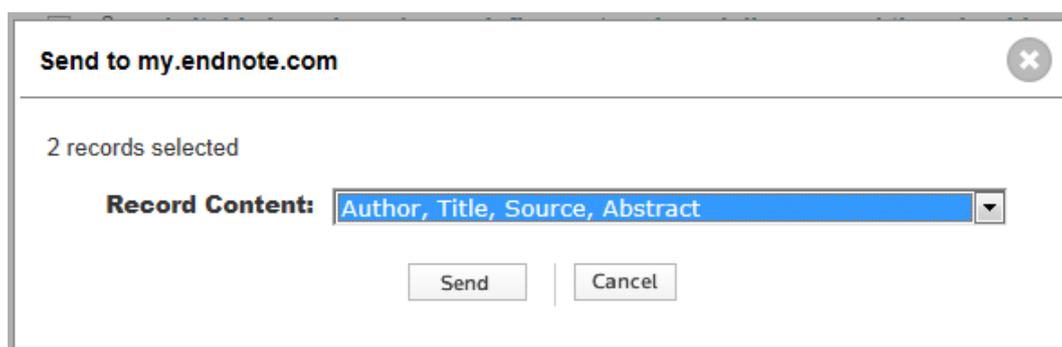
## Direct export

You can export directly from some databases (for instance, Web of Science and Business Source Complete) into EndNote Web. This is the easiest way to add references to your library.

1. You should already have the Web of Science open in another window, if not open it again by following the instructions in section 1 above.
2. Search for a topic of your choice
3. In your results list select a couple that look interesting by clicking in the checkbox to the left of the title - see the example below.



4. Now click on 'Save to EndNote online'
5. If you are not already logged in to your EndNote Web account you will be prompted to do so now.
6. Select the amount of detail you want - it is useful to have the abstract for future reference.



7. Click on 'Send'.
8. The items you have selected are transferred to EndNote Web and are in your Unfiled group in your EndNote library.
9. Once the reference is in your library you can attach a PDF of the article so that all your information is in one place. To do this click on the paper clip icon under the reference and select 'Attach files'.

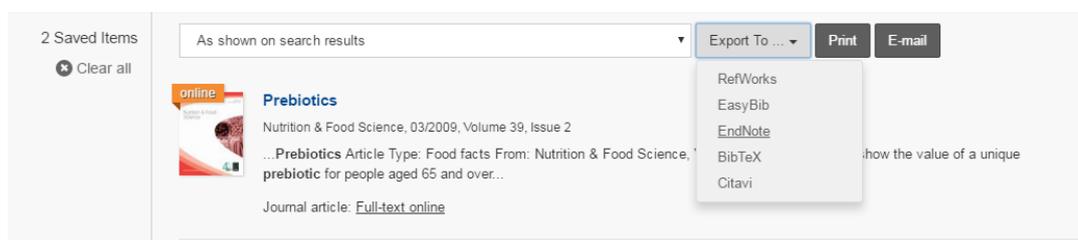
## Import from a text file – example using Summon

Unfortunately not all databases support direct export to EndNote Web. In this case you may be able to save reference details to a .ris or text file and then import them into EndNote Web.

Follow these steps to import references from our Summon discovery service.

### Saving a file of references from Summon

1. Go to the Library homepage and enter a search in the Summon search box.
2. When viewing your results click on the folder icon next to each reference you want to save. This will put the references into a temporary folder.
3. Once you have finished selecting your references, click on the Folder icon at the top of the screen.
4. You will see all the references in your temporary folder. From the 'Export to' list select 'EndNote'.



5. Save the file (by default it will be saved to your Downloads folder).

### Importing the references into EndNote Web

6. In your EndNote Web account click on 'Collect' and then 'Import references'.
7. Browse for your downloaded file of references (it will be a .ris file).
8. From the Import option list select 'Summon'.
9. Lastly, select a group to put them in - if you don't have any groups just select [Unfiled].

### Import References

#### Importing from EndNote?

File:  export-endnote-1445523812.ris

Import Option:  [Select Favorites](#)

To:

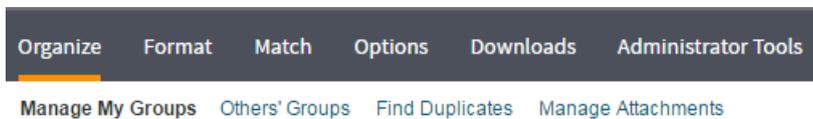
10. Click on 'Import'. The references will be added to your Library.

See our EndNote Web FAQs for more guidance [www.reading.ac.uk/library/endnote](http://www.reading.ac.uk/library/endnote)

## Creating groups

Filing your references into groups helps you to manage them.

1. To create a group, click on the 'Organize' tab and select the 'Manage my groups' link

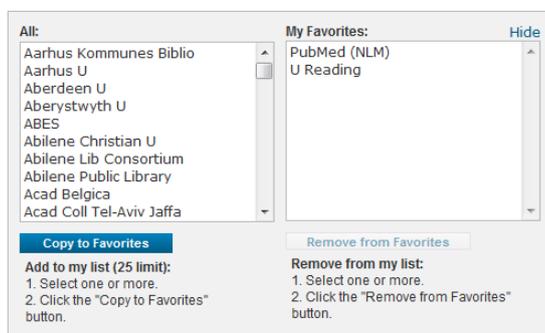


2. Click on the 'New Group' button, enter your group name and click OK.
3. To copy references into your group click on the 'My References' tab. Select the references you want to move to a group by clicking the checkbox box to the left of each reference.
4. Click the down arrow next to the 'Add to group...' box
5. Select your group. The selected items are copied to the group and the number of items in the group is displayed next to the group name.
6. You can also share groups with other EndNote Web users via the 'Manage my groups' option. You can grant read only or read and write access. This will share citations only, not attached full-text.



## Using the Online Search with the Library catalogue

1. Click on the 'Collect' tab.
2. Select 'Online Search'.
3. Click on 'Select Favorites' to see a full list of all the databases and catalogues you can connect to.



4. Scroll down the list on the left and select **U Reading** from the list and click on the **Copy to Favorites** button.
5. Click on Hide to close the window.
6. Now **select U Reading** from your list of favorites and click on the '**Connect**' button.

7. A search screen will appear. Search for a book on your reading list, or that you know. For each line in the search template you have to select a Field to search.
8. In the first box **type your author's surname** in the search box and **select Author** from the list of fields.
9. In the second box type one or two words from the title in the search box and **select Title** from the list of fields.
10. Your search screen should look something like this:

### Online Search

#### Step 2 of 3: Connecting to University of Reading : Library Catalogue

|                                         |     |        |     |
|-----------------------------------------|-----|--------|-----|
| <input type="text" value="gibson"/>     | in: | Author | And |
| <input type="text" value="prebiotics"/> | in: | Year   | And |
| <input type="text"/>                    | in: | Author | And |
| <input type="text"/>                    | in: | Author |     |

retrieve all records  
 select a range of records to retrieve

**Search**

11. Click 'Search' and you will see how many records your search has retrieved. Click on 'Retrieve'.
12. You will see a list of matching references. To add them to your own library you need to move them into a group. To do this select the references you want using the check boxes to the left of each one and from the 'Add to Group' pick-list select the group you created earlier.

Show 10 per page Page 1 of 1 [Go](#)

| <input type="checkbox"/> All <input type="checkbox"/> Page | Author           |      |   | Copied Title                                                                                                                |
|------------------------------------------------------------|------------------|------|---|-----------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/>                        | Gibson, Glenn R. |      |   | Handbook of prebiotics<br><a href="#">Search for Item at Reading</a>                                                        |
| <input type="checkbox"/>                                   | Gibson, G. R.    |      |   | Prebiotics development & application<br>Online Link <a href="#">Go to URL</a><br><a href="#">Search for Item at Reading</a> |
| <input checked="" type="checkbox"/>                        | Gibson, Glenn R. | 2006 | - | Prebiotics : development & application<br><a href="#">Search for Item at Reading</a>                                        |
| <input type="checkbox"/>                                   | Fuller, R.       | 2003 | - | Gut flora, nutrition, immunity and health<br><a href="#">Search for Item at Reading</a>                                     |

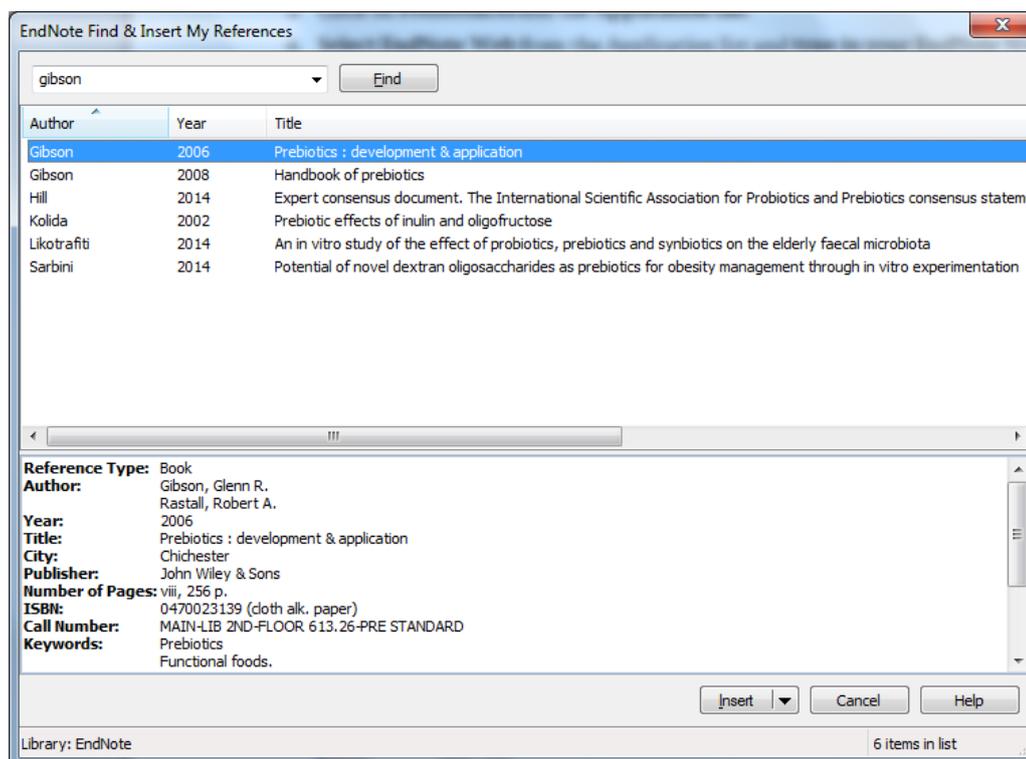
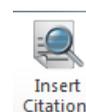
# Inserting references into Word documents

Once you have collected some references you can add them to your Word documents.

The PCs on campus already have an EndNote toolbar installed which you can use to insert references. If you are working on your own computer you will need to download the Cite While You Write plugin from the 'Downloads' section of your EndNote Web account - see instructions at the end of this guide.

Note: steps 3 & 4 are only required on campus PCs.

1. Open Word.
2. Click on the **EndNote tab** on the ribbon in Word. Firstly you need to tell Word to use your EndNote Web account as the source for your references.
3. Click on 'Preferences' and the 'Application' tab.
4. Select 'EndNote online' from the Application list and type in your EndNote Web username and password and click OK.
5. Imagine you are writing an essay - type a couple of sentences to which you could add a reference.
6. Place your cursor after one of the words and add a space.
7. On the EndNote toolbar click on the 'Insert citations' button.
8. Search for the author of one of the references in your library.
9. Select one of the references shown in the results.



10. Click on the 'Insert' button.

Your citation will be inserted in the text and the bibliography will start to appear at the foot of your document. For example

I have some text into which I want to insert my references. I can search for a specific reference and move between EndNote and Word (Gibson and Rastall, 2006). I can easily reformat it in the style I want and add additional references and reorder them. Then at the end of the document - several pages later I have my

### **Bibliography**

Gibson, G. R. & Rastall, R. A. (2006). *Prebiotics : development & application*.  
Chichester: John Wiley & Sons.

### **Changing the style of your references**

You can change the style of your references using the Style pick-list on the EndNote toolbar in Word.

If your department recommends using the Harvard style, select 'Harvard for Reading' for the closest match for most recommended styles.

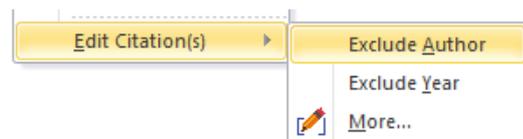
### **Including authors' names in your sentence (i.e. omitting them from the brackets)**

As you write you might want to use the authors' names as part of your sentence and exclude them from the citation brackets, as in this example:

*Smith and Jones (2005) argue that...*

To do this when using EndNote:

1. Right-click on the EndNote citation in the text
2. Select 'Edit Citations'
3. Depending on the PC you are using you will see one of the following options:
  - a. 'Display as: Author (Year)' - select this is put your citation in the correct format.
  - b. 'Exclude Author' - if option 'a' is not available, use this option and type the author name(s) manually in front of the year.



## **Next steps to using EndNote on your own computer**

### **Downloading the EndNote toolbar for Word**

The PCs on campus already have an EndNote toolbar installed in Word which you can use to insert references. If you are working on your own computer you will need to download the Cite While You Write plugin from your EndNote Web account.

1. Login to EndNote Web.
2. Click on the **Downloads** tab.
3. In the Cite While You Write section select the appropriate download link for Windows or Macintosh.
4. Install the software in the usual way for your computer, making sure you select the 'Cite while you write' plugin, not just the Internet Explorer plugin.

#### Cite While You Write™

Use the EndNote plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Word. This plug-in also allows you to save online references to your library in Internet Explorer for Windows.

**U.S. Patent 8,082,241**

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

- o [Download Windows](#) with Internet Explorer plug-in
- o [Download Windows MSI](#) for mass program installation
- o [Download Macintosh](#)

### Not using Word or unable to install the toolbar?

You can still export a bibliography from your EndNote library to use at the end of an assignment, but you will need to put the citations in the text manually.

1. Create a group in EndNote (see page 6) and put all the references you are using in your assignment into the group.
2. Click on the '**Format**' tab and select '**Bibliography**'
3. Select the group, then the style e.g. 'Harvard for Reading', and finally a format – RTF is recommended.
4. Download the file. You can then paste the references into your document, but don't forget to put the citations in the text!

## Preparing your document for electronic submission

When you have finished working on your document as a final step before submitting your work, it is a good idea to convert it to plain text or to PDF. This avoids any incompatibility between the field codes inserted by EndNote Web and the submission software.

### Converting to plain text

1. **Make a copy** of your final document before converting it, just in case you want to make some more changes.
2. On the EndNote Web toolbar in Word select '**Convert Citations and Bibliography**'
3. Then select '**Convert to Plain Text**'
4. This will remove all links with EndNote Web but will leave your citations and bibliography in the correct format. Once you have done that you can make any minor changes to the layout of your references to get them exactly how you want.

### Converting to a PDF

1. From the Word button select **Save As > Adobe PDF**
2. Your document will be converted to a PDF which you can submit online.

## Further information & help

For more information and help see [www.reading.ac.uk/library/endnote](http://www.reading.ac.uk/library/endnote) or contact your subject liaison librarian [www.reading.ac.uk/library/liaison](http://www.reading.ac.uk/library/liaison).