Introductory EndNote training

*Autumn 2017*

# Logging in/creating an account

If you have an EndNote Web/Basic account already then please log in to 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 in to 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!

## 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 
  + 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 in to 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.**

## Import via file download

### 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 in to EndNoteWeb the export will happen automatically, if not you will be prompted to log in

### 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 log in to EndNoteWeb the export will happen automatically, if not you will be prompted to log i

## 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

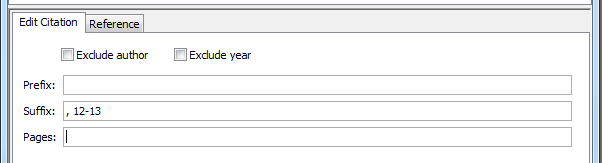
* Go to the **EndNote** tab in Word
* Go to **Insert Citations**
* Search for the item you want to cite by entering keywords in the search box (words from the item title, the author name, the year of publication etc.) and clicking **Find**
* Select the item you want to cite from the list of results and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