

# Introduction to EndNote Online

EndNote Online is a helpful citation tool which enables you to save and manage references. You can use EndNote Online to create a personal 'Library' of references including books, journal articles, reports, webpages and much more. You can also utilise the 'Cite While You Write' facility to insert citations quickly and easily into the body of the text and create a list of references at the end of your document in a variety of output styles, for example: Harvard LJMU.

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## 1. Getting Started

### 1.1 How to Access EndNote Online

LJMU has access to the full EndNote Online reference management tool. To access it you need to create an account via Web of Science, which is one of the databases LJMU subscribes to:

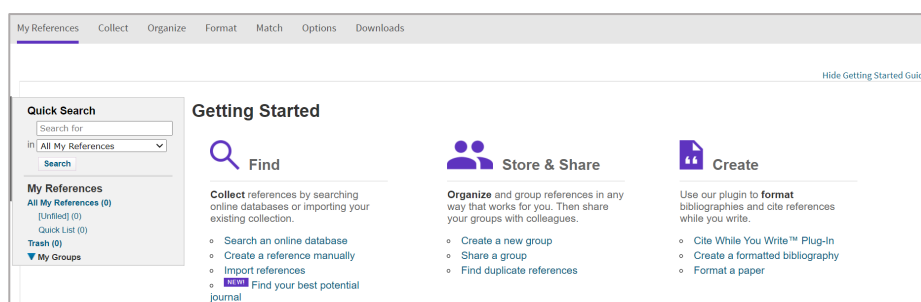
- Go to **Discover** and sign in
- Select on **Databases**
- Search for **Web of Science**
- On the tool bar select **Products**
- Select **EndNote**
- Select **Register**  to create an account

If you already have an account Sign in

If you have the Desktop version of EndNote 20 then you can synchronise this with an EndNote online account.

**Please Note:** You can create a free EndNote Basic online account, which offers limited reference and storage space for PDFs.

First time you sign in your will see the **Getting Started** guide which offers guidance on finding, organising and formatting your references.



To close the guide select **Hide Getting Started Guide** in the right corner.

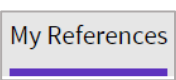
## 1.2 Plug-ins

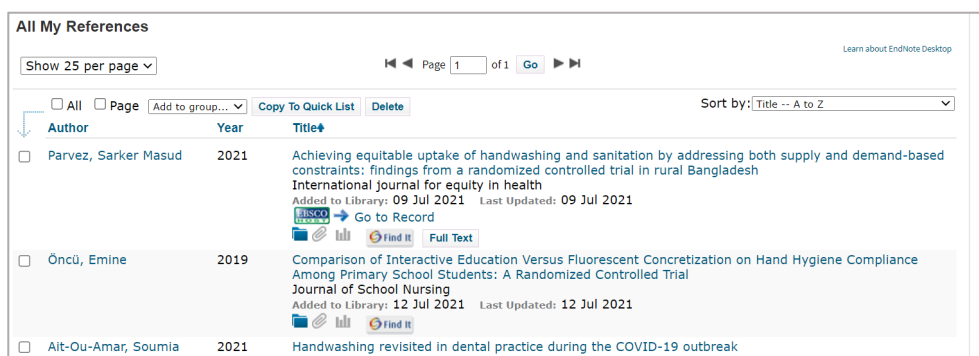
EndNote has some additional plug-ins that you can download, these can be found under the

**Downloads** tab 

- **Cite While You Write Cite:** if you are working from home then you will need to download this plug in to take automatically insert references into a word document
- **Capture Reference tool:** to automatically import references into your EndNote library, you can use the Capture Reference bookmark with any browser or the EndNote Capture toolbar for Internet Explorer (Windows only)
- **EndNote Click (formerly Kopernio):** helps you get to your full-text PDFs faster by securely connecting you to your library's journal subscriptions and open access content.

## 1.2 My References

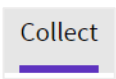
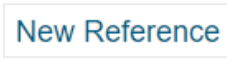
**My References**  is where all your references will be stored and displayed on in middle panel. Select it from the toolbar will take you to your references.



## 2. How to add content to an EndNote library

There are several ways to add a reference to an EndNote Library.

### 2.1 Adding a reference manually

- Select **Collect** , then **New Reference** 
- Select the **Reference Type** from the drop-down menu
- Select the relevant fields and enter the data

**New Reference**

**Bibliographic Fields:**

Reference Type:

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

Title:

Year:

Department:

## Author names

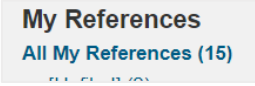
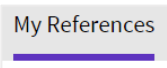
- Last name first and include a comma between the author's last name and initials or last name and first names
- Enter additional authors underneath on a separate line
- Corporate/Organisation/Society authors for example: Department of Health, add a comma after the name of the organisation, for example: Department of Health, this will ensure that the organisation's name is displayed correctly

<b>Bibliographic Fields:</b>	<input type="button" value="Cancel"/> <input type="button" value="Save"/> <i>Reference is saved.</i>
Reference Type:	Report
Author:	Department for Education, Use format Last Name, First name. Enter each name on a new line.

Enter all details in plain text, for example: omit brackets, extra punctuation, bold, italics or underlining. EndNote adds these automatically where necessary when it generates a reference list in the style you select.







Avoid gaps within a reference, take care not to include any unnecessary spaces as you type in details. How you enter the information is how it will be displayed, so think about capitals and access date format – be consistent.


- Select **Save**

Select **All My References**  or **My References**  to go back to your list of references.

## 2.2 To amend a reference:

- Select **title**, only the populated field will appear, select the field to make the amendments

<b>Bibliographic Fields:</b>	<a href="#">Show Empty Fields</a>
Reference Type:	Journal Article
Author:	Soto Calvo, E.  ; Simmons, F. R.  ; Adams, A. M.  ; Francis, H.  ; Patel, H.  ; Giofre, D. 
Title:	Identifying the preschool home learning experiences that predict early number skills: Evidence from a longitudinal study
Year:	2020
Publisher:	Elsevier

- Select **Show Empty Fields**
- Add the new adding into the required fields
- Select **Return to list**  to go back to **All My References**

**Please Note:** If you need to include the web address/link/URL details in your reference for a journal article, follow the above instructions to open the reference

- Change the Reference type to **Electronic Article**
- Select **Show Empty Fields**

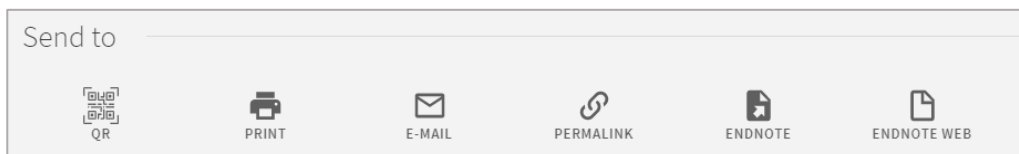
- Enter the date you accessed the article in the **Access Date** Access Date: field
- Check the **URL** field for a link - if there is no link check the **DOI** field
- Copy and paste DOI into the URL field - at start of the DOI and then type the following in front of the DOI: <https://doi.org/> For example: <https://doi.org/10.3390/nu6010001>
  - If there is no URL or DOI then you will need to go to the article online and copy the link and paste it into the URL field
  - For individual Discover records you can copy and paste the permalink into the URL
- Select **Save the reference**
- Select **Return to list** to go back to **All My References**

## 2.2 How to export a reference from LJMU's search tool – Discover

Discover offers a “Direct Export” option which allows you to search, select references and then transfer them to your EndNote Online library. You must have created an EndNote Online library before attempting to export references.

To export a single item:

- Make sure your EndNote library is open and perform a search in Discover
- Select the **title** to open the item record
- Scroll to **Send to**
- Select **ENDNOTE WEB**



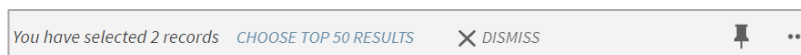
EndNote Online will open in a new tab and display a Primo Import Results confirmation.

In your EndNote library select **My References**, refresh the screen and you will see the reference(s) in the **[unfiled]** [Unfiled] (1) area of **All My References**

To export multiple items:

- Tick the box next to the records you want to export

- Select the **3 dots**
- Select **ENDNOTE WEB**



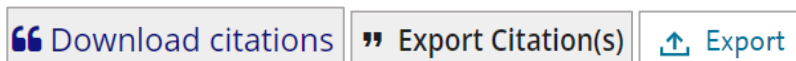
EndNote Online will open in a new tab and display a Primo Import Results confirmation

In your EndNote library select **My References**, refresh the screen and you will see the reference(s) in the **[unfiled]** [Unfiled] (2) area of **All My References**.

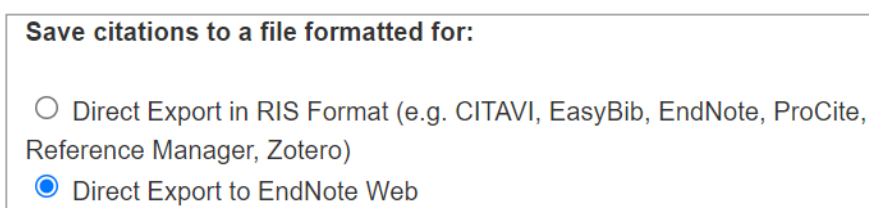
**Please Note:** titles in some of references you export may be all in capitals or have duplicated information. It is good practice to correct references or add details as you go along ([see section 2.1.1](#)).

### 2.3 How to export a reference from an electronic database

Exporting from databases involves selecting the references in your search results by either ticking boxes or adding them to a folder. Depending on the database you will have different options to export:



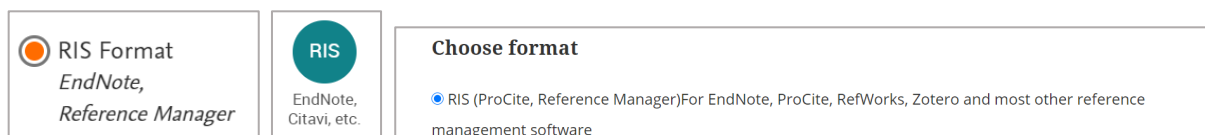
When you select an option you may need to select the level selecting the level of detail for each reference, (typically citation only or citation and abstract) and look for a **Direct Export to EndNote Web** or **EndNote Online** option.



EndNote Online will open separate tab and display an **Import Results** confirmation indicating the record(s) has been imported. Close the tab.



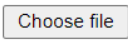
In your EndNote library select **My References**, refresh the screen and you will see the reference(s) in the **[unfiled]** **[Unfiled] (2)** area of **All My References**.

If there is no Direct Export Option look for an **RIS format** option.



This will create a **RIS Formatted File** **ProQuestDocument...ris** in the bottom left of the screen. You need go into your EndNote library and import this file.

In your EndNote library:


- Select **Collect** 
- Select then **Import References** 
- Select **Choose file** 
- Find the file in your **Download folder**
- Select **RefMan RIS** from the **Import Option** dropdown list

- Select place to save **To**


**Please Note:** If you do not have this in the dropdown list, select **Select Favorites**, find it in list and select **Copy to Favorites** to add it to your list

## 2.4 How to export a reference from Google Scholar



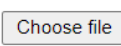
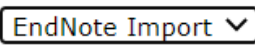
In Google Scholar:

- Select **Settings** in the **menu bar** , scroll down to the **Bibliography manager** options.
- Select **Show links to import citations into** and change the drop-down option to **EndNote**

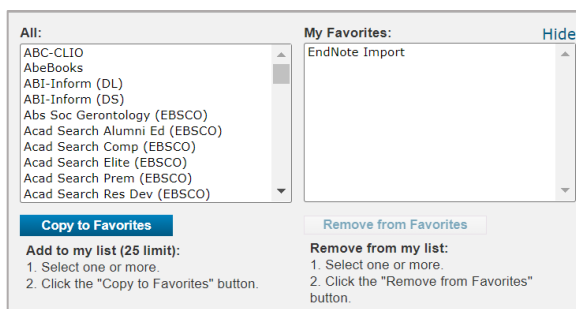
- **Save**

In your search results select the **Citation** icon  in the record. Scroll down and select **EndNote** to create an **.enw** file

In your EndNote library:

- Select **Collect** 
- Select **Import References** 
- Select **Choose file** 
- Find the file in your **Download folder**
- Select **EndNote Import**  from the **Import Option** dropdown list
- Select place to save **To**

**Please Note:** If you do not have this in the dropdown list, select **Select Favorites**, find it in list and select **Copy to Favorites** to add it to your list



## 2.5 How to add a reference via Online Search

The online search links to a limited number of library catalogue such as the British Library which can be searched via EndNote online.

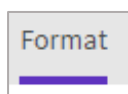
To do this:

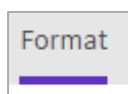
- Select **Select Favorites**
- Add the links to **My Favorites**.
- Hide the dialog box
- Choose the link from the drop down menu
- Select **Connect**

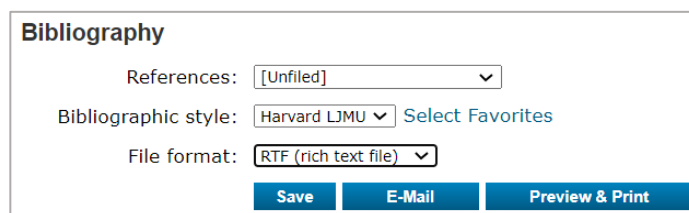
## 2.6 How to preview, check and edit a reference

It is good practice to check newly imported references ensuring that the details are correct, for example: removal of duplicated publisher details, abbreviated journal titles are displayed in full and capitalisation is removed.

To preview how references will look and check for any correction:



- Select **Format** , under **Bibliography** select **the References**
- Select a **Bibliographic Style** from the dropdown menu (if your style is not listed [see section 4.1 Select a referencing style](#))
- Select a **File Format: RTF (rich text file)**
- Select **Preview & Print**












Make a note of any amendments that need to be done. For example: the edition needs to be amended to 11<sup>th</sup> and the place of publication is duplicated

VanPutte, C.L. (2016) *Seeley's anatomy and physiology*. Eleventh edition. ed. New York: New York : McGraw-Hill.

- To edit/amend a reference:
- Select **My References**
- Select the **title**
- Select the fields you want to amend

Bibliographic Fields:		Show Empty Fields
Reference Type:	Book	
Author:	VanPutte, Cinnamon L. 	
Title:	Seeley's anatomy and physiology	
Year:	2016	
Series Editor:	Regan, Jennifer L.  ; Russo, Andrew F.  ; Seeley, Rod R.  ; Stephens, Trent D.  ; Tate, Phillip  ; Seeley, Rod R. 	
Series Title:	Seeley's anatomy and physiology	
Place Published:	New York	
Publisher:	McGraw-Hill	
Edition:	11th	

Author names:

- Last name first and include a comma between the author's last name and initials or last name and first names
- Enter additional authors underneath on a separate line
- Corporate/Organisations/Societies authors, for example: Department of Health, add a comma after the name of the organisation, for example: Department of Health, this will ensure that the organisation's name is displayed correctly
- Enter all details in plain text, for example: omit brackets, extra punctuation, bold, italics or underlining. EndNote adds these automatically where necessary when it generates a reference list in the style you select

Avoid gaps within a reference, take care not to include any unnecessary spaces

Check for capitalisation:

When you start making amendments a **Reference needs to be saved** message



will be displayed, this will change to **Reference is saved** message as you move from field to field. Selecting **Revert Reference** will remove any changes.

- Select **Return to list**  to go back to **All My References**


## 2.7 How to add PDFs to EndNote records

Many references include the URL for the online source, allowing you to view the source directly, but you can also attach a PDF to a reference if one is available. You will need to download and save it first. Locate the relevant reference

Rodrigues-Krause, Josianne	2016	Effects of dance interventions on cardiovascular risk with ageing: Systematic review and meta-analysis Complementary Therapies in Medicine Added to Library: 16 Dec 2016 Last Updated: 16 Dec 2016 Online Link→ Go to URL
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Select **View file attachment** (paperclip)  and select **Attach files** . Check your **Used Space**

- Select **Choose File**
- Find the PDF document
- Select **Open**.
- Choose **Upload** and **Close**

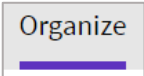

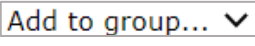

You will see an **Upload Complete** message, the **View file attachment** will now be blue  to indicate there is a PDF attached. To view the PDF, select **View file attachment** and select the link.

### 3. How to organise and managing your references

#### 3.1 Groups

As your EndNote library grows, finding an individual reference can become increasingly difficult. Rather than creating a separate library of references for each topic you are writing on, it is usually more convenient to create several groups within a single library and assign references to one or more of these. The left pane of the My References window lists groups of saved references.

To create a Group:

- Select **Organize** , under **Manage My Group**
- **New Group** 
- Type a name for the group in the dialogue box and **OK**
- A list will appear, select **My References** menu to display the entire library again
- Tick the boxes next to the records you want to move
- Select the group from the **Add to group**  dropdown menu
- Select the Group to display the references now included in that Group 

Child Safety		
Show 25 per page		
Page 1 of 1 Go		
<input type="checkbox"/> All	<input type="checkbox"/> Page	Add to group... ▼
Copy To Quick List Delete Remove from Group		
Author	Year	Title
<input type="checkbox"/> Department for Education,	2020	Keeping children safe in education – for schools Added to Library: 06 Jul 2021 Last Updated: 13 Ju Online Link→ Go to URL
<input type="checkbox"/> Öncü, Emine	2019	Comparison of Interactive Education Versus Fluc

To delete/rename a Group:

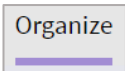

- Select **Organize** menu, under **Manage My Group**
- Select the **Delete** option or **Rename** option

To remove a reference from a Group:


- Select the Group name to display its contents
- Tick the reference(s) you wish to delete
- **Delete /Remove from Group**
- Confirm that you wish to delete/remove

### 3.2 Finding/Removing Duplicates

If you have collected references from several different databases, your library may contain some duplicate references. It is good practice to check for duplicate references and deleting any that you find.

To find duplicate and delete them select **Organize**  and select **Find Duplicates** . Duplicated references will appear with one ticked

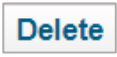
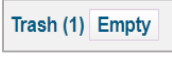
<input type="checkbox"/>	Niyonzima, Vallenge	2018	Practice and compliance of essential handwashing among healthcare workers at a regional referral hospital in Uganda: A quality improvement and evidence-based practice Canadian Journal of Infection Control Added to Library:12 Jul 2021 Last Updated:12 Jul 2021
<input checked="" type="checkbox"/>	Niyonzima, Vallenge	2018	Practice and compliance of essential handwashing among healthcare workers at a regional referral hospital in Uganda: A quality improvement and evidence-based practice Canadian Journal of Infection Control Added to Library:12 Jul 2021 Last Updated:12 Jul 2021

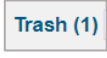

Check the **Group**  where the records are stored and if necessary, tick the other record.

Select **Delete**  to remove ticked items.

### 3.3 Deleting references from your library

To delete references from your library, select **My References** and tick the boxes next to the references you wish to delete.

Select **Delete** , references are moved to Trash .

Select **Trash**  to move a reference back into a folder. Select **Empty**  to remove the items from this folder.

### 3.4 Printing selected references in a specific style

Select **Format** , under **Bibliography** select the **References** you want to print, the **Bibliographic Style** and **File format**

Select **Preview & Print**, a preview will open, then **Print this Page**

**Please Note:** If your referencing style is not listed in the dropdown menu then select **Select Favorites** to add it to **My Favorites** ([see section 4.1](#))

### 3.4 Copying selected formatted references from your library into a Word document

This facility is useful if you need to add references formatted in a particular style to a Word document which you have written **without** using EndNote’s “Cite While You Write” facility. Your document needs to be saved as in Rich Text Format.

Select **Format**, under **Bibliography**, select the **Format Paper**. **Choose the file** and then select a **Bibliographic Style** and select **Format**.

Further information is available:

[https://www.myendnoteweb.com/help/en\\_us/ENW/hs\\_formatpaper.htm](https://www.myendnoteweb.com/help/en_us/ENW/hs_formatpaper.htm)

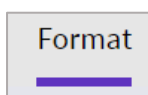
## 4. Citing references in a Word document and generating a list of references

EndNote has a “Cite While You Write” feature which allows you to incorporate references from your EndNote library in a Word document as you write it.

If you have collected references from several different databases, your library may contain some duplicate references. Before you start writing a document in Word and adding references via “Cite While You Write”, it is worth checking your library for duplicate references and deleting any that you find (see section 3.3 Deleting references from your library).

### 4.1 Select a referencing style

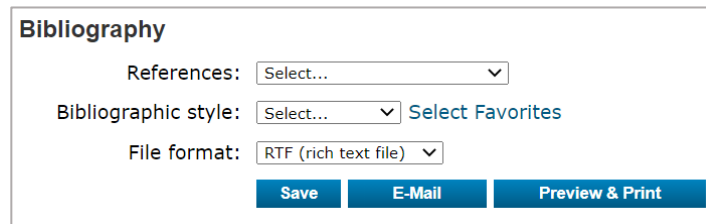
EndNote has many referencing styles, before you start to insert your references into your document you need to select the correct style.



Select **Format**, it will default to **Bibliography**.

- Select the **References**

- Select your style



If your style does not appear in the dropdown list select **Select Favorites**

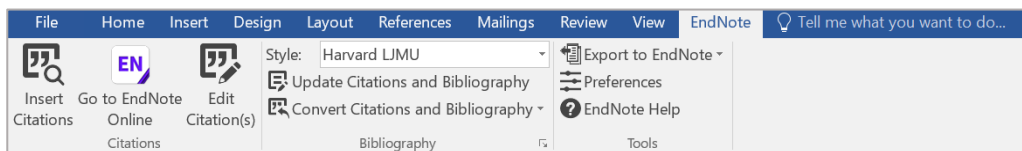
- Highlight it
- Select **Copy to Favorites** 
- **Hide** the box, then select the style from the **Bibliographic Style** dropdown list.

To preview a reference in a particular style:

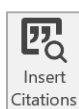
- Select **Format**
- Select **Bibliography References**, select what you want to preview
- Select **Bibliographic Style**
- File format: **RTF (rich text file)**
- Select **Preview & Print**

#### 4.2 How to insert a citation and reference

Open your EndNote library. Select **EndNote** tab in Word – check your referencing **Style** is correct

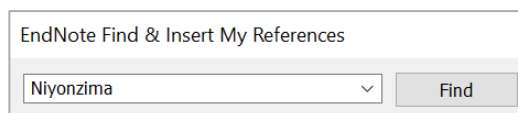


Place the cursor at the point in the text where the reference should appear

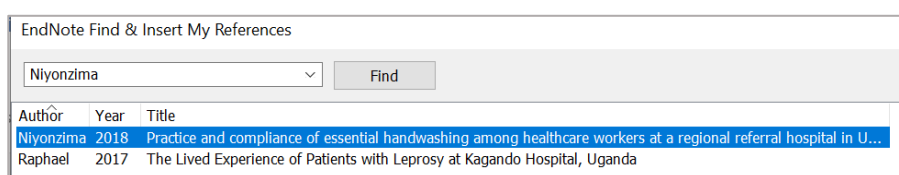


- Select **Insert Citations**

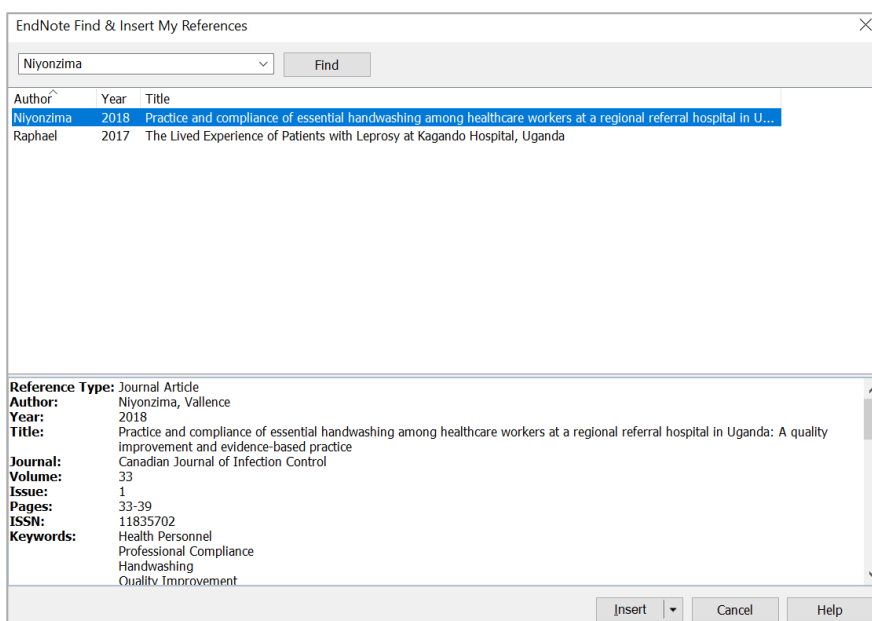
An **EndNote Find & Insert My References** box will open, type the author's last name in the search box and select **Find**



Any references containing this name will appear in the box



- Select the reference from the list, select **Insert**

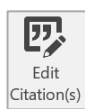


The citation and the reference will be inserted into your document. Each time you insert a reference an appropriate brief citation appears in the text and a full reference is added to the reference list at the end of the document.

To insert multiple citations, select one and use the **Ctrl** key to select the next one.

### 4.3 How to change a citation

The default display is (Author, year), to change a citation you need to select the citation within your word document to highlight it.



Select **Edit Citation(s)**, an **EndNote Edit & Manage Citations** box will open

To change the citation to Author (year), tick **Exclude author** in the **Edit Citation** box and **OK**

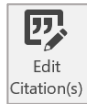


Only the year will appear in your word document, you will need to manually type the author.

### 4.4 How to add a quotation

If you have used a quotation you need to include the page number where the quote begins.

Select the citation within your word document to highlight it.



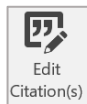
Select **Edit Citation(s)**, an **EndNote Edit & Manage Citations** box will open

Edit Citation	Reference		
<input type="checkbox"/>	Exclude author	<input type="checkbox"/>	Exclude year
Prefix:	<input type="text"/>		
Suffix:	<input type="text"/>		
Pages:	23		

Add the page number into the **Pages** field in the **Edit Citation** box and **OK**.

#### 4.5 How to create a Secondary Reference/Source citation

Select the citation within your word document to highlight it.



Select **Edit Citation(s)**, an **EndNote Edit & Manage Citations** box will open. Use the **Prefix** box for citations with all the details inside bracket

(Buchner et al., 2009 cited in Niyonzima, 2018, p.34)

Remember to add a space after cited in

Edit Citation	Reference		
<input type="checkbox"/>	Exclude author	<input type="checkbox"/>	Exclude year
Prefix:	Buchner et al., 2009 cited in		
Suffix:	<input type="text"/>		
Pages:	34		

Select **OK**

For citations with the author outside the brackets:

Edit Citation	Reference		
<input type="checkbox"/>	Exclude author	<input type="checkbox"/>	Exclude year
Prefix:	2009 cited in		
Suffix:	<input type="text"/>		
Pages:	34		

Add the author manually into your document.

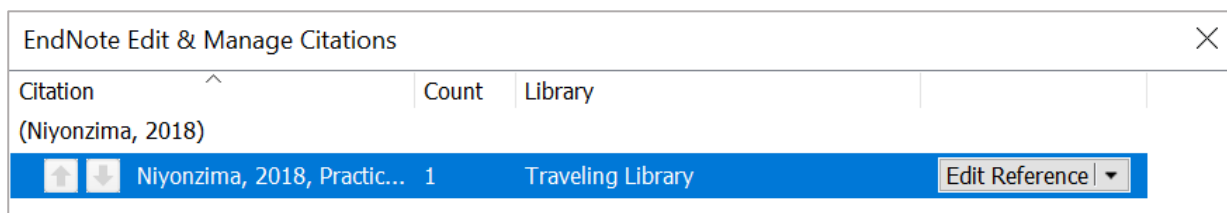
#### 4.6 Editing/updating References

If you spot an error in a reference, you need to make the amendments in your

EndNote library. Once you have update in EndNote then you can update the changes in your document.



Select **Edit Citation(s)**, an **EndNote Edit & Manage Citations** box will open.



Find the reference and select the arrow to the right of the **Edit Reference** button and choose **Update from My Library...**

Select the correct reference, select **Insert** and **OK**.

#### 4.7 How to delete a citation and/or reference

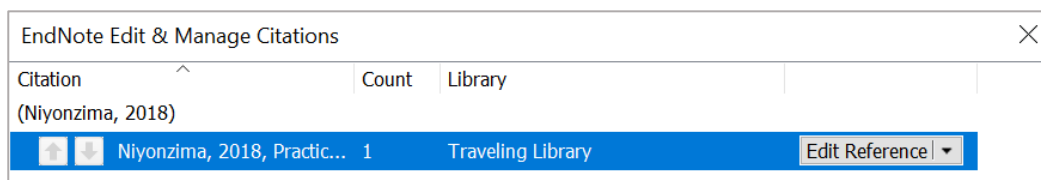
To delete a citation or reference from your document it is important that you do not just use the delete key, you need to completely remove the citation from your document.

Select the citation you want to delete



Select **Edit Citation(s)**, an **EndNote Edit & Manage Citations** box will open.

Make sure the correct citation is selected and select the arrow to the right of the **Edit Reference** button



To remove a citation select **Remove Citation** and select **OK**

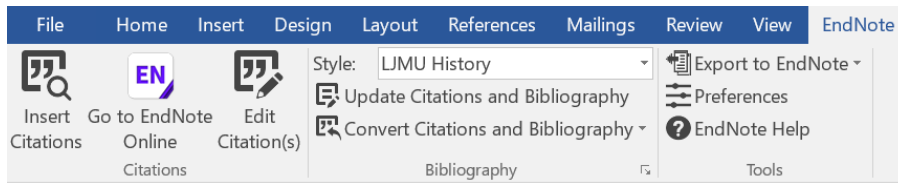
This will only remove the selected citation, if it is cited elsewhere in your document that citation will still be there, it will not be removed. If this is the only citation it will remove the reference from you reference list.

#### 4.8 LJMU History: using footnotes

Open your Word document and your EndNote library.

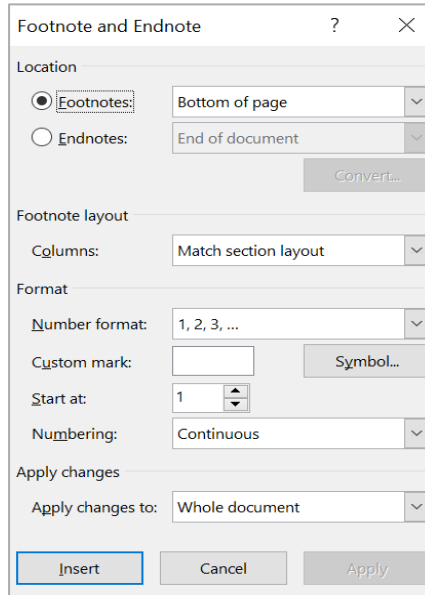
Ensure the style is in your EndNote Library list (see section 4.1 Select a referencing style to add a style). Select the **Style** on the EndNote ribbon in Word





On the **References** tab in Word, select the arrow within the **Footnotes** group

Make the following selections and select **Apply**, if Apply is greyed out, select **Cancel**.



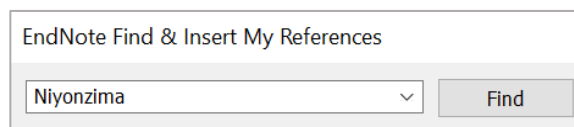
Place the cursor within the text where you wish to enter the citation. Select **AB' Insert Footnote**



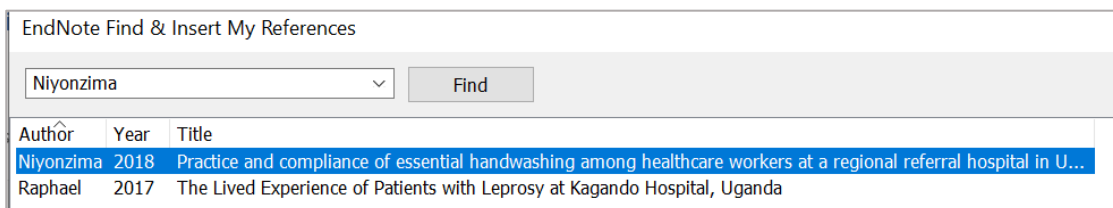
in the **Footnotes** group on the **References** tab in Word to create a footnote in your Word document. With your cursor still in the footnote, select the **EndNote** tab and select **Insert**



**Citations** An **EndNote Find & Insert My References** box will open, enter the name and select **Find**.

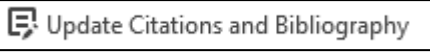


Any references containing this name will appear in the box.



Select the reference from the list, then select **Insert**.

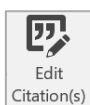
When you start writing a new document, the bibliography may appear above the footnotes on the first page of the Word document, but it should move down the page and towards the end of the document as your writing progresses and the document grows longer.

You may need to select **Update Citations and Bibliography**  in Word to reformat your document so that the bibliography appears at the end.

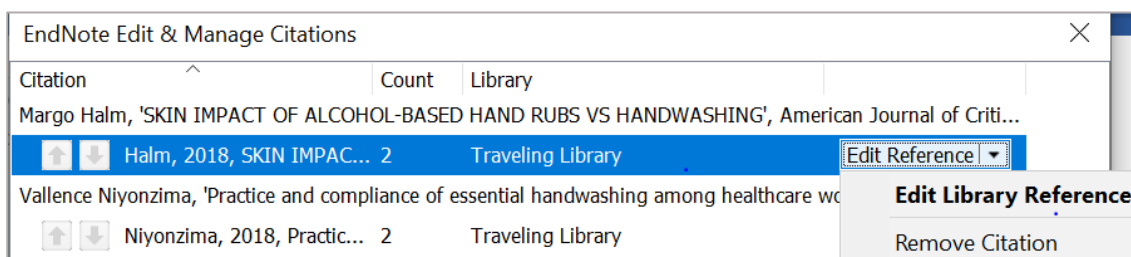
**Please Note:** If you insert a new footnote in the text between two existing ones they will automatically be renumbered in the order in which they appear in the text.

Managing footnotes:

To delete a footnote, highlight the reference in the footnote at the bottom of the page. Select



the **EndNote** tab and select **Edit Citation(s)**, an **EndNote Edit & Manage** Citation box will open. Select **Edit Reference**, then **Remove Citation**

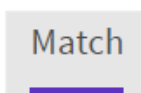


To add a page number to a footnote, highlight the reference in the footnote and select **Edit and Manage Citation(s)** and enter the page number in the **Pages** box.

To create a secondary reference select the footnote of the reference you wish to amend and select **Edit Citation(s)** and enter details of the item quoted in the **Prefix** box and also the relevant page number in the **Pages** box and select **OK**.

#### 4.9 Manuscript Matcher

Endnote Online, in conjunction with Web of Science can help find the right journal to submit an article/manuscript to.



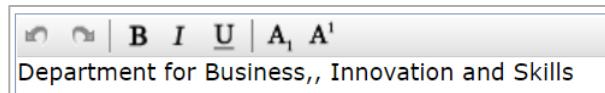
Select **Match** and enter the title and abstract of your document and select the group where the references are. When you select **Find Journals**, EndNote returns a list of possible journal matches and results such as Journal impact factors and category ranking.

### 5. Frequently Asked Questions

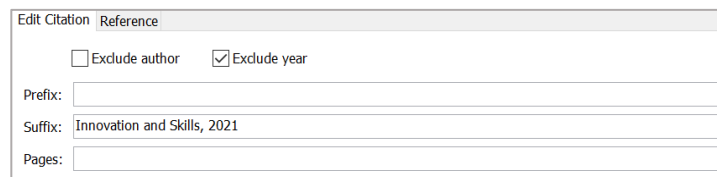
**Why is the name of the organisation displayed incorrectly in my reference list?**

You need to enter the name of an organisation (a corporate author) in the author field in an EndNote reference, followed by a comma immediately after the name, for example: Liverpool John Moores University,

If the name of the organisation includes a comma, for example: Department for Business, Innovation and Skills insert a **second comma** immediately after the one in the name rather than at the end of the name, for example: Department for Business,, Innovation and Skills



You will need to edit the citation in Word. Select **Edit Citations(s)**, tick the **Exclude year** box and enter the adding the words after the double comma and the year the **Suffix** box



### **Why are all the details I have provided displayed in the references it is produced?**

Some styles will not display all the details you provide about items. If a reference to a journal article includes a URL which you want to appear in the reference in a Word document, try opening the reference in EndNote and changing the **Reference type** from Journal Article to Electronic Article.

### **I have amended a reference in my EndNote library since I used it in a Word document. How can I get the change to appear in the Word document?**

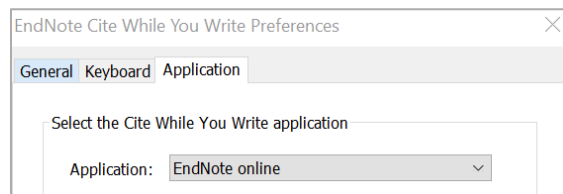
With your EndNote library and Word document open and select **Update Citations and Bibliography** in the **Bibliography** group under the **EndNote** tab in Word.

### **EndNote is not displaying the accessed date in references to web pages.**

Different referencing styles take the access date information for references to web pages/documents from different fields. Check you reference has the correct format/reference type in your library and enter the date in the **Access Date** or the **Date Accessed** field.

### **The reference I have just inserted looks strange, for example: "{Smith, 1981 #18}" when it should be (Smith, 1981).**

EndNote Online requires its own Word toolbar, make sure you have installed the Cite While You Write plug-in (See section **1.2 Plug-ins**) and that you have **EndNote online** selected under **Preferences**



## 6. Further help

EndNote Canvas site: <https://canvas.ljmu.ac.uk/enroll/EDA36F> offers videos and other materials

Academic Engagement Librarian: <https://www.ljmu.ac.uk/microsites/library/about-ljmu-libraries/contact-us/academic-liaison-librarians>

EndNote (Clarivate) Website: [https://clarivate.libguides.com/endnote\\_training/endnote\\_online](https://clarivate.libguides.com/endnote_training/endnote_online)

Guide by Jackie Fealey  
v.3. August 2023