

Using EndNote Web

University of Otago Library

www.library.otago.ac.nz/endnote



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Using EndNote Web

When you buy EndNote Desktop, you get free access to EndNote Web. EndNote Web is an online version of EndNote Desktop, and it has been created to make reference sharing easier, and to give you the ability to manage your references if you are away from your PC or laptop.

When you start EndNote for the first time you will be asked if you want to open an EndNote Web account. Fill in the details to set up an account.

If you use the Web of Science or Web of Knowledge databases you can sign up and use EndNote Web from there.

EndNote Web X5 introduces a new feature which allows users to transfer attached files, as well as the related references, between the desktop and web versions of the program.

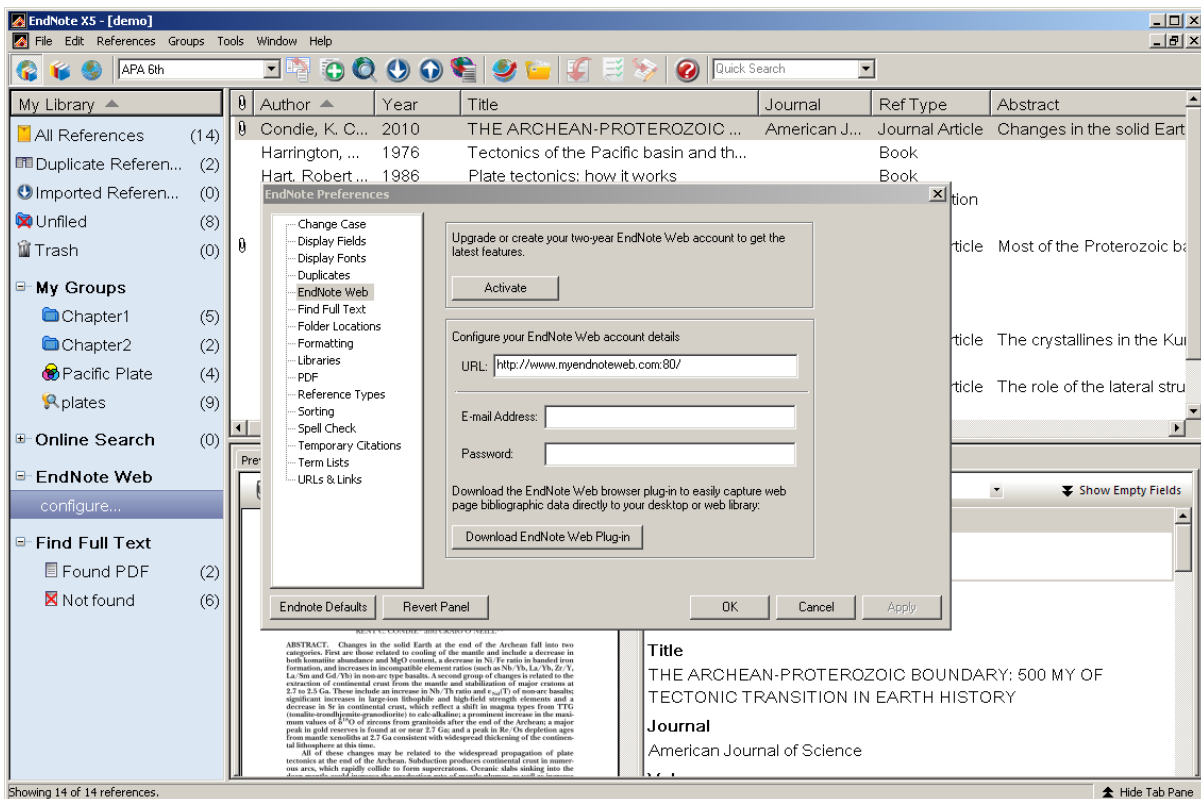
You can also share your EndNote Web Library with colleagues, or your supervisor, and you can access your Library anywhere you have an internet connection.

The screenshot shows the EndNote Web X5 interface. The top navigation bar includes 'My References', 'Collect', 'Organize', 'Format', and 'Options'. The main area displays a list of references under 'All My References'. A callout box points to the 'Add to group...' dropdown menu, stating 'Move references easily into different groups'. Another callout points to the 'ARTICLE LINKER' button, stating 'Click on Article Linker to search for Full Text'. A third callout points to the 'Go to source record' link, stating 'Go to the source record on the database used for the citation'. A fourth callout points to the 'My Groups' sidebar, stating 'Control your references using Groups.' The interface also shows a search bar, a 'Quick Search' section, and a list of references with columns for Author, Year, and Title.

- You can create groups to organise your references, and move references into groups easily
- You can click on Article Linker button to search for full text
- You can go to the original database record in a single click

Setting up the Connection

Before EndNote Web and EndNote Desktop can connect to each other, they need to be configured. To do this select the **<configure>** link under **EndNote Web** (highlighted in the image below). This will open a dialog box in which you will enter your EndNote Web sign on details (email address and password). After entering these details click **<OK>**.



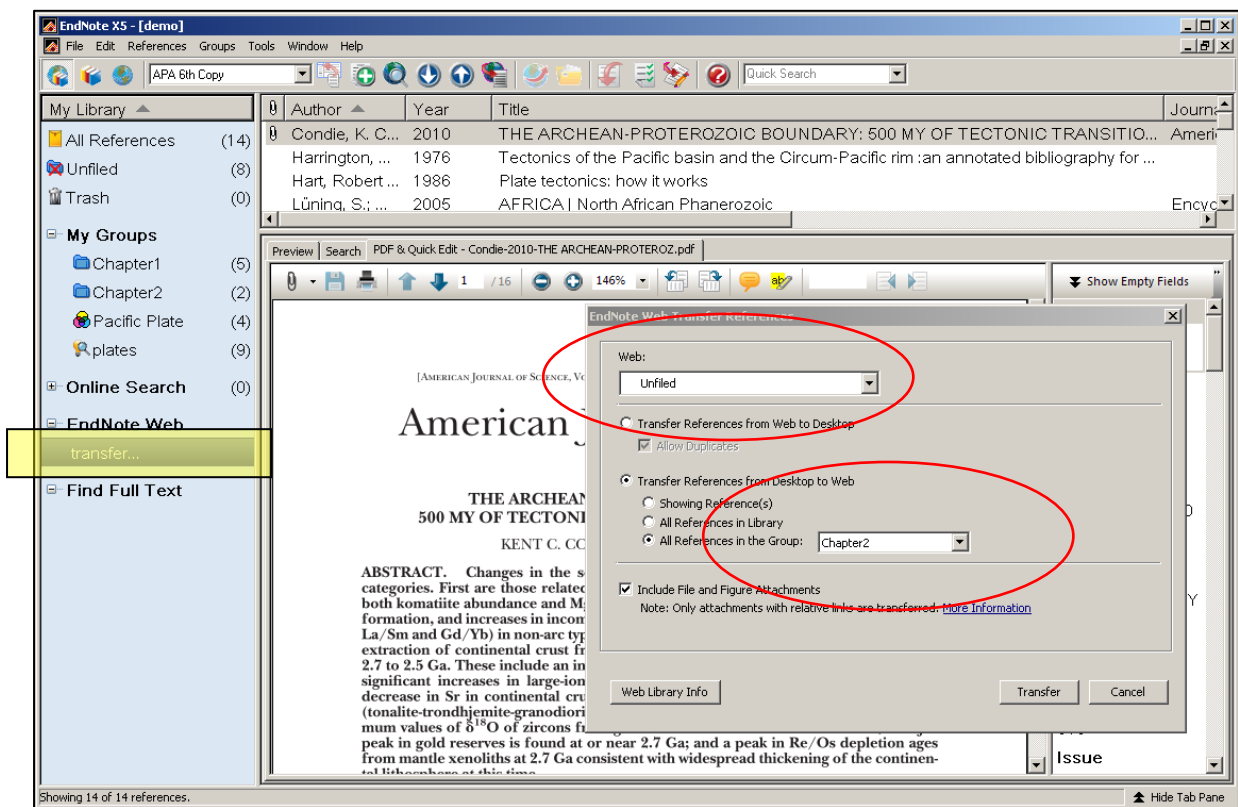
Your EndNote Desktop and EndNote Web accounts can now talk to each other.

In order to take advantage of the new file attachment transfer feature, you will also have to click on the 'Activate' button in this EndNote Preferences window. This will update your EndNote Web account to ensure you have access to all the latest features.

Transferring References between Desktop and Web

Once you have set up the connection between your desktop account and the web account, the transfer process is easy.

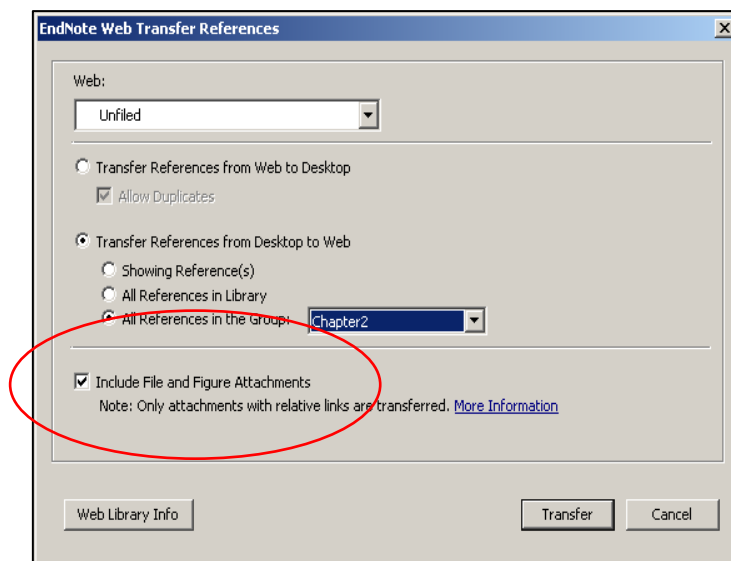
Click on the **EndNote Web <transfer>** link (highlighted on the left hand side of the image overleaf), or use **Tools>EndNote Web**.



This opens up the EndNote Web Transfer References dialog box. You can select to transfer from **Desktop to Web** or from **Web to Desktop**. The image above has 'Transfer References from Desktop to Web' selected.

Select the EndNote Desktop folder you want to transfer from ('Chapter2' is currently selected) and the folder in EndNote Web you want to transfer to (in the image above 'Unfiled' is currently selected).

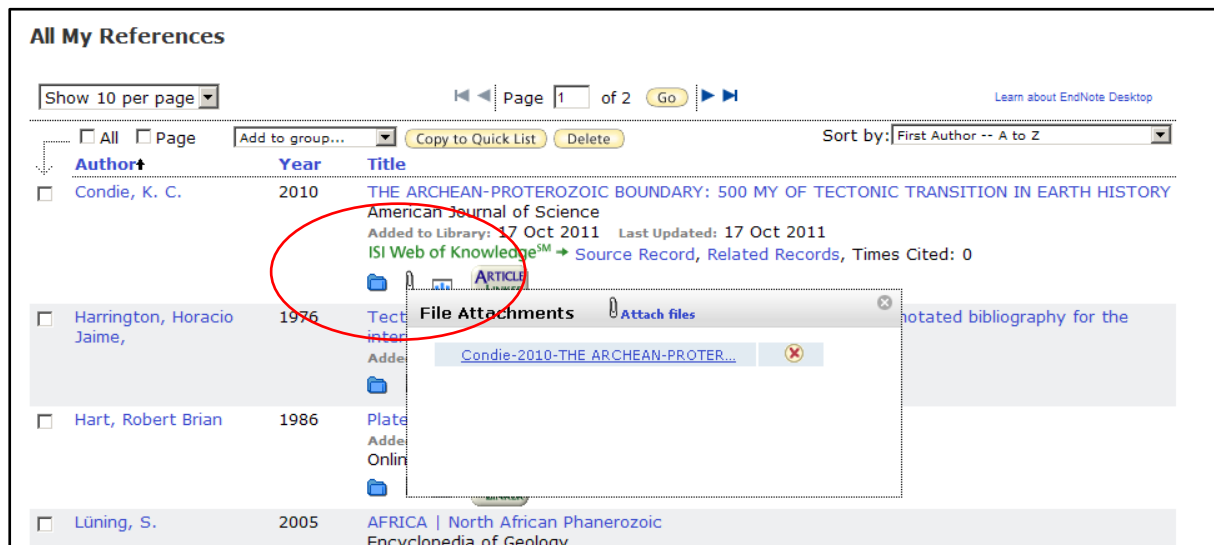
Tick the 'Include File and Figure Attachments' box to include file and figure attachments in the transfer (see image below)



Click <Transfer> and the references will be moved from your desktop Library to your web Library, or vice versa.

You can view the transferred results in your Endnote Web Library, either in the folder you transferred them to, or in the 'All My References' folder. If the EndNote Web Library appears not to have updated, press **F5** to refresh the screen.

A paper clip icon on a reference in the EndNote Web Library denotes an attached file. The file can be viewed by clicking on the paper clip icon and selecting the file attachment you would like to view.



Adding References to EndNote Web

The same steps can be used to bring references into your EndNote Web Library, as the Desktop version.

Exporting a Reference Directly from a Database to EndNote Web

Some databases will allow you to export directly into EndNote Web from their search interface. This is the same process as with the Desktop version of EndNote. Refer to the EndNote Introduction guide for more detail. The option to Export to EndNote Web will appear in the same place as the option to export to EndNote, RefWorks and any other reference software supported by the database.

If a database does not give you the option to export directly into EndNote Web, you have two options. Firstly, you can export into EndNote Desktop and transfer the results into EndNote Web, or you can save a file of the references and Import them into EndNote Web.

The images below show two databases which have a direct export to EndNote Web function. The method for Importing into EndNote Web from a database that does not have that function is in a later section.

The Web of Science database direct export to EndNote Web function

The screenshot shows the Web of Science interface. At the top, it says "WEB OF KNOWLEDGE™" and "DISCOVERY STARTS HERE" with the Thomson Reuters logo. Below the navigation bar, there are search options like "Search", "Author Finder", "Cited Reference Search", "Advanced Search", and "Search History". The main search results area shows "Results: 34,471" and "Page 1 of 3,448". A red circle highlights the "Export to EndNote Web" button in the top right of the results area. The left sidebar has "Refine Results" with categories like "Web of Science Categories" and "Document Types". The main results list shows several articles with titles like "A four year prospective study on intraocular pressure in relation to phacemulsification cataract surgery".

Ebsco's Academic Search Complete database Direct Export to EndNote Web function

The screenshot shows the Ebsco Export Manager interface. At the top left is the Ebsco Host logo and "Export Manager" text. Below it are "Save" and "E-mail" buttons. The main area shows "Number of items to be saved: 1" and a checkbox for "Remove these items from folder after saving". A "Save" button is present. A red circle highlights the "Save citations to a file formatted for:" section, which contains a list of options: "Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)", "Direct Export to EndNote Web", "Generic bibliographic management software", "Citations in XML format", "Citations in BbTeX format", "Citations in MARC21 format", and "Direct Export to RefWorks".

The screenshot shows the EndNote Web interface with the 'All My References' view. A red circle highlights the search and navigation area, which includes a 'Search for' input field, a dropdown menu for 'in All My References', a 'Search' button, and pagination controls showing 'Page 1 of 3'. Below these are options for 'All', 'Page', 'Add to group...', 'Copy to Quick List', and 'Delete', along with a 'Sort by' dropdown set to 'First Author -- A to Z'. The reference list contains two entries:

Author	Year	Title
	2002	Rugby Union Injuries to the Cervical Spine and Spinal Cord Added to Library: 04 Nov 2010 Last Updated: 04 Nov 2010 Online Link → Go to URL
	2003	Sports Career-Related Musculoskeletal Injuries: Long-Term Health Effects on Former Athletes Added to Library: 04 Nov 2010 Last Updated: 04 Nov 2010 Online Link → Go to URL

References exported from a database, now in the EndNote Web Library.

Although most databases have a direct export option, the process for exporting can differ between them. Go to <http://library.otago.ac.nz/endnote/instructions.html> for instructions on direct exporting from a variety of databases.

Adding a Reference Manually

The screen below resulted from clicking on **Collect > New Reference**. This option is equivalent to selecting the New Reference button in the desktop version in that it allows you to add a new reference to your Library manually.

The screenshot shows the 'New Reference' form in the EndNote Web interface. The form is titled 'New Reference' and includes a 'Cancel' button. The 'Bibliographic Fields' section contains the following fields:

- Reference Type: Generic (dropdown menu)
- Author: (text input field)
- Title: (text input field)
- Year: (text input field)
- Secondary Author: (text input field)
- Secondary Title: (text input field)
- Place Published: (text input field)
- Publisher: (text input field)
- Volume: (text input field)
- Number of Volumes: (text input field)
- Number: (text input field)
- Pages: (text input field)

Simply select the reference type, and enter the information in the relevant fields. As you type the reference is saved and added to the “All My References’ folder on the left hand side of the screen.

Importing References into EndNote Web

Importing references into EndNote Web is the same process for EndNote Desktop. First you need to save the references you want as a file from a database, then import that file into EndNote Web, selecting the relevant filter if necessary.

Many databases will allow you to save a file in RIS format (sometimes referred to as RefMan RIS) – that should be your preference if it is available, as it makes the Import process simple and reliable. If you do not have that option, take note of the format you select to save the file, and select the relevant filter from the import menu.

The screenshot shows the 'Folder Contents' page for 'Articles' in the EBSCO database. The page title is 'Articles' and it shows '1-3 of 3' items on 'Page: 1'. There are two articles listed, both with checkboxes selected for export:

- 1. A Geometric Theory of Everything.** (Periodical)
 - By: Lisi, A. Garrett; Weatherall, James Owen. Scientific American, Dec2010, Vol. 303 Issue 6, p54-61, 8p, 3 Color Photographs, 1 Diagram
 - The article discusses unification theory in physics and practical, philosophical, and aesthetic considerations that underlie the search for a unifying theory of everything. Physicist A. Garrett L...
 - Subjects: THEORY of everything (Physics); GRAND unified theories (Nuclear physics); QUANTUM theory; RESEARCH; PHYSICS -- Research; GEOMETRY; Reseach and Development in the Physical, Engineering, and Life Sciences (except Biotechnology); LISI, A. Garrett; EINSTEIN, Albert, 1879-1955
 - Database: Academic Search Complete
- 2. Lessons in quantum gravity from quantum field theory.** (Academic Journal)
 - By: Berenstein, David. AIP Conference Proceedings, 12/08/2010, Vol. 1318 Issue 1, p26-37, 12p; DOI: 10.1063/1.3531637
 - This paper reviews advances in the understanding of quantum gravity based on field theory calculations in the AdS/CFT correspondence.
 - Subjects: QUANTUM field theory; FIELD theory (Physics); CONFORMAL geometry; QUANTUM gravity; GENERAL relativity (Physics); GRAVITATION; QUANTUM theory

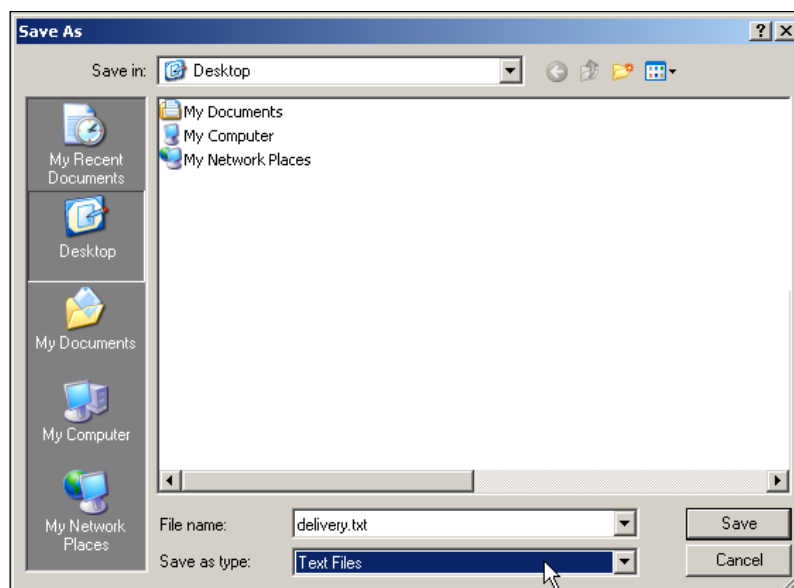
On the right side of the interface, there are buttons for 'Print', 'E-mail', 'Save as File', and 'Export'.

Select the items in your folder to be exported, then click <Export>.

The screenshot shows the 'Export Manager' interface. At the top, there are buttons for 'Save' and 'E-mail'. Below this, it indicates 'Number of items to be saved: 1'. There is a checkbox for 'Remove these items from folder after saving' which is currently unchecked. A 'Save' button is present. On the right side, under the heading 'Save citations to a file formatted for:', there are several radio button options:

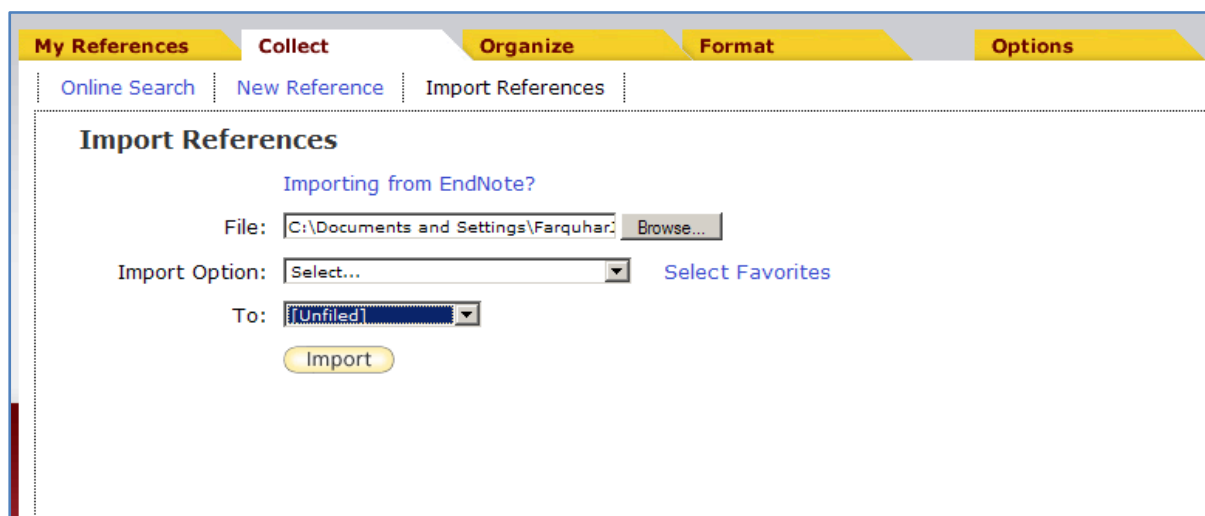
- Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)
- Direct Export to EndNote Web
- Generic bibliographic management software** (selected)
- Citations in XML format
- Citations in BibTeX format

For this example, save the resulting page to your desktop as a text file. (Under ordinary circumstances you would simply direct export to EndNote Web.)



Save the file as a **.txt** file to your desktop by clicking on **File > Save Page As...** (Firefox) or **File > Save As** (Internet Explorer).

Finally, open your EndNote Web page, click on **<Collect>**, then select **<Import References>** to import the file into EndNote Web.



In this case the references will appear in the [Unfiled] group of your EndNote Web Library.

EndNote Web has a variety of Filter options for importing references. If the database you have used to find the references does not allow you to save a file as an RIS document, save it in its native format and look for a filter in the dropdown list to match.

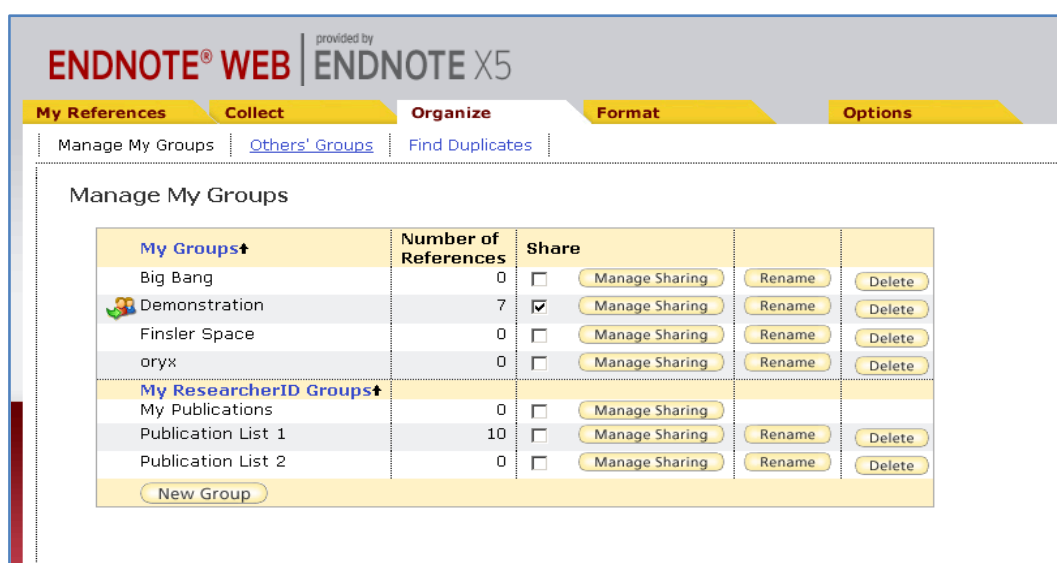
Although most databases have a direct export option, the process for exporting can differ between them. Go to <http://library.otago.ac.nz/endnote/instructions.html> for instructions on direct exporting from a variety of databases.

Sharing Your EndNote Web Library with Others

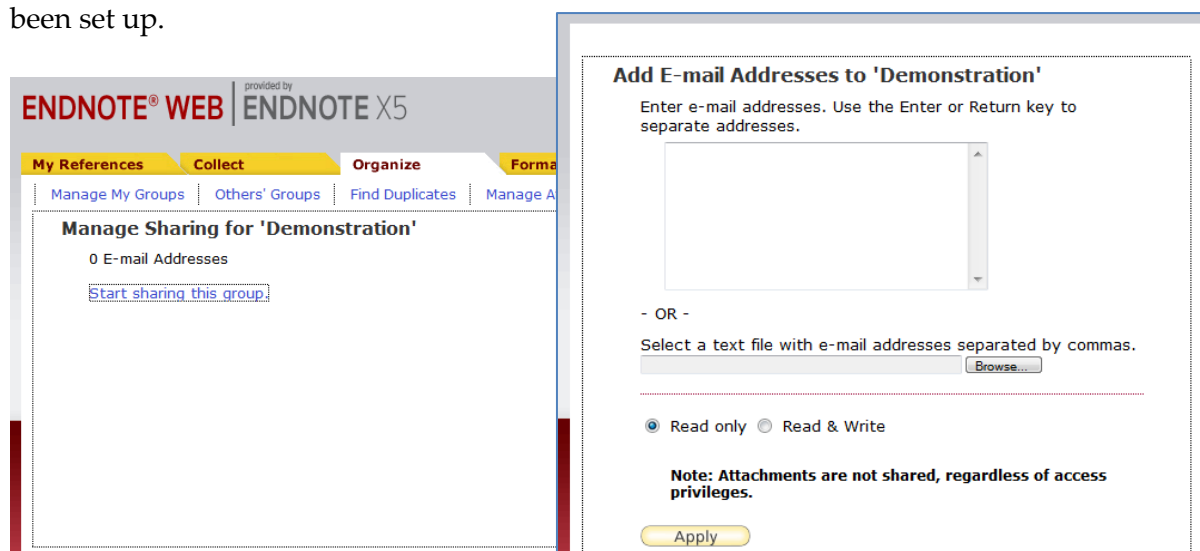
One of the main advantages of EndNote Web over EndNote Desktop is its ability to allow you to share your research libraries with other people, and have it update automatically for them as you add more records. This process is as simple as adding a person's email address to a list of those who can share the Library.

N.B. The person you are sharing your Library with must have an EndNote Web account. If they do not use EndNote Desktop they can set up a free EndNote Web account through the Web of Science database, or go to <http://www.myendnoteweb.com> to register.

First click on <Organise> then <Manage My Groups>. Select the group you want to share, and click <Manage Sharing>.



Click the link named 'Start sharing this group'. The pop-up window will allow you to enter the email address of another EndNote Web user, and give them the right to either read your Library, or read and write to it (i.e. add references to it). Click <Apply>, and the sharing has been set up.

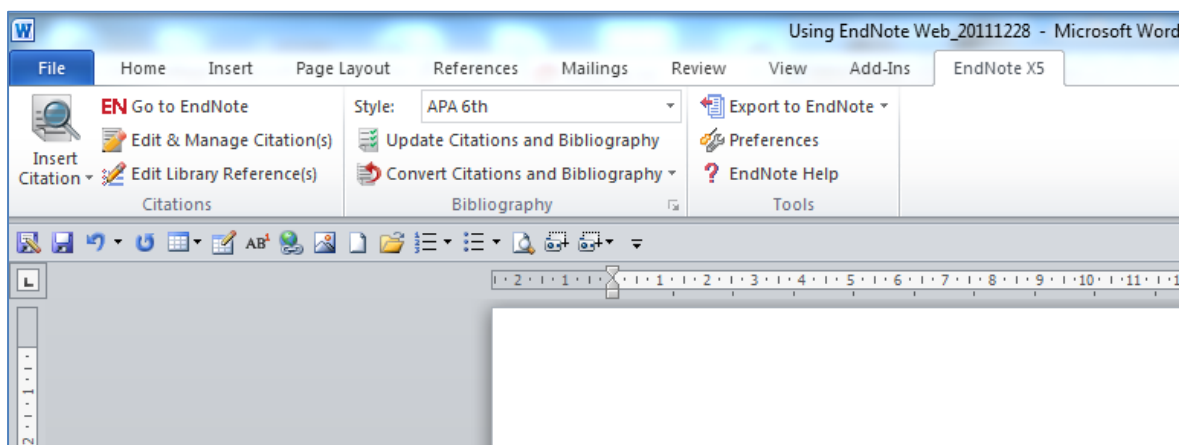


Note: Attachments are not shared, regardless of access privileges.

Cite while you Write

Using your Citations in Documents

With EndNote you can insert selected citations into your Word 2007 or 2010 document while you are writing it. You can do the same with OpenOffice Writer 3.



This is the new ribbon tab for EndNote X5 users. Check behind commands with a pull-down arrow for more actions, e.g. Find Citation is part of Insert Citation.

Insert citations into Word documents, using EndNote Web

The method for inserting citations into documents using EndNote Web involves changing the settings in the Microsoft Word EndNote X5 tab. This is only available to users who have Microsoft Word 2007, or 2010.

Before you can use EndNote Web from Microsoft Word, you will need to have the Internet Explorer plug-in installed. To download and install the required plug-in go to EndNote Web Library>Format>Cite While You Write> Download Installers for PC and Mac.

You can use Cite While You Write for EndNote Web even if you only use EndNote Web on your computer.

In order to use EndNote Web for CWYW you will need to change the settings in Microsoft Word's EndNote X5 Tab from EndNote Desktop to EndNote Web. To do this:

1. Click on the EndNote X5 tab in Microsoft Word 2007 or 2010
2. Click on <Preferences> and then select the **Application** tab.
3. In the Application drop down list, select **EndNote Web**. Enter your sign in details (email address and password).
4. Click <OK>

You will now be using your EndNote Web Library as your source for citations.

Edit citations

1. To add page numbers to your in-text reference, ensure your Word document and your EndNote Library are both displaying the same output style, e.g. APA 6th.

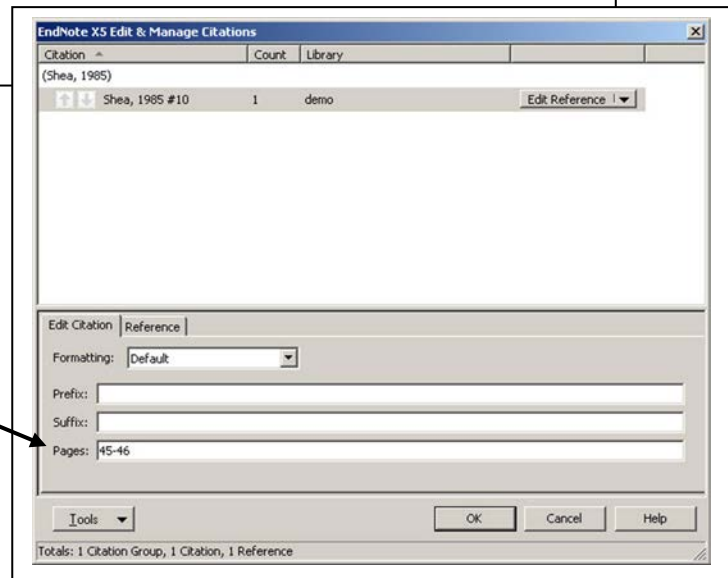
On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks (Baker, 1989).

Highlight the in-text citation

Click **<Edit & Manage Citations>** on your Word EndNote X5 toolbar

Add page number/s

Click **<OK>**



2. Pull down 'Formatting' and choose **<Exclude author>** or **<Exclude year>** if already mentioned in the body of your document.