EndNote Online on Windows: Class Notes

EndNote Training

Clarivate Analytics
1 Overview

1.1 EndNote

EndNote is a reference management solution with both a desktop and online component. When used on the desktop, it may be called “EndNote desktop” or “EndNote on the desktop.” When used online, it may be called “EndNote online.” These names do not mean the desktop and online components are separate products, but only that the EndNote product is being used in either the desktop or online environment at that time.

EndNote users can create online libraries with an unlimited number of references and unlimited attachments. The EndNote online library can contain up to 5,000 groups.

Although this class is designed for EndNote users, who will be able to benefit from all the features of EndNote both on the desktop and online, much of the information will also apply to EndNote basic users.

1.2 EndNote Basic

EndNote basic is a more limited reference management solution that is only available online. EndNote basic users can create online libraries with up to 50,000 references and up to 2G of attachments.

There are two versions of EndNote basic.

- The free version of EndNote basic has 21 styles and a very limited number of filters and connection files. This version is available to anybody, with no other purchase required.
- The version of EndNote basic available as part of the Web of Science has over 3,000 styles and hundreds of filters and connection files. This version is available to those whose institution has a subscription to the Web of Science.

See what you are missing if you are using only EndNote basic in section Error! Reference source not found. Download the 30-day trial for EndNote at http://endnote.com/downloads/30-day-trial.

2 Register for an EndNote Account

To use EndNote online you need to register for an account. Your account name will be your e-mail address. You will also need to create a strong password that is at least 8 characters long and includes at least one number, one symbol, and a change of capitalization. If you already have a Web of Science account, use the same logon information for your EndNote online account and your accounts will be able to cross-reference each other.

If you are using EndNote X8 or X9, you can also register during your first synchronization.
3 Adding References to Your Library

3.1 Online Search

The default option when you click on the Collect tab is Online Search. This feature allows you to search some online databases from within EndNote online.

- To begin an Online Search, select the *drop-down menu above the Connect button*. You will see a list of available online catalogs. If you see more options than you want to work with, you can customize this list by clicking the *Select Favorites* link. After you select favorites, only your favorites will be available in the drop-down list.
- Select the catalog you want to search and click the *Connect* button.
- You will be presented with a search window where you can enter your search criteria.
- Above the *Search* button will be two options: *retrieve all records or select a range of records to retrieve*. Select *select a range of records to retrieve*. With this option EndNote online reports the number of records found before retrieving them.
- Click the *Search* button to perform the search.
- Click the *Retrieve* button to retrieve the references.
- The references will appear in the *Online Search Results* list.
- Mark the references to copy to your personal EndNote online library, then select the group they will be added to from the drop-down *Add to group…* list, or create a new group. The marked references will be added to that group and can then be viewed on the *My References* tab.

3.2 Direct Export

Direct Export provides a quick and easy way to transfer data from online databases that support it. Direct Export requires the EndNote online plug-in for Internet Explorer for all databases except the Web of Science. See section 6.1 for instructions on installing the plug-in.

Below are two examples for using Direct Export, but the steps may vary depending on the database and database provider.

3.2.1 Web of Science (No Plug-in Required)

If you have not already done so, log on to your EndNote online account at [http://my.endnote.com](http://my.endnote.com). If you are using the same logon credentials for EndNote online and the Web of Science, you can just click on the EndNote button in the toolbar in Web of Science.
• Perform your search of the Web of Science. (Note: Limiting your search to the Web of Science Core Collection will give you the option to export more fields, including the keywords and author address.)
• Mark the references to export. You can export up to 500 references in a batch.
• From the drop-down list showing Save to EndNote online in the first line, select the option to Save to EndNote online.
• In the resulting Send to my.endnote.com window, select Full Record if you were searching the Web of Science Core Collection, or Author, Title, Source, Abstract if you were searching other databases in the Web of Science.
• Click the Send button.
• The references will be imported into the Unfiled group.
• Select the references in the Unfiled group and use the drop-down Add to group… list to add them to the group of your choice.

3.2.2 Other Databases—Using the Internet Explorer Plug-in

If you have installed the plug-in for Internet Explorer, direct export will work with many databases in the Internet Explorer, Microsoft Edge, or Google Chrome browsers on Windows. One example of a database Direct Export works with is PubMed. The steps for other databases will vary.
• Perform a search in PubMed and select references to export.
• Click the Send to link.
• Select Citation manager.
• Customize the Number to send and Start from citation options, if desired.
• Click the Create File button.
• If you have only EndNote basic, the references will be imported into your Unfiled folder. If you also have EndNote on the desktop, you can choose to send the references to either your online or desktop library.
• Select the references in the Unfiled group and use the Add to group… drop-down list to add them to the group of your choice.

3.3 The Capture Button and Bookmarklet

The Capture button on the Internet Explorer toolbar for EndNote online can be used to import data from the Web that is not within bibliographic databases, such as book information from Google Books or video information from YouTube videos. Please note that it may not import all the information for some sites, so you may need to add the rest manually.

If you are using a browser other than Internet Explorer, there is also a Capture Reference bookmarklet available. You can find the Capture Reference bookmarklet on the Downloads tab.

Some databases, such as PubMed, will allow you to capture multiple records while others may only allow you to capture one record at a time. Please note that although the Capture bookmarklet can capture much
of the same data the Capture button on the Internet Explorer plug-in can, it may produce different results than the plug-in with some data sources.

3.3.1 Using Capture with a List of Records from PubMed

- Perform your search in PubMed.
- By default, PubMed shows 20 results per page. Click on the drop-down arrow shown below to show up to 200 records per page. The capture will be for a single page of references.

- Click the Capture button on the EndNote toolbar for Internet Explorer, or the Capture Reference bookmarklet in other browsers. Below are the results you should see.

Results for Capture Button in Internet Explorer

- When the capture is finished you should see a message that multiple references have been imported into your Unfiled group. You can continue capturing references one page at a time. (Please note that in Internet Explorer you could also use direct export to export up to 200 references at a time to either your online or desktop library.)
Results for Capture Bookmarklet

- When you see the screen below, which may take several moments to appear, select my.endnote.com to import the page of references to your EndNote online library or EndNote to import the references to your EndNote desktop library.

![Capture New References](image)

- If you select my.endnote.com, you can also select the group to add the reference to or you can create a new group for the references.
- Click the Capture button. You should receive a message showing the number of references imported successfully.

3.3.2 Using Capture for a Book on Google Books (Optional)

- Open the record for the book on Google Books.
- Click About this book at the left.
- Click the Capture button or Capture Reference bookmarklet.
- EndNote will display a window showing the fields it was able to capture. The number of fields may vary based on the metadata available. Fill in the missing information manually.
- Choose to send the data to EndNote or my.endnote.com. If selecting my.endnote.com, also select the group for the record.
- Click the Save to button to save the record. A view of the data saved will be displayed.
- Click the Close button to close the record or the Go to EndNote button to go to your EndNote online library.

Please note this is just an example of how this feature works. Capture can be used for many web sites and types of data, not just Google Books. Also note that if you scroll to the bottom of the page, you
could use the RefMan button (better than the EndNote button) for direct export. For most sites where direct export is available, it will give better results, but it is not always available.

3.4 Importing Text Files

3.4.1 Saving Data from Online Databases

All importing uses a pattern matching process where the pattern of the tags in the data is matched against the pattern of the tags in the import filter. It is very important that data be saved in the tagged format that matches the filter that will be used to import it. Below is an example of tagged text. The tags are on the left and the data follows them.

TI - The Scale and the Feather: A Suggested Evolution
AU - Rex, Tiberius

You will need to save the data in a tagged format that matches the import filter, and you may be presented with multiple options by the data provider. You may need to download the data in more than one format the first time to find the format that matches the filter. (Note: If exporting from PubMed, use the MEDLINE format; if exporting from the Web of Science, use the Save to Other File Formats option, then the Other Reference Software file format.)

3.4.2 Importing the Saved Data

• On the EndNote online Collect tab, select Import References.
• Click the Choose File button to select the data file you saved (downloaded).
• Locate and select the file you saved. EndNote online may not always display the download location but it will display a standard dialog window where you can locate it.
• Select the matching filter from the Import Option drop-down list of available filters. If you do not want to see the complete list, you can customize this list just as you did the list for Online Search.
• Select the group you want to import to from the To drop-down list.
• Click the Import button. Your saved references will be imported into the group you chose, and you can view them using the My References tab.

3.5 EndNote Sync

Current versions of EndNote can synchronize an unlimited number of references, 5,000 groups, and 5,000 group sets between an EndNote online and desktop library. References can also be synchronized to a second desktop computer and/or an EndNote iPad library (EndNote for the iPad is available in the iTunes store). For the first synchronization on any device, there are several important considerations.

• For the first synchronization on any device, ALL references and groups will be copied in both directions. This will result in duplicates if the same references reside on the device and EndNote online.
• All references and groups will be synchronized, but group sets, smart groups, and combination groups (group from groups) will not be displayed in your online library. Therefore, if two custom
groups in an EndNote desktop library have the same name, but are under different group sets, they will have the same name in EndNote online, but will have no group set to distinguish them. Consider adding prefixes to custom group names to more easily tell them apart in EndNote online before your first synchronization.

- If you synchronize to a second computer, all groups and group sets will appear on the second computer.
- Only one EndNote library on a device and one EndNote online account can be synchronized, so it is best to keep all the references you want to sync or share in one library and use groups to categorize them.
- You can create a backup copy of your EndNote desktop library by selecting *Compressed Library* from the *File* menu. EndNote will prompt you to create a backup before the first sync, but this command can be used to create a backup of your library at any time. This backup will have a .enlx extension.
- *Syncing is not a backup system.* If you delete references or attachments from one library, they will be deleted from the other synchronized libraries with the next sync. Technical support will not be able to restore references you have deleted and then synced, so making frequent backups of your desktop library is essential.
- Synchronization will always be of the complete library. There is no selective sync.
- To begin syncing, click the Sync button, then follow the menus to create an EndNote online account or sign in to an existing account. It may take a very long time to sync a large library the first time, so please be patient.

### 3.6 New Reference (Optional)

Unfortunately, not all references can be found online, so you may occasionally need to enter a reference manually. You can do this by selecting the *New Reference* option on the *Collect* tab.

- Select a *Reference Type* from the drop-down list. The reference type you select will determine which fields are available in the data entry screen. Some fields have special properties and must have information entered in special ways.
- Personal author and editor names should be entered in the format Last Name, First Name and each name should be entered on a new line. So, John Smith and Peter Jones would be entered as—
  
  Smith, John Jason
  Jones, Peter S.

- To use initials instead of an author’s full name, put a space, or a period, or a period and a space between the initials. So, the names above could also be entered as below if using initials instead of the full names.
  
  Smith, J.J.  OR  Smith, J J  OR  Smith, J.  J.
  Jones, P.S.  OR  Jones, P S  OR  Jones, P.  S.

- For corporate names, put a comma at the end of the entire name. So, the University of California would be entered as—
  
  University of California,
• The Year field should have all four digits of the year.
• Keywords should be entered with each keyword on a separate line, much like authors.
• File Attachments: You can attach up to 5 files at a time, but there is no limit to the total number of file attachments per record. There is no restriction to the size of individual file attachments; however, there is a total limit of 2G of attachments for EndNote basic users. Purchase EndNote and sync to remove this limit.
• Figure Attachments: You can attach only one figure per record. There is no restriction to the size of a figure attachment, but figure attachments do count towards the 2G attachments limit for EndNote basic.
• At the bottom of the data entry screen you can select the groups you wish to add this reference to.
• Reference data will be saved automatically as you type.

4 Organizing References (The Organize Tab)

4.1 Manage My Groups

Manage My Groups will let you create up to 5,000 groups within your EndNote online library and share them with others. You can also create groups on the fly as data is imported, as described above.

• Mark the Share box to share a group with other EndNote online users, then select Manage Sharing for the group. See section 5.1.2 for details.
• Select Rename to change the name of one of your groups.
• Select Delete to delete a group.

4.2 Others’ Groups

Just as you can share your groups with other EndNote online users, they can share their groups with you. However, you may not wish to see all of their groups nor have all of their groups searched when using Cite While You Write (CWYW). Here you can select which groups others have shared with you will be displayed on the My References tab and if they will be searched with CWYW. You can change these settings at any time.

4.3 Finding Duplicates

The find duplicates option will search your EndNote online library for duplicates and automatically mark the newer duplicate references. EndNote online will consider a reference a duplicate if the authors, title, year, and reference type are the same.

Duplicates can be added to your Quick List or a group of your choice, or deleted, in this screen.
4.4 Manage Attachments

This option displays a list of all references with file and figure attachments, as well as information on how much of your allocated attachment space has been used.

5 Sharing References

5.1 Sharing Entire Libraries

5.1.1 The Basics

Users of EndNote X7.2 or later can share their entire library, with simultaneous access to all references and attachments, with other EndNote X7.2 or later users. The basic requirements and information for sharing are—

- EndNote X9 users can share their library with up to 100 other EndNote users. The owner of the library assigns Read & Write or Read Only permissions to each member of the sharing group, individually.
- EndNote X8 users can share their library with up to 100 other EndNote users. All users have full Read & Write access to the library.
- EndNote X7 users can share their library with up to 14 other EndNote users. All users have full Read & Write access to the library.
- All EndNote X7 users must be using X7.2 or later and must have begun syncing their EndNote library between the desktop and online before January 1, 2018. It is not possible to link an EndNote X7 library to an EndNote online account after that date.
- All users must sync their EndNote desktop and online libraries. The sharing process works through EndNote Sync.
- Although there are limits on the number of other users a library owner can share with, a “sharee” can have an unlimited number of libraries shared with them.
- Because the entire library is synced to all recipients, with attachments, the library will take up as much space on the sharee’s computer as it does on the owner’s computer and can be used off-line. However, the library can only be accessed through the File ➔ Open Shared Library command.
- Depending on the version of EndNote and the settings for each sharee, sharees may have full Read & Write access to the library; those sharees could add, change, or delete references and attachments. We suggest the owner make frequent backups of their library using the File ➔ Compressed Library command.

5.1.2 How to Share an EndNote Library

- Sync your EndNote library.

* The word “sharee” will be used throughout this section to designate the person a library is shared with.
• In your synced library, click the **Share Library** button:

• Enter the email address of the person you want to invite to the shared library, select the access permissions you want them to have, then click the **Invite** button. The email address does not need to be the one the invitee uses for their EndNote online account.

• The invitee’s name will be added to the list at the top of the dialog with a **Pending** status to show they have not yet accepted the invitation. If you want to send a reminder of the invitation, change their permissions, or remove them from the list, you can do that at any time.

• The invitee will receive an email inviting them to the shared library. They must accept the invitation to access the library. When they accept the invitation, the invitee will be directed to a special EndNote logon page, where they must logon to the EndNote online account they sync through. If they do not have an EndNote online account, they can create one on this page.

5.1.3 **How to Open an EndNote Library Shared with You**

• To open a library that has been shared with you in EndNote, select **File ➔ Open Shared Library**.

• You will see a list of all the libraries that have been shared with you. Remember that although you can only share one library with others, an unlimited number of libraries can be shared with you. Select the shared library you want to open and click the **Open** button.

• The first time you open a shared library EndNote will create an empty library and download all the references and groups in the library, including any file attachments, to your computer. This may take some time. Subsequently when you open the shared library, EndNote will only need to check for changes since the last time it was opened.

• The shared library will look much like any other EndNote library. Note, however, that the name of the library will show the EndNote online account name of the owner and the **Share Library** button will be unavailable. You cannot share a library that you do not own with others, only the owner of a library can share it.

• Because a library shared with you will have all the references and attachments from the original library, it will take up as much space on your computer as it does on the owner’s computer.

5.1.4 **The Activity Feed**

Every shared library includes an Activity Feed that provides library members with insight into who is making changes to the shared library. The Activity Feed is only available to EndNote X8 or X9 users but activity from all “sharees,” including those with earlier versions, will be seen in the feed.

• To view the Activity Feed, click the Activity Feed button:

• Activity is presented in reverse chronological order. The most recent activity will be at the top.

• The Activity Feed will display sync timestamps and show the activity that took place between those timestamps.
• Some items in the Activity Feed will appear in a darker shade of grey to signify that more information about that item is available by clicking on it. For example, selecting a line that says “Bob Smith added 145 references” will display those 145 references that Bob Smith added in a temporary Search Result group.
• Up to 500 lines of activity will be shown in the Activity Feed.
• Changes to references made in EndNote online will not be displayed in the Activity Feed.

5.2 Sharing Groups

You can also share groups through EndNote online with any other EndNote online user, no matter which version of the online interface they are using.

• Select Manage My Groups from the Organize tab.
• Mark the Share box for the group you want to share.
• Click the Manage Sharing button to add people to the shared group.
• Click Start sharing this group.
• Enter the email address (the account name) of the person you want to share the group with. You must use the email address they are using for their EndNote online account logon.
• Choose to give them Read only or Read & Write access to your group. With Read only access they can use your references in Word documents, copy your references to their own library, and view the data for your references, but they cannot change them. With Read & Write access they can do all of these things, but they can also change your references, add references to the group, or delete references from the group. The level of access can be set individually for each person you share the group with and can be changed at any time.
• Click the Apply button to apply your changes. You can add more EndNote online accounts to your list, applying changes as you go. Click the Close window button when finished.
• You should now see a list of all the EndNote online accounts you have shared that group with.

6 Cite While You Write in Microsoft Word

6.1 Cite While You Write Plug-In

A single installer includes both the Internet Explorer Direct Export and Cite While You Write (CYWY) plug-in for Microsoft Word. Do not install the Cite While You Write part of the plug-in if you are using EndNote because EndNote includes CYWY plug-ins for both EndNote online and EndNote desktop.

The Internet Explorer plug-in may require administrator access to install on your computer.

• Click the Downloads tab.
• Click Download Windows MSI to download an installer you can run on your computer or Download Windows with Internet Explorer to install from within your browser.
• Run the installer, clicking to continue as needed. Upon reaching the option to install both the Internet Explorer and CWYW plug-ins, **deselect the CWYW option if you are also using EndNote on the desktop.**

### 6.2 Cite While You Write (CWYW) Commands

If you are using both EndNote on the desktop and online, you can switch between the CWYW tools by selecting **Preferences ➔ Application**, then using the drop-down **Application** list.

The EndNote online Cite While You Write commands will display a tab on the Word ribbon. These commands will allow you to search your EndNote online library for references, insert those references into your Word documents, and instantly format the citations and bibliography according to the bibliographic style of your choice.

#### The EndNote online tab for Microsoft Word.

![EndNote Online Tab](image)

Shown below are the buttons for the Cite While You Write commands and short descriptions of their functions.

#### 6.2.1 Insert Citations

• This command opens a search window where you can enter text that is in any field of the record you wish to find. You can then select references from a list of those that contain your search terms and insert them into your paper.

#### 6.2.2 Go to EndNote Online

• This command will take you to your EndNote online library or the logon screen if you are not already logged on. You cannot select references online and insert them.
6.2.3 Configure Bibliography

- This command will allow you to change the EndNote online style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing. (If you wish to change just the style, you can do that using the drop down styles list. If you wish to update your citations and bibliography, you can do that using the Update Citations and Bibliography command. If you wish to do both of these, as well as change line spacing, add titles, and access other formatting options, click on the small arrow at the bottom right of the Bibliography group (the one the arrow is pointing at) to bring up the full Configure Bibliography window.)

6.2.4 Edit Citation(s)

- This command must be used to make changes inside a citation, such as adding page numbers, removing author names or the year from author-date citations, or removing references from grouped citations.

6.2.5 Convert to Unformatted Citations

- This command will remove the formatted bibliography and citations and replace all citations with plain-text placeholders that EndNote online can match to library records. This command is commonly used when moving documents between word-processing programs.

6.2.6 Convert to Plain Text

- This command will create a second copy of the document with all EndNote online field coding removed (you can generally recognize field codes such as formatted EndNote online citations by the grey shading when you select them in Word). It is often used when sending documents to a publisher because the field coding used for EndNote online citations can sometimes cause problems for publishers’ page layout programs. Please note that this command does not create a .TXT plain text file; it creates a Microsoft Word document with the EndNote online field codes removed.
6.2.7 Export Traveling Library

- EndNote online creates a hidden “traveling” library containing only the references used in each paper. This traveling library is part of the coded information contained in each citation, so it is automatically created when you add citations to the paper. Use this command to export the references in this traveling library to your EndNote online library.

6.2.8 Cite While You Write Preferences

- Use this command to set preferences for EndNote online’s Cite While You Write settings for future documents, and to switch between using the desktop or online library in Word.

7 Extras (Optional)

7.1 Quick Search

The Quick Search feature in EndNote online is very similar to that of many online database search engines. It will search all fields in the library, and you can search the entire library or just one group within the library. There is no way to limit your search to specific fields, as there is in EndNote on the desktop. Search terms can be combined or limited as shown in the examples below.

- dinosaur extinction: Enter multiple words to search for all records containing any of those words. This search would find any record containing either dinosaur OR extinction.
- “dinosaur extinction”: Enter a phrase in double quotation marks to find records containing that phrase. This search would find only records containing the phrase dinosaur extinction.
- +dinosaur +extinction: Place a plus sign (+) in front of any word that must be present in the records found. This search would find only records containing dinosaur AND extinction. The words would not need to be in the same field, but both would have to be present in the record.
- dinosaur -extinction: Place a minus sign (-) before any word that must not be present in the records found. This search would find records that contained dinosaur but did not contain extinction. Note that the minus sign can only be used in combination with another search term, so you could not enter –extinction alone, for example.

7.2 Adding Attachments to Records

Attachments can be added to records in list view or from within the record.

7.2.1 Adding an Attachment in List view

- Click the paperclip icon below the record in the list.
- Click the Attach Files button.
• Click a **Browse** button to browse for a file on your computer to attach. You cannot attach files directly from the Internet, they must be downloaded first. You can attach up to five files at a time to a record and there is no limit on the number of attachments per record. (Note that you can only add up to 45 attachments to an EndNote desktop record. If you attach more than 45 attachments to a record online, all of them will sync to the record in the desktop library, but you will not be able to add more records on the desktop unless you delete attachments until there are less than 45 attachments for that record.)

• Click the **Upload** button.

### 7.2.2 Adding an Attachment to an Open Record

• With the record open in EndNote online, click **Attach files** in the **Attachments** section of the record.

• Continue to attach the files just as you would in list view.

### 7.2.3 Adding a Figure Attachment to a Record

Figures can be attached using the same methods used to attach other files, either in list view or within the record. However, figures will be stored in the Figure field and can be used with Cite While You Write in EndNote on the desktop. Only one figure can be attached per record. Inserting figures in Word documents is not available with Cite While You Write for EndNote basic.

### 7.3 Manuscript Matcher

EndNote’s manuscript matcher feature can help you find journals that might be interested in publishing your papers.

• Click the **Match** tab in EndNote online.

• Copy your paper’s title into the **Title** field and abstract into the **Abstract** field.

• If you have a group in EndNote online that contains the references for your paper, select that group from the drop-down list of groups in your online library. Including the article’s citations is strongly recommended to improve the accuracy of the results, but they are not required.

• Click the **Find Journals** button.

EndNote compares the text in your title and abstract, plus citations if available, with those of over 11,000 journals in the Web of Science Core Collection, Journal Citation Reports, and the Arts and Humanities Citation Index.

When matches are found, results will show a list of between two and ten journals likely to be interested in papers like yours.

### 7.4 Cross-Referencing with the Web of Science

If you use the same logon information for your Web of Science and EndNote online account, and log into Web of Science first, then into EndNote online, they will cross-reference each other. This means when working in EndNote online, you will have links to the Web of Science source records, related records, and times-cited information for references imported from the Web of Science. When searching in the Web of Science, you will see an EndNote icon appear by any reference already in your EndNote library.
7.5 Export References

This feature works much like the Bibliography feature. You can export all the references in your library, your Quick List, the references in a specific group, or references in a group someone has shared with you. The main differences between this and Bibliography are that—

- References exported using Export References will always be saved as plain text files because they are meant to be imported into other database or bibliographic software programs.
- The bibliographic styles available here are either delimited or tagged and are designed to be imported into other programs.