# EndNote Online Workbook

## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>2</td>
</tr>
<tr>
<td>What is EndNote Online?</td>
<td>2</td>
</tr>
<tr>
<td>Why use EndNote?</td>
<td>2</td>
</tr>
<tr>
<td>TASK 1: Registering for an account</td>
<td>3</td>
</tr>
<tr>
<td>TASK 2: DISCOVER direct export</td>
<td>5</td>
</tr>
<tr>
<td>TASK 3: Capture Reference</td>
<td>7</td>
</tr>
<tr>
<td>TASK 4: Google Scholar</td>
<td>8</td>
</tr>
<tr>
<td>Google Scholar settings</td>
<td>8</td>
</tr>
<tr>
<td>Google Scholar Export</td>
<td>9</td>
</tr>
<tr>
<td>TASK 5: Importing References from text files</td>
<td>10</td>
</tr>
<tr>
<td>TASK 6: Adding References Manually</td>
<td>11</td>
</tr>
<tr>
<td>TASK 7: Organising Your References into Groups</td>
<td>12</td>
</tr>
<tr>
<td>TASK 8: Removing References</td>
<td>13</td>
</tr>
<tr>
<td>TASK 9: Creating Bibliographies</td>
<td>14</td>
</tr>
<tr>
<td>TASK 10: Cite While You Write</td>
<td>16</td>
</tr>
</tbody>
</table>
Introduction

This workbook serves as a 'getting started' guide to EndNote Online. It consists of a number of tasks which will take you through the process of setting up and using EndNote Online. It is probably helpful to read through each task and look at the screen shots which have been included for guidance purposes before you attempt a task.

What is EndNote Online?
Endnote Online is web-based reference management package. It enables you to build up an online database, or 'library', of references to all the items (books, journal articles, theses, conference proceedings, newspaper articles, etc.) you will collect during your research, so you can find them again easily. You can then select a referencing style and insert citations and references into your work using the ‘Cite While You Write’ plug-in.

Why use EndNote?
EndNote Online is available from any computer with an internet connection. It is an efficient means of managing your references and outputting them in a wide variety of referencing styles. It is possible to use EndNote Online on your own laptop or on university networked computers. EndNote is compatible with windows and Mac OS.
TASK 1: Registering for an account

The first time you use EndNote online you need to create an account in the Web of Science database using a university networked computer.

1. Open a browser and navigate to the Library homepage, www.liv.ac.uk/library. Click on Databases.

2. Click W then click on Web of Science in the alphabetical list.

3. Select the Sign In menu at the top right, and click on Register. In the dialogue box enter your email address in both boxes then click Continue.

4. Now open you email account and copy the verification code sent to your from noreply@webofscience.com. Go back to your browser and paste the code in the dialogue box.
You can now set up your account in the Registration dialogue box before clicking **Submit Changes**.

5. Enter your name, create a password and select your role and subject area

6. In Bibliographic software select **EndNote**

Now you can access EndNote online using the username and password you have just created, either by clicking on the **EndNote** tab in Web of Science or directly at [www.myEndNoteweb.com](http://www.myEndNoteweb.com).
TASK 2: DISCOVER direct export

1. Open a browser and navigate to the library homepage www.liv.ac.uk/library
2. In the DISCOVER search box type some keywords and click the search button
3. In your results list select a few of the articles by clicking on the folder icon on the right
4. Now click on the Folder option on the top right to access your folder
5. Select the references and click on Export
6. Select the **Export to EndNote Web** radio button and Save

7. Login when prompted using your EndNote Online username and password **nb if you already have EndNote Online open in another browser tab the reference will be exported directly to your library of references**

8. Click on **My References** to see the list of references you have just exported from DISCOVER
**TASK 3: Capture Reference**

Capture is a bookmarking tool which can be installed on your web browser allowing you to automatically add references found on a web page to your EndNote library.

1. Navigate to EndNote Online in an Internet Explorer browser then click on the **Downloads**
2. Right click at the very top of the screen, and click **Favourites Bar** to display your toolbar

3. Click on capture reference and drag up to the toolbar. In the dialogue box click **Yes** to install the tool to your Internet Explorer browser

You can now easily transfer references from your browser window to EndNote Online. The Capture tool can be installed on your own computer, and you can choose to use Chrome or Firefox instead of Internet Explorer if you prefer.
TASK 4: Google Scholar

Once the Capture toolbar has been installed to your browser references can be automatically exported from Google Scholar to your EndNote Online library.

Google Scholar settings

1. Open an Internet Explorer browser window and go to the Google Scholar home page at http://scholar.google.com. Sign in to your Google account then click on the three lines icon in the top left.

2. Click "Settings" in the pop up menu

3. Under "Bibliography Manager" select the option "Show links to import citations into" and choose "RefMan" in the drop down box. Click on the "Save" button.
You can now start searching Google Scholar and exporting selected references to Endnote Online.

**Google Scholar Export**

1. Type some keywords into the Google Scholar search box, then in the results list click on the "Import into RefMan" link next to one of the references.

2. In the dialogue window choose to **Open** the file. Click **allow** in the security pop-up window then select **EndNote Online** in the dialogue box.

3. Log in to your EndNote Online account when prompted

4. Navigate to EndNote online in your browser and click on **My References** to see the list of references you have just exported from Google Scholar

**NB You will need to install the Capture plug-in before automatically exporting from Google Scholar. Refer to the EndNote online guide available at: https://libguides.liverpool.ac.uk/londoncampuslibrary/endnoteonline for instructions. Alternatively you can use the instructions below to save Google Scholar results to a text-file and import to EndNote Online.**
TASK 5: Importing References from text files

It is possible to import references from many databases and from Google Scholar by saving them as a file (a .txt, .ris or .enw file, depending on the database) and importing the file into EndNote Online using the appropriate filter.

First you need to set up the import filters so EndNote can interpret the text files.

Click on Collect | Import References | Select Favourites

Select Endnote import from the left-hand box then click Copy to favourites
TASK 6: Adding References Manually

If you are unable to find your reference online you can create it yourself within EndNote.

1. Click on the **Collect** tab and select **New Reference**.

2. From the **reference type** drop down menu select **Book Section**

3. Now fill out the fields as follows:

   Author: Franklin, A.W.
   Title: Management of the problem
   Year: 2012
   Editor: Smith, S.M.
   Book Title: The maltreatment of children
   Place Published: Lancaster
   Publisher: MTP
   Pages: 83–95

   **nb note that you don’t have to fill out every field, just make sure you have included all the information required for your bibliography**

4. Click **Save** when you have finished then select **My References** to view the new reference in your full list.
**TASK 7: Organising Your References into Groups**

Whenever you add references to EndNote Online they are stored in the [unfiled] section. Your references can be arranged into groups e.g. for references associated with individual assignments, or different sections of your dissertation.

1. Click on the Organize tab and select New group then enter the name “Literature Review” for your group and click OK.

2. Click on the My References tab then click All my references to view the full list. Now check the boxes next to a few of these references to select them, then select Literature Review from the add to group drop-down menu.

3. Now click on the group name within the My References tab to view the references in the new group.

**NB references added to groups also continue to be included in the All My References group, so the total number will remain unchanged.**
TASK 8: Removing References

If you wish to remove a reference from a group you can do so without permanently deleting the reference.

1. Click on the My References tab then click Literature Review to view the references in this group

2. Select one of the references by checking the box to the left, then click Remove from Group

**nb if you wish to permanently delete a reference from your EndNote Online library follow the steps above, clicking the Delete button instead of Remove from Group**
TASK 9: Creating Bibliographies

Bibliographies can be generated directly from EndNote and formatted in your preferred style.

First you need to set your preferred citation style. In this example we will use **Cite them right Harvard** (the main version of Harvard used at the University of Liverpool.)

1. Click on the **Format** tab then click **Bibliography**
2. Next to **Bibliographic Style** click on **select favourites**
3. Scroll down in the list to select **Cite them right Harvard** then click **copy to Favourites**.

![Image 1](image1.png)

4. In the **References** drop-down menu select **Literature Review**
5. From the **bibliographic style** menu select **Cite them right Harvard**, then from the file format menu select **HTML**
6. In the dialogue window select **Open** and your bibliography will open in another browser tab

![Image 2](image2.png)
7. Select the references and copy them, then paste into a Word document.

**NB if you wish to create a full bibliography including all the references you have saved to EndNote select **All my references** from the **References** drop down menu**
**TASK 10: Cite While You Write**

EndNote can communicate with Word, insert citations in your Word document and produce a formatted bibliography. The EndNote toolbar is installed on university computers.

**nb for instructions on installing the toolbar on your own computer please consult the EndNote Online Quick Start Guide available at [https://libguides.liverpool.ac.uk/londoncampuslibrary/endnoteonline](https://libguides.liverpool.ac.uk/londoncampuslibrary/endnoteonline)**

You first need to adjust the toolbar so it connects with your EndNote Online library. Open a Word document and click on the EndNoteX8 toolbar.

1. Click on preferences and in the pop-up window select Applications, then choose EndNote Online from the drop-down menu for application

2. Enter your EndNote username and password and click ok.

![EndNote toolbar](image)

Now you are ready to automatically insert citations into your document.

1. In the EndNote toolbar select Cite them right Harvard from the drop-down Style menu

2. Position the cursor at the top of the document then click Insert Citations.

3. In the dialogue box type a keyword to search for one of the references you have added to your EndNote Online library earlier then click Find

4. Highlight one of the references and click insert.

As well as inserting the citation within the text EndNote will start to build your bibliography.
5. Repeat the above steps and add another reference from your library

As you add more references into the text the bibliography will continue to be updated and will remain in alphabetical order.

(Cruz, Couto and Costa, 2019) (Ashrarei and de Lange, 2019)

Further Help

For a more detailed introduction to using EndNote Online please see our EndNote Online Guide available to download at: https://libguides.liverpool.ac.uk/referencing/endnoteonline.


For information and guidance on the desktop version of EndNote please see our Referencing Guide at http://libguides.liv.ac.uk/referencing/endnote.

For further help with EndNote please contact your librarian at londonlibrary@liverpool.ac.uk or book an appointment with Ruth at http://libguides.liv.ac.uk/london