

# Web based Endnote Instructions

This guide will take you through the various aspects of using web based Endnote.

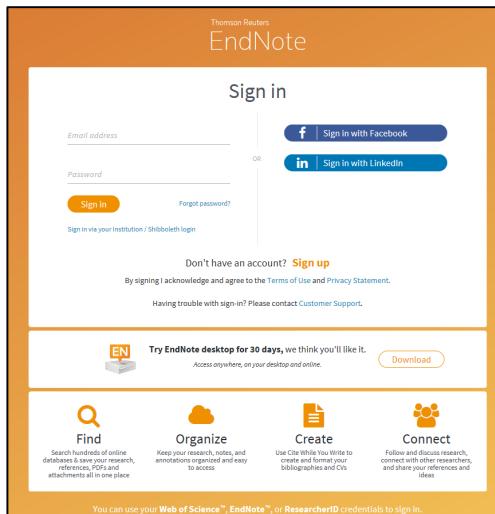
## Contents

Setting up an Endnote Account.....	2
The Reference Library.....	3
Manually adding references .....	3
Tips for entering authors.....	4
Organising your Library .....	5
Editing references.....	5
Deleting references .....	5
Reordering the library .....	5
Removing duplicate references .....	6
Adding attachments to references.....	6
Grouping your references.....	7
Sharing your groups .....	7
Using Endnote and Online Search .....	8
Getting References from Databases .....	9
Direct Export using Library Search.....	9
Capturing Bibliographic Information from a Website .....	11
Using Endnote and Word .....	12
Installing the toolbar .....	12
Linking the document to your Endnote library .....	12
Inserting a citation .....	13
Changing the referencing style in Word .....	13
Deleting citations in Word.....	14
Excluding parts of citation.....	15
Including page numbers in a reference .....	15
Editing citations/bibliography .....	16
Standalone bibliographies .....	16
Submitting documents electronically .....	17

# Setting up an Endnote Account

Web based Endnote is an online software package that allows you to manage bibliographic references and create bibliographies easily and automatically.

Endnote is available through the Internet at <http://www.myendnoteweb.com>



In order to see features relating to MMU like the MMU Harvard style, you first need to login via the Institutional/Shibboleth option. Click Sign in via your Institution/Shibboleth login. Under the option for Institutional (Shibboleth) users sign in, choose UK Federation and click Go. Now type Manchester Metropolitan University and click Continue. Now enter your MMU username and password and click OK.

You can now register for your own account. Select Sign Up and follow the on screen instructions. Your password must be eight characters long, include an uppercase letter, a lower case letter as well as a number and a symbol. This will enable you to use Endnote for as long as you are registered as a member of MMU.

A screenshot of the Endnote Sign up page. The page has a white header with the word "Sign up". Below the header is a form with fields for "Email address" (containing "a.student@mmu.ac.uk"), "Password", "First name", and "Last name". To the right of the form is a vertical list of validation errors for the password field:

- Passwords should be at least 8 characters
- Must contain at least 1 lowercase letter
- Must contain at least 1 uppercase letter
- Must contain at least 1 number
- Should not have leading and trailing spaces
- Should have at least one special character (!@#\$%^&\*()~`[]{}|&\_)
- Password is too long

At the bottom of the page is a "Sign up" button.

## The Reference Library

The file that holds your references is called a library. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc. This is the main screen for Endnote. The short records format is displayed and a Find It! link is provided so that you can link to full-text if available at MMU.

The screenshot shows the EndNote software interface. At the top, there's a navigation bar with tabs: EndNote™, My References (which is selected), Collect, Organize, Format, Match, Options, and Downloads. Below the navigation bar is a 'Quick Search' bar with a search input field and dropdown options for 'Search for' and 'in All My References'. To the left, there's a sidebar titled 'My References' showing a list of groups: 'All My References (305)', 'Trash (76) Empty', and 'My Groups' which includes 'Chapter 1 (10)', 'Chapter 2 (7)', 'Chapter 3 (6)', 'Chapter 4 (1)', 'Project (11)', 'Project 2 (1)', 'Research Methods (0)', and 'Research project (1)'. Below this is a section for 'Groups Shared by Others' with 'Assignment 1 (3)'. A 'ResearcherID' button is also present. The main area is titled 'All My References' and displays a list of references with columns for 'Author', 'Year', and 'Title'. Each reference entry includes a checkbox, a 'find it!@MMU' link, and a 'Copy To Quick List' option. The first few entries are:

- Bell, Judith (2009) Research methods for first time researchers. Added to Library: 20 Dec 2011 Last Updated: 18 Dec 2015. [find it!@MMU](#)
- Berger, John (2008) Ways of seeing. Added to Library: 23 Oct 2013 Last Updated: 13 Jul 2016. [find it!@MMU](#)
- Burton, Neil (2016) Doing your education research project. Added to Library: 13 Jul 2016 Last Updated: 15 Sep 2016. Online Link → Go to URL. [find it!@MMU](#)
- Cohen, Louis (2007) Research methods in education. Added to Library: 17 Sep 2015 Last Updated: 22 Jan 2016. Online Link → Go to URL. [find it!@MMU](#)
- Creswell, John W. (2007) Designing and conducting mixed methods research. Added to Library: 18 Apr 2016 Last Updated: 18 Apr 2016. [find it!@MMU](#)
- Crowe, Michael (2012) Mind mapping research methods. Quality & Quantity. Added to Library: 17 Sep 2013 Last Updated: 26 Oct 2015. Online Link → Go to URL. [find it!@MMU](#)

## Manually adding references

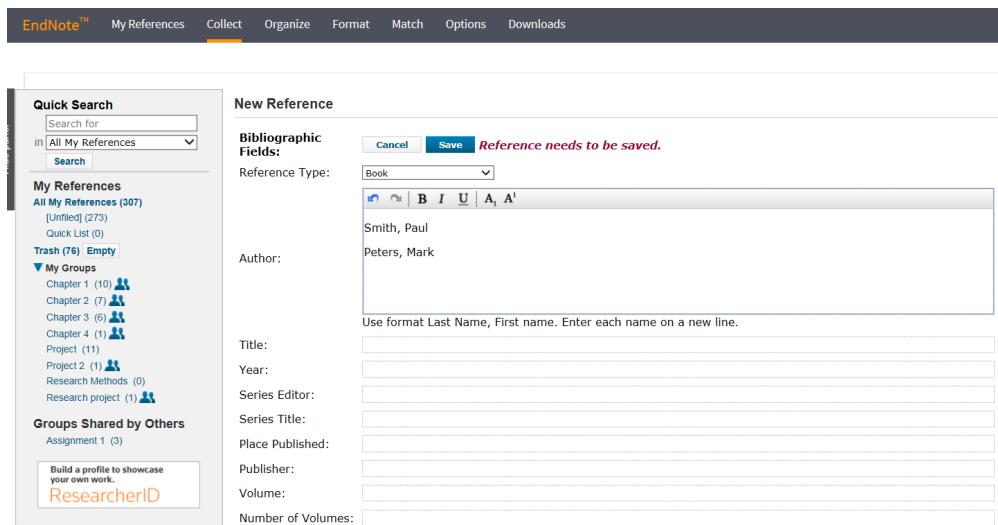
To add a new reference select the Collect tab and click on New Reference then choose the type of reference you require from the drop down menu.

The screenshot shows the 'New Reference' dialog box in EndNote. At the top, there's a 'Bibliographic Fields:' section with a 'Cancel' button. Below it, a 'Reference Type:' dropdown menu is open, showing a list of options: General, Aggregated Database, Ancient Text, Artwork, Audiovisual Material, Bill, Blog, Book, Book Section, Catalog, Chart or Table, Child Work, Computer Program, Conference Paper, Conference Proceedings, Document, Dictionary, Edited Book, Electronic Article, Electronic Book, Electronic Book Section, Encyclopedia, Episode, Figure, Film or Broadcast, Government Document, Interview, Hearing, and Tertiary Author. The 'General' option is currently selected. To the right of the dropdown, there are several input fields for 'Author', 'Title', 'Year', 'Secondary Author', 'Secondary Title', 'Place Published', 'Publisher', 'Volume', 'Number of Volumes', 'Number', 'Pages', 'Section', and 'Tertiary Author'. Each field has a corresponding text input box below it.

The fields will change to reflect the reference type, simply click in each field and type the details of the reference.

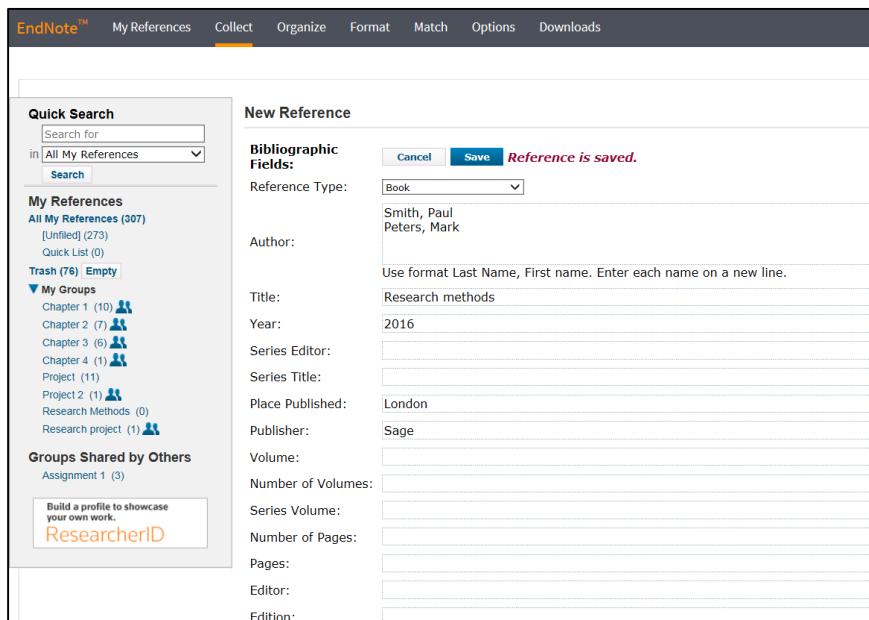
## Tips for entering authors

When entering the names of authors or editors always use the following order, Last Name, First Name i.e. Smith, John. If the reference includes multiple authors/editors, each must be entered on a separate line.



If the reference includes the name of the organisation you will need to insert a comma after the name so that it will appear correctly in your reference list i.e. Manchester Metropolitan University,

When you have entered all the fields you want to use click on Save to add the reference to your library.



## Organising your Library

### Editing references

Each reference can be edited, if you need to add or subtract information. From the list of references, simply click on the title and click on the field that you need to edit. Once you have made the changes, click Save to update the record.

### Deleting references

To delete any unnecessary records, click the tick box next to reference and click Delete. The reference will be moved to Trash. Records can be retrieved from Trash, so long as it hasn't been emptied. To delete reference from Trash select Empty.

The screenshot shows the 'All My References' interface in EndNote. On the left, there's a sidebar with 'Quick Search' and sections for 'My References' (including 'All My References (209)', 'Trash (22) Empty', and 'My Groups' with various categories like Chapter 1, Chapter 2, etc.), and a 'ResearcherID' button. The main area displays a list of references with columns for 'Author', 'Year', and 'Title'. At the top of this list, there are buttons for 'Copy To Quick List', 'Delete' (which is circled), and sorting options ('All', 'Page', 'Add to group...', 'Author', 'Year', 'Title'). Below the list, there are download links and 'find it!@MMU' buttons for each reference. The bottom of the screen shows pagination and navigation controls.

### Reordering the library

The library can be organised in a number of different ways. The default is to order by the name of the first author. However, by clicking on Sort by and selecting from the drop down menu on the right hand side of the screen you can change the order using the options given. This can be useful if you want to find items recently added to your library.

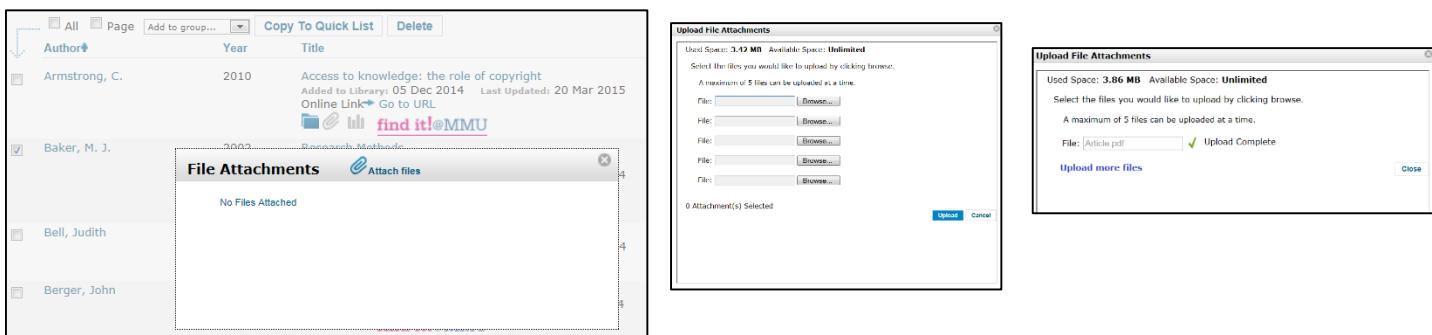
This screenshot shows the same 'All My References' interface as above, but with a dropdown menu open over the 'Sort by' button. The menu lists several sorting options: 'First Author - A to Z', 'First Author - Z to A', 'Year -- newest to oldest', 'Year -- oldest to newest', 'Title -- A to Z', 'Title -- Z to A', 'Source Title -- A to Z', 'Source Title -- Z to A', 'Times Cited -- highest to lowest', 'Times Cited -- lowest to highest', 'Added to Library -- newest to oldest', 'Added to Library -- oldest to newest', 'Last Updated -- newest to oldest', and 'Last Updated -- oldest to newest'. The rest of the interface is identical to the previous screenshot.

## Removing duplicate references

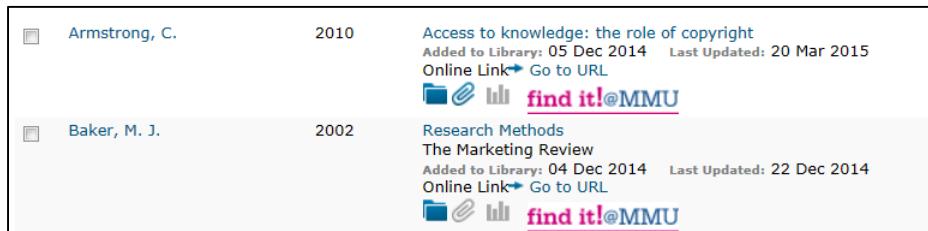
If you are downloading many records from different sources, you may find that you end up with duplicate references in your library. Endnote has a handy tool to find these for you. Click on Organize and choose Find Duplicates. The duplicates are highlighted and can be reviewed and then deleted, by clicking on Delete.

## Adding attachments to references

Endnote allows you to attach files such as PDF files to individual records. To attach, first click on the Paper clip icon for the individual record, click Attach files, now click on Browse and locate the file. Once you have found the file click Upload.



Once an attachment has been added, the paper clip will change colour to blue.



To remove an attachment, simply click on the paper clip, then hover over the name of the file and click the blue cross to remove.



If you wanted to see the total number of attachments in your library, choose Organize and click Manage Attachments. All the attachments will be listed as well as how much space has been used.

Attachment Name	Author	Year	Title
GettingStartedGuide.pdf	May, Tim	1997	When theory fails? The history of American sociological research methods History of the Human Sciences
Gustafson-2001-Using a GIS model...	Gustafson, E. J.	2001	Using a GIS model to assess terrestrial salamander response to alternative forest management plans

## Grouping your references

Records are automatically added to All My References Folder – but you can also sort them into individual folders (up to 5000 personal folders). To create a new group, select the Organize tab, click on Manage My Groups and then click New Group and give the group a relevant name i.e. Research Methods, Chapter 1, etc.

Return to My References and tick the records you want to add to your group and then select the group from Add to Group drop down menu. References can be added to multiple groups as required.

## Sharing your groups

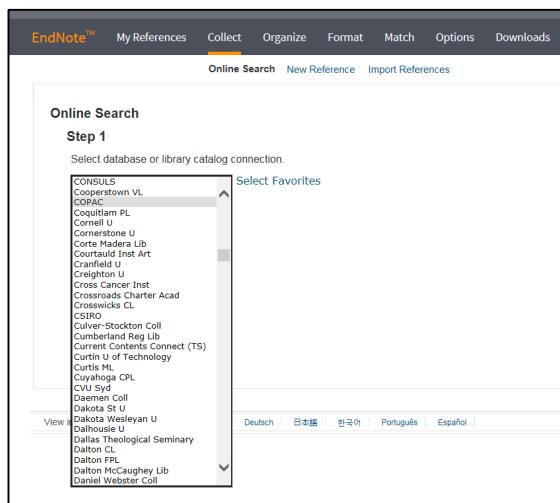
Endnote also allows you to share your groups of references with other researchers who are using Endnote. You can choose to give your colleagues read only or editing rights. Click on the Organize tab, Manage My Groups, Manage Sharing and then click on Start Sharing this group. A new screen will appear, simply enter the email address for your colleague and choose the level of access allowed. They will now be able to see your references in their Endnote library.

# Using Endnote and Online Search

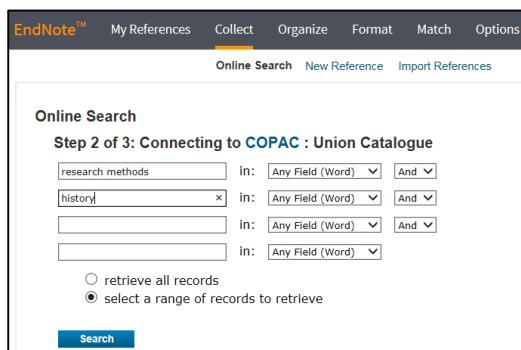
Within Endnote you can connect to different databases such as library catalogues and download details of books directly into your own Endnote library.

For example - COPAC provides access to the merged online catalogues of many UK research libraries. It has over 35 million records from over 90 libraries, representing a wide range of materials across all subject areas.

Click on Collect, Online Search, click on the drop down arrow next to Select to see the list of different library catalogues. Scroll down and select COPAC and then click Connect.



To run a search, simply type your terms in the search box, choose to retrieve all the results or a specific range of records and click Search. Records will be retrieved from COPAC.



Once the results are displayed, simply check the tick box to select the records you want to add and choose where in your library to add them, either to a specific group or the Unfiled library. Once they are added to your library, you will be able to use them as citations.

## Getting References from Databases

As well as using Endnote to connect to different catalogues, it is possible to search many of the library's resources and then add records into your own Endnote library. On the library website you can find an A-Z listing (<http://libguides.mmu.ac.uk/az.php>) of our resources, click on the question mark next to an individual resource to access the help guide and click the Endnote tab to see specific instructions. The majority use a system called Direct Export.

### Direct Export using Library Search

To use direct export, you need to leave your Endnote library running and open a new tab in your browser. Access Library Search from the library website ([www.library.mmu.ac.uk](http://www.library.mmu.ac.uk)) and run your search. When you retrieve results, you will need to select the ones you want to transfer into Endnote Online.

To do this click on the folder icon on the right hand side of each record.



Once selected, the icon changes colour and items will be added to the folder located next to the search box.

**Library Search**

research methods

Advanced

From Wikipedia, the free encyclopedia

Online research methods (ORMs) are ways in which researchers can collect data via the internet. They are also referred to as Internet research, Internet science or iScience. Many of these online research methods are related to existing research methodologies but reinvent and re-imagine them in the light of new technologies and conditions associated with the internet. The field is relatively new and evolving. With the growth of social media a new level of complexity and opportunity has been created. Inclusion of social media research can provide unique insights into consumer and societal segments and gaining an "emotional" measure of a population on issues of interest.

**REFINE YOUR SEARCH**

- Full Text Online
- Scholarly & Peer-Review
- Library Catalogue

**CONTENT TYPE**

- Journal Article (16,116,820)
- Newspaper Article (1,711,243)
- Conference Proceeding (1,189,519)
- Newsletter (807,981)
- Book / eBook (133,690)
- More...

**PUBLICATION DATE**

20,930,961 results sorted by relevance

Add results beyond your library's collection

Database Recommendations

MEDLINE - A bibliographic database of life sciences and biomedical information

Web of Science - Covers over 10,000 of the highest impact journals worldwide, including Open Access journals and over 110,000 conference proceedings

1 **online** Research methods by Walliman, Nicholas S. R. 2011 eBook: Full Text Online Book: Available\_001.4/WAL\_All Saints (+16 more) Preview

2 Research methods: a process of inquiry by Graziano, Anthony M; Raulin, Michael L. 2010, 7th ed. Book: Available\_001.42/GRA\_Crewe

**NB** The selected records will disappear after 20 minutes. You can export up to 50 items at a time.

When you are ready to transfer your results to Endnote, click on the Folder icon at the top of the screen.

A new screen will appear, listing the records to be transferred. To transfer records click on the arrow next to Export To and choose Endnote.

This screenshot shows a library search results page with a sidebar for 'Saved Items'. The sidebar indicates there are 4 saved items and a 'Clear all' link. Below the sidebar, three search results are listed. The first result is 'Research methods' by Wallman, Nicholas S. R., published in 2011, available online. A context menu is open over this item, showing options like 'RefWorks', 'EasyBIB', 'EndNote' (which is circled), 'BibTeX', and 'Citavi'. The other two results are also 'Research methods: a process of inquiry' by Graziano, Anthony M. and Raulin, Michael L., with publication details 2010, 7th ed. and 2004, 5th ed. respectively.

Depending on which browser you are using, a dialog box will open (images below) – in Internet Explorer(left) click Open; in Firefox(centre) select OK; in Chrome(right) click on the button labelled export-endnote... which will appear in the left hand corner of the screen.

These three screenshots demonstrate the export process in different browsers. The left image shows an Internet Explorer dialog box titled 'Opening export-endnote-1434356641.ris' with an 'Open' button circled. The middle image shows a Firefox dialog box with an 'OK' button circled. The right image shows a Google Chrome browser window where the URL in the address bar has been modified to include '&export=export-endnote...', with this part of the URL circled.

Next, a box called Choose Destination will appear, highlight Endnote Web, and click OK. You may be asked to enter the details of your Endnote Online account, simply type these in and click OK. A final message will appear confirming your records have been added to Endnote. Click OK.

The first screenshot shows a 'Choose Destination' dialog box with 'EndNote Web' selected and highlighted. The second screenshot shows a 'ENWebLink' dialog box with a message stating '6 references exported to EndNote Web.' and an 'OK' button.

## Capturing Bibliographic Information from a Website

You can also save bibliographic information from web pages into Endnote. This is called Capture.

**NB** This function does not work in Internet Explorer. You need to use Firefox/Google Chrome to use this function.

To do this you need to install the tool on your browser. In Endnote, choose Downloads

You simply need to drag the grey Capture Reference icon onto the bookmarks toolbar. (**NB** If the bookmark toolbar is not already on screen, right click next to help and choose Bookmarks toolbar).

**EndNote™** My References Collect Organize Format Match Options Downloads

Download Installers

**Capture:** Capture Reference

To install the Capture tool, just drag the **Capture Reference** button to your Bookmarks bar (also known as "Favorites Bar" or "Bookmarks Toolbar"). In some browsers, you may need to right-click and select "Add to Favorites" or "Bookmark This Link." To use it, browse to a page you like and click the **Capture Reference** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window.

Open a new tab and go to the site you would like to add to your Endnote library. Click Capture Reference. A new screen will appear. You may need to enter the details of your Endnote Online account the first time you use the tool.

The University for World-Class Professionals Study at MMU Over 1,000 courses International Studying in the UK Research Real-life research Business Work

A-Z Index Search for

Find a course Undergraduate courses Postgraduate taught courses

Search for Undergraduate courses  or

The Faculty of Business and Law is proud to have been awarded Business School of the Year!

Go to EndNote

**Capture New Reference**

**Save To:**  my.endnote.com  EndNote

Bibliographic Fields | Optional Fields

**Groups:** Add or remove

**Bibliographic Fields:** At least one of the fields must be filled out.

Reference Type: Web Page

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

Title: Manchester Metropolitan University Home Page

Year: 2016

Series Editor:

Series Title:

Place Published:

Publisher:

Access Year:

Access Date: 11th July 2016

Description:

First check that the reference is correct i.e. reference type is set to web page, any other details such as author are added as well as the access date.

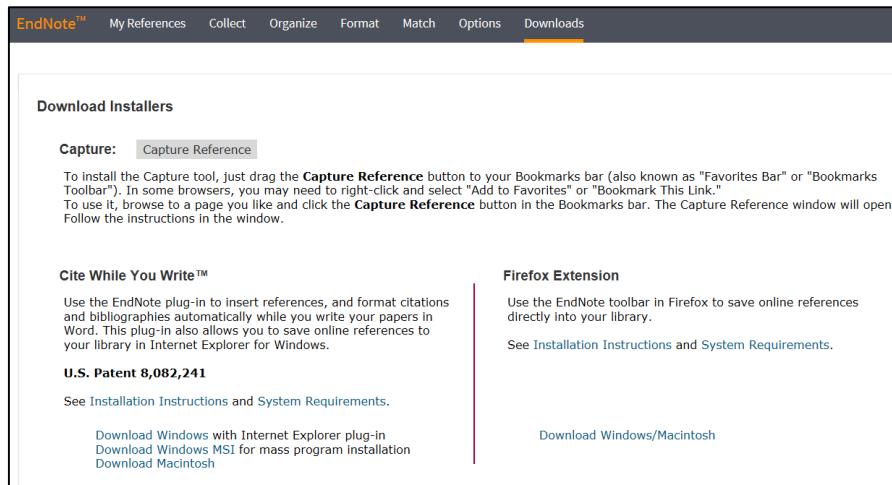
When you are happy with the reference click, Save to myendnote.com. A confirmation window will appear and the reference will be added to your library. Click Close and you can return to the webpage you were using.

# Using Endnote and Word

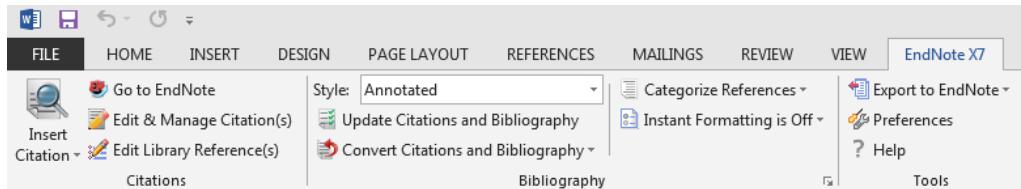
## Installing the toolbar

Endnote also allows you to work in Word and create in text citations which will automatically be added to a bibliography at the end of your document. This is called Cite While You Write. First you will need to install the Endnote toolbar into Word. Click on Downloads, choose the option for your computer and follow the on screen instructions.

(**NB** On campus the Endnote toolbar is already available in Word on the student PCs, on staff PCs you will need to ask IT to install Endnote).

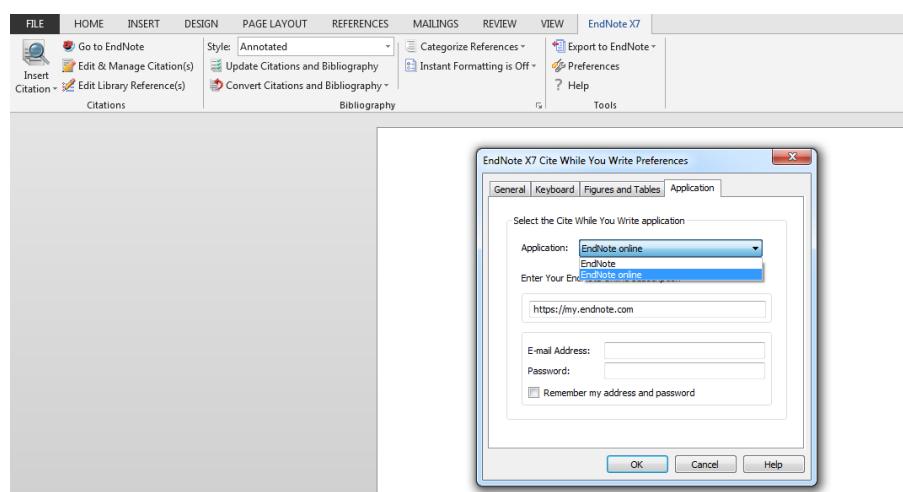


Once installed you will see an Endnote toolbar in Word.



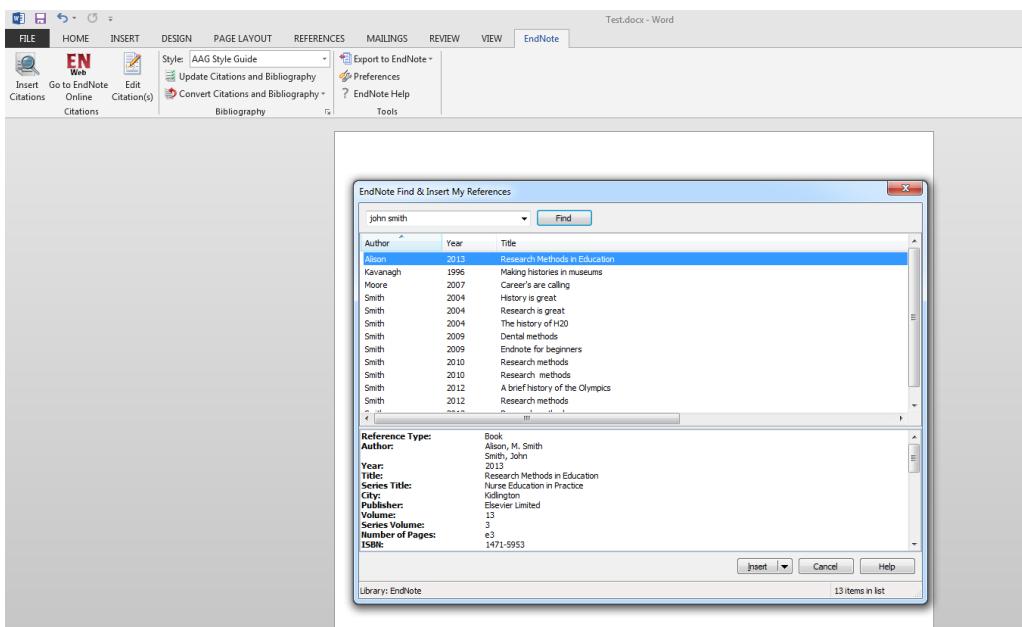
## Linking the document to your Endnote library

To Cite While You Write you will need to link the document to your Endnote library. Click on Preferences, then Application and enter the email address and the password for your Endnote online account.



## Inserting a citation

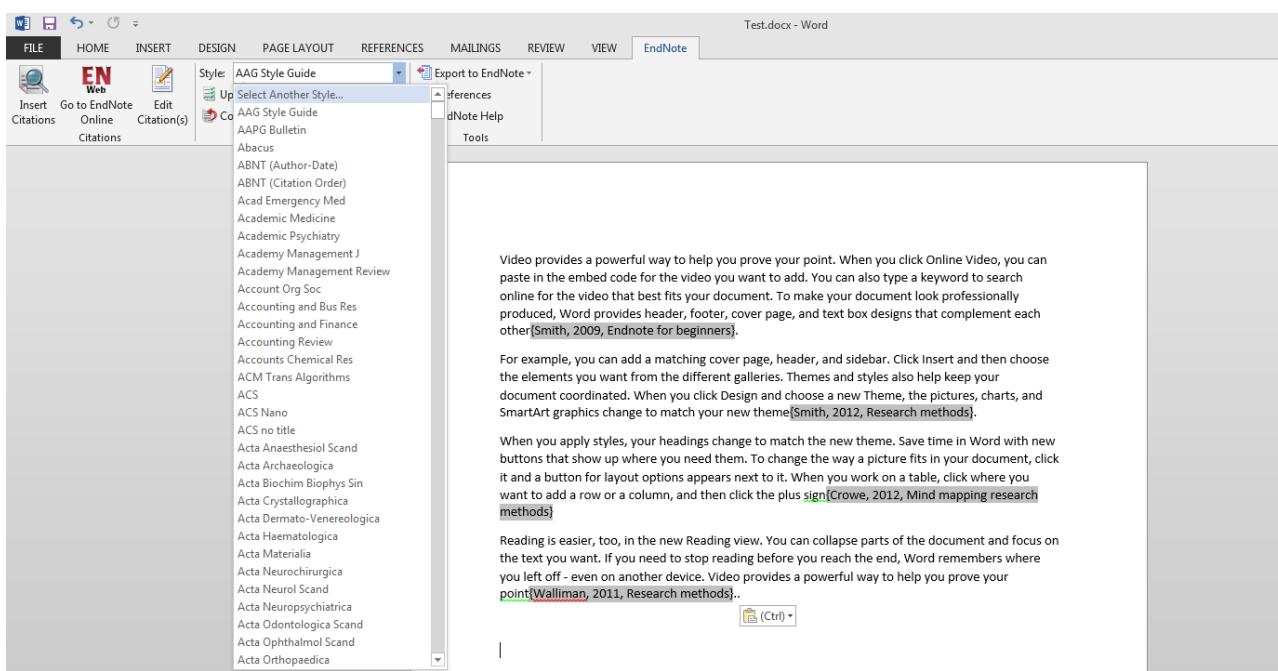
Once connected to Endnote, you can start writing your text. When you need to insert a citation, simply place the cursor, where you want the citation to appear. Next click on Insert Citations on the Endnote toolbar. Then search for the relevant citation, click to highlight and select Insert.



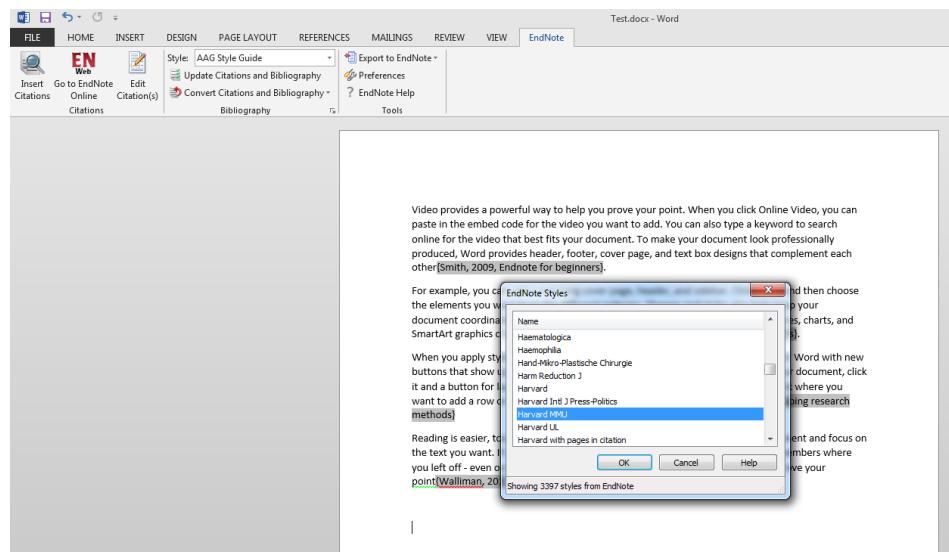
The citation will appear in the text and a bibliography will be created at the end of your document. You can continue to add citations and create your bibliography as required.

## Changing the referencing style in Word

To choose how your citations and bibliography appear, you simply need to choose the relevant output style. Only a limited number of styles are listed on the drop down menu, if you click on Select Another Style, you can choose from the full list available.



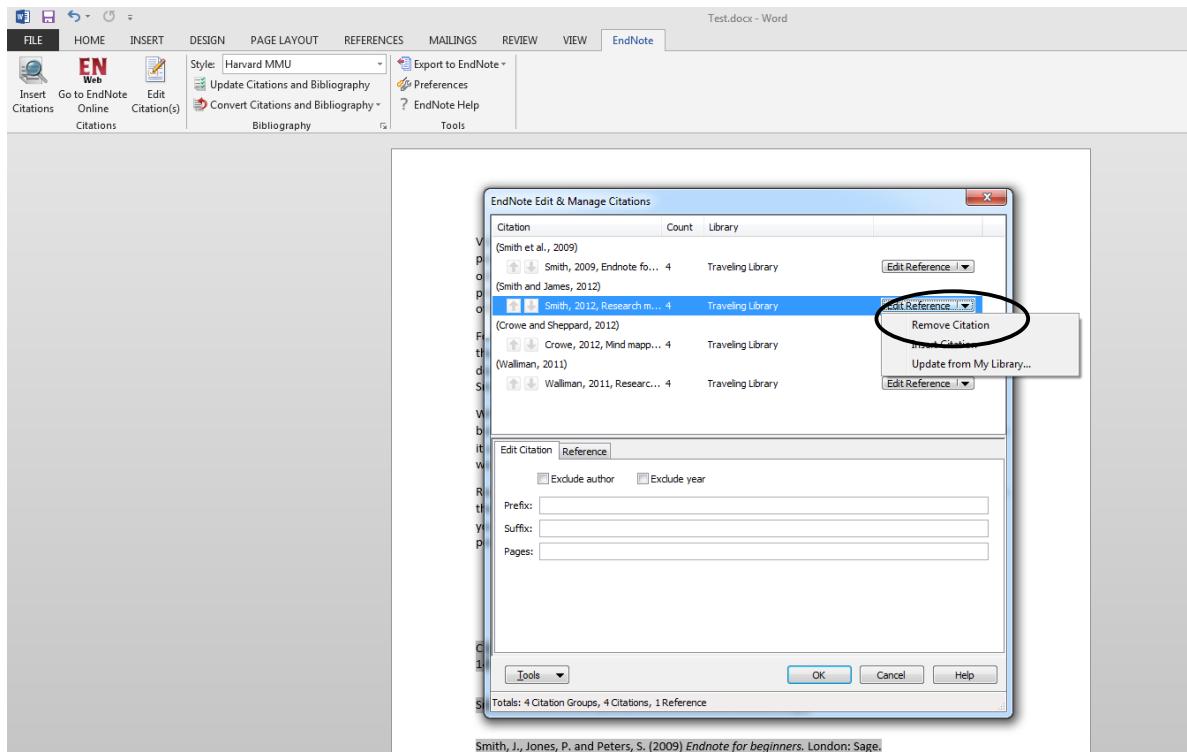
A new box will open, scroll down to the style you require, highlight and click OK. Your citations and bibliography will be reformatted in that specific style i.e. Harvard MMU or MMU Harvard.



## Deleting citations in Word

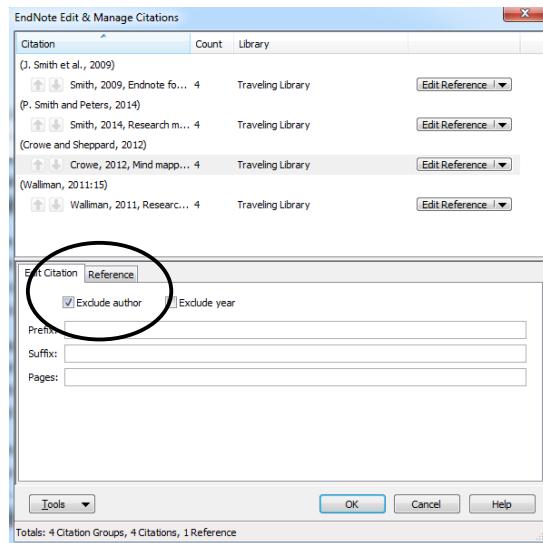
If you want to delete or change a citation you will need to click on Edit Citations on the Endnote toolbar.

To delete a citation click Edit Citation on the Endnote toolbar, highlight the citation you want to delete, click Edit Reference and then choose Remove Citation.



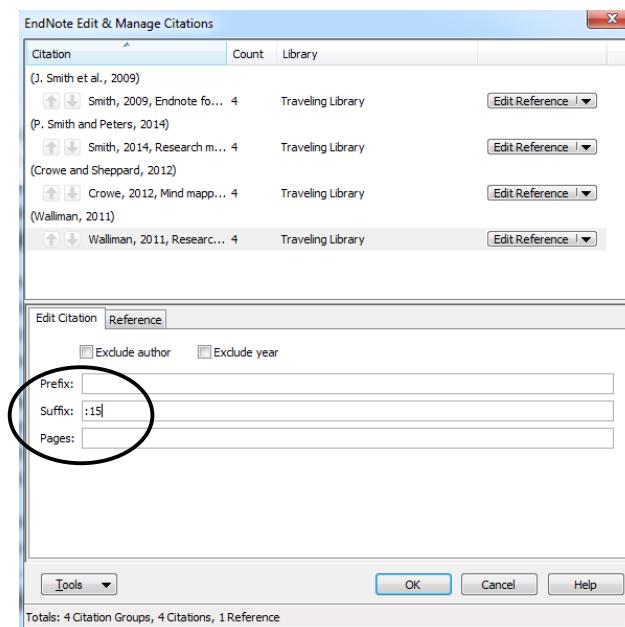
## Excluding parts of citation

In some cases you may need to use an author's name as part of the text, you can still insert your citation and then use Endnote to exclude the author's surname. Select Edit Citation on the Endnote toolbar, highlight the citation you want to edit and then click in the box next to Exclude Author. Only the year will now appear in the text and the reference will remain in your bibliography. You can now use the name of the author as part of the text.



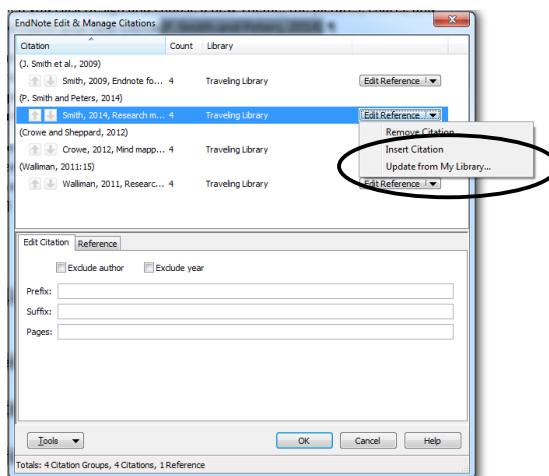
## Including page numbers in a reference

If you need to include a page number as part of your reference, click on Edit Citations on the Endnote toolbar. Click to highlight the reference you want to edit and then type the page number in the field marked Suffix i.e. :15.



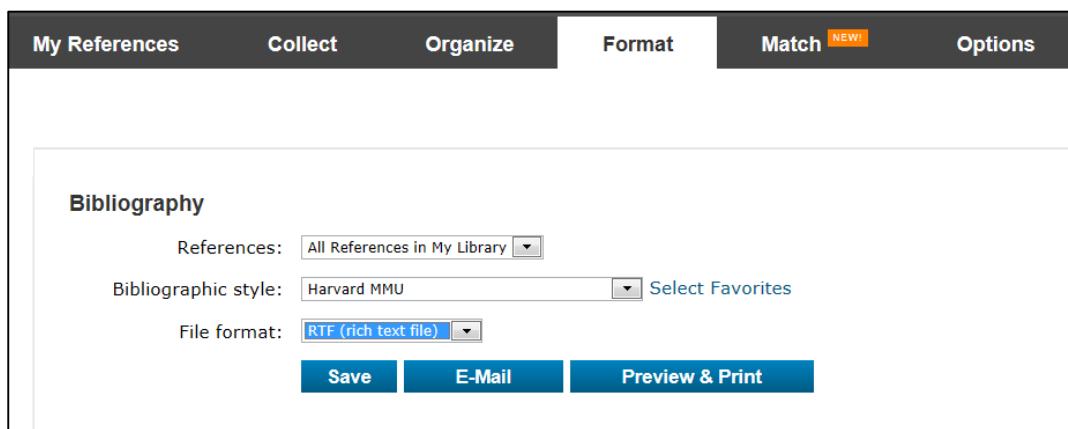
## Editing citations/bibliography

If something is appearing incorrectly in a reference in Word, it is probably due to an error in the data in your Endnote library. To amend this in Word, click Edit Citation, choose the Reference and click on Edit Reference. This will take you back to online Endnote, where you can locate the reference and amend the data. Once you have made any corrections, return to Word, choose Edit Citation, click on the drop down menu next to Edit Reference and click Update from My Library. The reference screen will appear, click Insert and the updated reference will now appear in your document.



## Standalone bibliographies

Occasionally you might want to create a standalone bibliography from your library, without citing the references in a piece of work. In Endnote, choose the Format tab, click on Bibliography. You can choose All References in My Library or a particular group. Next select the correct output style, and then select RTF(rich text file). Click to Save the document, choose your location and your references can now be accessed as a list in Word.



## **Submitting documents electronically**

If you are intending to submit a document electronically, you might find it necessary to remove the links between your Endnote Library and your Word document. On the Endnote toolbar in Word, simply select Convert Citations and Bibliography, choose to Convert to Plain Text. A message will appear telling you that a new version of your document will be created, click OK. This will create a new version of your document, which can be saved as normal. This document is no longer linked to Endnote and can then be submitted electronically. If you need to subsequently edit the document, you will need to return to your original, make the necessary changes and repeat the process above.

Further help on Endnote is available on the library website:

**<http://libguides.mmu.ac.uk/endnote>**