

EndNote<sup>x9</sup>



# Research Smarter.

Quick Reference Guide for Online



Don't forget to download the iPad App

# Quick Reference Guide for Online

## What can you do with EndNote?

EndNote online is the online component of our popular EndNote reference management and bibliography-creation software.

Whether you use EndNote online through Web of Science, with EndNote desktop, or on its own – you reduce the time you spend searching, updating, and cleaning your research and formatting

document . Depending on how you access EndNote online , you may see different features and options.

### EndNote basic

If you only have access to EndNote online, and not EndNote desktop, you are considered a basic user. While your feature set is limited compared to those using EndNote online in addition to the

desktop, it's still perfect for the new-to-research and writing student.

### EndNote online for desktop users

Moving from EndNote basic to EndNote on the desktop opens an array of advanced features and options and increases storage space in the online environment.

## Get started in 5 steps

### Create your EndNote account

#### Desktop users

With your EndNote library open, select the Sync button. You will be prompted to either create an account or log in to your preexisting EndNote online account.

This process syncs your desktop and online libraries. Learn more about syncing in Step 3.



EndNote Login

Using an EndNote account makes it easy to keep your EndNote library in sync. [more information](#)

Create a new EndNote Account

If you don't have an EndNote account or aren't sure, then click Sign Up. Sign Up

EndNote Account Credentials

E-mail Address:

Password:

[Forgot Password](#)

OK Cancel

#### Web of Science users

Sign in to the Web of Science and click the EndNote link from the top menu bar to open your EndNote online library.



Web of Science

Select a database

#### Basic users

If you do not have EndNote desktop or access to Web of Science, go to myendnoteweb.com and sign up for a free account.



Email address

Password

[Forgot password?](#) Sign in

Sign in via your institution / Shibboleth login

or sign in using

Not a member yet? Register

## Access Getting Started Guide

The first time you sign in to your EndNote account, you will see the Getting Started Guide, which offers links to help you collect, organize, and format your references.



## Getting Started



Find

Collect references by searching online databases or importing your existing collection.

- Search an online database
- Create a reference manually
- Import references
- Hot tip** Find your best potential journal



Store & Share

Organize and group references in any way that works for you. Then share your groups with colleagues.

- Create a new group
- Share a group
- Find duplicate references



Create

Use our plugin to format bibliographies and cite references while you write.

- Cite While You Write™ Plug-in
- Create a formatted bibliography
- Format a paper

## Install plug-ins

### Get started

Go to the Downloads tab. Here, you will see all available plug-ins.



### Install Capture Reference tool

To automatically import references into your EndNote library, you can use the Capture Reference bookmarklet with any browser or the EndNote Capture toolbar for Internet Explorer (Windows only).

### Install Cite While You Write

Download the Cite While You Write plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Microsoft Word.

Note: If you are using EndNote X9, you should not install the plug-in because it is already included.

The screenshot shows the EndNote Downloads page. The 'Cite While You Write™' section describes the plug-in for inserting references and formatting citations in Word. It includes a 'U.S. Patent 8,082,241' and links to download instructions for Windows (Internet Explorer plug-in, MSI) and Macintosh. The 'Capture Reference' section explains how to install the Capture tool by dragging the 'Capture Reference' button to the browser's bookmarks bar.

## Add references to your library

There are six ways to add references to your library: by syncing with the desktop, direct export, capture, online search, import text file, and manual entry.

### 1) Sync libraries

After syncing your desktop and online references, as shown in Step 1, all your references and attachments will be available both on your desktop and online through any Internet browser. References can also be synced to the EndNote iPad app and to EndNote on the desktop on your other computers. (Hint: Open a new empty library for the first sync on other computers.)

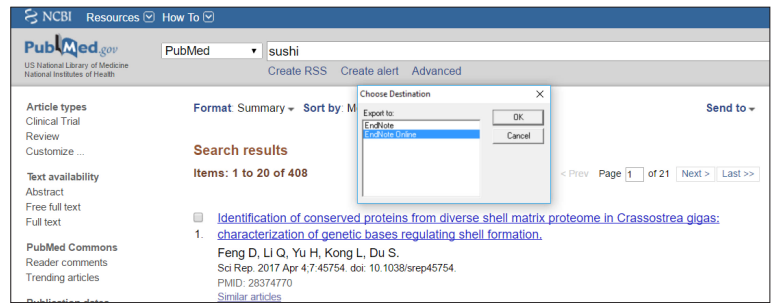


During the first sync, all references in both the EndNote desktop and online libraries will be copied to the other library, as well as all group information, but only custom groups will be displayed in EndNote online. Once synced, any change made in any synchronized library will be reflected in all synchronized copies of the library.

The screenshot shows the EndNote desktop application interface. The 'My Library' pane on the left lists various sources like 'Recently Added', 'Trash', and 'All My References'. The main window displays a list of references with columns for Author, Year, Title, Rating, and Journal. Visible references include 'Leaf-roosted bat' by Allen, Glover M. (2004) and 'Ecological, taxonomic, and physiological correlates of cave use by Mexican bats' by Avila Flores, R. (2004).

## 2) Export to EndNote online

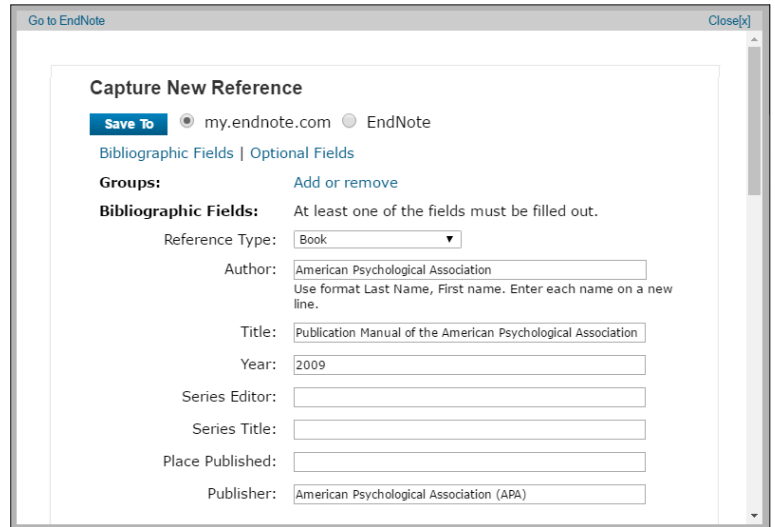
The EndNote online Internet Explorer plug-in makes it possible for you to export references from online databases that have an option for saving to EndNote if you are using Internet Explorer, Google Chrome, or Microsoft Edge. Web of Science and EBSCOhost databases do not require a plug-in for direct export. See Install plug-ins section on previous page.



## 3) Capture references

Use the Capture Reference feature for online resources that do not have options for direct export.

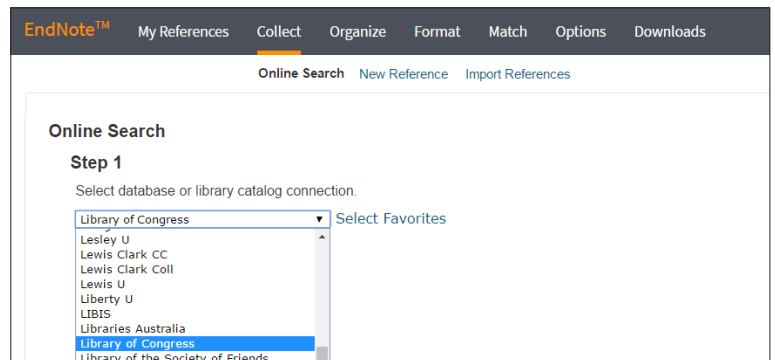
Capture Reference scans the bibliographic information presented on a Web page and creates a reference for you to save to a new or existing group. Some databases, such as Pubmed, allow you to capture an entire page of references at once.



## 4) Online search

You can search many library catalogs and databases through the EndNote interface.

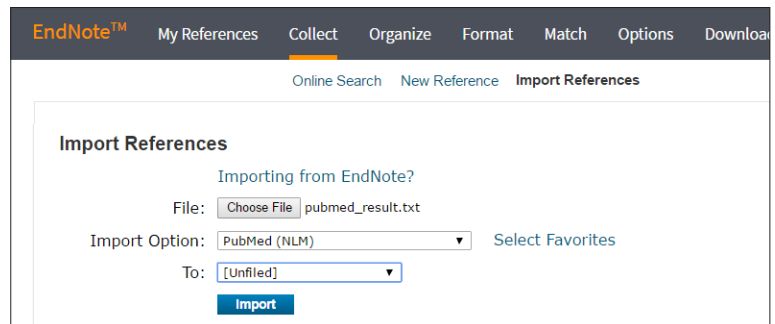
- Click the Collect tab; then click Online Search.
- Select an online database.
- Perform your search.
- Mark desired references, and use the drop-down menu to add them to your library.



## 5) Import references

To import references in a plain-text file, data in the file must be tagged in machine-readable format.

- Click the Collect tab; then click Import References.
- Browse to select the text file.
- Select the Import Option (filter) that matches the database where you created the file.
- Select the group for imported references. • Click Import.



## 6) Add new reference

To enter a reference manually:

- Click the Collect tab; then click New Reference.
- Select the appropriate reference type.
- Enter data into the desired fields. Fields commonly used by major style guides will appear first.




## Organize and share your references

### Create groups

By default, EndNote places references into the Unfiled group. You can create up to 5,000 groups to organize your references in any way that works for you.

- Select the references you want to group.
  - Click on Add to group from the drop-down menu and select New group.
- Name the new group and click OK.

Note: You can place a reference in multiple groups. To see which group(s) a given reference is currently in, click the Folder icon  below the reference.



### Eliminate duplicate references

It is possible to have duplicate records in your library. To identify and delete them, use the Find Duplicates link under the Organize tab. EndNote compares the Author, Year, Title, and Reference Type fields when identifying duplicates.



## Share references with other EndNote users

Use the Manage My Groups link under the Organize tab. Click the Manage Sharing button next to the group you'd like to share.

Enter the email addresses of the people with whom you'd like to share.

Note: Any individual you share your group with must have an EndNote online account in order to view references and you must use their account email address. Enter the email address they use to access EndNote.

Choose whether to give your colleagues Read-only access, or Read & Write access. Click Apply.

- Read-only access allows designated users to view references, use them in Word documents, or copy them to their own library.
- Read & Write access allows the designated user to do everything allowed with read-only access, as well as editing, adding, or deleting references.

The screenshot shows the 'Manage My Groups' window in EndNote. It contains a table with the following data:

My Groups	Number of References	Share
Chiroptera	22	<input type="checkbox"/> Manage Sharing
Corvids	19	<input type="checkbox"/> Manage Sharing
Echolocation	6	<input type="checkbox"/> Manage Sharing
Parrots	24	<input type="checkbox"/> Manage Sharing
Reference Books	1	<input type="checkbox"/> Manage Sharing

Below the table is a 'New group' button. To the right is a dialog box titled 'Add E-mail Addresses to 'Chiroptera''. It contains a text input field with 'EndNote.Training@Clarivate.com', radio buttons for 'Read only' and 'Read & Write', and an 'Apply' button. A note states: 'Note: Attachments are not shared, regardless of access privileges.'

The screenshot shows the 'My Groups' sidebar. It lists 'Chiroptera (22)' with a share icon and 'Dark Chocolate-Health (109)' with a share icon. Below this is the section 'Groups Shared by Others'.

## Understanding icons

Groups that you are sharing with others display the Share icon. You can click on the icon to view or modify user access.

When another user shares a group with you, it appears under Groups Shared by Others. When the Read-Write icon is present, you have permission to add, change or remove references in a group.

## Use Cite While You Write

Using Cite While You Write, you can instantly insert references and format citations and bibliographies while you write your papers in Word.

### 1) Find and select citations

and insert them into your manuscript.

### 2) Formatting bibliographies

Reformat your citations and bibliography with one click. Choose from thousands of available styles.

### 3) Editing citations

Edit citations to add information such as a page number, or remove a reference from a group of citations.

The screenshot shows the Microsoft Word ribbon with the 'References' tab selected. The 'EndNote' group is expanded, showing options: 'Insert Citations', 'Go to EndNote Online Citations', 'Edit Citation(s)', 'Style: APA 6th', 'Update Citations and Bibliography', 'Convert Citations and Bibliography', 'Export to EndNote', 'Preferences', and 'EndNote Help'.

## Cite references from both online and desktop

Cite While You Write is compatible with EndNote online and desktop. You can start a document using one environment but can switch to the other at any time.

The screenshot shows the 'EndNote Cite While You Write Preferences' dialog box. It has three tabs: 'General', 'Keyboard', and 'Application'. The 'Application' tab is selected. It contains a dropdown for 'Application' (set to 'EndNote online'), a text field for 'Enter Your Email Address' (set to 'http://www.myendnoteweb.com/'), and fields for 'E-mail Address' (set to 'endnote.training@outlook.com') and 'Password' (masked with dots). There are 'OK', 'Cancel', and 'Help' buttons at the bottom.

## Match your manuscript to the right journal

Use manuscript matcher to make a more informed decision about the best potential journals for your manuscript. Our patent-pending technology analyzes millions of data points and citation connections from the Web of Science to identify meaningful relationships between these publications and your work.

### Find the right journal for submitting your manuscript

With a few key pieces of information – your title, abstract, and references – you'll have JCR data, key journal information and publisher details at your fingertips to help you compare your options and submit your manuscript.

- Click on the Match tab.
- Enter the title and abstract of your manuscript.
- Select the EndNote group holding your references from the drop-down (optional).
- Click Find Journals.

### Compare your options and start the submission process

EndNote returns a list of possible journal matches and provides results that give you:

- Match Score
- JCR Impact Factor
- Journal
- JCR Category
- Rank in Category
- Quartile in Category
- Link to journal's website
- Publisher

Match Score	JCR Impact Factor Current Year   5 Year	Journal	Similar Articles
8	1,318 2015   1,533 5 Year	BEHAVIOURAL PROCESSES	8
4	1,211 2015   1,266 5 Year	JOURNAL OF FELINE MEDICINE AND SURGERY	4

## Access and Expand your EndNote Library from the iPad App

Download the EndNote for iPad app from the App Store – and access your library from anywhere. The EndNote app allows you to log in to your account and continue working on your library. With the EndNote app, you can:

- Use the app's built-in browser or Safari™ to search Web of Science, Google Scholar, or PubMed to expand your library, and even pull in full-text PDFs.
- Organize references and create new groups.
- Email PDFs to collaborators.
- Sync changes made to the desktop and online.

Capacity and capabilities	Reference storage	File attachment storage	Cite While You Write (Microsoft Word)	Bibliographic styles	Web of Science data and links
EndNote basic users	50,000	2GB	Limited Feature Set	21	-
EndNote basic & Web of Science users	50,000	2GB	Limited Feature Set	6000+	√
EndNote desktop users	Unlimited	Unlimited	Full Feature Set	6000+	-
EndNote desktop & Web of Science users	Unlimited	Unlimited	Full Feature Set	6000+	√

EndNote™ basic My References Collect Organize Format Match Options Downloads

Account Information

Your roaming access has expired and therefore you will not see Web of Science™ and Full Text links and you will not be able to search Web of Science™. Please login from your institution to reactivate roaming.  
Your account only provides limited functionality.  
Please login from your institution or purchase the latest version of EndNote to access all the functionality.

Account	Status	Days Remaining	To Reactivate
Web of Science™	Roaming Expired	0	Please login from your institution
EndNote Web	Active		

EndNote™ My References Collect Organize Format Match Options Downloads

Account Information

Your roaming access has expired and therefore you will not see Web of Science™ and Full Text links and you will not be able to search Web of Science™. Please login from your institution to reactivate roaming.  
Receive a free subscription to my.endnote.com with advanced features for two years when you upgrade to the latest version of EndNote.

Account	Status	Days Remaining	Expiration Date	To Reactivate
EndNote X8	Active	731	08 April 2019	
Web of Science™	Roaming Expired	0		Please login from your institution

This user has a free, limited online version of EndNote.

A basic user has 21 styles and 2GB of storage.

This user has EndNote installed on their desktop.

In addition to the basic features, this user has unlimited file storage and all the import, export, and style options.

EndNote™ basic My References Collect Organize Format Match Options Downloads

Account Information

Account	Status	Days Remaining	Expiration Date	To Reactivate
Web of Science™	Roaming	366	07 April 2018	Please login from your institution

EndNote™ My References Collect Organize Format Match Options Downloads

Account Information

Account	Status	Days Remaining	Expiration Date	To Reactivate
EndNote X8	Active	581	08 November 2018	
Web of Science™	Roaming	366	07 April 2018	Please login from your institution

This user has Web of Science.

In addition to the basic features, this user has extra styles and will see Times Cited counts and other Web of Science data and links in their library.

This user has Web of Science and EndNote desktop.

In addition to unlimited file storage and additional capabilities, this user will see Times Cited counts and other Web of Science data and links in their online library.



## Resources

Contact technical support or search the EndNote knowledge base at: [endnote.com/support](https://endnote.com/support)

Contact the education team at: [clarivate.libwizard.com/contact-training](https://clarivate.libwizard.com/contact-training)

Find more training resources on the EndNote LibGuide at: [clarivate.libguides.com/endnote\\_training/home](https://clarivate.libguides.com/endnote_training/home)

Register for free EndNote classes at: [clarivate.libguides.com/endnote\\_training/calendar](https://clarivate.libguides.com/endnote_training/calendar)

Download the EndNote Guided Tour, a written tutorial, at: [clarivate.libguides.com/ld.php?content\\_id=42326715](https://clarivate.libguides.com/ld.php?content_id=42326715)

Download the Little EndNote How-To Book, a reference work for common EndNote tasks, at: [clarivate.libguides.com/ld.php?content\\_id=42104347](https://clarivate.libguides.com/ld.php?content_id=42104347)

Watch How to Use EndNote in 6 Minutes at: [youtu.be/7e6-6QkcYm0](https://youtu.be/7e6-6QkcYm0)

## Learn more about EndNote

Visit: [endnote.com](https://endnote.com)

Contact Sales: +1 800 722 1227

Join the Conversation:

[twitter.com/EndNoteNews](https://twitter.com/EndNoteNews)

[youtube.com/EndNoteTraining](https://youtube.com/EndNoteTraining)

With EndNote, your research is accessible from anywhere, anytime.

## Compatibility

For compatibility and system requirements visit [endnote.com/product-details/compatibility/](https://endnote.com/product-details/compatibility/)



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