

EndNote Online: quick start guide

Why have an EndNote Online account?

As a member of the University of Leeds, you already have access to the desktop version of EndNote, which is available on campus PCs and off campus via Apps Anywhere. If you want to access the same EndNote library on multiple computers, or want to be able to quickly access your library in a browser, then you should set up an EndNote Online account.

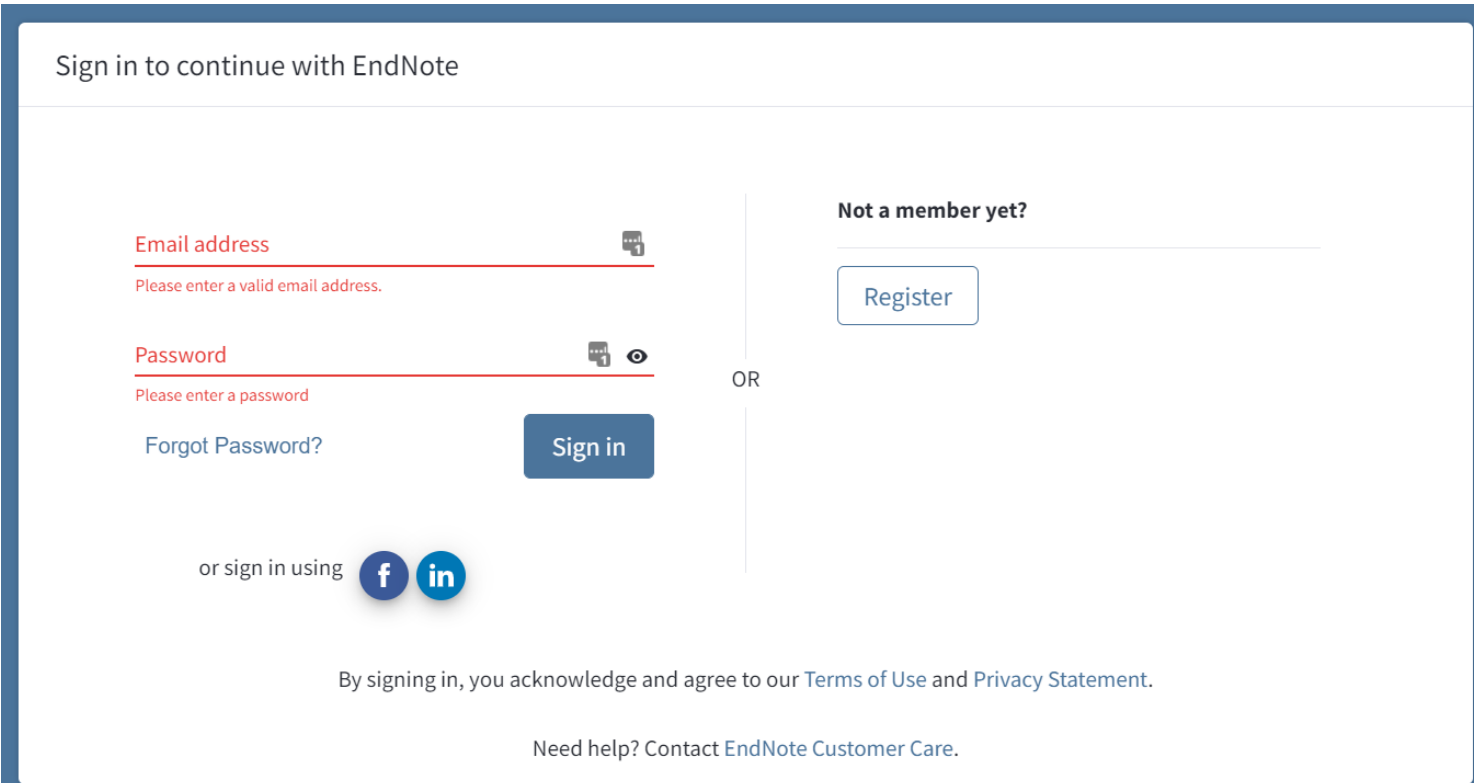
You might choose to use only EndNote Online for managing your references on and off campus, but please note that it has fewer features than the desktop version.

Registering with EndNote Online

It is recommended that you create your EndNote Online account **on campus** or via Desktop Anywhere, as this will ensure that your account is automatically associated with the University of Leeds, giving you 5GB of storage as well as access to the University of Leeds referencing styles.

If you have created your EndNote Online account **off campus**, you can subsequently link your account to the University by logging into EndNote Online when you are on campus, preferably via a University computer rather than a personal device.

To create an EndNote Online account on or off campus, go to <https://my.endnote.com> and click on the option to **Register**. You can use your personal or University email address to register.



The screenshot shows the EndNote Online login interface. At the top, it says "Sign in to continue with EndNote". Below this, there are two main sections. On the left, the "Sign in" section includes an "Email address" field with a red underline and a red error message "Please enter a valid email address.", a "Password" field with a red underline and a red error message "Please enter a password", a "Forgot Password?" link, and a blue "Sign in" button. On the right, the "Not a member yet?" section has a blue "Register" button. A vertical line with "OR" in the middle separates the two sections. Below the sign-in fields, there is a link "or sign in using" followed by Facebook and LinkedIn icons. At the bottom, there is a disclaimer: "By signing in, you acknowledge and agree to our [Terms of Use](#) and [Privacy Statement](#)." and a link "Need help? Contact [EndNote Customer Care](#)."

You can use your EndNote Online account off campus for a year after you have created it. If you log into EndNote Online on campus again at any time during that year, your account will be reactivated to give you another 12 months from that date.

Adding references to your EndNote Online library

There are many ways to add references to your EndNote Online account; this guide covers three methods.

1. Transfer (sync) your desktop library to EndNote Online

If you have an EndNote desktop library, you can synchronise it with your Online library, so that the same information is available in both. Please note that you can only sync one EndNote Online library with one desktop library per computer. Syncing will make the references in both libraries identical.

To ensure that your desktop library syncs with the correct EndNote Online account, you will need to connect the two by setting your preferences in the desktop version:

- Open the EndNote desktop library you want to sync
- Go to **Edit**, then **Preferences**
- Choose **Sync** from the left-hand menu, and fill in the **EndNote Account Credentials** (email address and password for your EndNote Online account).
- Tick the box to Sync Automatically.

EndNote will regularly sync your references, but you can force a sync by going to **Library > Sync**.

2. Exporting references from a database

Some databases, such as Web of Science and EBSCO, have a direct export feature. Every database is different, but look for links or buttons within the database that say “Export to EndNote Online” or something similar. For example, in Web of Science:

1. Search for information on a topic of interest to you and, from the results list, tick the boxes of items that you would like to save to your EndNote Online library
2. Select **Save to EndNote Online** from the drop-down menu (located above and below your results), and fill in the login details of your EndNote Online account to send the references into that library.

Other databases don't have a direct export feature. Instead, you can export the references in a different file format, and then import them to EndNote Online. For example, in Ovid databases:

1. Search for information on a topic of interest to you and, from the results list, tick the boxes of items that you would like to save to your EndNote Online library
2. Select **Export** and then choose RIS from the Format menu. Choose how much detail you want to export from the Fields menu and untick the Search History box
3. Press **Export**. A file will be downloaded to your computer
4. In EndNote Online, click **Collect** and then **Import References**
5. Choose the correct file from your computer and set the import option to RefMan RIS
6. Press **Import** to add the files to your EndNote Online library.

Remember that these references will not appear in your EndNote desktop library until you sync it with your EndNote Online library.

3. Manually entering a reference

1. From the **Collect** tab, choose **New reference**
2. Select the reference type (e.g. book) from the drop-down menu, and enter the details of the item for which you wish to create a reference
3. Click **Save** when you have finished adding all the details.

Creating citations and references in Word with EndNote Online

You can use EndNote Online to create citations and reference lists in Word, just as you can with the desktop version of EndNote. You will need to ensure the EndNote Online Cite While You Write tab is installed in Word. To do this:

1. In EndNote Online, go to the **Downloads** tab
2. In the Cite While You Write section, choose the download for either **Windows** or **Mac**
3. Follow the instructions to install the tool.

Once the tool has been installed, an EndNote Online tab should appear in your Word toolbar. Use the extra tools here to insert citations and references. If you need to, you can switch between the EndNote Desktop and EndNote Online version of the tab by choosing **Preferences > Application** and choosing either EndNote or EndNote online.

Formatting references

In Word, use the **Style** drop-down menu in the EndNote Online tab to select the correct style for your references. At the University of Leeds, most students are expected to use one of two styles: LeedsUniHarvard or LeedsUniNumeric. We have also created a version of MHRA which is available through EndNote.

If you have logged in to EndNote Online while on campus within the past year, the styles should be available to you. If you can't see them in the Styles menu, do the following:

1. Log in to EndNote Online in a browser
2. Go to **Format** and then **Bibliography**
3. Click **Select Favorites**
4. Scroll the list of styles to find the style you need. The Leeds styles are called LeedsUniHarvard, LeedsUniNumeric, and MHRA (Leeds Univ)
5. Select the style and choose **Copy to Favorites**
6. In Word, the style should now appear in the Style menu. You may need to choose Select Another Style... to force the list to update.

Creating a standalone bibliography

EndNote Online has a helpful bibliography creation feature that makes bibliographies without citations:

1. In your EndNote Online library, tick the references you want to include in your bibliography
2. Choose Add to group... and either add the references to an existing group, or create a new group
3. Under the **Format** tab in EndNote Online, click the link for **Bibliography**
4. Select the group you saved the references into, select the referencing style you want to use, and select the file format (HTML should work in most instances)
5. Your bibliography can be saved, emailed or printed.

Getting help

- EndNote Online: A comprehensive online guide to using the software is available at <http://www.myendnoteweb.com/help/ENW/help.htm>
- EndNote desktop version: Leeds University Library provides webpages supporting all aspects of using the desktop version on campus https://library.leeds.ac.uk/info/1403/endnote/43/endnote_support
- Contact the Library for more support with using EndNote https://library.leeds.ac.uk/info/1800/contact_us/161/contact_the_library