

Endnote Web: Beginners Guide to Using Endnote Web and the Cite While You Write Function

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Endnote Web

1. About Endnote

EndNote Web is a Web-based version of EndNote which is designed to help students and researchers through the process of writing a research paper.

System Requirements:

Browser Requirements

Microsoft® Internet Explorer 6.0-7.0*

Firefox™ 1.5 - 2.0*

Safari™ 1.3 - 2.0*

Windows Plug-in Requirements

Microsoft® Windows® XP SP2 or later / Vista

Microsoft® Word® 2000 / XP / 2003 / 2007

Microsoft® Internet Explorer® 6.0-7.0* with the latest service pack set as the default Web browser

Firefox™ Browser 1.5-2.0* for Windows set as the default Web browser

Macintosh Plug-in Requirements

Macintosh® OS X 10.3.9 and 10.4.x

Microsoft® Word® X/2004

Firefox™ Browser 1.0-2.0* for Macintosh set as the default Web browser

- Cookies and JavaScript must be enabled in the Web browser settings.

The product is best viewed in 800 x 600 resolution.

1.1 Setting up your EndNote Web Account

1. To access EndNote web, TCD members should go to www.myendnoteweb.com (using a PC on campus).

The screenshot shows the EndNote Web homepage. At the top left is the EndNote Web logo. To the right, a box titled "EndNote Web delivers tools to:" lists features: "Search online resources", "Save ISI Web of Knowledge® records directly to an online library", "Collect and organize references", and "Format citations and footnotes or a bibliography". Below this is a sign-up section titled "New to EndNote Web? Sign Up for an account". It asks the user to "Enter your e-mail address and password here:" and provides input fields for "E-mail Address:" and "Password:". A "Log-In" button is below the fields, along with a checkbox for "Keep me logged in on this computer unless I log out." and a link for "Forgot Your Password? Problems Logging-In?". On the right side, a box titled "Did you know, when you register for EndNote Web" lists features: "Use Cite While You Write™ in Microsoft® Word to easily cite references in your paper", "Transfer references to and from Endnote on your desktop", and "Share references with others who have EndNote Web". Below this, it says "... and if you are also an ISI Web of Knowledge subscriber, you are automatically registered and can take advantage of these features:" and lists: "Citation Alerts", "Saved Searches", "Custom Journal Lists and Table of Content Alerts", and "Custom ISI Web of Knowledge start page". A black arrow points from the "Sign Up" link to the "E-mail Address" field.

22.

Once on the Endnote Homepage, click on the blue hyperlinked "Sign Up" to create an account.

3. Creating an account with EndNote Web is a quick process. Simply:

- a) Type your first name in the First Name field.
- b) Type your last name in the Last Name field.
- c) Type your middle initial in the Middle Initial field (optional).

- d) Type your password in the Password field. And also in the Retype Password field.
Password Guidelines:
 Must be 8 or more characters (no spaces) and contain:
 - at least 1 numeral: 0 - 9
 - at least 1 alpha character, case-sensitive
 - at least 1 symbol: ! @ # \$ % ^ * () ~ ` { } [] | \\
 Example: 1sun%moon
- e) Type your e-mail address in the E-mail Address field and in the Retype E-mail Address field.
- f) Select your primary role in the Primary Role/Title field.

- g) Select your subject area in the Subject Area field.
- h) Select the bibliographic software you are using in the Bibliographic Software Use field (optional).
- i) Select the appropriate radio button to Opt in or Opt out for e-mail communication.

4. Finally click the "I Agree" button indicating that you agree to the Terms and Conditions.

Users should note that if you are already registered in the Web of Knowledge, you do not have to register for EndNote Web. Go to www.myendnoteweb.com to login using the same login credentials.

1.2. Logging In to EndNote Web

- Return to the EndNote Web home page and enter in your username and password:

New to EndNote Web? Sign Up for an account

Enter your e-mail address and password here:

Failed: The username/password specified is not valid.

E-mail Address:

Password:

Keep me logged in on this computer unless I log out.

1. Click Log-In to proceed.

2. Getting Started in Endnote Web

1. This is the “My References” tab in Endnote Web. You will only see this page the first time you login to Endnote.

Getting Started with EndNote Web

- 1 Collect**
Collect references from electronic and traditional sources.
 - Search online database
 - Create a reference manually
 - Import references
- 2 Organize**
Organize your references for your research topics and papers.
 - Create a new group
 - Share a group
 - Find duplicate references
- 3 Format**
Create a formatted bibliography for your paper or cite references while you write.
 - Create a formatted bibliography
 - Cite While You Write™ Plug-in
 - Format a paper

2. Once you have created or imported some references you will see the My References tab with a list of your references in your library.

All My References

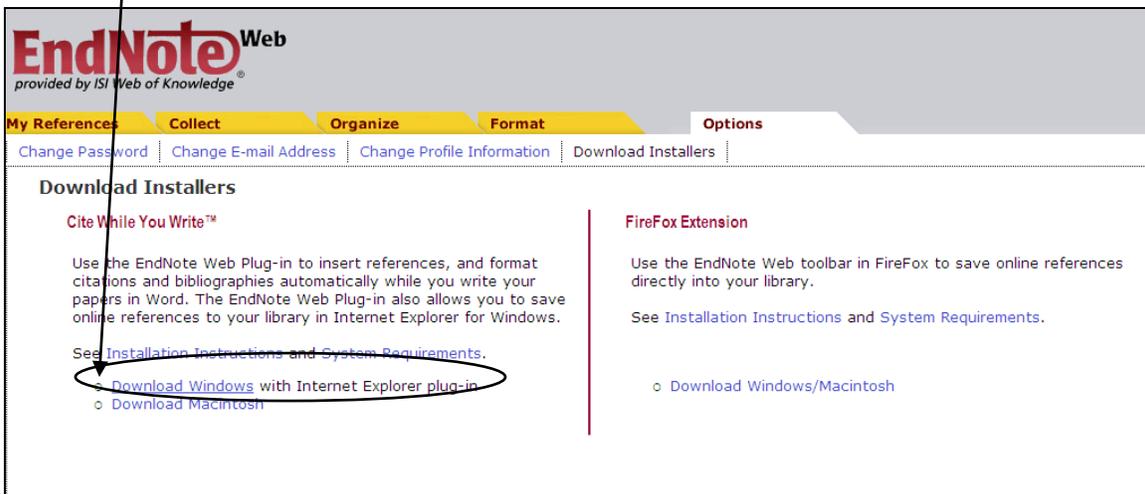
Author	Year	Title	Edit
<input type="checkbox"/> Antarasena, C.	2007	The indirect immunofluorescence assay using cardiac tissue from chickens, quails and ducks for identification of influenza A virus during an outbreak of highly pathogen avian influenza virus (H5N1): A rapid and simple screening tool for limited resource... Research in Veterinary Science ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0	Edit
<input type="checkbox"/> Avicino, A. A.	2006	Beat the flu : how to stay healthy through the coming Bird Flu pandemic	Edit
<input type="checkbox"/> Brydak, L. B.	2007	[Health risks connected with the avian flu virus] Wiad Parazytol	Edit
<input type="checkbox"/> Buck, Stephen.	2008	Endnote Training Library	Edit

3. To use Endnote Web with Word then you will need to download and install the [EndNote Web Cite While You Write plug-in](#) and/ or [Firefox Extension](#).

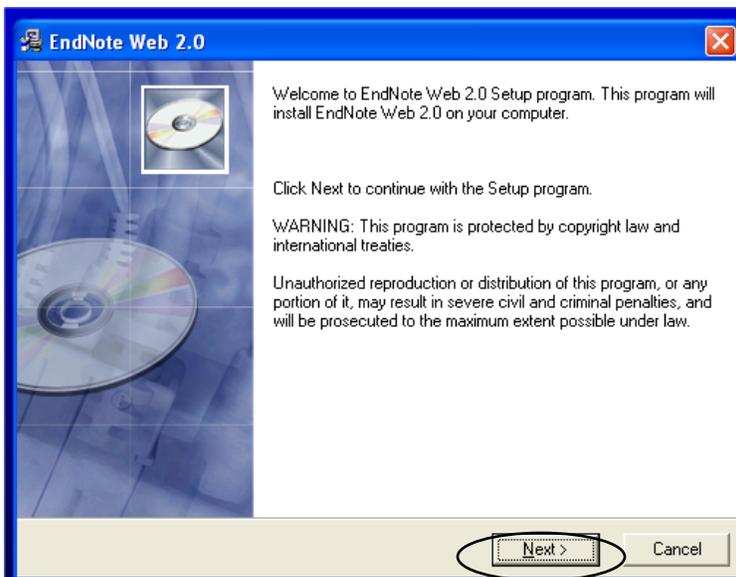
- To download the EndNote Web Cite While you write plug in scroll to the bottom of the “My reference Tab.
- Click on the “Download Installers” hyperlink.



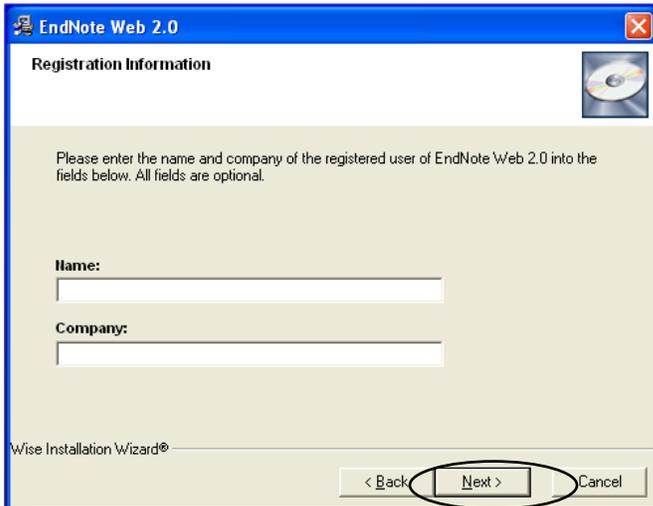
- Select the Installer most appropriate to you. In most cases this will be the “Download Windows” option.



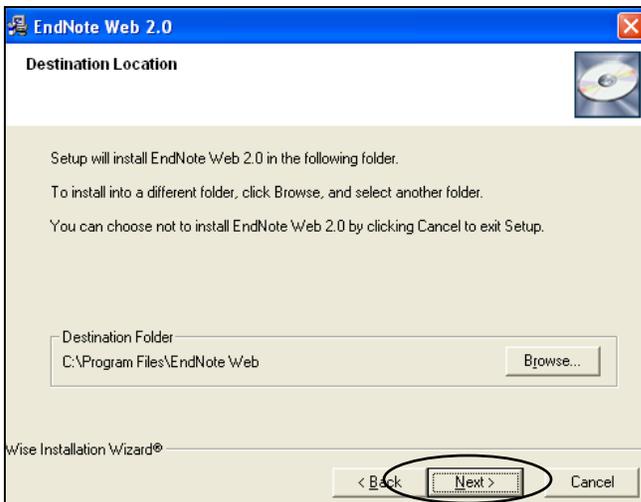
- A new window will open with an installation walk through screen.



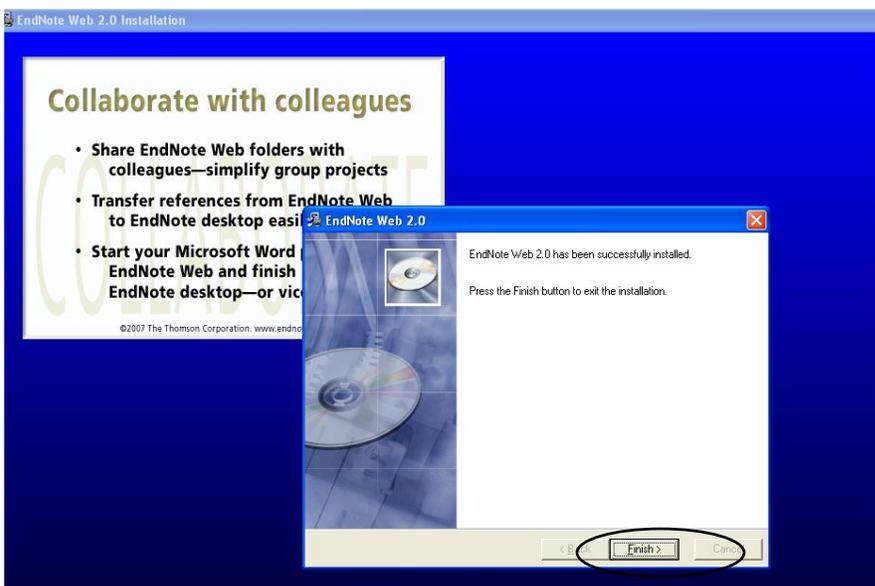
You can fill in these details or leave blank as appropriate Click “Next” to continue.



Confirm the destination of Endnote Web – click next



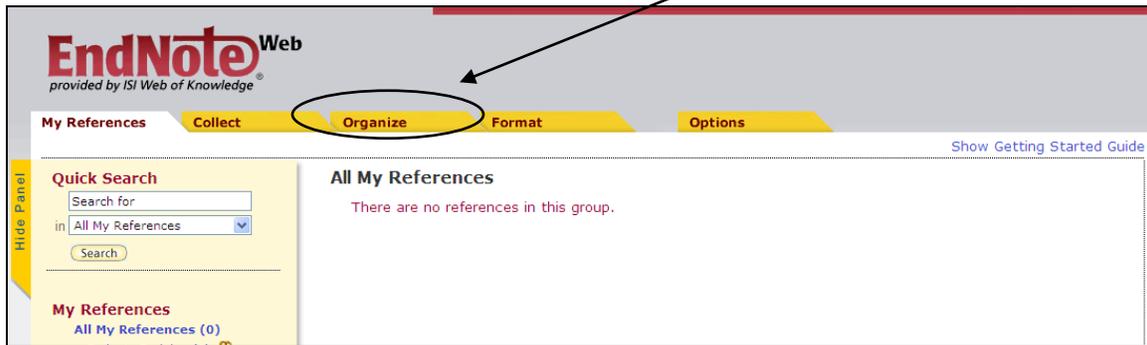
Follow the instructions and you will be guided through until you see this page. Simply Click on "Finish"



3. Organizing your References

3.1 Managing your References:

1. Click on the organize tab in the Endnote window.

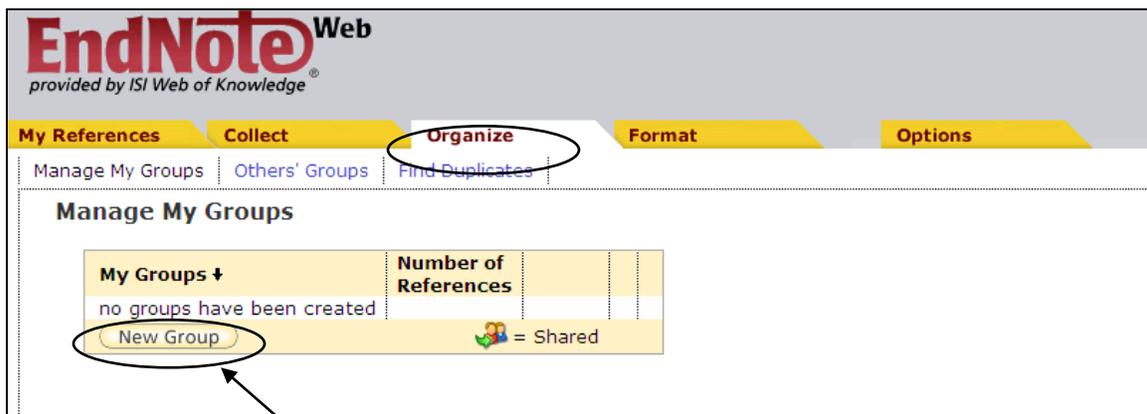


2. All references imported into Endnote Web are stored in your “Unfiled” stores until they have been copied to a group in your library.

Important Points about Unfiled:

- You cannot delete or rename Unfiled.
- You cannot copy references to Unfiled except from reference groups shared to you or Online Search results.
- A reference is automatically moved to Unfiled when you delete the reference from all personal groups.
- References imported through the Import References tool are stored in Unfiled automatically.
- References collected using Capture are stored in Unfiled unless one or more groups are specified before saving.

The Organize tab gives you the option to create groups. Groups can be used to organize your references in a more coherent manner. We recommend that you create groups to organize your references into relevant subgroups for example chapter sections or a group for separate papers.



3.2 Creating a Group:

To create a group:

1. Click the **Organize** tab which will display the Manage Groups page.

2. In the upper Manage Groups table, click the **New Group** button in the bottom row.
3. Enter a name up to 255 characters in the New Group dialog.
4. Click the **OK** button

n.b. References can belong to more than one group.

3.3 Sharing Groups:

You can share groups with colleagues easily in EndNote Web. Colleagues that have access to your shared groups will see them in their Groups Shared by Others section of the left navigation pane

You can share your groups with anyone that has an EndNote Web account. Below are instructions to share groups, unshare groups, and hide groups shared to you.

3.3.1 Sharing Groups

1. Click the **Organize** tab which will display the Manage Groups page.
2. Find the group you wish to share and click the **Share Group** button.
3. Enter up to 1,000 e-mail addresses in the Share Group dialog separating each address by pressing the Enter or Return key. You can also provide a text file containing e-mail addresses separated by commas using the **Browse** button.
4. Click the **Apply** button.

The screenshot shows the EndNote Web interface. The 'Organize' tab is selected, displaying the 'Manage My Groups' page. A table lists groups: 'chapter 1' (0 references) and 'endnote training' (0 references). The 'Share Group' button for 'chapter 1' is circled. A dialog box titled 'Share 'chapter 1'' is open, showing a text input field for email addresses, a 'Browse...' button, and an 'Apply' button (circled). An arrow points from the 'Apply' button in the dialog to the 'Share Group' button in the table.

To modify the sharing settings for a group, just click the **Modify Sharing** button and update the settings as needed.

3.4 Unsharing Groups

1. Click the **Organize** tab which will display the Manage My Groups page.
2. Find the group you wish to unshare and click the **Modify Sharing** button.
3. Select all the e-mail addresses for Step 1 in the Share Group dialog and press **Delete**.
4. Click the **Apply** button.

The screenshot shows the EndNote Web interface with the 'Organize' tab selected. The 'Manage My Groups' page displays a table with two groups: 'chapter 1' and 'endnote training'. The 'Modify Sharing' button for the 'chapter 1' group is circled.

3.5 Hiding Groups Shared from Others

1. Click the **Organize** tab, then click the **Others' Groups** link.
2. Uncheck the group you wish to hide.
3. Click the **Apply** button.

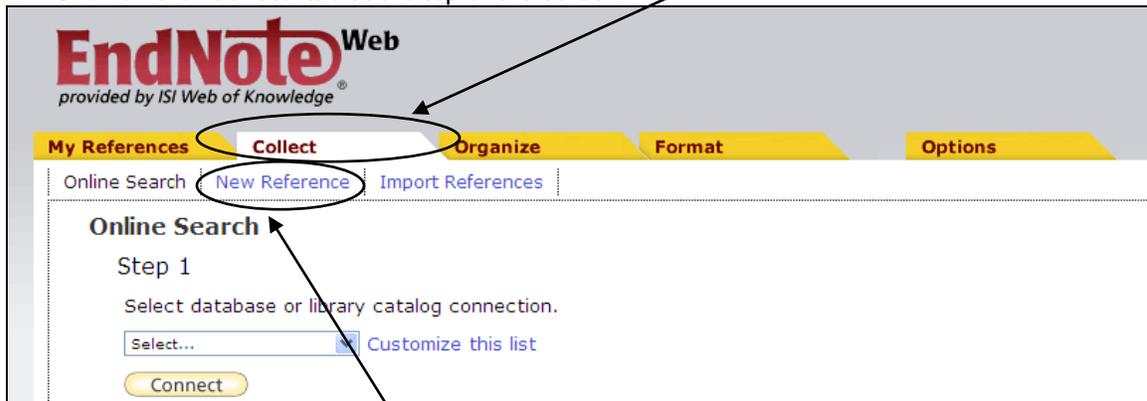
3.5.1 Important Points about sharing groups:

- You can share groups with EndNote Web users at any institution.
- You can share groups with individuals who have not yet created their EndNote Web account. The group will automatically appear after they've registered and logged in.
- Access to shared groups is read-only.
- References in shared groups can be searched.
- References in shared groups cannot be copied to your Quick List.
- Shared groups are available to generate a Bibliography or an export file

4. Manual Entry of References:

You can add references to your EndNote Web library by typing the bibliographic information in the fields provided on the New Reference page.

1. To add a new reference:
2. Click on the "Collect" tab at the top of the screen.



3. Click on the "New Reference" hyperlink.

3. Change the Reference Type by selecting the appropriate type from the Reference Type drop-down list box. The screen will redraw when the reference type changes, displaying appropriate fields for that reference type.

A screenshot of the 'New Reference' form. At the top, there are 'Save' and 'Clear' buttons. Below that, the 'Groups' section has a link 'Add or remove'. The 'Bibliographic Fields' section contains a list of fields with asterisks indicating required fields: 'Author:', 'Year:', 'Secondary Author:', 'Secondary Title:', 'Place Published:', 'Publisher:', 'Volume:', 'Number of Volumes:', 'Number:', and 'Pages:'. The 'Reference Type:' dropdown menu is open, showing a list of reference types such as 'Generic', 'Ancient Text', 'Artwork', 'Audiovisual Material', 'Bill', 'Book', 'Book Section', 'Case', 'Chart or Table', 'Classical Work', 'Computer Program', 'Conference Paper', 'Conference Proceeding', 'Dictionary', 'Edited Book', 'Electronic Article', 'Electronic Book', 'Encyclopedia', 'Equation', 'Figure', 'Film or Broadcast', 'Government Document', 'Grant', 'Hearing', 'Journal Article', 'Legal Rule or Regulation', 'Magazine Article', 'Manuscript', and 'Map'. An arrow points from the 'Reference Type' dropdown menu to the 'Author:' field.

4. Enter the bibliographic data in each of the fields in the reference. Reference fields most commonly required for a properly formatted citation and bibliography are in the Bibliographic fields section.
5. When you have entered all of the required bibliographic data, scroll down to the bottom of the page and select a group to enter your new reference into. For example chapter 1 (which we created earlier) You can create a new group at this stage by giving it a title in the box provided – this is illustrated below.

Groups: chapter 1

[Back to top](#)

6. Click the Save button to save your new reference.

EndNote[®] Web
provided by ISI Web of Knowledge[®]

My References Collect Organize

Online Search New Reference Import References

New Reference Save Clear



Tip:

4.1 Entering Author Names

Author names can vary greatly so refer to the examples below for accurate formatting.

Single Author

Smith, John Allen
Smith, J.A.
Smith, J A

Multiple Authors (Do not include "et al.")

Smith, John Allen; Doe, J.; Green, M. T.

Complex Author Names (Last, First, Title)

de Gaulle, Charles
Smith, John, Jr.
Smith, James, II

Anonymous Author (leave blank)

Company or Institutional Authors (Include a comma at the end)

Oregon Department of Geology and Mineral Industries,

Complex Company or Institutional Authors (Include two commas in the name)

American Academy of Pediatrics,, Committee on Genetics

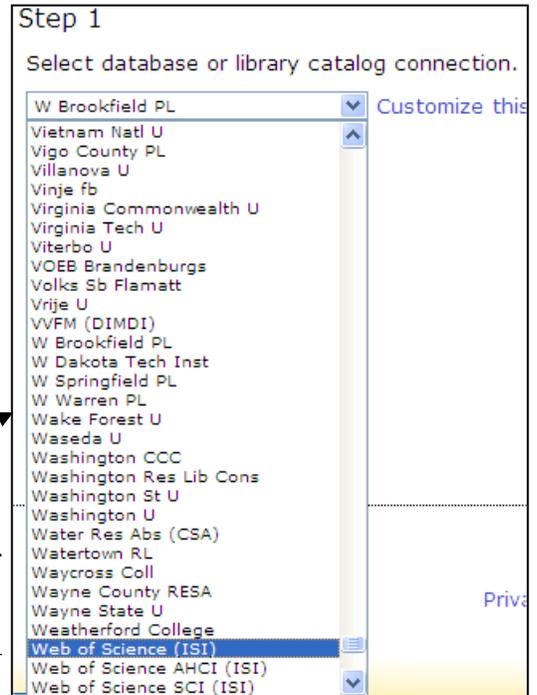
5. Direct Import of References:

You can perform searches of *ISI Web of Knowledge*SM products, PubMed[®], and many other library catalog and reference database sites directly through EndNote Web.

1. Click the Collect tab.



2. In the connection file drop-down list, select the database. For example the Web of Science.



Note:

To customize this list.

The Online Search tool allows you to search a variety of online resources and save references easily to your library. By default, all available connection files appear in the Online Search Connection drop-down list. Defining your Connection Files Favorites allows you to show a smaller, more convenient list.

Adding Connection Files to your Favorites

- From the initial Online Search page, click the **Customize this list** link.
- Select one or more connection files from the All Connection Files list on the left.
- Click the **Copy to Favorites** button.

Removing Connection Files from your Favorites

- From the initial Online Search page, click the **Customize this list** link.
- Select one or more connection files from the Your Favorite Connection Files list on the right.
- Click the **Remove from Favorites** button.

3. Click the **Connect** button.



- If the site requires access authentication, enter a User ID, Password, and Group ID on the authentication screen and click **Connect**.

Note: Connections to online databases through EndNote Web originate from the EndNote Web server rather than your connection, so IP authentication or proxy authentication will not take place, and a username and password may be required by the online database. Contact your institution's help desk to see if they have a username and password for this resource.

- Enter the search phrase in the **Search Criteria** field.

- Select a field in the **Search Field** drop-down list to limit the search to a specific field.
- Select a connector (And, Or, or Not) from the **Connector** drop-down list if searching for more than one expression.
- Repeat steps 4-6 if appropriate.
- Click the **Search** button.
- Select the results range to retrieve.

- As the results download, you can view the initial set. Click in the radio buttons to the left of the articles retrieved and from the drop down box select which group you wish for them to be added to. By not selecting a group these items will be added to an unfilled group.

Note: There are cases when the number of references downloaded does not match the original result count. This will occur if there are references without author and year information

6. Managing your References:

6.1 Deleting References:

To delete a reference:

1. Click the check box to the left of a record.

Author	Year	Title	Edit
<input checked="" type="checkbox"/> Ma, L	2007	Heterologous MVA-S prime Ad5-S boost regimen induces high and persistent levels of neutralizing antibody response against SARS coronavirus APPLIED MICROBIOLOGY AND BIOTECHNOLOGY ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0	Edit
<input checked="" type="checkbox"/> Brix, S	2007	Four new species of Desmosomatidae Sars, 1897 (Crustacea : Isopoda) from the deep sea of the Angola Basin MARINE BIOLOGY RESEARCH ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0	Edit
<input checked="" type="checkbox"/> Chan, SSC	2007	Parental response to child's isolation during the SARS outbreak AMBULATORY PEDIATRICS ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0	Edit
<input type="checkbox"/> Chan, SSC	2007	Improving older adults' knowledge and practice of preventive measures through a telephone health education during the SARS epidemic in Hong Kong: A pilot study INTERNATIONAL JOURNAL OF NURSING STUDIES ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0	Edit

Note: You can check multiple references to delete. To delete all the references on that page, click the **Check Page** checkbox. To delete all the references in a group, click the **Check All** checkbox.

2. Click the **Delete** button at the top of the page.

To delete a reference from a reference page:

1. Click the **Delete** button.

Author	Year	Title	Edit
<input checked="" type="checkbox"/> Ma, L	2007	Heterologous MVA-S prime Ad5-S boost regimen induces high and persistent levels of neutralizing antibody response against SARS coronavirus	Edit
<input checked="" type="checkbox"/> Brix, S			
<input checked="" type="checkbox"/> Chan, SSC			
<input type="checkbox"/> Chan, SSC			

Windows Internet Explorer

Are you sure you want to permanently delete the selected reference(s)?

OK Cancel

2. Click the **OK** button in the Confirmation window to delete the reference

6.2 Editing References

1. Find the reference you wish to edit under the references tab.

All My References

All Page

	Author	Year	Title	Edit
<input type="checkbox"/>	Ba, L	2007	Heterologous MVA-S prime Ad5-S boost regimen induces high and persistent levels of neutralizing antibody response against SARS coronavirus APPLIED MICROBIOLOGY AND BIOTECHNOLOGY ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0 TCO	Edit
<input type="checkbox"/>	Brix, S	2007	Four new species of Desmosomatidae Sars, 1897 (Crustacea : Isopoda) from the deep sea of the Angola Basin MARINE BIOLOGY RESEARCH ISI Web of Knowledge SM → Source Record, Related Records, Times Cited: 0 TCO	Edit

2. Click the Edit link for that reference in the far right column.
3. Edit all necessary fields.

Edit Reference

Groups: [Add or remove](#)

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

Reference Type:

* Author:
Use format Last Name, First name. Separate with ";".

Title:

* Year:

Journal:

Volume:

Issue:

Pages:

Start Page:

Epub Date:

DOI:

Note: The above fields are needed for most bibliographic styles.

Note: If you change the Reference Type, you may be required to input additional information for fields required for that type, or lose data input for the previous reference type which is not used for the new reference type.

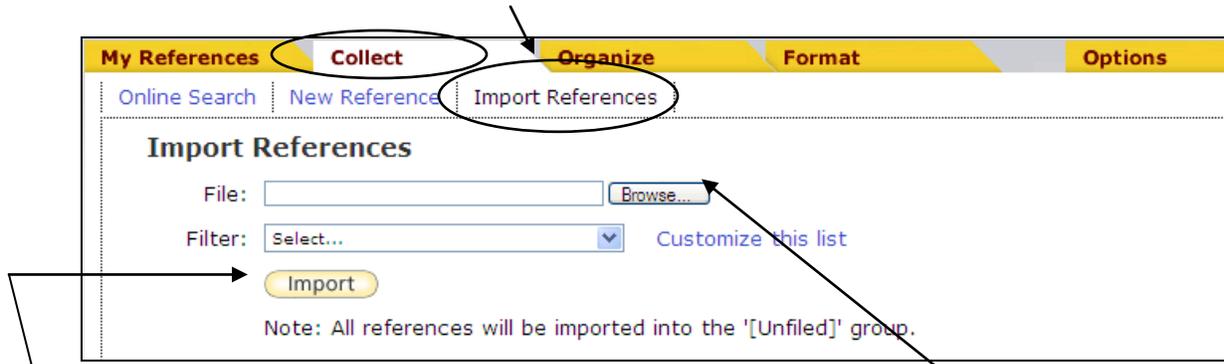
4. Click the Save button at the top of the page to save changes.

6.3 Importing References:

The process to import references into your library requires only a few steps. First, it's important that the import file is in the proper format. To determine the appropriate format, refer to the Import Formats in EndNote Web for details. EndNote Web provides hundreds of import filters for a variety of data sources, as well as the standard RIS and Tab Delimited Formats.

To import a file:

1. From the Collect tab, click the **Import** link.



2. For the File field, click the **Browse** button to find and select the file containing reference data.
3. For the Filter field, select the import filter that matches the reference data format.
4. Click the **Import** button.

The references imported from the selected file are now available in Unfiled.

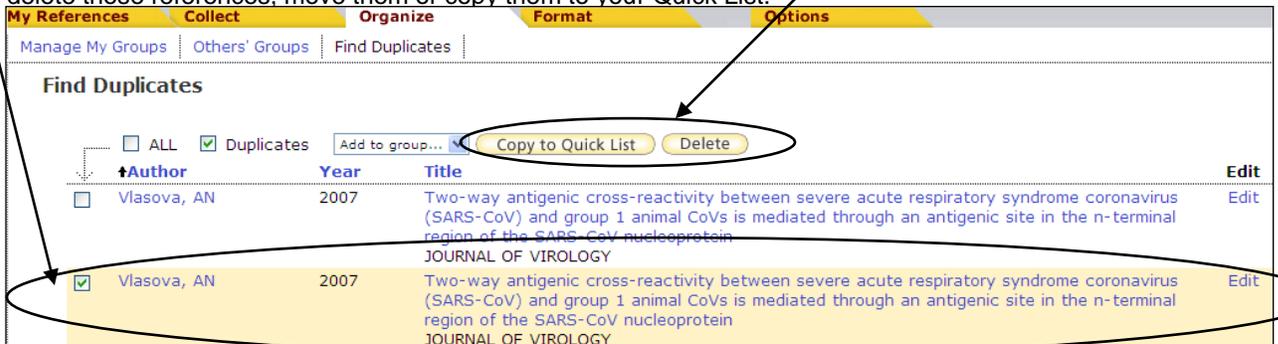
6.4 Deduplicating Records:

You can check your library for duplicates at any time by clicking Organize tab, then clicking **Find Duplicates** in the secondary navigation.



Any reference identified as a duplicate will have a yellow background.

You can quickly check the 'Duplicates' checkbox to check all references with the yellow background to delete those references, move them or copy them to your Quick List.

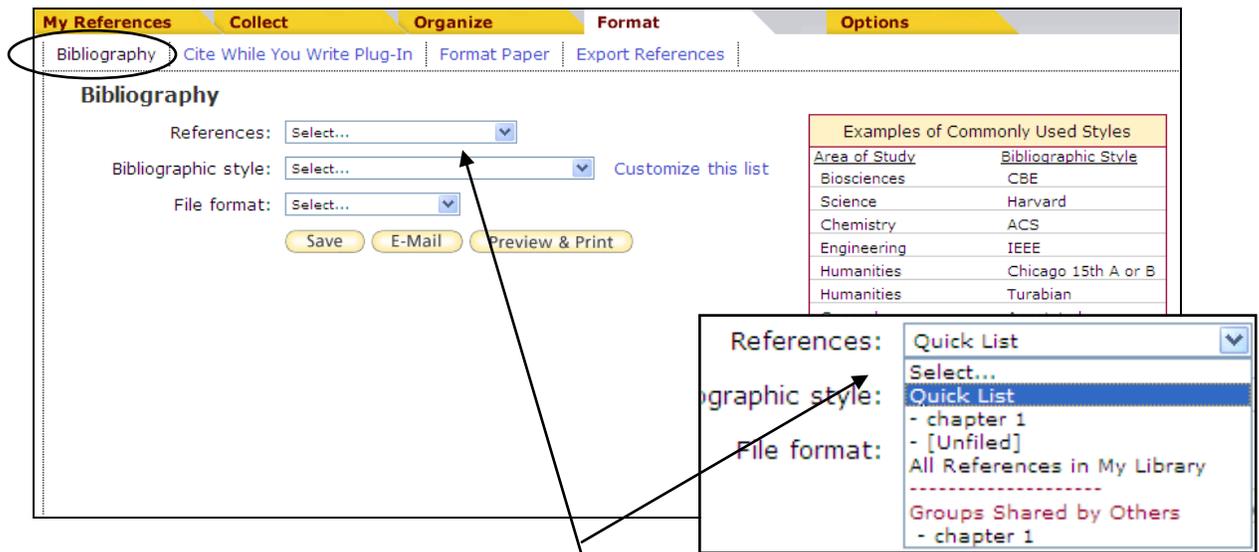


7. Creating a Bibliography

EndNote® Web provides a bibliography feature allowing you to output your references in a specified bibliography output style and in a specified file format to e-mail, save or print.

7.1 To create a bibliography:

1. From the Format tab, click the **Bibliography** link.

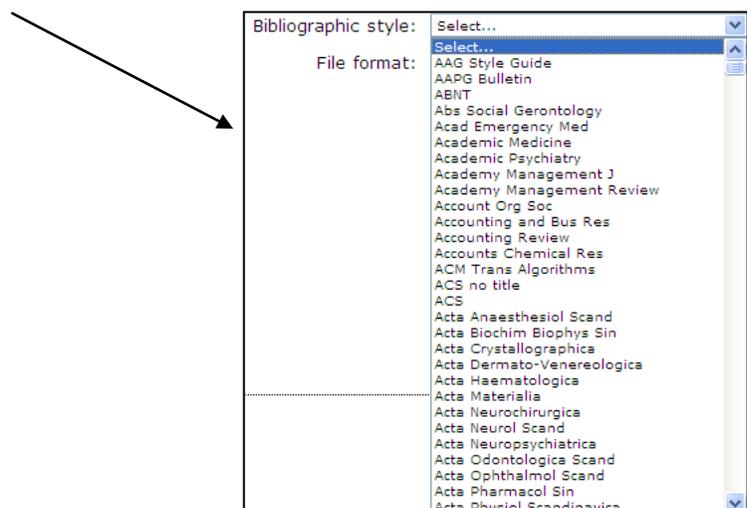


2. Select the references to format, such as the **quick list** or a personal group, from the **References** drop-down list box.

7.2 To create a quick list:

1. Click the check box to the left of a record. Check the **Check Page** checkbox to check all references on a page or **Check All** to check all references in a group or list view.
2. Click the **Copy To Quick List** button.
3. Repeat steps 1-2 if you are selecting references from different pages and groups until your Quick List is complete. A warning message will display in your browser if you have exceeded your export data limit.

3. Select the output style from the **Bibliographic style** drop-down list box.



4. Click the **Save To**, **E-mail**, or **Preview & Print** buttons.

Bibliography

References: Quick List

Bibliographic style: Select... [Customize this list](#)

File format: Select...

Save E-Mail Preview & Print

- A file using the **Save** option – a standard 'File Download' window will appear allowing you to open the file or save to disk. If saving to disk, a standard 'Save to' window will open so that you can browse to the folder location and name the file.
- An e-mail using the **Email** option – an 'e-mail' window will appear allowing you to enter the e-mail addresses of those to receive the e-mail, a subject, and a message.
- A printed list using the **Preview & Print** option – a 'Preview & Print' window will appear allowing you to print to a local or network printer.

8. Cite While You Write

8.1 Inserting a Citation Within Word:

While you are writing your paper, you can easily find and insert a citation using EndNote Web's Find Citation(s) tool. This tool searches your entire library, meaning all reference fields for all references in your library.

To find and cite your source:

1. With your Word document open, place the cursor in the location where the citation should appear.
2. Click the **Find Citation(s)** button in the EndNote Web toolbar. Or from the **Tools** menu, select **EndNote Web** then **Find Citation(s)**. The Find Citation(s) dialog will appear.
3. Enter a search term in the **Search** field to find the reference or references to insert. Refer to Search Tips in this topic or search operators for ways to refine your search.

Note: The search term must be a minimum of three characters.

5. Click the **Search** button.
6. Select the reference. To insert multiple references in one citation, click each reference while holding the Ctrl key.
7. Click the **Insert** button.

To support the speculation that the Iceman died not from exposure but from violence, an arrow wound was discovered in the Iceman's shoulder⁽¹⁾. Additionally four fractured ribs⁽²⁾ have been documented. And to dispel the belief that he was a human sacrifice, Eduard Egarter Vigl concludes that the attack came from behind⁽³⁾.

The citation appears at the cursor location, formatted according to the bibliographic style specified. The reference information is also automatically added to the bibliography.

Note: If you expect to see an in-text citation but only see the reference in the bibliography, check the bibliographic style selected in [Format Bibliography](#). Not all styles format in-text citations, such as Chicago 15th A, Refman (RIS) Export, Tab-delimited, and Turabian Bibliography.

8.2 Editing Citations Within Word:

You can use EndNote Web's Edit Citation(s) tool to add or exclude information in the citation, add or delete a citation, or change the order of citations in a group. To delete a citation, follow the steps below and use the Remove option in the Edit Citation(s) window.

To edit a citation:

1. In your Microsoft® Word document, highlight the citation to edit.
2. Click on the **Edit Citation(s)** button in the EndNote Web toolbar. Or from the **Tools** menu, select **EndNote Web** then **Edit Citation(s)**. An **Edit Citation(s)** window will appear.
3. Select the appropriate edit option(s). The options available are:
 - **Exclude the author** – Removes the author's name in the selected citation
 - **Exclude the year** - Removes the Year in the citation in the selected citation
 - **Prefix** – Adds the prefix entered in the Prefix field to the citation
 - **Suffix** – Adds the suffix entered in the Prefix field to the citation
 - **Page(s)** – Adds the page numbers in the citation
 - **Insert** – Launches a Find Citation(s) window to select an additional reference to add to the citation
 - **Remove** – Removes the reference highlighted in the citations field of the Edit Option(s) window from the citation

Note: Use this option to delete citations. This will ensure that all field codes are also removed.

8.3 Formatting your Bibliography in Word:

Each time you find and insert a citation in your document, the bibliography automatically formats according to the style selected. You can change the bibliographic style or other layout options in the Format Bibliography window.

To format your bibliography:

1. Click the **Format Bibliography** button in the EndNote Web toolbar. Or from the **Tools** menu, select **EndNote Web** then **Format Bibliography**.
2. In the Format Bibliography dialog, select the style from the **With output style** drop-down list box.
3. If desired, modify the font and size for the references in the Bibliography.
4. Add a title in the **Bibliography Title** field, such as "Works Cited."
5. Click the **OK** button.

This will format your citations and bibliography according to the style and appearance specified.

Bibliography

1. Mead, R., *A really cold case*. The New Yorker, 2001. 77(24): p. 58(1).
2. Allman, W.F., *Tales from the crevasse*, in *U.S. News & World Report*. 1994. p. 60(3).
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8.4 Removing Field Codes for Publishing:

Some publishers require documents without field codes. EndNote Web provides a tool to create a formatted document stripped of Cite While You Write field codes.

To remove field codes in a formatted document:

1. Click the **Remove Field Codes** button in the EndNote Web toolbar. Or from the **Tools** menu, select **EndNote Web** then **Remove Field Codes**.
2. Next, you will be prompted to create a new document. Click **OK** to continue.
3. Save the new document making sure not to overwrite the original.

Tip:

Cite While You Write will not be able to edit the citations and bibliography in this new document. To make edits, you must edit the original document and use Remove Field Codes again.