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## What is EndNote?

EndNote is a reference management package which enables you to:

- create a personal library of references
- insert these references into a Word document
- format citations and bibliography automatically in the citation style of your choice.

EndNote is available as a desktop program, an online version (EndNote Online, previously EndNote Web) and an iPad app. UCL has an institutional license so EndNote can be available on all UCL computers. The desktop version may also be accessed remotely via Desktop@UCL Anywhere. Access to the full online version of EndNote is included as part of this license. There is also a free version of EndNote Online available to anybody, but this offers less functionality than the desktop or full online versions. An iPad app is available for free from the iTunes store.

UCL's license for EndNote is changing, and it is anticipated that late in 2019 the programme will be available for UCL staff and students to download to their own computer. We therefore recommend that you do not purchase an individual license and make use of EndNote via Desktop@UCL Anywhere until the changes are implemented. Until then, should you still wish to purchase EndNote for your own computer, a special student price is available via Bilaney Consultants <http://www.bilaney-consultants.co.uk/our-products/endnote.html>.

## What's the difference between the web, desktop and iPad versions?

You can use them as independent programs, or synchronise them so you can work with your EndNote references from any device: your own computer, on the web or on your iPad. The online and iPad versions do not have all the functionality of EndNote desktop.

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## A guide to EndNote desktop

These instructions are for EndNote X9 on Windows (some commands are different on a Mac) using Firefox.

When you first open EndNote you may be asked if you want to use EndNote Online. Select not to at this point. A dialogue box may prompt you to open an existing library or create a new one. Choose to create a new library. If not prompted then from the **File** menu select **New**. Give your library a name and save it to a location of your choice, e.g. your N: drive if using Desktop@UCL.

The screen is split into three main areas:

- The centre of the screen lists your references. You can sort the references by clicking on any column header. To change fields displayed in the list of references in your EndNote library, right-click anywhere in the column headings. Select or deselect fields listed. You might like to display the Record Number field, as this can be helpful when using EndNote with Word.
- The right pane offers a quick view of all fields for the highlighted reference (Reference tab), shows how it would display in a bibliography (Preview tab), or displays the pdf (Attached pdfs tab)
- The left pane displays groups

## Term Lists

EndNote has lists of full journal titles and their standard abbreviations available to download into a feature called the *Journals Term List*, so that when you cite references in a Word document, the correct format of the journal title will appear in the bibliography.


You should import a list of journal titles before you begin to add references to your EndNote Library. To download standard sets of journal titles:

- From the **Tools** menu, select **Define Terms Lists**
- From the **Lists** tab select **Journals**.
- Click on **Import List...** and navigate to where the Terms Lists folder is located (usually within **Program Files** on your computer)
- Click on the list which best suits your subject area and click on **Open**. An index of journal titles will now be loaded into your **Journals Terms List**. You can then **close the Terms List window**.


You can import more than one list but importing too many will make the EndNote program run more slowly.

## Adding references to your library

### Adding references manually

- With your library open, go to **References** then **New Reference**
- Enter all the information you have for the reference. Note:
  - **Ref type:** The default reference type is 'journal article'. Click on the drop down box next the reference type that is displayed to choose a different one. The fields available for that reference type will change accordingly.
  - **Authors:** Each individual author must be entered on a new line. Names can be entered in the format **Bloggs, Joe** or **Joe Bloggs**. If there are no commas, EndNote will treat the last word as the last name. Anything before the first comma is treated as a last name; anything after the first comma is treated as the given name.
- There is a spell checker available at the top of the page 
- When you have finished entering data, save (**File > Save**) and close (**File > Close reference**) the reference.
- To edit the reference, double-click on it

## Searching online resources from within EndNote

You can search a number of online databases from within EndNote. Click on the **Integrated Library & Online Search Mode** icon  at the top of the screen. Databases are displayed under 'Online search' in the left pane. To see other databases to search, click on **more...** at the bottom of your Online Search group in the Groups pane. Highlight the resource of your choice and click on **Choose**.

**NB** Some resources require authentication which is not possible with UCL single sign-on. You should search these resources directly through your web browser and export references into EndNote from there (see below).

- The Search box is at the top of the screen.
- Complete your search criteria and then click Search.
- The number of results retrieved will be displayed. Click on **OK** to import them.

## Exporting references from online resources

For a comprehensive search, you should always go to the database itself. Some online databases and electronic journals allow you to **export references directly** into EndNote. See the table below for examples and instructions. This is the quickest and most convenient way to get references directly from online databases into your EndNote Library.


### **WARNING!**



Be careful to check records imported from online databases. Sometimes data may be missing or misplaced. This must be amended manually. It is sometimes possible to download results and import them manually instead of direct export, using an amended filter. Ask a member of Library staff for advice.


**Please note:** These instructions were compiled using Firefox. Details may differ for other browsers. If you experience difficulties with the instructions below, try using a different browser.

**Default application:** If you are using Desktop@UCL you may find that the default application that is set to open particular file types will cause files to open in other reference management packages, e.g. Zotero. If this is the case you may need to change the default program in Windows (Search Windows for **Default Apps**, click on **Choose default applications by file type**, change the default programme for the appropriate file type, e.g. .ris, to EndNote).

Database	Instructions for direct export or for saving references to import
COPAC	Tick the box or click on any result. At the bottom of the screen choose to <b>export as EndNote, Zotero</b> . Click on <b>Export</b> . If provided with the option, choose destination as <b>EndNote</b> and select your EndNote library. Check that all data is exported to the correct fields.
EBSCO	To export multiple results, add the results to your folder by clicking on the blue folder icon. From a single result or from the <b>Folder</b> view (for multiple records) click <b>Export</b> . Ensure <b>Direct Export in RIS Format</b> is selected and click <b>Save</b> . When prompted, confirm to open with EndNote or ResearchSoft Direct Export Helper. Check that all data is exported to the correct fields.
Explore	From the details screen for any result, select <b>RIS (Endnote OR Refman)</b> . When prompted to select encoding, select US-ASCII. Sending the reference to Endnote Desktop creates a <b>RIS</b> file. Click on <b>Download</b> . If prompted to select the application, select EndNote by selecting <b>Other</b> from the <b>Open with</b> drop-down menu. WARNING: not all fields may export correctly, ensure that you check and edit fields carefully.
Google Scholar <a href="http://scholar.google.co.uk">http://scholar.google.co.uk</a>	In Google Scholar, before carrying out a search, click on  (top left) and then <b>Settings</b> . Under Bibliography Manager, select to show links to import citations into <b>EndNote</b> .

	Click on <b>Save</b> . From your search results you can now click on the link beneath any result <b>Import into EndNote</b> and open the file. To export multiple records, click the star icon under each record, log into your Google account, then go to <b>My Library</b> . Select the relevant results, or check the box for all results, click on the <b>Export</b> icon and select <b>EndNote</b> . <b>WARNING:</b> Data might be missing or misplaced. Check the import carefully and make amendments manually.
<b>OvidSP</b>	Mark the references you wish to save. At the top of the screen, click on <b>Export</b> . Select <b>EndNote</b> from the drop-down 'Export to' menu. Choose which fields you want to export then click on <b>Export</b> . The first time you open an exported file you might be told Windows can't open this type of file (.cgi). Choose to <b>Try an app on this PC –</b> Select <b>EndNote X9</b> from the list and tick the box to <b>Always use the Endnote app to open .cgi files</b> . You might be asked to select the import filter. Some OVID databases to which UCL subscribes do not have filters available. In this case, select the most appropriate filter and edit as necessary, or ask staff about downloading EndNote filters. <b>WARNING:</b> In some Ovid databases reference data will be missing or misplaced, so check the imported record carefully.
<b>ProQuest</b>	Mark the relevant records and click on <b>Save</b> . Select <b>RIS (works with EndNote, Citavi, etc.)</b> and then click on <b>Continue</b> . If prompted, choose to <b>open</b> the file. Select <b>EndNote</b> if prompted.
<b>PubMed</b>	Mark the relevant records. From the <b>Send to</b> menu, Select <b>Citation Manager</b> and click <b>Create file</b> ; if prompted choose to <b>open</b> the file. Select <b>EndNote</b> if prompted.
<b>SCOPUS</b>	Mark the references you wish to export and click on <b>Export</b> . Select <b>RIS format</b> as the export format. Choose which fields to output then click on <b>Export</b> . Choose to <b>open</b> the file and select <b>EndNote</b> if prompted. You can then select your EndNote library. Check that all data is exported to the correct fields.
<b>Web of Science</b> (includes Web of Science, BIOSIS Previews)	Check the boxes next to the articles you want to export. Select <b>Save to EndNote Desktop</b> . Select the fields to export and click on <b>Send</b> . If you are asked which programme to export to, select <b>EndNote</b> . You can then select your EndNote library from the window which appears, if necessary. References may also be added to the <b>marked list</b> and then exported. This will give you further options regarding which fields to export.

Some databases do not have a direct export facility; in this case you should save your references as a text file in a format which can then be imported into EndNote:

- Run a search in the database as normal. Select references and save them in the appropriate format. Ensure you save the files in a place where you will easily find them again, e.g. desktop.
- Open your EndNote library. Click on the **import** icon 
- Select '**Choose File**' to locate your saved file
- Select the appropriate import option for the database you have searched. If the option required is not listed, select **Other filters....** for a comprehensive list.
- Click on **Import**

For further instructions, refer to the help pages within the database you are using.

Your references appear in the main window, and the **Imported** group in the left pane. This group is temporary and is refreshed with each new import. To see all the references in your Library at any time, click on the **All References** group at the top of the left pane.

## Obtaining references from PDF documents

EndNote allows you to import pdfs to your Library, and automatically fills in the bibliographic details.

- Go to **File > Import > File** (for a single PDF) or **Folder** (for a folder containing multiple PDFs). If importing a folder, you can select to include files in sub-folders and also to create a Group Set into which your files will be added in EndNote.
- Click **Choose** and navigate to the folder on your drive which contains the pdfs
- With the import option as '**PDF**' select **Import**
- The bibliographic details of the articles are filled in for you where possible
- Always check the reference. Any missing data can be added manually.

EndNote can be set up to automatically import from a selected folder on your computer:

- Go to **Edit > Preferences > PDF handling**
- Tick the option **Automatic PDF importing** and select your folder by browsing
- From the options at the top of the dialogue box you can also choose to have the files re-named automatically upon import if you wish

PDFs added to the folder selected will automatically import to the Unfiled group. Imported files are added to an Imported folder created on your computer (not EndNote). EndNote actually creates a copy of the pdfs, so you don't need to worry about broken/changing file paths.

## Deleting references

When you delete a reference, it is sent to the 'Trash' folder. You can drag references across to 'Trash' or highlight the references and go to **References > Move references to Trash**. To delete references permanently, go to **References > Empty trash**. This cannot be undone.

## Organising references in a Group

References can be organised into 'groups', displayed on the left of the Library. A 'Group Set' holds a number of your Groups.

- Go to the **Groups** menu (or right click on any of the groups/group sets in the left pane – e.g. **My Groups**) and select **Create Group Set** or **Create Group**.
- Give your group set/group a name.
- Select the references you want to move to the group, by highlighting them (use **Ctrl** key to select more than one) and drag them into the group. Or go to the **Groups** menu and then **Add references to**

**Tip:** 

Groups are effectively a way of *tagging* your references. If you delete a reference from a group it will remain in **All References** because all you have really done is remove its 'tag'.

## Searching for references within your Library

- Select the group you want to search ( e.g. All References )
- The quick search box at the top will search all fields, including the fulltext of any pdfs attached
- For a detailed search click **Show search panel** if it is not already showing. Fill in your search criteria. To add more search lines, click on the '+' box at the right.
- Click **Search**. The results shown comprise a **Search results** group, at the top on the left pane. This group is temporary and contents will be replaced with your next search.

**Tip:** 

The Preview tab next to the Search tab allows you to see how the reference would look in a bibliography, as determined by a selected *output* style. If you want to browse through your references with the abstract visible, select the *Annotated* output style from the drop-down box at the top left of the screen.


## Dealing with duplicate references

Ensure duplicates are removed before using EndNote with Word to cite references. EndNote will search the currently selected references for duplicates.

- To search the whole library, click on the **All References** group.
- Go to **References** and then **Find duplicates**.
- Compare duplicate references to decide which to keep. The display automatically shows the first difference detected between the references, if any. If you select **Keep this record** the other record will be sent to **Trash**.
- If you want to keep both records (or decide later) click on **Skip** to go to the next duplicate.
- References skipped are held in a temporary **Duplicate References** group. This group is discarded when you close your library.
- Go to **Edit > Preferences > Duplicates** to view and amend criteria used for identifying duplicates (the fields compared).

## Finding the full text

To search for the full text free online for the references which you have in your library:

- Highlight reference(s)
- Click on **References > Find full text > Find full text** or click on the toolbar icon 
- A copyright warning window will be shown; click **OK**.
- The **'Find full text'** group in the left pane indicates whether the full text has been found. If the pdf is found it will be attached.
- If EndNote has found the URL associated with the record, e.g. the publisher's website, this is inserted in the URL field.

**Tip:** 

If no full text has been found, it is possible to set your EndNote preferences to search for the full text of items which you have access to via UCL subscriptions: **NB** These settings are already applied on Desktop@UCL computers.

- Go to the **Edit** menu, and then select **Preferences...**
- Select **'Find Full Text'**
- Set the **OpenURL path** to  
[https://ucl-new-primo.hosted.exlibrisgroup.com/openurl/UCL/UCL\\_VU2](https://ucl-new-primo.hosted.exlibrisgroup.com/openurl/UCL/UCL_VU2)
- Set the **'Authenticate with'** URL to  
<http://libproxy.ucl.ac.uk/login>
- When you execute **"Find Full Text"** (from the References menu or by right-clicking) on a set of records in your EndNote library, EndNote will ask you to log in with your UCL username and password and then try to connect to the publisher of the article and bring back a PDF, or a link to the full text. The mechanism for this differs from publisher to publisher, and EndNote is not yet working for every publisher. This is why only a proportion of PDFs or links are found.

EndNote can check to see if there is any updated information about a reference in your library and update the fields for you. Select the reference(s) that you want to check and click **References, Find Reference Updates**.

## Backing up your library

Every EndNote library is made up of a library file (.enl) **and** a data folder. Your library will not work unless both are saved together in the same place.

- In EndNote, go to the **File** menu and select **Save a copy** or **Compressed Library (.enlx)**.
- Navigate to the location where you wish to back up your files.
- EndNote will automatically append 'Copy' to the file name, but you can re-name the file if you wish.
- Click on **Save**


## Sharing your library

EndNote X9 allows you to share your library with anyone using EndNote X7.2 or above. With EndNote X9 you can share your library with up to 100 others. The sharing function enables sharing of and simultaneous access to your entire library including references, PDFs and annotations to PDFs. You can choose whether people with whom you share your library have full **Read & Write access** or **Read Only access**.

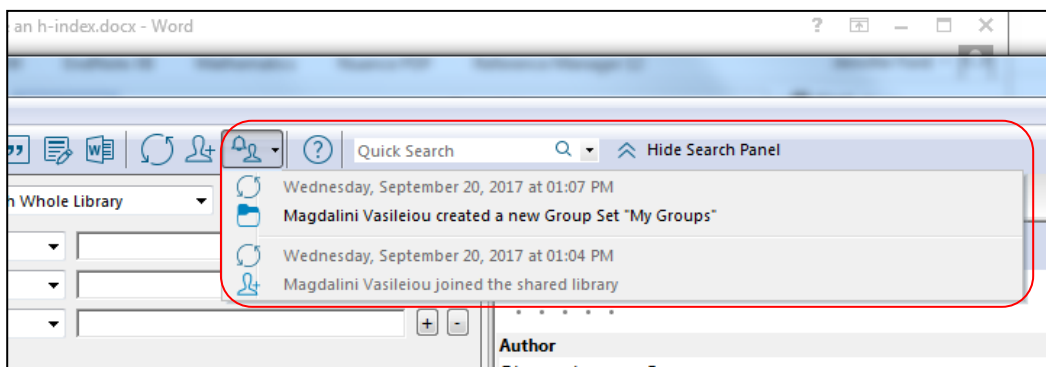
**Note: if sharing an EndNote library, it is advisable for the library owner to make regular back-ups of the library (see 'Backing up your library' above).**

Sharing relies on EndNote's 'Sync' function to work correctly. **You and any others with whom you want to share your library must all have an EndNote online account set up first.** Before you can share a library you must ensure it is fully synced with your EndNote online library (see 'Using EndNote online with EndNote desktop' below for instructions on syncing your library).

To set up sharing of your library:

Click on **File > Share**, or click the sharing button in the toolbar:  and if necessary log in with your EndNote Online credentials.

- Enter the email addresses of the people with whom you would like to share your library. Click **Invite** and select whether to give them Read & Write access or Read Only access.
- Those you have invited to share your library will receive an email invitation and will need to log in to their own EndNote online accounts to begin sharing. Once invites have been sent, you can monitor their acceptance by revisiting the share settings under **File > Share**. You can remove invites or send email reminders for invites from this screen by clicking on the cog for the relevant person.
- When the invitation to share the library has been accepted, each user can open the shared library in EndNote desktop by going to **File > Open shared library**. That user can then select which shared EndNote library they want to open. It is possible for one user to be given access to multiple shared libraries, but each user can be the owner of only one shared library as each shared library is uniquely connected to an individual email address.
- Once the library has been successfully shared, an activity feed will become available through which all members of the group can monitor changes which any other group member makes to the library e.g. addition of new references to the library or annotations to PDFs stored in the library. The activity feed can be accessed by clicking on the **Activity feed** button in the toolbar (shown below). The last 500 activities are shown in this feed, with the most recent appearing first:



Further information about some of the items appearing in the activity feed can be accessed by clicking on that item. Items where more information is available are shown in a darker grey colour.

## A guide to EndNote Online

Institutional access to the online programme is available to you while you are registered at UCL or are a member of a UCL library. To access EndNote online for the first time, you need to create an account. If you already have a *Web of Science* account, you should use the same login details.

### UCL students/staff:

- From within the EndNote desktop program, click on **Tools** and then **Sync**.
- Follow the instructions to sign up for an account for the online version.
- Online access is included as part of the product purchase for two years

### Other library members (e.g. NHS staff)

- Access should be created whilst using a UCL Explore Access Point computer in the library.
- Open the database *Web of Science*. Click on **EndNote** then click on the **register** link on the left.
- You can use Endnote online from a non-UCL computer for up to twelve months, after which you should log on at a UCL computer to have the twelve month roaming access re-set.

Once registered you can log on directly at <http://my.endnote.com>. If you leave UCL, you will still be able to access the full version of EndNote Online for one year after you last synchronised with the Desktop version, after which you will still be able to access the 'basic' version of EndNote Online (see p. 1 of this guide), so your references are retained. The following instructions refer to the version accessible via the UCL institutional license.

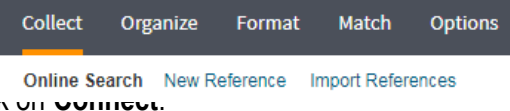
## My References

The first tab, **My References**, will show your references in the centre of the screen. On the left you will see any Groups you have created to help sort your references, and that there are links to see **All My References** and those which are **Unfiled** (not yet put into Groups).

## Adding references to your library

### Searching online databases from within EndNote online

You can search a number of online databases from within EndNote online. This is best if you are aware of a specific reference and wish to get the details into your library. Note that for a comprehensive search, you should always go to the database itself (e.g. *PubMed*, *EMBASE*)

- 
- Click on the **Collect** tab and then **Online Search**. If you click on **Select Favorites** you can choose which databases you would like to appear on the drop-down menu. Select a database and then click on **Collect**.
  - Fill out the search criteria. You can see how many results have been retrieved. Beware of retrieving large sets of results as they will take a long time to import. Consider refining your search criteria if you retrieve unexpectedly large numbers of results.
  - Click on **Retrieve**.
  - To select items to add to your library, tick the boxes and choose which group to add them to from the drop-down menu. A tick will appear in the copied column to indicate items which have been added to your library.

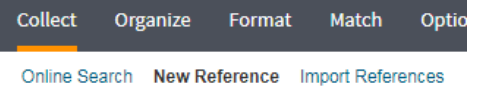
Note that if you click away from the online search results page, the search results are not remembered.



## Adding references manually

Where possible it is best to get your references from online sources as this helps prevent typographical errors in adding references and is usually quicker. Sometimes, however, you cannot find a reference in an online source and you will need to add it manually, e.g. for references to chapters within books, conferences, unpublished material.

- With your library open, from the **Collect** menu, select **New Reference**.
- Select the appropriate **Reference Type** from the drop down menu
- Enter the information you have for the reference. The first fields displayed are the ones usually required for bibliographic styles (citations and bibliographies)
- If you want to add the reference to a Group at this stage (see Using Groups below), click on the arrow to expand the **Groups** option at the bottom of the page
- When you have finished entering data, save the reference.
- To view the reference in your Library, click on the **References** tab



## Collecting references from the Web – using the bookmarklet

When looking at an online record on a webpage or in an online resource, it is possible to 'capture' the references and add them directly to EndNote Online or EndNote Desktop. You need to install a 'bookmarklet' which will allow you to do so.

- Click on the **Downloads** tab, and follow instructions for the 'Capture' tool. This can be positioned in the Bookmarks/Favourites bar of your browser.
- Run your search in the database of your choice as usual (e.g. PubMed, Cinahl, PsycINFO). When you find a result you would like to keep, navigate to the details screen for that reference, then click on the Capture Reference button in your bookmarks bar.
- A new window opens, giving you the opportunity to add or edit bibliographic details and to assign the reference to one of your Groups. Select to export to my.endnote.com or EndNote Desktop, then click on **Save to**.
- Check the reference in your library to make sure all the bibliographic fields have been successfully captured.

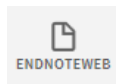
In many cases, you will find that the bookmarklet tool is not the best way to capture references; it works better for some databases than others. You might have better results using the online search within EndNote Online (above) or exporting bibliographic details from online databases.

## Exporting references from online databases

Some databases, e.g. *Web of Science*, give you the option to export selected references directly into EndNote Online:


### Direct export from Explore

- Click on the title of the item to see the details page. From the **Send to** link, click on **EndNoteWeb**
- OR
- Click on Add to My Favourites to add to My Favourites /Saved Items. Then open your Saved Items. Click on the three 'dots' (...) to show actions, then select **EndNoteWeb**.



Then log in to EndNote Online if necessary. The reference(s) will automatically be added to your **Unfiled** group.

### Direct export from *Web of Science*

- From your *Web of Science* search results, tick the boxes for the items you want to export to EndNote Online.
- Select **Save to EndNote Online** from the top of the screen
- The references will be sent to your EndNote Online Library. Click on **EndNote** at the top of the *Web of Science* screen to go directly to EndNote Online.
- Your references will be in the Unfiled group (from the 'Sort by' drop-down menu you can sort the group to see the most recently imported items).
- In *Web of Science*, search results which are in your EndNote online Library will have an icon displayed: 

If you are using a computer without EndNote Desktop installed, for some databases a direct export to EndNote request will push the references into EndNote Online. Always check the references carefully. If there is no direct export option you need to create a text file to import the references into EndNote Online. This is a two-stage process; please see tables below for specific examples.

Step 1 – create the file	Step 2 – import the file
<ul style="list-style-type: none"> <li>• In most databases you need to mark or select the references you wish to export, then save the resulting file (see examples below).</li> </ul>	<ul style="list-style-type: none"> <li>• Go to EndNote Online and from the <b>Collect</b> tab, click on <b>Import References</b></li> <li>• Browse to locate your saved file, select it and click on <b>Open</b></li> <li>• From the <b>Import Option</b> menu, select the filter required</li> <li>• Select the group you want to import references (<b>To:</b>) then click on <b>&lt;Import&gt;</b>.</li> </ul>

Step 1 – database used	Import option (filter) required
<p><b>Cochrane Library</b></p> <ul style="list-style-type: none"> <li>• Mark the references you wish to save and click <b>Export Selected</b>.</li> <li>• Choose whether to save just the citation or the citation and abstract, and choose the PC file type if using a PC.</li> <li>• Click <b>Export Citation</b>. Save the results as a <b>text file (.txt)</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Follow <b>Step 2</b> above.</li> <li>• Import Option: <b>Cochrane Library (Wiley)</b>.</li> </ul>
<p><b>OvidSP Databases</b> (AMED, EMBASE, HMIC, Medline, PsycINFO)</p> <ul style="list-style-type: none"> <li>• Mark the references you wish to save and click <b>Export</b> at the top of the screen.</li> <li>• From the Export Citation(s), Format drop-down menu, select <b>Reprint /Medlars</b>.</li> <li>• Choose which fields you want to export and then click on <b>Export</b>. (Save the file.)</li> </ul>	<ul style="list-style-type: none"> <li>• Follow <b>Step 2</b> above.</li> <li>• Import Option: use the relevant Import Option for the database you are searching, e.g. Embase (OvidSP).</li> </ul> <p><b>Check imported records carefully</b>, the data may be missing or misplaced.</p>
<p><b>SCOPUS</b></p> <ul style="list-style-type: none"> <li>• Tick the boxes next to the articles you want to export. Click <b>Export</b> from the menu near the top of the screen.</li> <li>• Select <b>RIS</b> as the export format. Choose which fields to output, and click <b>Export</b>. Save the file</li> </ul>	<ul style="list-style-type: none"> <li>• Follow <b>Step 2</b> above.</li> <li>• Import Option: <b>Scopus</b>.</li> </ul>

Be careful to check records imported from online databases. Sometimes data may be missing or misplaced and must be amended manually.

## Removing duplicates

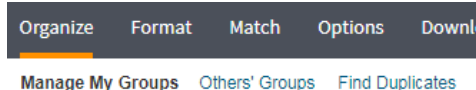
If you are using many sources to obtain references, you should make sure that duplicates are discarded. Check for duplicates by clicking on the **Organize** tab, then **Find Duplicates**.

## Using Groups

Once you begin to add references to your Library, you might want to organise them into groups. On the left of the Library, there is a pane to display **Groups**. By default you will have an **All References** group, an **Unfiled** Group for references which have not been put into a Group, and a **Trash** group, where deleted references are held before they are permanently removed. The **Quick List** is a 'clipboard' area where you can collect together references, e.g. from different groups (see below) for the duration of your EndNote Online session. Once you log out, the quick list is emptied.

### To create and manage a group

- Go to the **Organise** tab and **Manage My Groups**. Click **New Group**. Give your group a name and click **OK**.
- Click back on the **My References** tab, and to add references to your group, click on **All References**. Select the references you want to move and choose the group from the **Add to group...** drop-down menu.
- To view the references in a group, select that group from the list on the left. You can then also delete references from the group showing by selecting the reference and clicking **Remove from Group**
- If another EndNote user chooses to share their group with you, this will be shown under the **Organise** tab, under the sub-tab, **Others' groups**. You will also see the group listed in the left pane under **Groups Shared by Others**.



Groups are effectively a way of tagging your references. If you delete a reference from a group it will remain in **All References** because all you have really done is remove its 'tag'.

Use the options at the top of the displayed list of references to move references between groups, delete or add to the Quick List. To search for references in your Library, use the **Quick Search** box at the top left of the screen and select a group to search or **All References**. Note if you choose **All References** this won't include groups shared with you by other EndNote users.

## Sharing references with colleagues

It is possible to share your 'groups' of references with any other EndNote online user, so that you all have access to the same set of references for collaborative working. You can also share an EndNote Desktop library with others – see section above on 'Sharing your library' for information on doing this.

### Sharing references in a Group

- Go to the **Organise** tab and **Manage My Groups**. From this screen you can choose to share references you file into any of your groups with other EndNote Online users
- Tick on the box in the '**Share**' column for that group
- Click on **Manage Sharing**. You can then invite others by email, and choose whether to give them read only or editing rights to references in the group
- File and figure attachments cannot be shared

### Groups shared by others


- You might also be invited to share references in another EndNote Online user's group. In this case such groups are listed separately in your EndNote Online library as '**Groups shared by others**'
- Click on '**Others' Groups**' under the Organize tab to:
- Choose to show or hide groups shared with you
- Check who the group owner is
- Check your level of access (read only or read-write) as indicated in the **Access** column

## Using EndNote Online with EndNote Desktop

**Please note:** The following only applies to users who also have access to EndNote Desktop.

If you want to take advantage of the full features of EndNote Desktop, particularly the Cite-While-You-Write tools, you can transfer references from EndNote Online to EndNote Desktop and vice versa.

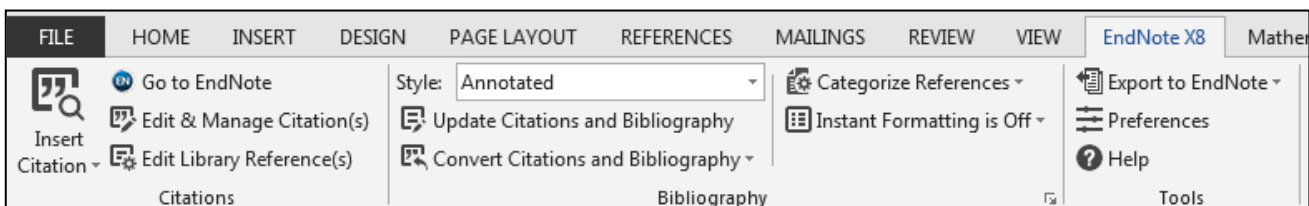
You can automatically synchronise your EndNote Desktop and EndNote Online libraries

- In EndNote Desktop, go to **Tools** then **Sync** or click the **Sync** button in the Library toolbar: 
- Enter your EndNote Online email and password.
- Press **OK** to initiate the Sync process.
- File and figure attachments are transferred

## Using Cite-While-You-Write

Both EndNote Desktop and EndNote Online can work with Word to create bibliographies or insert references from your library into a Word document. You can then format the document into a citation style of your choice, e.g. Harvard, Vancouver. This facility is called *Cite While You Write*.

If you are using a computer with EndNote desktop installed, the Cite While you Write tools for both EndNote and EndNote Online should be included in Word as part of the installation. On **Desktop@UCL computers** or via **Desktop@UCL Anywhere** the EndNote toolbar should automatically appear in Word.



If the toolbar does not display, you need to activate it from the *Options*.

- In Word, Click on **File** then **Options**, then **Add-ins**
- At the bottom of the screen where it says **Manage**, check that **COM Add-Ins** is displayed then click **Go**
- Tick the box for the Cite While You Write add-in and click **OK**
- If the EndNote toolbar does not appear, close Word and re-open the program

If you are using a computer **without** EndNote desktop installed, you can download the Word tools for EndNote Online only, but you may need administrative rights to do so. In Endnote Online, go to the **Downloads** tab and follow instructions for **Cite While You Write**.

Tip: 

If you have EndNote Desktop, you can still choose to use the tools with EndNote Online if necessary.

- Within Word click on the **EndNote X9** tab and then **Preferences**.
- Click on the **Application** tab and select **EndNote online** from the drop-down menu.
- You will need to fill in your EndNote online account details so that Word can communicate with your EndNote Online library.

## Inserting citations in Word

- Place your cursor in the place where you wish to insert a citation in your Word document
- Click near the bottom of the **Insert Citation** icon and then select **Insert Citation** (In EndNote Online, click on **Find Citations**)
- Enter a search term to locate your reference, e.g. author's surname or title keyword
- Click on **Insert**. Your reference is entered as a citation in your document, together with an automatically formatted bibliography / reference list

In EndNote Desktop, you can also select references from your Library first:

- Go to EndNote. In your library highlight the reference(s) you wish to cite (hold the **Ctrl** key for selecting multiple references)
- Go to your Word document. Place the cursor where you wish to insert the citation
- Click near the bottom of the **Insert Citation** icon on the toolbar then select **Insert Selected Citation(s)**

## Formatting citations and bibliographies


EndNote automatically formats inserted citations and creates bibliographies in the chosen output style.

- In Word, click on the drop-down menu next to 'Style:' on the **EndNote X9** tab
- Click on **Select another style** button to view output styles. Click on the column headers to sort the lists by name / category.
- Click on **OK**. Your document will be reformatted to the style of your choice

### Tip:

Some output styles use full journal titles, some use abbreviated. If your journal titles don't display as you expect, contact us for help.


You might want to temporarily un-format your citation – for example, if you are using a numbered style and you want to check which reference the number refers to. To un-format citations:

- Click on **Convert Citations and Bibliography** and then **Convert to Unformatted Citations** 
- To re-format your document, click on **Update Citations and Bibliography**

## Editing citations

Word generates code that is hidden in your Word document to enable it to communicate with EndNote. When you click on an in-text citation or your bibliography, the background will go grey, indicating that code is present. Do not type over or delete and part of your document with code, as this will disable communication with EndNote. Instead, use the Edit Citation command.

- In your Word document select an in-text citation and the background will go grey. Click on **Edit & Manage Citation(s)**
- From the Edit Citation screen, you can change the order of inserted citations (where multiple citations are inserted at the same point) add a prefix, suffix or page numbers to a citation; exclude the author name or year if desired, etc.

Tip:  Keeping track of references used in your work

As you begin to insert citations, EndNote Desktop automatically creates a new group containing those references. This group has the same name as your Word document. This is a useful way to see which of the references in your Library you have used in your work.

When you close the program(s) and re-open them, the group is not automatically displayed in EndNote. Open your Word document and from the EndNote toolbar select Update Citations and bibliography, to see the group re-appear in EndNote.

### Creating an independent bibliography

To create a quick list of references from your library

EndNote Desktop:

- Select the required output style from the drop down menu at the top of the screen
- Highlight the references you wish to include (to choose all go to **Edit > Select All**)
- Right click or go to **Edit** and click on **Copy Formatted**
- In a Word document, click on **Paste**


Your reference list will be displayed in the Output style selected in EndNote

Endnote Online:

- If the references you wish to include are not all in the same group, create a quick list of the references you would like - from **All References**, select boxes and click **Copy to Quick List**
- Click on the **Format** tab, and then **Bibliography**
- Select the references you wish to include, the bibliographic style and the file type from the drop-down options
- Choose to save, print or email the bibliography created.

### Preparing a paper for submission to publishers

The hidden code which enables Word and Endnote to communicate makes the Word file size a lot larger and many publishers request that you remove this code when you submit your paper for publication. You should only do this when you are sure you have finished editing your document.

- Save your Word document (e.g. to your desktop or your own file area).
- Click on **Convert Citations and Bibliography** and then **Convert to Plain Text** 
- This creates a copy of your manuscript, with the citations and bibliography inserted without the code (i.e. the links to EndNote.)
- Save this copy to your own drive. Do not delete your original document with the field codes retained!

To edit your references once the code has been removed, you must edit the original copy of the manuscript and then remove the code again.

### Further information and support

Help for EndNote Desktop is available at the top of the screen 

For EndNote Online, there is a link to a *Getting Started Guide* in the top right of the screen when you click on the **My References** tab.

You can search the EndNote 'Knowledge base' at: [http://clarivate.libguides.com/endnote\\_training](http://clarivate.libguides.com/endnote_training) and user support is available at: <https://support.clarivate.com/Endnote>