

# ENDNOTE WEB GUIDE

## Benefits of EndNote Web

- EndNote Web is available without charge for Yale affiliates at [www.myendnoteweb.com](http://www.myendnoteweb.com).
- Available from anywhere you have an Internet connection.

## Benefits of EndNote Software

- No record limit. (EndNote Web has a 10,000 record limit.)
- Work offline.
- More databases offer direct exporting of search results to EndNote software version.
- Ability to customize and save searches, displays, and output styles.
- Link to PDF files.
- Cite tables, figures, and equations.
- Use term lists for automatic text entry.

## Create an Account on EndNote Web

1. Connect to [www.myendnoteweb.com](http://www.myendnoteweb.com) from a computer on the Yale network. *Note: you will need to login from a computer connected to the Yale network at least once every twelve months.*
2. Click the “Sign Up for an account” link.

## Add References Individually

1. From the “Collect” tab, select “New Reference.”
2. Select the reference type from the drop down menu (i.e., journal article).
3. Enter the reference information and click “Save.”

## Add References using Online Search

Only free databases are available for searching via the Online Search feature. These databases include PubMed (biomedical journal articles) and library catalogs, like Orbis. If the database requires a password, use the Import option below.

1. Select the “Collect” tab.
2. From the “Online Search” page, select the database you want to search from the menu.
3. Enter your search terms and retrieve the results.
4. Click the box to the left of the references you want to keep and choose where to put them in your personal library from the “Add to group...” drop down menu.

### Tip: Create a list of favorite databases

If you prefer not to scroll through the entire list of databases you can create a list of favorite databases. Only the selected databases will display in the “Online Search” menu.

1. Select the “Collect” tab and “Customize this list” from the “Online Search” page.
2. Select one or more databases.
3. Click the “Copy to Favorites” button.

## Add References using Import

1. Search a database and save citation records you want to keep to a file. For database-specific instructions about saving records, go to the EndNote Web Help link and select the “Import Formats” link under “Collect References.”
2. From the EndNote Web “Collect” tab, select “Import References.”
3. Browse to locate the downloaded file containing the references.
4. Select the filter (hint: the filter will have the same name as the database that you used to obtain the references).
5. Click the “Import” button.

### Tip: Create a list of favorite databases

If you prefer not to scroll through the entire list of databases you can create a list of favorite databases. Only the selected databases will display in the “Import” menu.


1. From the “Collect” tab, select “Import References” and “Customize this list.”
2. Select one or more databases.
3. Click the “Copy to Favorites” button.

## Add References using Direct Export

You can import references directly into your EndNote Web account from databases on the Web of Knowledge platform. These databases are: Web of Science, BIOSIS, Medline, and Zoological Record. You can access these databases at [www.isiknowledge.com](http://www.isiknowledge.com).

1. Perform a search in the database.
2. Select records you want to keep.
3. Select the “Save to My EndNote Web” button on the right hand column.

## Use to Locate Full Text

The  button displays beside every reference in your EndNote database. Click on the button to locate full text, if available.

## Edit a Reference/Add Research Notes

Once a reference is in EndNote, you can change it and add your personal research notes by selecting “Edit” in the right column. When a reference is open for editing, you will see two notes fields at the bottom of the screen: one called “Notes” and the other “Research Notes.” Both are available for your use.

## Work with Groups

You can organize your references into groups. To create a new group, select the “Organize” tab and “New Group.”

To add references to a group:

1. From the “My References” tab, select “All of my references.”
2. Check the boxes next to the references you want to put in a group.
3. From the “Add to group ...” drop down menu, select the group name. You can also select “New group” to add a group.

## Share a Group of References

You can share groups of references with other users, including users at other institutions. However, access to shared groups is read only, so other users cannot modify a group you share.

To share a group:

1. Select the “Organize” tab.
2. Click the “Share Group” button next to the group you want to share.
3. Enter or update the e-mail addresses who will share the group. Use the “Enter” or “Return” key to separate addresses.
4. Press the “Apply” button.

## Use While Writing a Paper

Install the EndNote toolbar to cite references in a Word document. From your EndNote Web account, select the “Download Installers” link at the bottom of the screen.

Note for EndNote Desktop Software Users: If you have EndNote X.0.2 for the desktop installed, the “Cite-While-You-Write” plug-in is installed by default in Word. EndNote X users can install the EndNote X.0.2. update patch that is available for free from the “Support & Services” menu at [www.endnote.com](http://www.endnote.com). In Word, choose between EndNote desktop and EndNote Web by clicking “EN Pref” in the EndNote tools menu and clicking the “Application” tab. Select the EndNote application (desktop or Web) you want to use.

To create a bibliography with in-text citations (i.e., APA and MLA styles):

1. From the EndNote Web toolbar in Word choose a bibliographic style by selecting “Format Bibliography.”
2. Position the cursor in your document where you want to insert the reference.
3. From the EndNote Web toolbar select “Find Citations” represented by a magnifying glass icon.
4. Search for the reference you want to cite.
5. Select the reference and click “Insert.”
6. If your style requires you to cite a specific page number, select “Edit Citation” from the EndNote Web toolbar. Select the relevant cited reference and add the page number. Click the “OK” button.

To create a bibliography with footnotes and a bibliography (i.e., Chicago style):

1. From the EndNote Web toolbar in Word choose a bibliographic style by selecting “Format Bibliography.”
2. In Word, position the cursor in your document where you want to insert the reference.
3. From the Word “Insert” menu select “Reference” and “Footnote.”
4. The “Footnote and Endnote” window will open, click “Insert.”
5. From the EndNote Web toolbar select “Find Citations” represented by a magnifying glass icon.
6. Search for the reference you want to cite.
7. Select the reference and click “Insert.”
8. To cite a specific page number, select “Edit Citation” from the EndNote Web toolbar. Select the relevant cited reference and add the page number. Click the “OK” button.

### Tip: Automatic Login to EndNote Web

You can setup EndNote Web to login automatically by selecting “EndNote Preferences” on the toolbar. Under the “Application” tab enter your EndNote Web account information.

**Tip: Create a list of favorite bibliographic styles**

If you prefer not to scroll through the entire list of styles, you can create a list of favorites.

1. In EndNote Web from the “Format” tab and “Bibliography” page, select “Customize this list.”
2. Select one or more styles in the “All” list.
3. Click the “Copy to Favorites” button.

### **Cite References While Offline**

It is possible to cite references in a Word document while working offline. To do this you will need to create temporary citations with the last name of the author and year of the reference you want to cite. You may wish to print a bibliography of your EndNote references before working offline (see below).

Insert the author last name and year in your document between curly brackets. To add a cited page, include the page number after the “@” sign. Here is an example: {Smith, 2007 @100}. If the author name and year are not unique in your EndNote reference database, you can add the first word from the title, e.g., {Smith, Synthesis, 2007}.

When online, select the “Format Bibliography” icon from the toolbar in Word to format the temporary citations in the selected output style.

### **Create a Stand-Alone Bibliography**

You can create a formatted stand-alone bibliography with your references in EndNote Web.

1. Select the “Format” tab in EndNote Web.
2. From the “Bibliography” page, choose the references, bibliographic style, and file format. If you want to export the bibliography to Word, select the RTF file format.
3. Select an option to save, email or print the bibliography.

**Tip: Select individual references for your bibliography**

To create a bibliography with a selected group of references, display “All My References” or a group that you have created. Check the box to the left of individual references and click “Copy to Quick List.” Follow the directions above to create a bibliography using those references.

### **Export References to EndNote Desktop**

You can transfer records in your EndNote Web database to EndNote desktop software. If you have EndNote desktop software version 10.0.2 or higher it is simpler to initiate the transfer from there. Go to the “Tools” menu in the desktop software version and select “EndNote Web.” If you have an earlier software version, follow these steps:

1. From EndNote Web, select the “Format” tab and “Export References.”
2. Select the references you want to export and select "RefMan (RIS) Export" as the export style.
3. Click the “Save” button and save the export file to your computer.
4. Open EndNote desktop software.
5. Open an existing or new library.
6. Select “Import” from the File menu.
7. In the Import dialog, click “Browse” to select the saved file.
8. Select "Reference Manager (RIS)" as the Import Option.
9. For EndNote 8 or later, select "No Translation" as the Text Translation.