

Introductory guide to setting up and using an EndNote Web Basic account

As you carry out your research you will find many useful sources of information and it is helpful to think about how you wish to organise these. One option is to use a reference management tool such as EndNote Web Basic, which will allow you to store information about the sources you find and create references for those that you have used in your work.

This is an introductory guide to using the online version of EndNote Web Basic. To get started you will first need to register for a free account.

Step 1 – registering

Registering for an EndNote Web account

Go to: [MyEndNoteWeb](#) and register online. You will need to click on **Register** to get started where you will have the opportunity to set up an account with an email and password of your choice. A confirmation will be sent to the email address that you have registered with, but you may need to check the spam box as this is sometimes where it ends up. If you already have an account just sign in using your account details from this page. If you have an account but have forgotten your password it is easily retrieved.

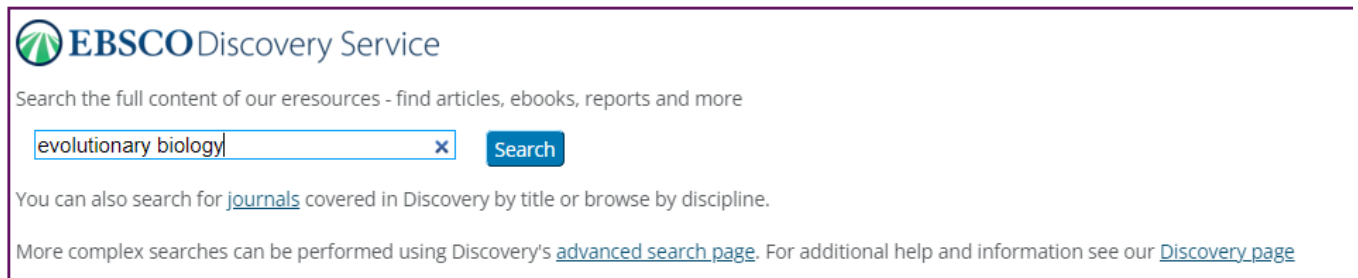
EndNote Web Basic users can create an online library with a maximum of 50,000 references and up to 2G of attachments.

How you get your records/references into EndNote will depend upon where you currently search for literature. Some databases/search tools allow a direct export whereas others require you to save RIS files and import the files in. It is also possible to add records manually.

Step 2 – exporting references from Ebsco databases

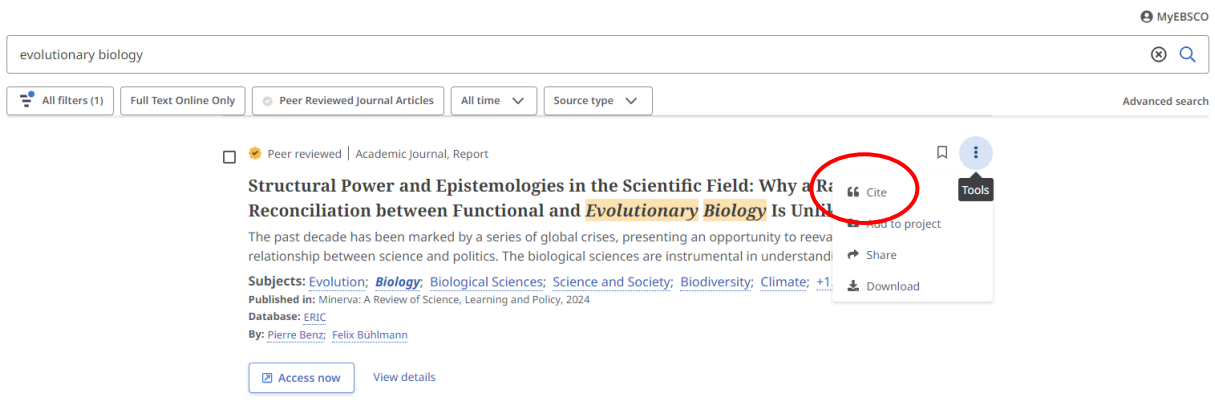
Searching for information in Discovery or EBSCO databases

Go to the [Library Website](#) where you can carry out a Discovery search. This will allow you to send anything useful that you find directly to your EndNote account. Carry out a search on a topic of interest in either basic or advanced search, or within another Ebsco database.



Selecting your records in Discovery

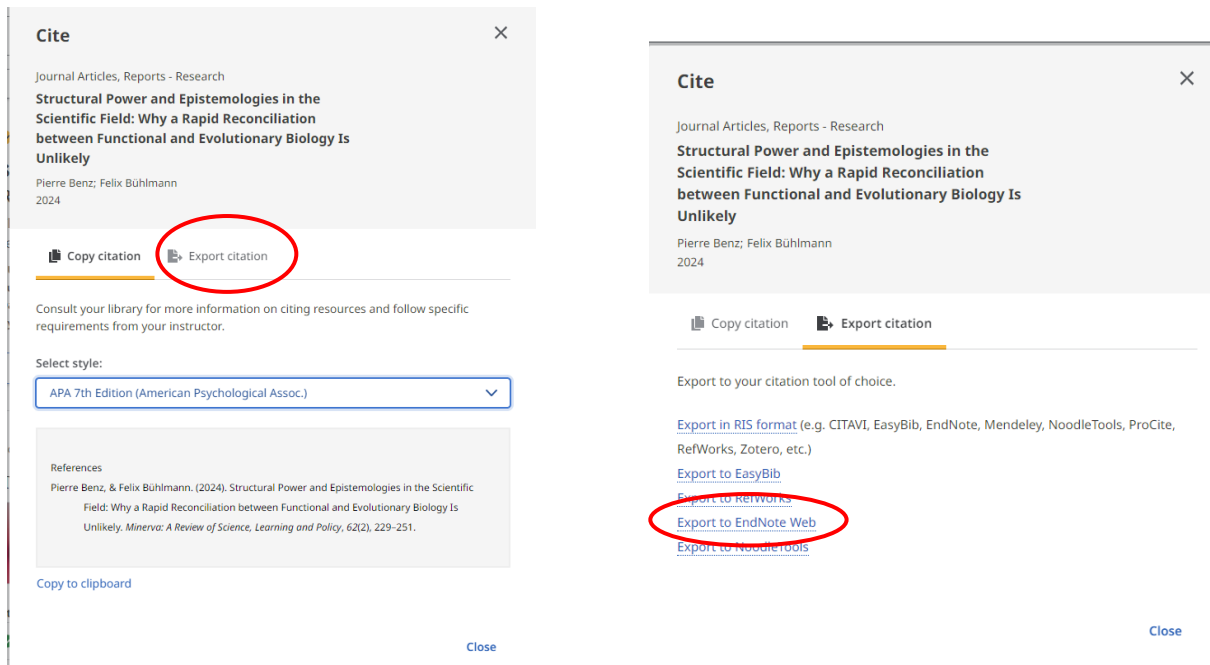
On your list of results select a record and click on the three dots on the right. This will bring up a short options menu, from here click **Cite**:



Sending records to EndNote Web

After clicking Cite a pop up box will appear. On the first tab select the referencing style you wish to use.

Then click on **export citation** and then **Export to EndNote Web**



Viewing your references in EndNote Web

At this stage you may be asked to enter your email address and password for EndNote if not already logged in. Any references that have been exported to EndNote in this way will be stored in the **Unfiled** section. You can organise these into groups if you wish at a later stage (**see Step 4**)

It is important to look at your references carefully once they are in EndNote as you cannot assume that once they are imported that they will produce an exact correctly formatted reference. Check to make sure you have all the details needed for your reference including author, title, date etc. (**See Step 4 for more information about editing**)

Exporting multiple references from Ebsco Discovery

It is possible to export up to 50 references at once from an Ebsco database. To do so first click the check box against all the search results you wish to export the reference for:

The screenshot shows two search results from Ebsco Discovery. The first result is a book titled "Evolutionary Computer Vision [electronic resource] : The First Footprints / by Gustavo Olague." It has a blue checkbox checked, which is circled in red. The second result is a peer-reviewed academic journal article titled "Computationally reproducing results from meta-analyses in ecology and evolutionary biology using shared code and data." It also has a blue checkbox checked, circled in red. Both results include a summary, subjects, and publication information.

☒ Book

Evolutionary Computer Vision [electronic resource] : The First Footprints / by Gustavo Olague.

Summary: This book explains the theory and application of **evolutionary** computer vision, a new paradigm where challenging vision problems can be approached using the techniques of **evo...** [Show more](#)

Subjects: Computer science; Computers; Artificial intelligence; Computer graphics; **Evolutionary biology**; Computational intelligence; +6 more

Published in: Springer eBooks, 2016

Database: Library Catalogue

By: Olague, Gustavo

Status:	Location:	Call number:
✓ Available	OR Online Resources	ELECTRONIC BOOKS

[Access now](#) [View details](#)

☒ Peer reviewed | Academic Journal

Computationally reproducing results from meta-analyses in ecology and evolutionary biology using shared code and data.

Many journals in ecology and **evolutionary biology** encourage or require authors to make their data and code available alongside articles. In this study we investigated how often this ... [Show more](#)


Subjects: INFORMATION sharing; **BIOLOGY**; REPRODUCIBLE research; PERIODICAL publishing; Periodical Publishers

Then go to the top of the search results list and click the cite icon:

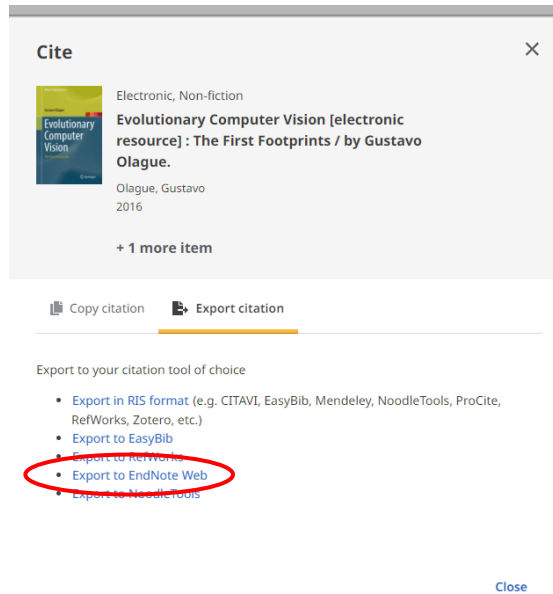
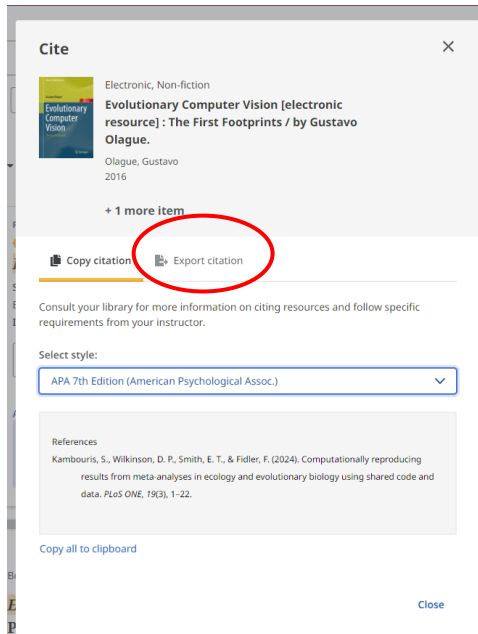
The screenshot shows the top of the search results list for "evolutionary biology". It includes filter buttons for "All filters (1)", "Full Text Online Only", "Peer Reviewed Journal Articles", "All time", and "Source type". Below the filters is a row of icons: a blue square, a download icon, a print icon, a share icon, and a cite icon (two quotation marks). The cite icon is circled in red. To the right of the icons, it says "2 selected" and "Results: 2,040,429".

evolutionary biology

[All filters \(1\)](#) [Full Text Online Only](#) [Peer Reviewed Journal Articles](#) [All time](#) [Source type](#)

 2 selected Results: 2,040,429

Now you will see the reference details for your first item, then underneath it will show that you have more than one result selected. Choose the relevant referencing style, click Export citation and the Export to EndNote Web. All your selected references will go over to EndNote in one go.



Step 3 - Adding to EndNote in other ways

Importing citations from other databases

EndNote has an optional browser plugin tool called EndNote Click which you can install on your device. This allows you to go to any PDF which you may have found on a database or via Google Scholar and import the citation details into EndNote.

On EndNote go to Downloads and install EndNote Click. Follow the instructions to set this up.

Downloads

Formatting.

ferences, and format
r papers in Word.

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16, 9588955, 9218344,
:: 201380034689.3;

EndNote Click

Save time getting full-text PDFs into EndNote with the free browser plugin.

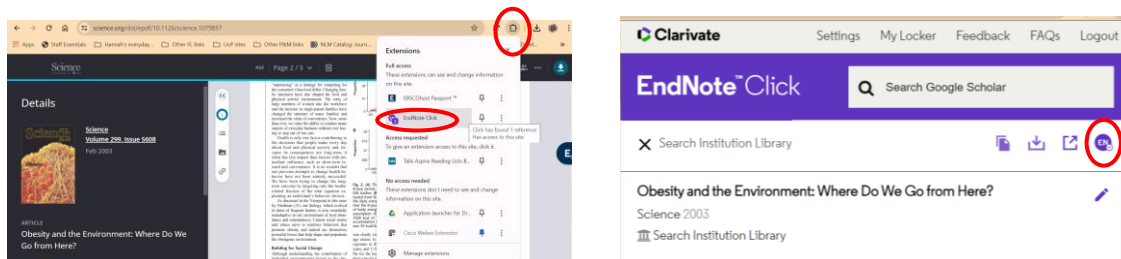
EndNote Click works on thousands of academic websites to help you get one-click access to full-text PDFs using your library subscription and open access alternatives, whether you are on or off campus.

Once you have the PDF, you can easily export it to EndNote.

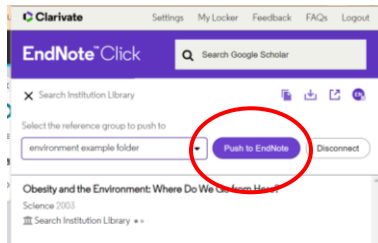
Get started in two minutes and find out why over 200,000 researchers, librarians and academic professionals are already using EndNote Click.

[Find out more and try it for yourself](#)

After setting up EndNote Click when you have found a PDF online which you wish to save the citation for click on the browser extension in your toolbar to open the EndNote Click box. Click the **Push reference to endnote account** button



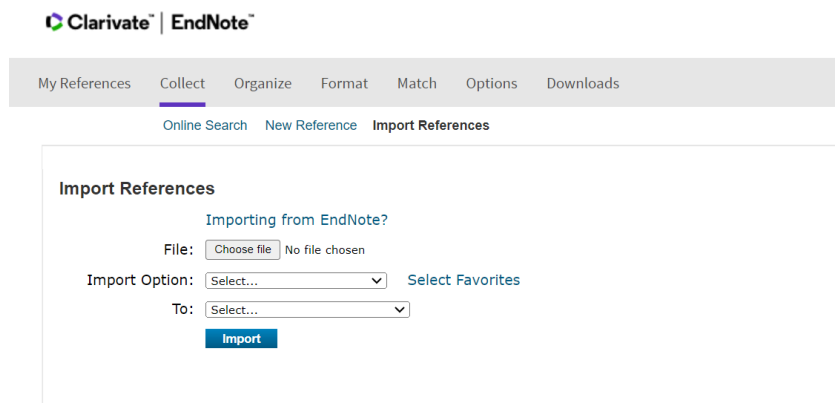
You will be prompted to login then asked which group to put the citation in, then click **Push to EndNote**:



Remember to check that the information which pulls into EndNote is correct.

Importing records using RIS files

Some databases such as Scopus allow you to select your search records and export them as a RIS file. You will need to save the RIS file to a suitable location on your computer for later retrieval. Within EndNote go to the **Collect** tab to open up the Import References window. Find the location of your chosen RIS file and select an appropriate Import Option where the records originated from (eg in this case Scopus) and which group you wish the records to go to within EndNote. Click Import.



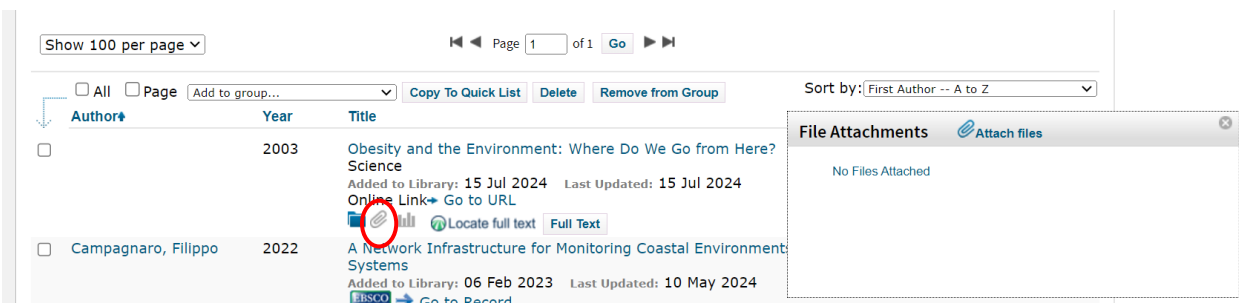
Manual entry

You might decide at some point to add a manual record to EndNote.

From the **Collect** tab in EndNote select **New reference**. Choose your resource type and then add information to the relevant fields that you need to create your reference.

Adding PDF documents

You may wish to add PDFs to EndNote rather than storing them on your computer. You can do this by first inputting the reference then clicking the paperclip under the record. Click Attach file and chose the PDF you wish to attach.



Step 4 - Editing references in Endnote Web

If any of your references look incorrect you will need to edit them yourself. To do this you will need to click on the blue title of the record in your EndNote Web account.

Choose the reference that you wish to edit and then correct or add information to the relevant fields. You will not need to add information to all of the fields listed, just the ones that are required for a reference in the desired style.

Organising your references in Endnote Web

You can organise your references into groups by subjects of your choice. To do this select the **Organize** tab and create a new group with a name of your choice. To put records into your groups select your **Unfiled** references and then choose the references that you wish to move by clicking each record on the left. From here, choose the appropriate group from the **Add to group** drop down list.

It is also possible to share folders with people that you are working with.

Step 5- Creating a reference list or bibliography

To create a stand alone reference list or bibliography in EndNote Web go to **Format, Bibliography** and select where your references are coming from (you can select from groups that you have created - see step 4 for more information) and choose the **bibliographic style you wish to use** along with **RTF file format**. Next select **Preview & Print** to download your list. It is important to check the items contained in this list against the APA 7th guide and edit accordingly (step 4).

My References Collect Organize **Format** Match Options Downloads

Bibliography Cite While You Write™ Plug-In Format Paper Export References

Bibliography

References: - health search ▼

Bibliographic style: APA 7th ▼ [Select Favorites](#)

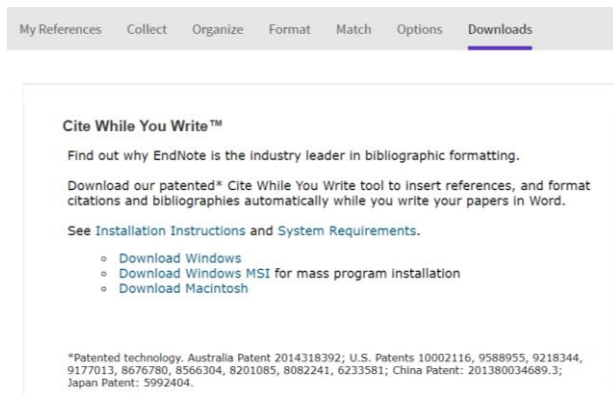
File format: RTF (rich text file) ▼

Save **E-Mail** **Preview & Print**

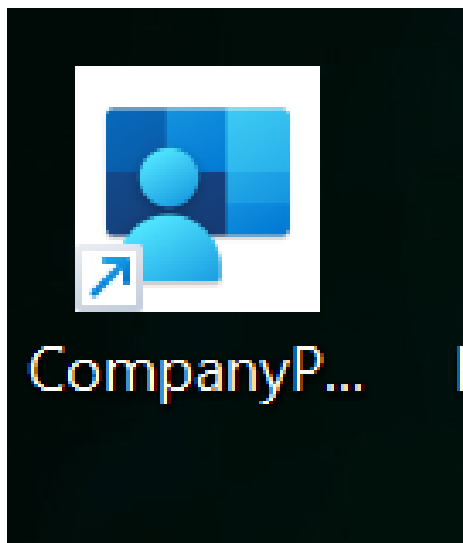
Adding citations as you write in Microsoft Word 365

You can also use the **Cite While You Write** functionality by linking your Word documents using a plug in. This will allow you to cite sources in your work and create a bibliography at the same time as you write.

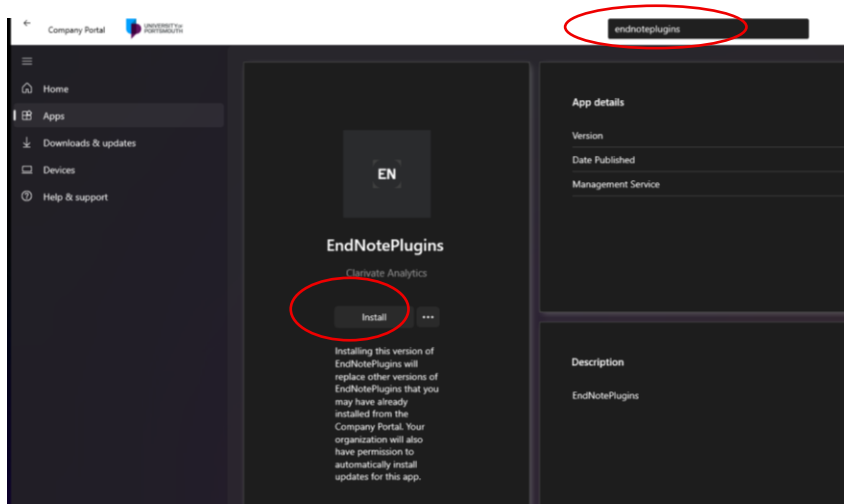
If you are on your own personal device and version of Word go to the Downloads tab to install Cite While You Write:



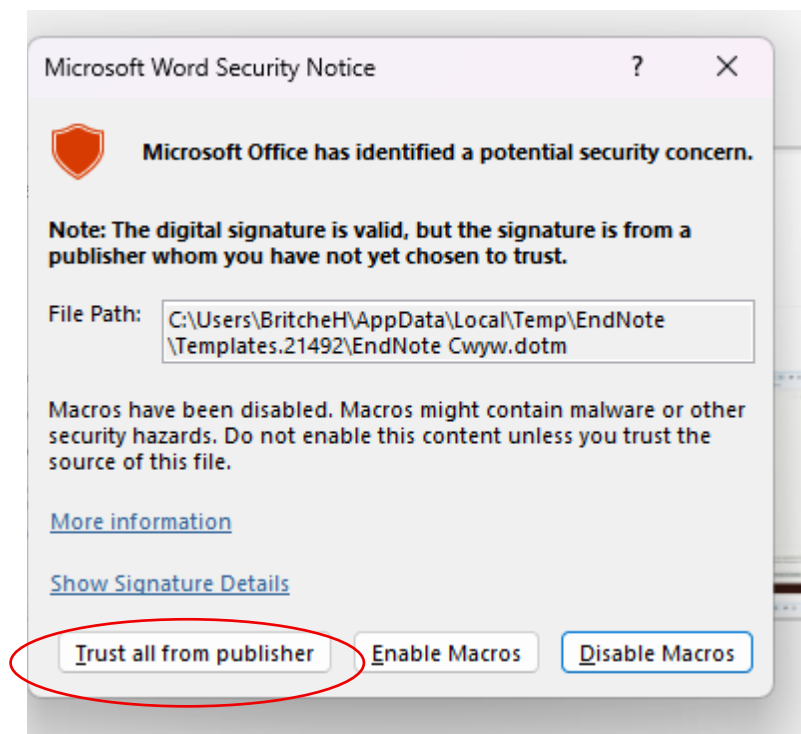
On a University PC or laptop you will need to go to the company portal to install Cite While You Write. The company portal should be available on your desktop.



On the Company Portal search for EndNotePlugins and click install.

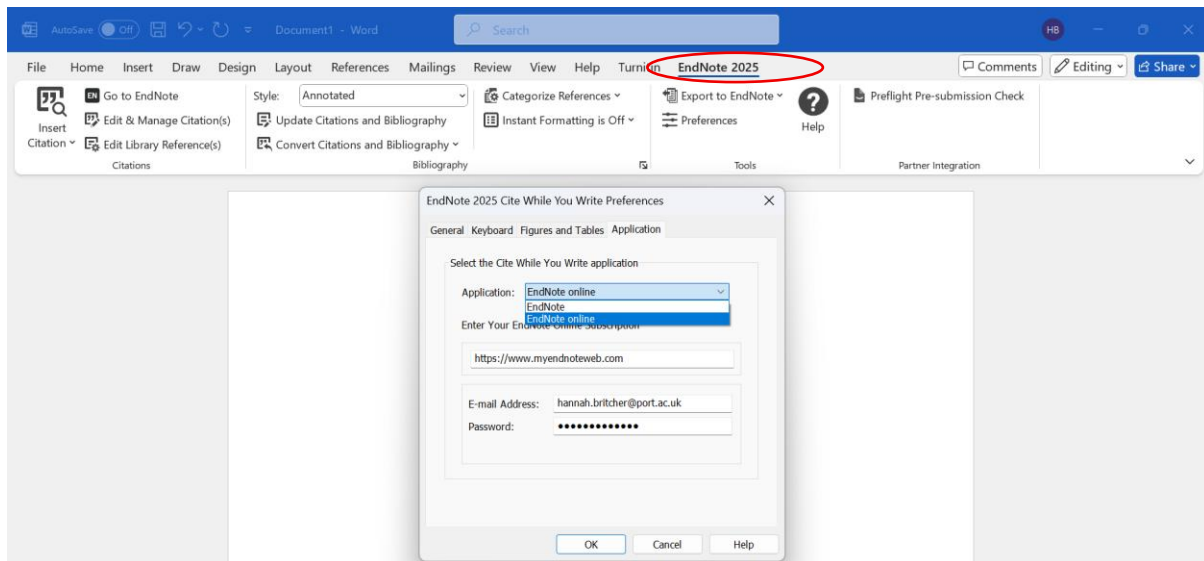


If you see the security notice click 'trust all from publisher'.

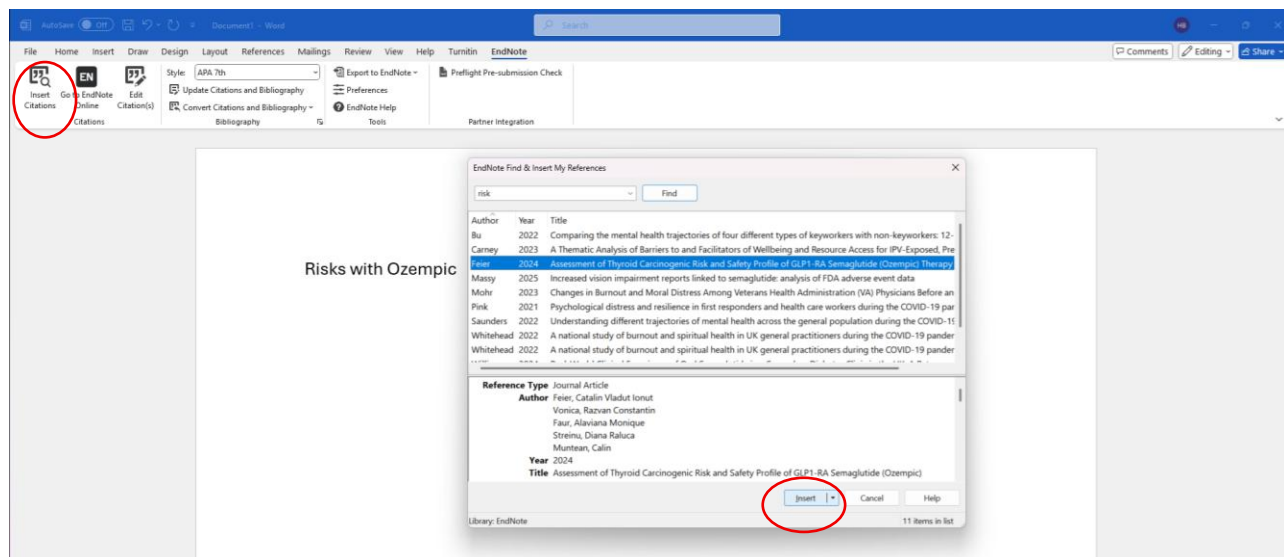


After installing the plugin the EndNote tab will appear in the Word ribbon when you open a Word document, allowing you to insert citations and a bibliography.

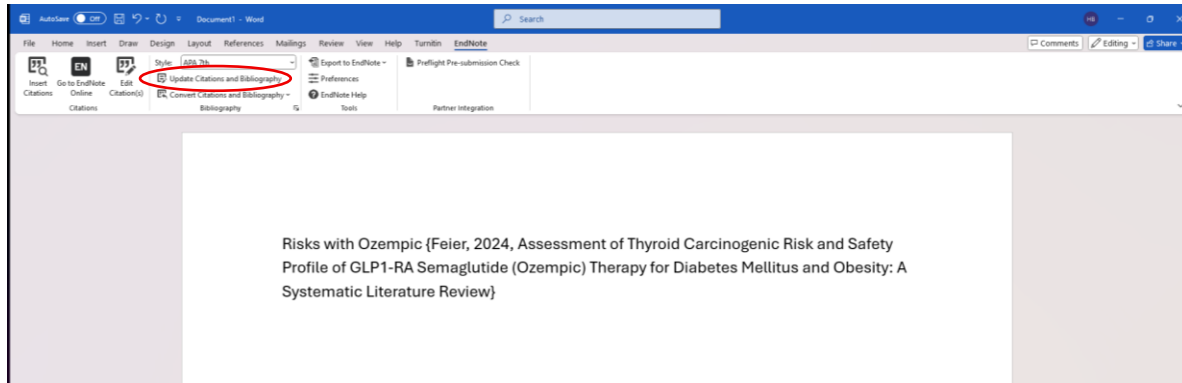
If the EndNote tab is named 'EndNote 2025' go to preferences and choose EndNote Online from the drop down menu. Sign into your EndNote Web Basic account to allow word to access your EndNote Library. Click 'ok'.



To insert a citation start by making sure your referencing style is set correctly. Then go to 'insert citation' and search your EndNote Library for an author or title or even a word from a title. Find the reference you want, click on it to highlight it and choose insert.



Your citation will be inserted. Click 'update citations and bibliography' to convert it to your chosen reference style. You may wish to convert your references after you have finished writing to save clicking update after each citation is inserted.



The citation and bibliography have been reformatted. Remember that the information pulling through is only as good as the information in your EndNote record. If there are any errors go into EndNote to correct them rather than changing the entry on the Word document, as otherwise the incorrect information will pull through each time you insert that citation.



Further help and support:

Additional support is available from the EndNote suppliers site: <https://clarivate.com/academia-government/training-support/endnote/endnote-online/>

Alternatively, you can contact the University Library: <https://library.port.ac.uk/using-the-library/how-we-can-help>