

Getting started with EndNote X7



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Scope

Learning outcomes

- Develop a better understanding of how EndNote works as a tool.
- Understand how EndNote can help you to effectively organise and manage your references for your essays and articles.
- Explore further functionality that will help you to integrate with word processing software and populate your library.

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Getting started with EndNote (Moodle course)	Error! Bookmark not defined.
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Help us improve your training	Error! Bookmark not defined.

Introduction

This document will explain how EndNote works and the benefits of using it as a bibliographic and reference tool. You will find out how you can get started using EndNote to collaborate, cite while your write, create new groups, modify and edit references, compare duplicates and expand your library.

What is EndNote?

EndNote is a software program that allows easy and accurate creation of bibliographies. It allows you to access your research from anywhere and manage your EndNote library from multiple computers. Once created, the bibliography can be formatted into a wide range of styles and works in conjunction with Microsoft Word to automatically format bibliography and reference text.

The desktop version of the software is available free on all University Lab PCs and the web version, that facilitates off-campus working, is available through institutional sign-in using your Essex credentials.

EndNote Desktop

Opening EndNote Desktop on a Lab PC

Step 1: Go to Start > All programs > EndNote.

Step 2: Re-name your library (the default is set to My EndNote Library) then Save this to your (M:) drive.

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EndNote saves your Library as a small .enl file that is easily transferrable on USB.

Step 3: Cancel out of the **Welcome to EndNote** window – we will show you later in this course how to sync your library and access EndNote Web via our institutional sign-in.



Views in EndNote

Layout

You change your layout when you first set-up EndNote using the **Layout** button at the bottom right of your window. The example shown below shows the reference panel on the **Right**.

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Split view allows you to view a list of **All References** as well as more detailed information for the selected reference listed in a scrollable split screen.

Viewing Modes

There are three viewing modes in EndNote:

- **Local Library Mode** (books): displays your local library only it does not display Online Search Results
 - **Online Search Mode** (Globe): is your temporary library and displays online search results only (records retrieved from Online Searches are **not** automatically placed in your Library)
- **Integrated Library & Online Search Mode (recommend)**: records retrieved from an Online Search are automatically placed in your Library under "**unfiled**".

Collecting references

There are three main ways of collecting references:

- Direct import via a website
- Searching online databases within EndNote
- Manually creating a reference in EndNote

Direct import from a website

In the following three examples we will be using the University of Essex Library Catalogue called **encore**, Google Scholar and Web of Science. Other common websites include EBSCOhost, JSTOR and PubMed.

University of Essex Library Catalogue

Step 1: Open your web browser and go to **libwww.essex.ac.uk**, then type in your search criteria (we are using 'Fish') and press **Enter** (or click on the arrow on the right).



Step 2: In the search results, under **Additional actions** click the shopping cart icon to add your chosen reference(s) to your shopping cart, then click **view cart**.

University of Esse	ĸ		THE ALBERT SLOMAN LIBRARY
ASL home Opening hours	Renew books Encore guide E	Resources help FAQs	
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NB: If you are using **Chrome** or **Firefox**, you don't have to add to the shopping cart, you can click on the double quotation marks and it will download the file. You can then just click on it to open it in EndNote

Step 3: Click on **Export to EndNote** in the top ribbon and choose the destination (if applicable), in this example we will choose EndNote (**not** EndNote Online).

University of Essex		THE ALBERT	SLOMAN LIBRAR
SL home Opening hours Renew books	Encore guide EResources help FAQs		Clear my cart Logir
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 Fish / Elizabeth R. DeSombr DeSombre, Elizabeth R Print book 2011 Available at Floor 2 (SH 331) see all 	e, J. Samuel Barkin	Additional actions:	This item is in your bookcart remove
	Choose Destination Export to: EndNote EndNote Online Cance		

You will automatically be redirected to EndNote or prompted to open a Library if you don't already have one open.

Step 4: A window will appear called **Choose An Import Filter**, make sure **EssexUniLibrary** is selected and then click **Choose**.

Note: If you have downloaded a personal copy of EndNote Desktop and you cannot see **EssexUniLibrary** in the list of filters, you will need to download the EssexUniLibrary.enf file from the IT Services Knowledge Base at **answers.essex.ac.uk**. Simply search for EndNote, choose the relevant article and follow the instructions.

Name	Information Provider	
ENVIROLINE (DL)	DIALOG	
Environment Comp (EBSCO)	EBSCO	
Environment Index (EBSCO)	EBSCO	
EnvironmentS (OCLC)	OCLC	
ERIC (DL)	DIALOG	6
ERIC (DS)	DataStar	
ERIC (EBSCO)	EBSCO	
ERIC (OCLC)	OCLC	
ERIC (OvidSP)	OvidSP	
Essav Gen Lit Index (EBSCO)	EBSCO	
EssexUniLibrary	Wellcome Library	
Ethnic NewsWatch (OCLC)	OCLC	
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Created: 24 September 2015, 1 Modified: 24 September 2015, 1 Based On: Category: Wellcome Library	14:31:18 14:31:18	
Created: 24 September 2015, 1 Modified: 24 September 2015, 1 Based On: Category: Wellcome Library Comments: 9 March 2013.	14:31:18 14:31:18	*

Your reference will automatically appear in your library in **All References**, **Imported References** and **Unfiled** ready for you to use.

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Google Scholar

Step 1: Open Internet Explorer, go to scholar.google.co.uk and select Settings



Step 2: Select Show links to import citations and change default from BibTeX to EndNote >Save.

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10 \$ Google's default (10 results) provides the fastest results.	
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Open each selected result in a new browser window.	
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Save	ncel
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Step 3: Search for a subject (eg fossils), author or journal and press Return/Enter.

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Step 4: Make sure you have EndNote open then click on the Import into EndNote link.



Step 5: Click Open to insert reference into EndNote.

Do you want to open or save scholar.enw (222 bytes) from scholar.google.co.uk?	<u>O</u> pen	<u>S</u> ave ▼ <u>C</u> ancel ×
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Web of Science

Step 1: Open **Internet Explorer**, go to **webofknowledge.com**, then search for a subject (eg Fish) and press **Enter** or click on the **Search** button.

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			+ Add Another Field	Reset Form								

Step 2: Select your chosen reference by ticking the box to the left and then select **Save to EndNote Desktop** from the drop down menu.

	Course FordMass of Free		
Select Page	Save to EndNote online Add to Marke	d List	Citation Report feature not available
1. An Autonomous Charge By: Phamduy, Paul; Cheong, IEEE-ASME TRANSACTION: 2017	Save to EndNote desktop Save to ResearcherID - 1 wrote these Save to InCites Save to Other File Formats ADStract	ages: 2953-2963 Published: DEC	Times Cited: 0 (from Web of Science Core Collection) Usage Count ~
2. Effect of Physical Osmos By: Li, Min; Wu, Yang-yang; G	s Methods on Quality of Tilapia Fillets Pro Jan, Zhi-qiang	ocessed by Heat Pump Drying	Times Cited: 0 (from Web of Science Core Collection)

Step 3: Choose how much information you want to send from the **Record Content** drop down menu and then press **Send.**

Send to EndNote	×
1 record selected	
Record Content: Author, Title, Source, Abstract	
Send Cancel	

NB: If you don't select which references you want to send using the tick box, a message will appear asking you to select the **Number of Records** to send. Make sure you select the range or you may find 1,000s of references are added to your library by mistake.

Ser	nd to EndNote		\mathbf{x}
	Number of Records: All records on page Records to		
	Record Content: Author, Title, Source, Abstract Send Cancel	¥	

Searching online databases within EndNote

Something to be aware of, whilst you can search online for journals and publications, **you may not have permission to access the full publication**. The Albert Sloman Library holds the licencing agreements for our entire electronic journal subscriptions, and some of these electronic journals can only be accessed using the Library's connection.

Step 1: Choose your method of connection:

1. Click on the Online Search icon (a globe with a magnifying glass) in the ribbon; or

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File Edit References Groups Tool	s Window Help	
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2. Go to Tools >Online Search in the top menu bar; or

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Sample.enl	Search Library	Ctrl+F
	Spell Check	Ctrl+Y
MAPA 6th	Cite While You Write [CWYW]	+
My Library	Online Search	
All References	Format Paper	•
🎸 Imported References	Change/Move/Copy Fields	
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3. In **Integrated Library & Online Search Mode**, choose from the list of databases in the left-hand navigation pane or click **More...** to bring up a window with the full list of databases to choose from.

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Note: If you have downloaded a personal copy of EndNote Desktop and you cannot see **U Essex** in the list of connections, you will need to download the **U Essex.enz** file from the IT Services Knowledge Base at **answers.essex.ac.uk**. Simply search for EndNote, choose the relevant article and follow the instructions.

Step 2: Enter the search criteria eg **Title = Fish** then press **Search** or **Return** (you can double-check that you are searching the correct online database via the left navigation).

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Step 3: If the number of records returned is large, reduce the number by changing the range **1 through 145** to something more manageable like **1 through 10**, and then click **OK**.

Confirm Online Search			— ×
Found 145 records.			
Retrieve records from:	1	through	145
	1		

If you are in Integrated Library mode, retrieved references will be automatically added to your library, or...

Step 4: You can copy the selected references to a Library of your choice by selecting the references then clicking on **References >Copy References to >New Library** or **Choose your own Library**.

le Edit R	eferences Groups Tools Window	w Help	
Sample	New Reference	Ctrl+N	
4.	Edit References	Ctrl+E	(A @ @ .
10 30	Move References to Trash	Ctrl+D	🔸 🍞 🛃 🧐 🗑
My Librar	Go To	Ctrl+J	
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Impor	E-mail Reference		Choose Library

The number of references retrieved from your last search will be displayed in the left-hand menu.

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Online Search		0	DeSombre, Elizabeth R.; Barkin	J. Sa	2011	Fish				16/10/2015	Book
Library of Congress	(0)	0	Rendalls, Coralie; Fotiades, Tina;	Hyd	1985	Fish : a nev	r play		Territory Nort	16/10/2015	Book
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more		0	Shadwick, Robert Edward; Laud	ler, G	2006	Fish biome	chanics		Fish physiology	16/10/2015	Electronic Boc
		0	Crichton, Charles; Cleese, John		2004	A fish calle	d Wanda			16/10/2015	Audiovisual M
⊟ Find Full Text											

Manually entering references

Step 1: Make sure you have the All References folder selected, then either:

- Press Ctrl + N; or
- From the top menu click on References > New Reference; or
- From the ribbon click on the New Reference icon

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File Edit	References Groups Tools Window Help	EN Contractory 7
Sample	New Reference Ctri	N File Edit Referencer Groupe Teols Window Help
41.0	Edit References Ctr	E The care references oroups roots window rich
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🔼 All Ref	Copy References To	, 6 S G APA 6th 2 C APA 6th 2
Impor	E-mail Reference	My Library Search Opt Mew Reference (Ctrl+N)
Unfile	File Attachments	All References (12) group.

Step 2: Select the Reference Type (Book, Journal etc) from the drop-down list.



The fields displayed will change depending on what type of reference it is.

Step 3: Enter the data in the relevant fields and when complete, you can either:

- 1. Select File > Close Reference; or
- 2. Click on the **red cross** an the top right of the new reference window.

You will be asked to save, press Yes.

Note: The field called **Research Notes** is for you, the researcher, to make notes in. <u>*Do not*</u> use **Notes** as this field may already be populated by the author.

Finding duplicates

When references are imported from many different sources it is likely that you will find you have duplicates in your Library. To search for duplicates make sure the **All References** group selected then click on **References** > **Find Duplicates** (from the top menu).



You will be presented with a screen comparing the duplicate entries side-by-side (the duplicates are also displayed in a list in the background – see above).

If there are any differences they will automatically be highlighted in **blue**. You can edit by selecting text and dragging it from one side to the other. You can **Skip** to leave both references in the library or to deal with them later and clicking on **Keep This Record** will keep that reference and delete the other.

The tool decides that references are duplicates when they have the same reference type (eg Journal Article or Book) and the Author, Year and Title fields are identical.

Managing your references

Creating groups

You can create new groups to organise and make references easier to locate.

Step 1: Right click on My Groups then click Create Group.



Step 2: Give your **Group** a name. In this example we have organised our groups according to where the reference came from.

EndNote	Х7		
<u>F</u> ile <u>E</u> dit	<u>R</u> eferences	Groups	Too
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My Library	^		
🞽 All Refe	rences	(.	18)
Docum	ent2		(1)
🞸 Importe	d Reference	s	(1)
🔲 Unfiled		(18)
🗑 Trash			(0)
= My Gro	ups		
en e	core		(0)
Pul	bMed		(0)
We	bofScience		(0)
New 0	Group		

Step 3: Drag and drop your references into the relevant group. Multiple references can be put into multiple groups so the numbers of your groups won't necessarily tally with your **All References** folder.

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File Edit References Groups	То	ols Wind	ow He	lp							
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My Library		Searc	h 📄	Options +					Search Whole Library	- Match Case M	atch Words
All References	(18)		Author		- Conta	ine .	-				
Document2	(1)		AUGIO		• conta	1.9					
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U Essex	(5)	-				2011					
Webothcience	121	0	DeSomb	re, Elizabeth R.		2011	Fish			1 A	22/10/2
	(2)					2011					22,10,1

Note: Deleting a reference from a Group will not delete it from the All References folder.

References in Word

The EndNote Toolbar in Word 2010

Activating the EndNote options

An EndNote X7 tab will appear in the top menu of Word, simply click on the tab to activate the EndNote options.

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File	Home	Insert	Page I	ayout	References	Mailings	Review	v View	Develope	EndNote X7	
-	🐺 Go to E	ndNote		Style:	Harvard		• 3	Categorize	References *	🗐 Export to End	Note -
	📑 Edit & M	Manage Cit	tation(s)	🧮 Up	date Citations ar	nd Bibliograph	y 📑	Instant For	matting is Off -	of Preferences	
Citation *	🖌 💋 Edit Lib	rary Refere	nce(s)	D Cor	nvert Citations a	nd Bibliograph	iy •			? Help	
	Citatio	ons				Bibliogra	phy		Γ _N	Tools	

Note: if you are using EndNote Desktop or EndNote Online on your personal device and you can't see the EndNote toolbar in Word, you can download the **CWYW** (Cite While You Write) installer from the EndNote support pages at <u>http://www.myendnoteweb.com/help/en_us/ENW/hgs_installingtools.htm</u>.

Word 2010 shows the **icons** with a brief description and scrolling over the icon will give you more information.

👿 🔙 🔊 × 😈 -			
File Home Insert Page L	ayout References Mailings Re	view View Developer	EndNote X7
Go to EndNote Insert Citation + 22 Edit Library Reference(s)	Style: Hanvard	Categorize References *	 Export to EndNote ▼ Preferences Help
Citations	Bibliography	Est.	Tools
	Update Citations and Bibliography Format (or reformat) your document according to the rules of the selected Bibliographic Output style. The EndNote formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. Cite While You Write Press F1 for add-in help.	1 · 4 · 1 · 5 · 1 · 6 · 1 · 7 · 1 · 8 · 1	· · 9 · · · 10 · · · 11 · · · 12 · ·

Inserting references

There are two main ways to insert references:

- 1. Insert Selected Citation
- 2. Find & Insert your References

Insert Selected Citation

Step 1: Open EndNote and highlight the relevant reference.

😣 EndNote X7										
<u>File Edit References Groups To</u>	ols <u>W</u> inde	ow <u>H</u> elp								
🖳 Sample.enl										
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My Library	Search	Options					Search Whole Libr	ary	👻 🕅 Match Case 🕅 Ma	tch Words
All References (18)		Author	Contain	ve	-					- eel
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Imported References (1)	And 👻	Year •	Contain	15	•	1				
Unfiled (18)	And 👻	Title 👻	Contain	ns	•					••
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C. Mr. Ground	0 4 4	Author		Year	Title			Rating	Journal	Last Upd
E⊢ my Groups	0			2000	Fish and fis	heries				16/10/2
Online Search		Commonwealth Economic Com	mitt	1966	Fish				Commonwealt	16/10/2
Q Library of Congress (0)		DeSembre Elizabeth P		2004	A tish called	s wanda				16/10/2
Q LISTA (EBSCO) (0)		DeSombre, Elizabeth R.		2011	Fish					22/10/2
Q PubMed (NLM) (0)	-									
Q U Essex (0)	0 I	DeSombre, Elizabeth R.		2011	Fish				•	22/10/2
Web of Science Core (0)	-									
more	0 E	Ellis, Anthony E.		1985	Fish and she	ellfish pathology				16/10/2
	• •	Gagne, George P.; Medrano, Ri	chard	2009	Fish consur	nption and health			Food and beve	20/10/2
⊟- Find Full Text	0 H	Hood, Robin		1418	Maid Mario	n			The Merry Men	20/10/2
	0 J	obling, Malcolm		1994	Fish bioene	rgetics		**		21/10/20
	0 1	lobling, Malcolm		1994	Fish bioene	rgetics				20/10/2
		ranayı, Panikos	C. hard	1000	rish and chi	ps : a history				16/10/2
		reters, Kenneth C, Moldowan, J P Rendalik Coralie: Entiador Tina	- Hvd	1995	Fich : a power	ker guide: interpretin	g molecular toss		Territory Next	16/10/20
		Shadwick, Robert Edward: Laur	ler G	2006	Fish biomer	thanics			Fish physiology	16/10/2
		funstall. Jeremy		1968	Fish: an ant	iquated industry			Fabian tract	16/10/2
	. ·				un un					

Step 2: In **Word**, position your cursor where you want your citation to appear, then click **Insert Citation** > **Insert Selected Citation** to immediately insert the reference that you have already selected in EndNote.

Go to EndNote	Style: Harva	ard * tations and Bibliography	Categorize R	eferences * atting is On *	Export to EndNote +	
tion + Edit Library Reference(s)	Convert Cit	tations and Bibliography ~			? Help	
insert Citation		Bibliography		Gr.	Tools	
Insert A Insert A Insert A Citation for each reference in the frontmo library. Cite While You Write Press F1 for add-in he	eselected sst EndNote	On the insert tab, the your document. You other document build with your current doc You-can easily chang selected text from the the other controls on; theme or using a form To change the overal To change the iooks: command Both the T can always restore th	galleries includei can use these gall ting block with the second second the formatting o cauck Styles gall Wook of your docu available in the Qu hemes gallery an e look of your doc	items that are d eries to insert f selected text ery on the Hom st controls offe y directly.¶ iment, choose ick Style galle dthe Quick Sty ument to the o Corat reef-bibli	lesigned to coordinate with the overal ables, headers, footers, lists, coverp ures, charts, or diagrams, they also co in the document text by choosing a to net ab. You can also format text direct r a choice of using the look from the c new Theme elements on the Page La ry, use the Change Current Quick Styl les gallery provide reset commands s iginal contained in your current templ	Hook of ages, and oordinate ok for the ty by using- surrent- youttab e Set o that you- late.¶
		DESOMBRE, E.R2	011. <i>Fish</i> , Cambri	dge, Polity Pre	ss.¶	

The result is that your citation:

- will be referred to in the text; and
- the complete reference will be **listed** at the end of the document.

Find & Insert your References

Step 1: Click on the magnifying glass (located above **Insert Citation**), then type in your search criteria in the **Find & Insert your References** window and click **Insert**.

EndNote X7 Fin	d & Insert My References	
heart	✓ Find	
A	····	
Hollenberg	1998 Hypertension : mechanisms and therapy	
•	III	,
Reference Typ Record Number Author: Year: Title: Series Title: Call Number: Keywords: Language:	e: Book r: 1 Hollenberg, Norman K. 1998 Hypertension : mechanisms and therapy Atlas of heart diseases v. 1 British Library ; University of Oxford Libraries Hypertension Atlases. Hypertension physiopathology atlases. Hypertension therapy atlases. English	
		<u>Insert</u> I ▼ Cancel <u>H</u> elp
Library: Traveling	Library	1 items in list

Your reference will be automatically added to your document and your bibliography updated.



Changing the Output Style

You can easily change the **Bibliographic Output Style** for your references using the **Style drop down list** in EndNote and in Word. For this example we are changing from **Annotated** to **Harvard** in **Word**.

Step 1: In **Word**, click on the **Style** drop down box and **Select Another Style** (if the Style you want is showing in the favourites list you can select it here).



Step 2: Type H to jump to the Styles beginning with the letter H, then select Harvard and press OK.

Name	Category	^
Habitat International	Sociology	
Haematologica	Hematology	
Haemophilia	Hematology	
Handchir Mikrochir Plast Chir	Surgery	-
Harm Reduction J	Public Health	
Harmful Algae	Biology	
Harvard	Science	
Harvard (NUIG)	Science	
Harvard (UP DW)	Science	-
	Cancel Help	0

Your reference style is automatically changed from Annotated to Harvard.

On the insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look (DeSombre 2011).

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most control for the selected formal text from the current the more using a format that you specify directly (Hollenberg 1998)

To change the overall look of your document, choose new Theme elements on the Page Layouttab. To change the looks available in the Quick Style gallery, use the Change CurrentQuick Style. Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template. On the insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current documentlook (DeSombre, 2011).

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. Most control offer a choice of using the look from the current theme or using a format that you specify direct / (Hollenberg, 1998).

To change the overall-look of your document, choose new Theme elements on the Page Layouttab. To change the looks available in the Quick Style gallery, use the Change CurrentQuick Style Setcommand. Both the Themes gallery and the Quick Styles gallery provide reset commands so that youcan always restore the look of your document to the original contained in your current template.



Using EndNote Online

You can set up an EndNote Online account and use it to get access to your References when you do not have access to the EndNote desktop application. It can also provide a way for you to share references with another EndNote user.

You should first set up your online account and then configure your online account in a Desktop version.

Types of online accounts

There are two types of online account:

- 1. EndNote online (Basic) free to anyone, only requires registration with an email and password.
- EndNote online (Premium) requires institutional sign-in and gives users additional entitlement (eg access to our recommended Styles and online search connections) through Essex's subscription to Web of Science.

Details of entitlement options can be found at: <u>http://endnote.com/sites/en/files/m/pdf/en-comp-chart.pdf</u>.

Creating your account for the first time

To ensure you get the full entitlement we recommend you choose log into Web of Science first using the institutional (Shibboleth) log on, then register for a personalised account which can be used across the WoS platform, and includes access to EndNote Web.

Step 1: Go to http://wok.mimas.ac.uk/ and select 'Problems with access? Try this alternative link'.

http://woil.mimas.ac.uk/	•م
Constant	Planners
w Favorites Tools Help	
ng service 2 internet start @	res sace salery * 👔 becuments - est jupolea
WEB OF SCIENC	E ^{nt} THOMSON RELITER
in proud partnership with Ji	Supporting Education and Islandon
	Site Kap Contact Helpdesk
	Web of Optimum Complex for UK Education
Home	web of science service for UK Education
News	The Web of Science Service for UK Education provides a single route to all the Thomson Reuters products subscribed to by your institution. Connect to the Web of Science Service, search using the 'All
About	Database search' or select an individual product from the drop down list.
Support	Check the <u>Subscribers List</u> to see if your institution has a <u>subscription</u> to Web of Science and any additional resources.
FAQ	Cick here to access
Feedback	Wob of Science
	Problems with access? Try as Alternative Link, tatution name, username and password required. Please note you may need to try alternative options.
Master Inumalities	Pender Information - Demoine normally
master Journal List	Service mormation - Running normality.

Step 2: Under 'Institutional users (Shibboleth)', choose 'UK Federation' then click Go.



Step 3: Search for and select University of Essex then click **Continue**.

THOMSON REUTERS WEB OF KNOWLEDGESM

Explore literature in the sciences, social sciences, arts and humanities and publish bibliographies.

Which organisation would you like to sign in with?

Start typing the name of your organisation (e.g. Anywhere College) in the search box, and options will appear below:

University	of Essex				Continue
or <u>Let me</u>	choose from a	list			
Need hel	p logging in?				
	Th <u>Access</u> i	e UK Access M bility statement	anagement Feder Privacy and Coo	ration kies Policy	
		Search	over <u>All Sites</u>		

Step 4: Enter your University username and password when prompted then click Login.

University of Essex
Thomson Reuters SP (Web of Knowledge & EndNote Web) requires that you log in with your University of Essex ID and password.
University of Essex ID ben@essex.ac.uk
Don't Remember University of Essex ID
Clear prior granting of permission for release of your information to this service.

Step 5: Once you have been taken to the Web of Science platform, click the **Sign-in** button on the righthand side of the top toolbar, then **Register**.

Web of Science ¹⁹⁸ InCites ¹⁹⁴ Journal Citation Reports [®] Essential Science Indicators ⁹⁴⁴ EndNote ¹⁹⁴			Ser	iln 👻 elp English 🛩
WEB OF SCIENCE [™]		· · · ·	Sign In	SON REUTERS
			Kegister	
Search All Databases 🔛		My	X Log Out	ry Marked List
Basic Search 🔽				
Example: oil spill* mediterranean	Topic 🖌	Search		Click here for tips to improve your search.
Add Another Field Reset Form				
TIMESPAN				
All years				
○ From 1900 10 2015				
MORE SETTINGS				

Step 6: Follow the on-screen instructions to Register then click Submit changes.

NB: Remember that this password is not linked to your University of Essex account and you will not be asked to change it every 3 months like your University password, so choose something memorable.



Step 7: You will be asked to verify your email address before being prompted to create your account.

Email Verification	8	Registration	8
We need to verify your email address. An email has been sent to: ben@essex.ac.uk. If you do not receive an email within 5 minutes, please check your spam folder or click here to resend the email. Please copy and paste the code enclosed in the email in the box below:		Thank you for registering, Ben. You are now signed in to Web of Science. Note: Your "Signed In" status is indicated at the top of every page. To protect your privacy, remember to log out each time you finish your session. Your sign in e-mail address is: ben@essex.ac.uk. You selected automatic sign in. You can change your settings in Settings.	

This one email address and password can then be used across the Web of Science platform both for setting up alerts and saving searches in WoS, and also for use with EndNote online. It will also provide remote access for Web of Science if users sign in to their personal accounts on campus (on campus sign in required every 6 months to continue to be able to access this way).

Step 8: Sign in to EndNote online by clicking on **EndNote** in the top menu bar and then type in your **EndNote Online credentials**



NB: Your EndNote Online library will appear blank until you Sync it with your EndNote Desktop library.

Step 8: Return to EndNote Desktop and enter your EndNote Online credentials **Edit** > **Preferences** > **Sync** > **EndNote Account Credentials**. Make sure **Sync Automatically** is ticked.

EndNote Preferences		×
EndNote Preferences Change Case Display Fields Duplicates Find Full Text Folder Locations Formatting Libraries PDF Handling Reference Types Sorting Spell Check Sync Temporary Citations Term Lists URLs & Links	Synchronize your data with your EndNote account. Learn more Upgrade or create your two-year EndNote account to get the latest features and enable Sync Enable Sync Enable Sync EndNote Account Credentials E-mail Address: ben@essex.ac.uk Password: Sync this EndNote Library M:\Endnote\My EndNote Library.enl Sync Automatically	
EndNote Defaults R	evert Panel OK Cancel Appl	y

Step 9: Now run the Sync in your EndNote Desktop library by clicking on the blue sync button.

C 1											
😸 EndNote X7											
<u>File Edit References Grou</u>	ups <u>T</u> o	ols <u>W</u> ind	ow <u>H</u> elp			_					
🥺 My EndNote Library.enl											
🍯 🌒 👔 IEEE			• 🖣 👰 🍳 🖌	1	🐑 🥑 🖌	-2	🏷 🕝 😤 🕜	Quick Search	2 🛓 🎗	Hide Search Pane	I.
My Library		Searc	h Options +						Search V	Yhole Library	Match Cas
All References	(20)		Title	•	Contains	•	Fish				
Unfiled	(0)	And 🕶	Year	•	Contains	•					
🗃 Trash	(0)	And 🕶	Title	•	Contains	•	<u></u>				
⊡- My Groups		• 0	Author	Yea	r Title			Rating	Journal	Last Updated	Reference Type
🛅 Fish	(20)	0	Benkwitt, C. E.	201	7 Predator effects on	ree	f fish settlement depe		Ecology	13/01/2017	Journal Article
PubMed	(20)		Buddhachat, K.; Siengde	201	7 Effects of different	om	ega-3 sources, fish oil,		In Vitro Cell De	13/01/2017	Journal Article
			Christensen, K. Y.; Raym	201	7 Perfluoroalkyl subst	anc	es and fish consumption		Environ Res	13/01/2017	Journal Article
- Online Search		0	Di Lena, G.; Casini, I.; Ca	201	7 Total mercury levels	in	commercial fish specie		Food Addit Con	13/01/2017	Journal Article
Library of Congress	(0)	0	Drobac, D.; Tokodi, N.; L	201	6 Cyanobacteria and c	yan	otoxins in fishponds an		Harmful Algae	13/01/2017	Journal Article
🔍 LISTA (EBSCO)	(0)	•	Drobac, D.; Tokodi, N.; L	201	6 Corrigendum to "Cy	ano	bacteria and cyanotoxi		Harmful Algae	13/01/2017	Journal Article
Q PubMed (NLM)	(20)	0	Dural, A. C.; Celik, M. F.;	201	6 Laparoscopic resecti	on	and intracorporeal anas		Ulus Travma A	13/01/2017	Journal Article
Q U Abat Oliba	(0)	0	Heins, D. C.	201	7 The cestode parasite	Sc	histocephalus pungitii:		Parasitology	13/01/2017	Journal Article
🙆 II Aherdeen	(0)	0	Hofmann, V.; Sanguinet	201	7 Sensory Flow as a Ba	sis	for a Novel Distance Cu		J Neurosci	13/01/2017	Journal Article

Return to your EndNote Online library and refresh (F5) to check your libraries are linked.

Signing in to an existing EndNote online account using institutional sign-in

To ensure you get the full entitlement we recommend you log into Web of Science first using the institutional (Shibboleth) log on, then sign in to EndNote online.

Step 1: Go to http://wok.mimas.ac.uk/ and select 'Problems with access? Try this alternative link'.



Step 2: Under 'Institutional users (Shibboleth)', choose 'UK Federation' then click Go.



Step 3: Search for and select University of Essex then click Continue.

THOMSON REUTERS
WEB OF KNOWLEDGE SM

Explore literature in the sciences, social sciences, arts and humanities and publish bibliographies.

Which organisation would you like to sign in with?

Start typing the name of your organisation (e.g. Anywhere College) in the search box, and options will appear below:

University of Essex		Continue
or Let me choose from a l	ist	
Need help logging in?		
The <u>Accessit</u>	UK Access Management Federation ility statement Privacy and Cookies Policy	
	Search over All Sites	

Step 4: Enter your University username and password when prompted then click Login.

University of Essex
Thomson Reuters SP (Web of Knowledge & EndNote Web) requires that you log in with your University of Essex ID and password.
University of Essex ID ben@essex.ac.uk Password
Don't Remember University of Essex ID
Clear prior granting of permission for release of your information to this service.

Step 5: Once you have been taken to the Web of Science platform, click on **EndNote** in the top toolbar.

b of Science TM InCites TM Journal Citation Reports ®	Essential Science Indicators	INote ™ EndNote	Sign In 💌 He	lp English <mark>v</mark>
VEB OF SCIENCE [™]			() тномзог	N REUTERS
earch 🔰 All Databases 👱		Му То	ols 👻 Search History	Marked List
		Welcome to the	new Web of Science! Vi <mark>ew</mark>	a brief tutorial
asic Search 🔽				
Example: oil spill* mediterranean	С Торіс	✓ Search	Click he improve	re for tips to your search.
+ Add Another F	ield Reset Form			
JESPAN				
All years 🗸				
All years From 1900 v to 2015 ~				

Step 6: Enter your **University of Essex email address** and your **EndNote online password** and click **Sign In**.





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Duick Search Search In All My References Search Wy References Us My References Us My References Us My References Us Us (0) Trash (0) U of Essex (0) Build a porfile to showcase your own work. ResearcherID	Getting Started Find Collect references by searching online databases or importing your existing collection. Search an online database Create a reference manually End your peet notential journel	Store & Share Organize and group references in any way that works for you. Then share your groups with colleagues. Create a new group Share a group Find duplicate references
	Use our plugin to format bibliographies and cite references while you write.	Connect ^{Beta} Interact and connect with researchers from around the world. • Connect now

Configuring EndNote desktop for an online account

If you decide to use the online access regularly, the best way to link it up is through your EndNote Desktop preferences. This will allow you to configure your online account (you only do this once) to enable '**Sync**'.

Step 1: Go to Edit > Preferences > Sync > Enable Sync > Ok.

B	ndNote X7		EndNote Preferences
	Edit) References Groups Undo Cut Copy Paste Paste With Text Styles Clear Select All Copy Formatted Find and Replace	Tools Winds Ctrl+Z Ctrl+X Ctrl+C Ctrl+V Ctrl+A Ctrl+K Ctrl+R	Change Case Display Fields Display F
⊜	Font Size Style Output Styles Import Filters Connection Files Preferences	> > > >	

Step 2: Enter your **University of Essex email address** and your **EndNote online password** then click **OK**.

Ising an EndNote	account makes it easy to keep your EndNote library in sync.	
Create a new End	dNote Account	
If you don't ha	ave an EndNote account or aren't k Sign Up.	Sign Up
EndNote Account	Gredentials	
EndNote Account E-mail Address:	Credentials ben@essex.ac.uk	
EndNote Account E-mail Address: Password:	Credentials ben@essex.ac.uk	

Step 3: Your online account's details will have been filled in. Tick the **Sync Automatically** box if you want EndNote to run sync automatically. If you untick the box you can manually sync (see below).

EndNote Preferences		×
Change Case Display Fields Display Fonts Duplicates Find Full Text Folder Locations Formatting Libraries PDF Handling Read / Unread Reference Types Sorting Spell Check Sync Temporary Citations Term Lists URLs & Links	Synchronize your data with your EndNote account. Learn more Upgrade or create your two-year EndNote account to get the latest features and enable Sync Enable Sync EndNote Account Credentials E-mail Address: Bassword: Sync this EndNote Library Sync this EndNote Library Sync Automatically	
EndNote Defaults R	evert Panel OK Cancel App	bly

Using Sync

Once set up, simply click the Sync button Sin the top menu bar when you want to sync.

When synching for the first time, you will be prompted to create a backup (recommended).



Sync works in the background, when it is running; you will see a Status Bar in the bottom right of the screen, Retrieving account info...

After a Sync you will see a Sync Status option just under the All References group.



Click this to see the current status.

Sync Status		×
Sync Details		
Sync was last run:	Tuesday, November 03, 2015 at 13:14:43 PM GMT Standard Time	
Sync Status:	All changes have been sent.	
Error Code:	None	
Error Message:	None	
Local Sync Library		
Library Name:	Train-the-trainerSession.enl	
References:	39	
Groups:	1	
Group Sets:	1	
Attachments:	1	
Online Sync Library		
Username:	sally.swaine@essex.ac.uk	
Serial Number:	5091799894 (Premium until November 03, 2017)	
References:	39	
Group Sets:	1	
Attachments:	0 (0)	
Sync Limits		
Number of References:	1000000 (999961 can still be added)	
Number of Groups:	5000 (4999 can still be added)	
Number of Group Sets:	5000 (4999 can still be added)	
Attachment Storage:	10240.00 GB (10240.00 GB can still be added)	
Copy text to dipboard		Close

You will be asked to

NB: You can only Sync one desktop Library to your EndNote online account. If you open another Library and Sync you will be warned that the two Libraries will be merged.



Licencing

The University of Essex has a site-wide licence for EndNote Desktop. It is available (for free) in all our Lab PCs and free to staff to download on their work machine (see below).

You can also obtain a personal copy of EndNote Desktop at a discounted rate through Bilaney Consultants:

"For each licence purchased, EndNote X7 may be installed on up to 3 computers (both Mac and Windows) for exclusive use by the licence holder."

To install and/or purchase the latest version of the software visit the University of Essex Software catalogue at <u>http://www2.essex.ac.uk/cs/services/software/catalogue.asp</u>, type in **EndNote** (in Option 5) > **go** > **EndNote X7**.

Software Catalogue

Software packages available on Computing Service maintained machines on CAMPUS. Where a package is also available for staff or students to download and/or use on their own PCs, this is noted in the details		Softwar	e Catalogue	
Option 1: Show alphabetical list of all packages Show all	Alphabetical list Computing Serv	ting of software packages (by se vice machines.	earch of 'endnote') available for use at Essex on	ě.
Option 2: Show packages by category (select one) Application () 30	SOFTWARE PACKAGE	CATEGORY	INSTALLED IN [more]	NOTES
Option 4: Show packages available at (select one) AV Seminar Rooms V () (0)	Endnote Web	Application (Bibliographic, General, Word Processing)	GRR, Hatfield, Labs A, B, C, D, E, F, G, H, I, J, K, M, O, P, OSA	
Option 5: Search for specific package endnote X	Endnote X7	Application (Bibliographic, General, Word Processing)	AV Seminar Rooms, GRR, Hatfield, IT1, IT2, Labs A, B, C, D, E, F, G, H, I, J, K, M, O, P, R, Library, OSA, SEECLIB	
The person responsible for the content of this page is Chris Mead.	The person res	ponsible for the content of this p	page is <u>Chris Mead</u> .	

Staff installations on a work machine (free)

To install EndNote on a University owned or operated computer, follow the instructions for **Staff Installations – Windows**.

Endnote X7



Installing a personal copy

Students (and Staff) can purchase a personal copy of EndNote (approximately £75) to put on their laptops or home computer, follow the instructions for **Student Installations – Windows & Mac**.

Endnote X7



You will be taken to the Bilaney Consultants website where you can purchase either a boxed CD set or downloadable software at a discounted rate through our EduServ CHEST agreement.

Code	Description	Price exc. VAT	Price inc. VAT	
N3197	EndNote X7 Personal Copy for CHEST Customers - CD	£62.50	£75.00	BUY NOW
ownlo	ad Software			
ownloa _{Code}	ad Software Description	Price exc. VAT	Price inc. VAT	

You can find out which Bibliographic product is right for you by checking the comparison document from Thomson Reuters at the following address: <u>http://www.essex.ac.uk/it/training/courses/endnote-current-versions-comp.pdf</u>.

IT Services help

- Email: <u>it.helpdesk@essex.ac.uk</u> or visit the IT Helpdesk in the Silberrad Centre
- Purchase a personal copy: <u>http://www2.essex.ac.uk/cs/services/software/catalogue.asp</u>
- Classroom training: <u>https://shortcoursesgateway.essex.ac.uk/</u> (search for EndNote)
- Moodle course: <u>https://moodle.essex.ac.uk/course/view.php?id=4718</u>

EndNote.com help

- Downloads: <u>http://endnote.com/downloads</u>:
 - o output styles
 - o import filters
 - o connection files for online databases
 - writing templates
- Training: <u>http://endnote.com/training</u>:
 - \circ guides
 - o resources
 - training calendar (live webx tutorials)
- Support: <u>http://endnote.com/support</u>:
 - o FAQs
 - o Technical support

Your feedback

Your feedback is important to us.

You will receive an email asking you to complete an online feedback survey.

Please take a few minutes to tell us what you think.