



EndNote X8

Research Smarter.

Online Guide



Don't forget to download
the iPad App



EndNote online

EndNote online is the online component of our popular *EndNote* reference management and bibliography-creation software.

Whether you use *EndNote* online through *Web of Science*, with *EndNote* desktop, or on its own – you reduce the time you spend searching, updating, and cleaning your research and formatting

documents. Depending on how you access *EndNote* online, you may see different features and options.

EndNote basic

If you only have access to *EndNote* online, and not *EndNote* desktop, you are considered a basic user. While your feature set is limited compared to those using *EndNote* online in addition to the

desktop, it's still perfect for the new-to-research and writing student.

EndNote online for desktop users

Moving from *EndNote* basic to *EndNote* on the desktop opens an array of advanced features and options and increases storage space in the online environment.

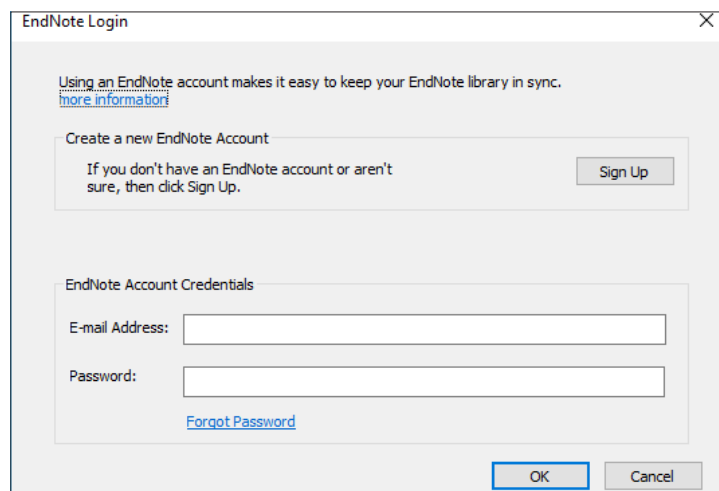
Get started in 5 steps

① Create your EndNote account

Desktop users

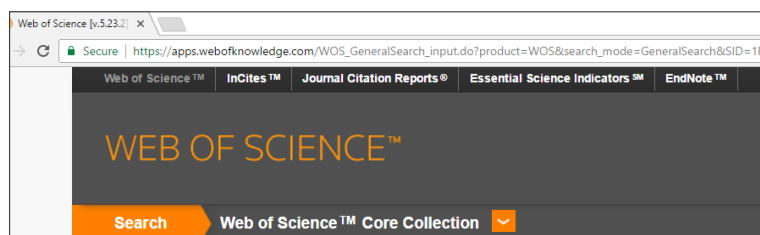
With your *EndNote* library open, select the Sync button. You will be prompted to either create an account or log in to your preexisting *EndNote* online account.

This process syncs your desktop and online libraries. Learn more about syncing in Step 3.



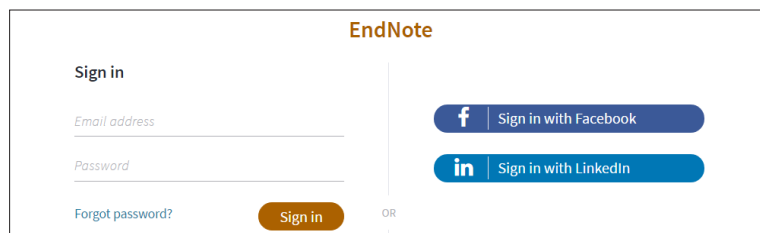
Web of Science users

Sign in to the *Web of Science* and click the *EndNote* link from the top menu bar to open your *EndNote* online library.



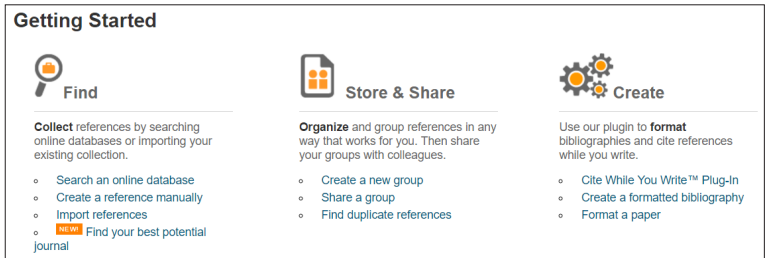
Basic users

If you do not have *EndNote* desktop or access to *Web of Science*, go to my.endnote.com and sign up for a free account.



Access Getting Started Guide

The first time you sign in to your *EndNote* account, you will see the Getting Started Guide, which offers links to help you collect, organize, and format your references.



Getting Started

- Find**
 - Collect references by searching online databases or importing your existing collection.
 - Search an online database
 - Create a reference manually
 - Import references
 - Hot tip!** Find your best potential journal
- 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
- Create**
 - Use our plugin to **format** bibliographies and cite references while you write.
 - Cite While You Write™ Plug-in
 - Create a formatted bibliography
 - Format a paper



② Install plug-ins

Get started

Go to the Downloads tab. Here, you will see all available plug-ins.

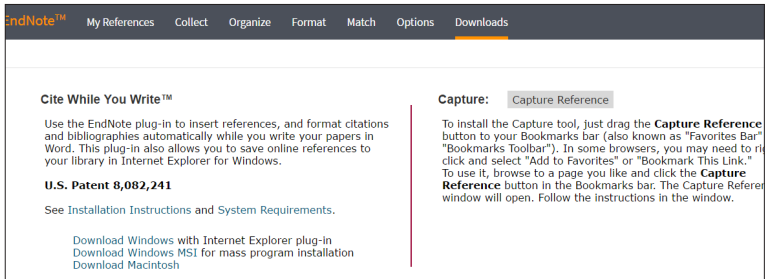
Install Capture Reference tool

To automatically import references into your *EndNote* library, you can use the Capture Reference bookmarklet with any browser or the *EndNote* Capture toolbar for Internet Explorer (Windows only).

Install Cite While You Write

Download the Cite While You Write plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Microsoft Word.

Note: If you are using *EndNote* X8, you should not install the plug-in because it is already included.



EndNote™ My References Collect Organize Format Match Options Downloads

Cite While You Write™

Use the EndNote plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Word. This plug-in also allows you to save online references to your library in Internet Explorer for Windows.

U.S. Patent 8,082,241

See Installation Instructions and System Requirements.

Download Windows with Internet Explorer plug-in
Download Windows MSI for mass program installation
Download Macintosh

Capture: Capture Reference

To install the Capture tool, just drag the **Capture Reference** button to your Bookmarks bar (also known as "Favorites Bar" or "Bookmarks Toolbar"). In some browsers, you may need to right click and select "Add to Favorites" or "Bookmark This Link." To use it, browse to a page you like and click the **Capture Reference** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window.



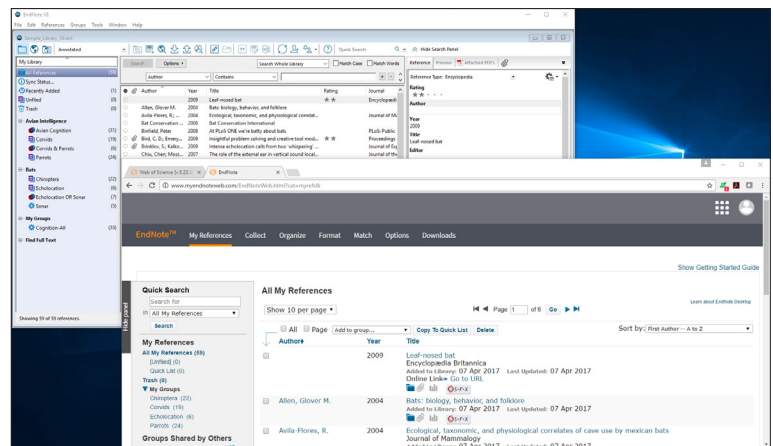
③ Add references to your library

There are six ways to add references to your library: by syncing with the desktop, direct export, capture, online search, import text file, and manual entry.

1) Sync libraries

After syncing your desktop and online references, as shown in Step 1, all your references and attachments will be available both on your desktop and online through any Internet browser. References can also be synced to the *EndNote* iPad app and to *EndNote* on the desktop on your other computers. (Hint: Open a new empty library for the first sync on other computers.)

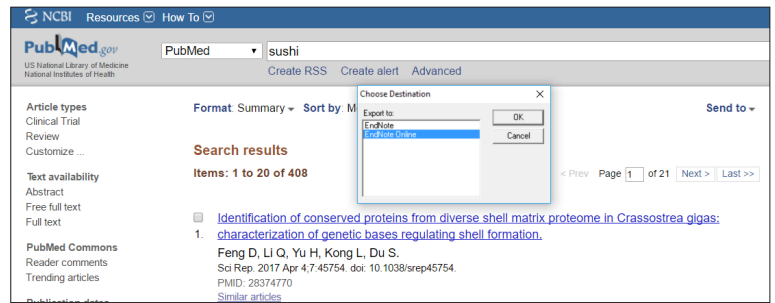
During the first sync, all references in both the *EndNote* desktop and online libraries will be copied to the other library, as well as all group information, but only custom groups will be displayed in *EndNote* online. Once synced, any change made in any synchronized library will be reflected in all synchronized copies of the library.



The image shows two screenshots. The top one is a screenshot of the EndNote desktop application interface, displaying a list of references with columns for Author, Year, Title, Rating, and Journal. The bottom one is a screenshot of the EndNote online web interface, showing a search bar, a list of references, and navigation options like 'Page 1 of 6' and 'Sort by: First Author - A to Z'.

2) Export to EndNote online

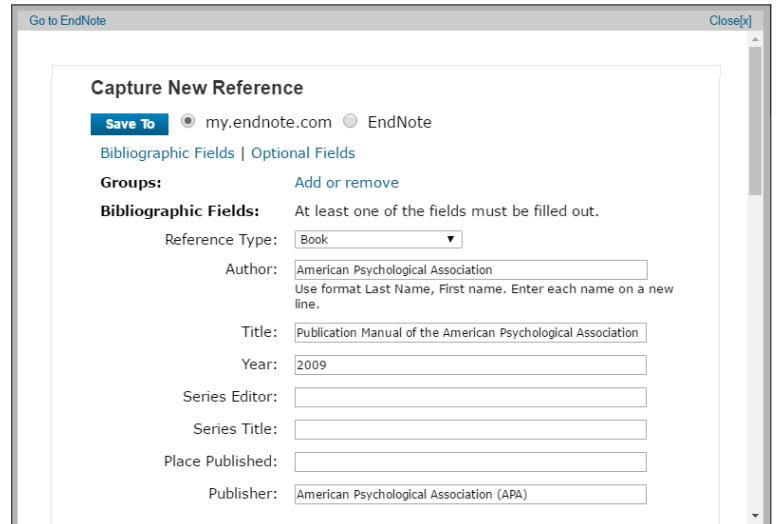
The *EndNote* online Internet Explorer plug-in makes it possible for you to export references from online databases that have an option for saving to *EndNote* if you are using Internet Explorer, Google Chrome, or Microsoft Edge. *Web of Science* and EBSCOhost databases do not require a plug-in for direct export. See Install plug-ins section on previous page.



3) Capture references

Use the Capture Reference feature for online resources that do not have options for direct export.

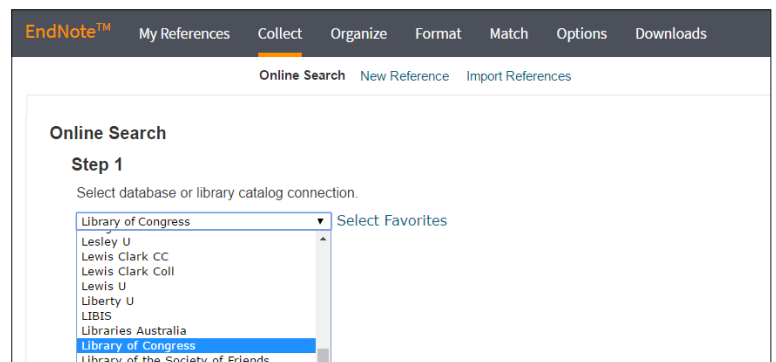
Capture Reference scans the bibliographic information presented on a Web page and creates a reference for you to save to a new or existing group. Some databases, such as Pubmed, allow you to capture an entire page of references at once.



4) Online search

You can search many library catalogs and databases through the *EndNote* interface.

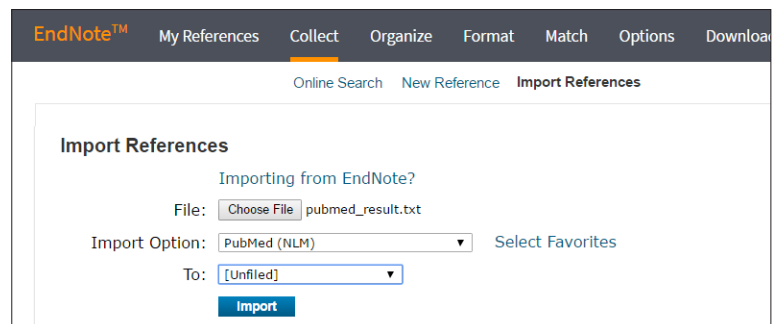
- Click the Collect tab; then click Online Search.
- Select an online database.
- Perform your search.
- Mark desired references, and use the drop-down menu to add them to your library.



5) Import references

To import references in a plain-text file, data in the file must be tagged in machine-readable format.

- Click the Collect tab; then click Import References.
- Browse to select the text file.
- Select the Import Option (filter) that matches the database where you created the file.
- Select the group for imported references.
- Click Import.



6) Add new reference

To enter a reference manually:

- Click the Collect tab; then click New Reference.
- Select the appropriate reference type.
- Enter data into the desired fields. Fields commonly used by major style guides will appear first.




4) Organize and share your references

Create groups

By default, *EndNote* places references into the Unfiled group. You can create up to 5,000 groups to organize your references in any way that works for you.

- Select the references you want to group.
- Click on Add to group from the drop-down menu and select New group.
- Name the new group and click OK.

Note: You can place a reference in multiple groups. To see which group(s) a given reference is currently in, click the Folder icon  below the reference.



Eliminate duplicate references

It is possible to have duplicate records in your library. To identify and delete them, use the Find Duplicates link under the Organize tab. *EndNote* compares the Author, Year, Title, and Reference Type fields when identifying duplicates.



Share references with other EndNote users

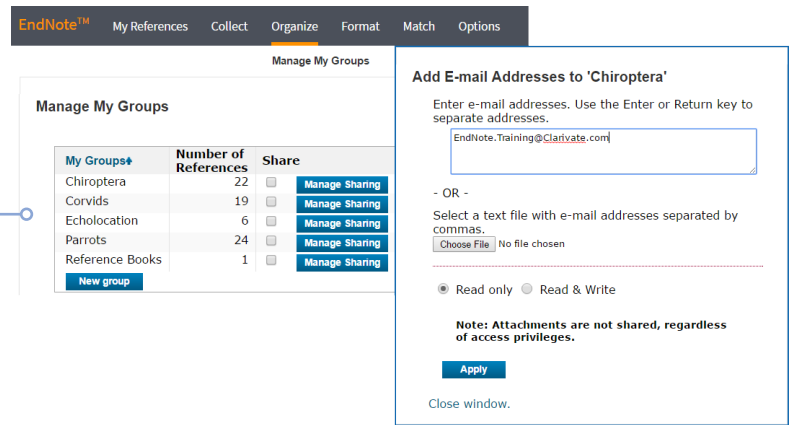
Use the Manage My Groups link under the Organize tab. Click the Manage Sharing button next to the group you'd like to share.

Enter the email addresses of the people with whom you'd like to share.

Note: Any individual you share your group with must have an *EndNote* online account in order to view references and you must use their account email address. Enter the email address they use to access *EndNote*.

Choose whether to give your colleagues Read-only access, or Read & Write access. Click Apply.

- Read-only access allows designated users to view references, use them in Word documents, or copy them to their own library.
- Read & Write access allows the designated user to do everything allowed with read-only access, as well as editing, adding, or deleting references.



Understanding icons

Groups that you are sharing with others display the Share icon. You can click on the icon to view or modify user access.

When another user shares a group with you, it appears under Groups Shared by Others. When the Read-Write icon is present, you have permission to add, change or remove references in a group.

5) Use Cite While You Write

Using Cite While You Write, you can instantly insert references and format citations and bibliographies while you write your papers in Word.

1) Find and select citations

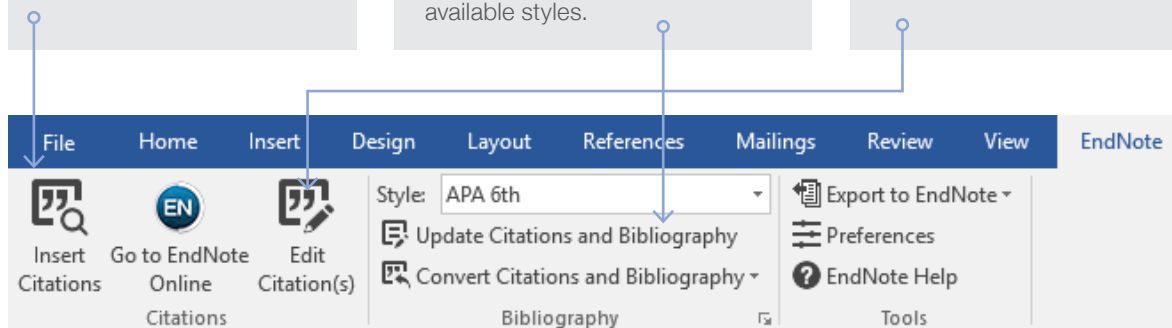
and insert them into your manuscript.

2) Formatting bibliographies

Reformat your citations and bibliography with one click. Choose from thousands of available styles.

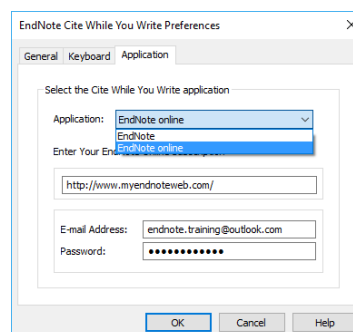
3) Editing citations

Edit citations to add information such as a page number, or remove a reference from a group of citations.



Cite references from both online and desktop

Cite While You Write is compatible with *EndNote* online and desktop. You can start a document using one environment but can switch to the other at any time.



⑥ Match your manuscript to the right journal

Use manuscript matcher to make a more informed decision about the best potential journals for your manuscript. Our patent-pending technology analyzes millions of data points and citation connections from the *Web of Science* to identify meaningful relationships between these publications and your work.

Find the right journal for submitting your manuscript

With a few key pieces of information – your title, abstract, and references – you'll have JCR data, key journal information and publisher details at your fingertips to help you compare your options and submit your manuscript.

- Click on the Match tab.
- Enter the title and abstract of your manuscript.
- Select the *EndNote* group holding your references from the drop-down (optional).
- Click Find Journals.



EndNote™ My References Collect Organize Format Match Options Downloads

Find the Best Fit Journals for your Manuscript Powered By Web of Science™

Enter your Manuscript Details:

*Title:
Bird brains: How can something so small be so smart?

*Abstract:
A comparison of the cognitive abilities of birds versus dogs, cats, and apes.

*required

References:
-Parrots

Including references allows us to match more data points relevant to your manuscript

Find Journals >

Compare your options and start the submission process

EndNote returns a list of possible journal matches and provides results that give you:

- Match Score
- JCR Impact Factor
- Journal
- JCR Category
- Rank in Category
- Quartile in Category
- Link to journal's website
- Publisher



Find the Best Fit Journals for your Manuscript Powered By Web of Science™

6 Journal Matches

< Edit Manuscript Data Expand All | Collapse All

Match Score	JCR Impact Factor Current Year 5 Year	Journal	Similar Articles
▶ [Bar]	1.318 2015 1.533 5 Year	BEHAVIOURAL PROCESSES	8
▶ [Bar]	1.211 2015 1.266 5 Year	JOURNAL OF FELINE MEDICINE AND SURGERY	4

⑦ Access and Expand your EndNote Library from the iPad App

Download the EndNote for iPad app

Download the *EndNote* for iPad app from the App Store – and access your library from anywhere. The *EndNote* app allows you to log in to your account and continue working on your library. With the *EndNote* app, you can:

- Use the app's built-in browser or Safari™ to search *Web of Science*, Google Scholar, or PubMed to expand your library, and even pull in full-text PDFs.
- Organize references and create new groups.
- Email PDFs to collaborators.
- Sync changes made to the desktop and online.



iPad 4:12 PM 100%

ENDNOTE™

Journal Article

GROUPS
Corvids

AUTHOR
Taylor, A. H., Miller, R., Gray, R. D.

YEAR
2012

TITLE
New Caledonian crows reason about hidden causal agents

JOURNAL
Proceedings of the National Academy of Sciences of the United States of America

VOLUME
109

ISSUE
40

PAGES
16389-16391

DATE
Oct

Capacity and capabilities	Reference storage	File attachment storage	Cite While You Write (Microsoft Word)	Bibliographic styles	Web of Science data and links
EndNote basic users	50,000	2GB	Limited Feature Set	21	-
EndNote basic & Web of Science users	50,000	2GB	Limited Feature Set	6000+	√
EndNote desktop users	Unlimited	Unlimited	Full Feature Set	6000+	-
EndNote desktop & Web of Science users	Unlimited	Unlimited	Full Feature Set	6000+	√

EndNote™ basic My References Collect Organize Format Match Options Downloads

Account Information

Your roaming access has expired and therefore you will not see Web of Science™ and Full Text links and you will not be able to search Web of Science™. Please login from your institution to reactivate roaming. Your account only provides limited functionality. Please login from your institution or purchase the latest version of EndNote to access all the functionality.

Account	Status	Days Remaining	To Reactivate
Web of Science™	Roaming Expired	0	Please login from your institution
EndNote Web	Active		

EndNote™ My References Collect Organize Format Match Options Downloads

Account Information

Your roaming access has expired and therefore you will not see Web of Science™ and Full Text links and you will not be able to search Web of Science™. Please login from your institution to reactivate roaming. Receive a free subscription to my.endnote.com with advanced features for two years when you upgrade to the latest version of EndNote.

Account	Status	Days Remaining	Expiration Date	To Reactivate
EndNote X8	Active	731	08 April 2019	
Web of Science™	Roaming Expired	0		Please login from your institution

This user has a free, limited online version of EndNote.

A basic user has 21 styles and 2GB of storage.

This user has EndNote installed on their desktop.

In addition to the basic features, this user has unlimited file storage and all the import, export, and style options.

EndNote™ basic My References Collect Organize Format Match Options Downloads

Account Information

Account	Status	Days Remaining	Expiration Date	To Reactivate
Web of Science™	Roaming	366	07 April 2018	Please login from your institution

EndNote™ My References Collect Organize Format Match Options Downloads

Account Information

Account	Status	Days Remaining	Expiration Date	To Reactivate
EndNote X8	Active	581	08 November 2018	
Web of Science™	Roaming	366	07 April 2018	Please login from your institution

This user has Web of Science.

In addition to the basic features, this user has extra styles and will see Times Cited counts and other *Web of Science* data and links in their library.

This user has Web of Science and EndNote desktop.

In addition to unlimited file storage and additional capabilities, this user will see Times Cited counts and other *Web of Science* data and links in their online library.

Contact sales

Phone: 1-800-722-1227

Email: endnote.sales@clarivate.com

Science Head Offices

Americas

Philadelphia: +1 800 336 4474

+1 215 386 0100

Europe, Middle East and Africa

London: +44 20 7433 4000

Asia Pacific

Singapore: +65 6775 5088

Tokyo: +81 3 5218 6500

Need Help?

Additional training resources

Whether you want to get the basics or fine-tune your skills, *Clarivate Analytics* can help with a variety of training resources, including recorded trainings, live expert-led WebEx sessions, and downloadable materials at clarivate.libguides.com/endnote_training/home

Getting Technical Help

Search our Frequently Asked Questions Knowledgebase or contact our expert technical support staff at endnote.com/support.

Ask the community

One of the most important benefits of *EndNote* is our knowledgeable and committed user base. Follow us on Twitter™, or join our user forum accessible on our online platform at my.endnote.com.

Additional features only available with EndNote desktop

- Share your entire research library with other collaborators.
- Store as many files as you need with no limit on library size or cloud storage.
- Automatically organize references into groups based on searches and rules you create.
- Designate a watch folder on your desktop to auto-import PDFs.

- Annotate PDFs with searchable notes and comments with a built-in PDF viewer.
- Use journal titles or abbreviations in your bibliography – regardless of which one appears in the reference – with prebuilt lists for journals.
- Create and customize bibliography styles or reference types.
- Create bibliographies with subheadings or add multiple bibliographies at the ends of sections to one document.
- And much more. See our video at <https://www.youtube.com/watch?v=9PHUGeBgtf0> to find out what you are missing if using only *EndNote* online.