Setting up EndNote Desktop and EndNote Online accounts

This guide takes you through the process of setting up EndNote Desktop and EndNote Online accounts.

User guidance

Downloading EndNote onto a personal computer (all staff and students): Go to the university's Software Library.

Downloading EndNote onto a University laptop (staff and postgraduate researchers: You may need to contact IT to request temporary admin rights before you can download EndNote.

Associate users: If you're unable to access the university's Software Library, you may not have the appropriate permissions to download EndNote. Instead, go to EndNote's interface on the web and click **Register** to set up an **EndNote Basic** account.

For help with using EndNote:

- Go to our Using EndNote Desktop and Using EndNote Online guides
- Join one of our term-time Using EndNote webinars on Teams (all students)
- Book onto our Using EndNote Desktop for Researchers session (postgraduate researchers and staff),
- Request a Literature Searching Support one-to-one appointment

Contents

Downloading and setting up an EndNote Desktop library

1. Go to the university's Software Library

- Go to the University's Software Library

- This will take you to **Workspace**, where you should login with your university **username and password**

2. Scroll down to 'how we make it available'

- On the **EndNote** page, scroll down to the **How we make it available** section

- Under the **For personal use** heading, click the **EndNote** link to install on personally owned computers

3. Click on the installer link

Scroll down the **EndNote Software Downloads** page to find installation options for Microsoft Windows and Apple Mac
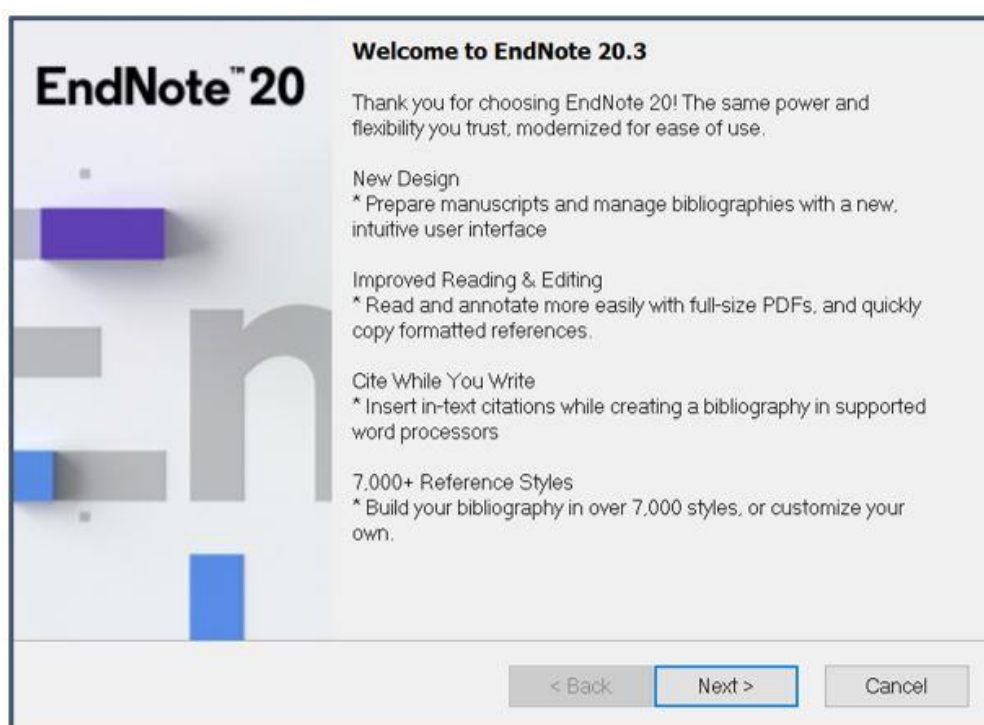
For a Windows Device

- Note the **product key** - you will need to enter this as part of the installation process

- Click the **Windows installer** option

For an Apple Mac

- Click the **Mac Installer** link to download and launch the file

4. Open the installer and start the download process

- Having clicked the **Windows installer**, you may see another window prompting you to download the file, click **Download**

- Once EndNote has finished downloading, click the **EN...exe** file (bottom left corner of your screen), then **Open**

- When prompted to allow the app to make changes to your device, click **Yes**

- The **Welcome to EndNote set up wizard** should display, click **Next** to begin the installation

5. Enter your user and organisation information

- On a Windows device, enter the **product key** you noted earlier (see step 2) - (you shouldn't need this for a Mac)

- Click **Next**

- On the **User Information screen**:

    o In the User Information box, change Windows User to your own name

    o Set the organisation to 'University of Nottingham'

- Continue to click **Next** through subsequent screens, **accepting the license agreement** when prompted

- Take note of the **default destination folder** for your EndNote installation, or select your preferred destination

- Once EndNote has been successfully installed click **Finish**
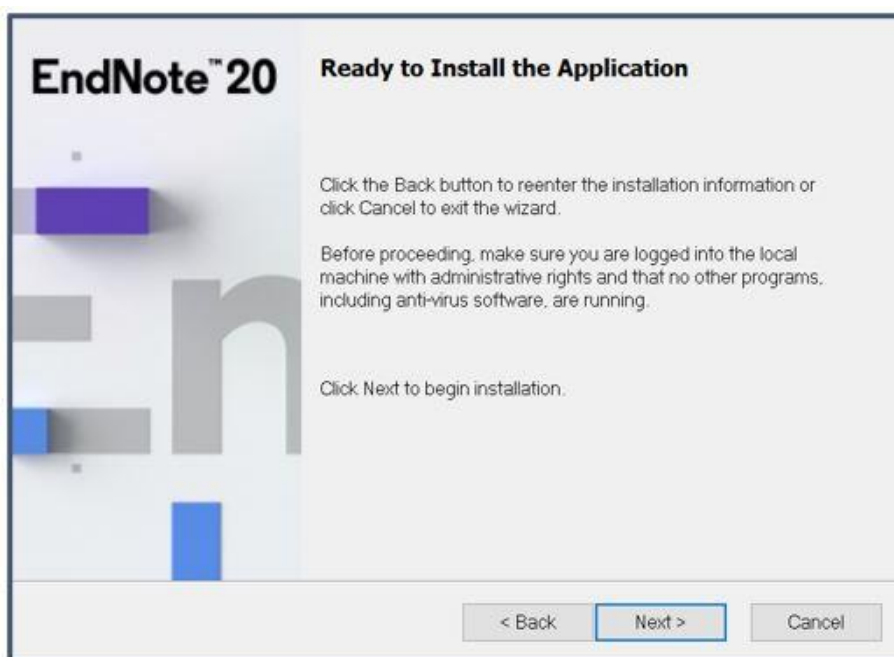
6. Click next and download EndNote

- Go to the destination folder selected during the installation process to find and open **EndNote**

- You may be prompted to accept the **End user License Agreement**, then click **Next**

- If prompted to install later EndNote updates, click **Ignore this**

- EndNote will now be downloaded on your computer – click the EndNote Desktop icon to open EndNote
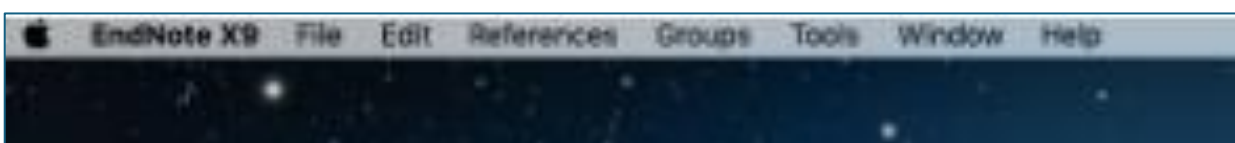
7. Open your EndNote Desktop Library

- **Note -** If you are opening EndNote from a university PC, this would be the first screen you see when you open EndNote from the start menu

When you open EndNote Desktop, it will open '**Set up EndNote Library'** screen, select:

- **Open an existing library** - for example, if you already have an earlier version of EndNote installed on your device

- **Create a new library** - if you are installing and using EndNote for the first time – make sure you ensure you **save your EndNote Library directly to your device or onto a memory stick** and **not** in a cloud-based service (such as OneDrive or iCloud) - EndNote and cloud storage are not compatible, it can corrupt the library if it is saved in this location.
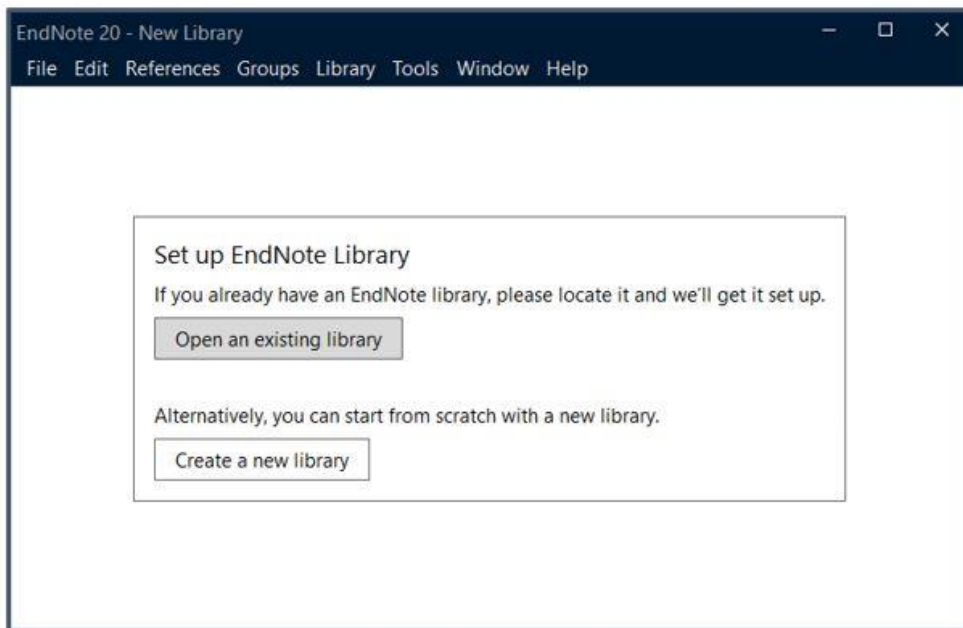
If you are using a mac, this does not always open automatically and it can appear that EndNote has not opened. If this happens, go to 'file' in the very top right-hand side of the screen and select 'create a new library'.

8. EndNote Desktop download complete

- Having saved your new EndNote library it will open automatically

- Click the **maximise button** (top right corner) to make it full screen

- You can start importing references and using your new EndNote Desktop Library, for more information visit the Using EndNote Desktop guide

- If you want to also use EndNote Online, or if you want to backup your EndNote Library, follow the instructions below to create an EndNote Online account

Creating an EndNote Online account and syncing with EndNote Desktop

You will need to download and set up an EndNote Desktop library, before creating an EndNote Online account.

9. Creating an EndNote Online account

Having set up an EndNote Desktop account, we recommended you also create an **EndNote Online account**. This will ensure your EndNote Desktop Library is backed up. As EndNote Online is web-based it also means you can access your account from wherever you are.
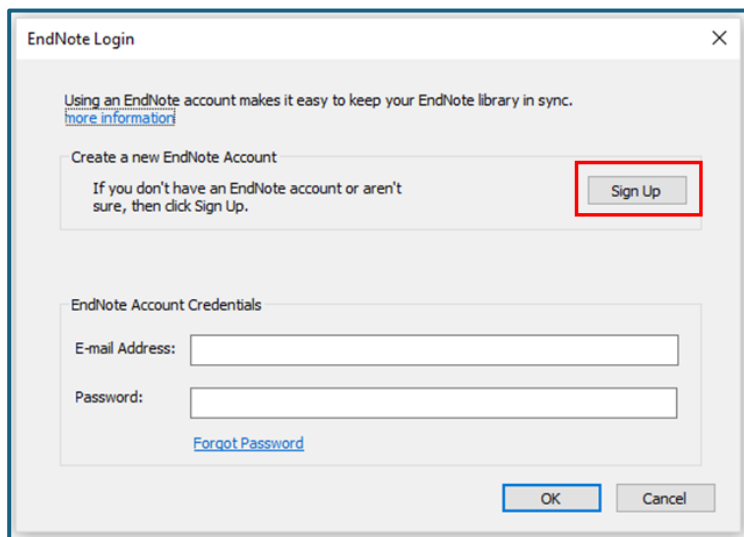
From your new EndNote Desktop library:

- Click **Sync Configuration** (top left corner) to create an EndNote Online account

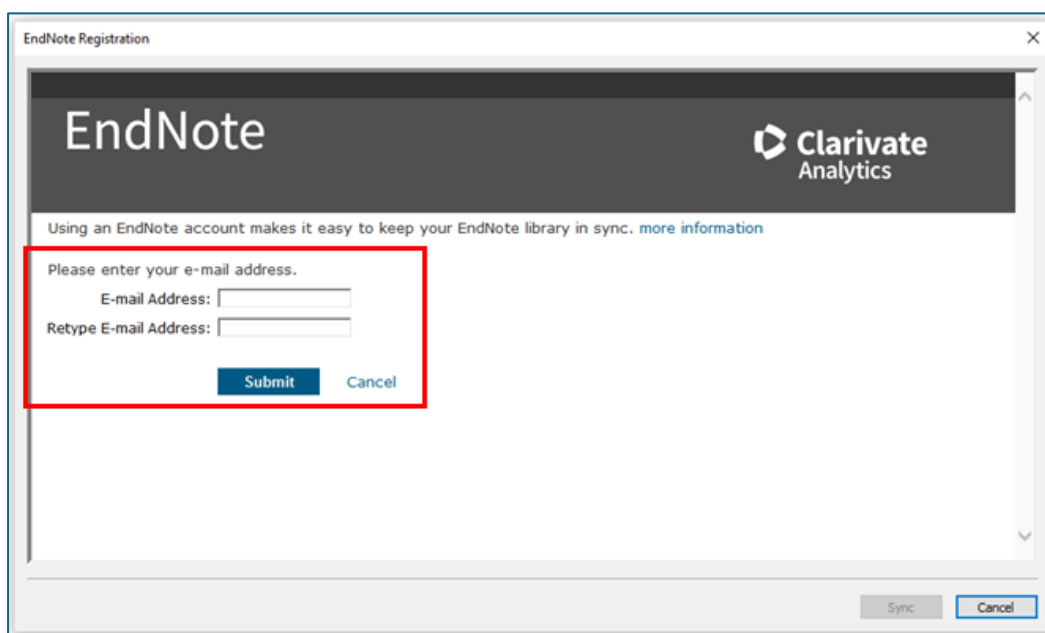- Then click **Sync Now** (top right corner)

10. Signing up for an EndNote Online account

- Having clicked **Sync**, click **Sign-Up** - this will enable you to create an **EndNote Online** account – if you already have an endnote account, enter your details into the 'account credentials section, if you don't have an EndNote Online account click 'sign up'

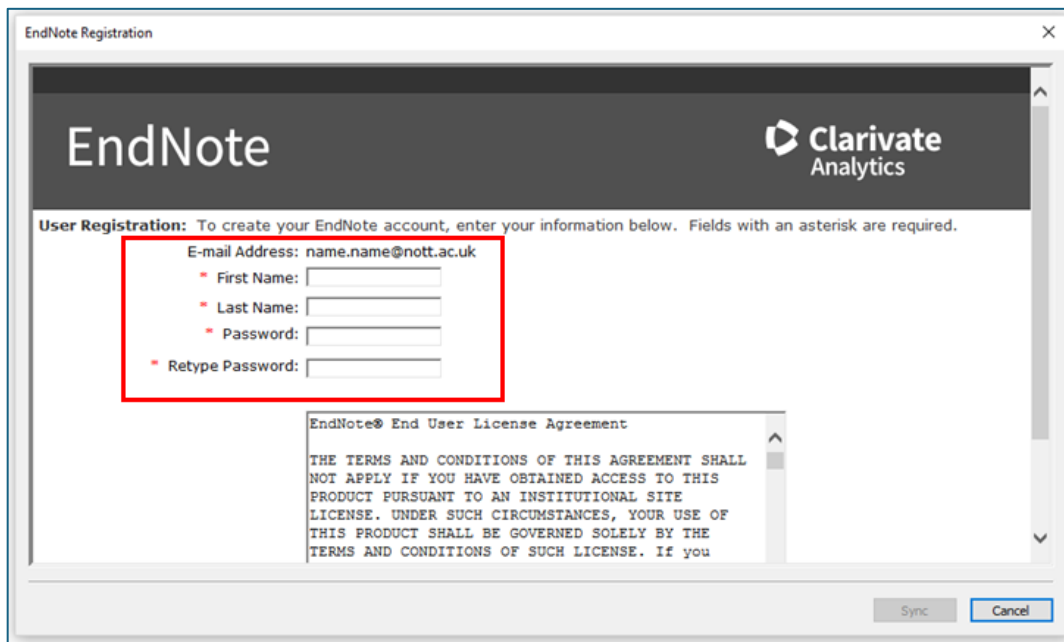## 11. Creating an EndNote Online account- Enter your email address

- Enter an **email address** and click **Submit**

- If you use a **personal email address** this will enable you to continue using EndNote Basic after graduation

12. Creating an EndNote Online account - Enter your details

- To begin the user registration process, add your **first and last names**, and set up a **password**

- Your password should be a combination of letters, numbers and symbols
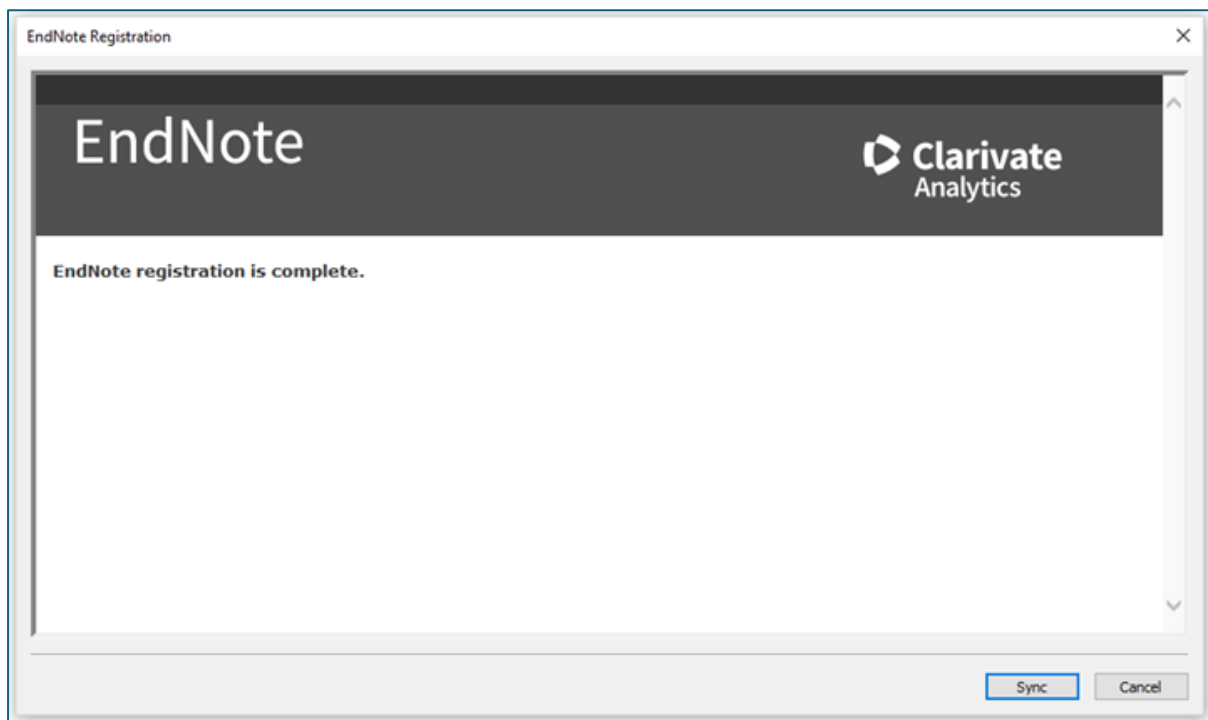
- Scroll down and click 'I agree' to the licence agreement, then click 'save'
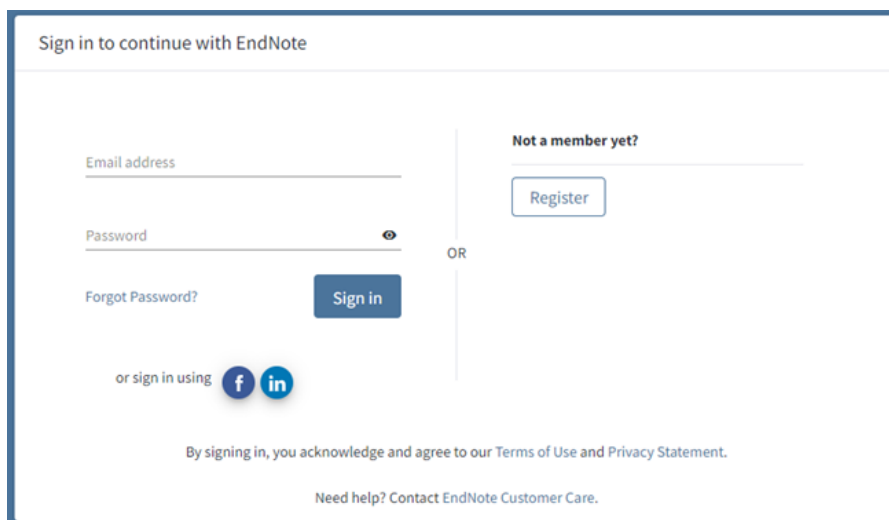

13. Creating an EndNote Online account - Sync

- Your EndNote Online account should now be set up

- Click **Sync** to connect both your EndNote Online and EndNote Desktop accounts

14. EndNote Online account creation complete

- You have now created you EndNote Online account, in order to access your EndNote Online account go to www.myendnoteweb.com

- You may be asked to enter your University username and password first

- Then, login to EndNote Online with the email address and password you've just created