

Getting started with EndNote Fusion (Formerly Refworks)

Clarivate

EndNote Fusion

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Create an Endnote Fusion Account

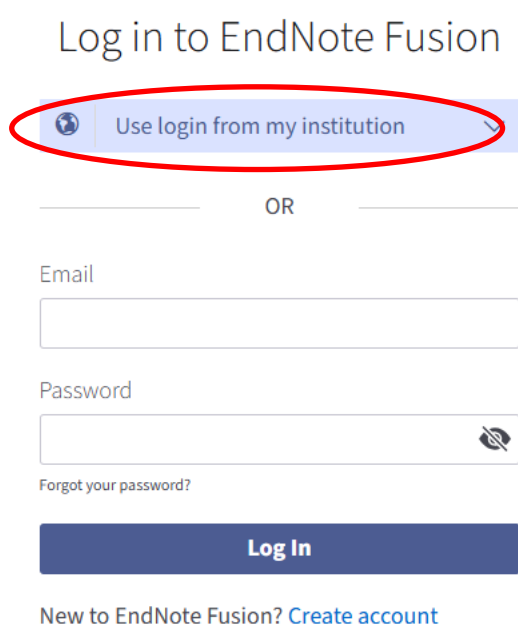
- Find Endnote Fusion in the Eresources A to Z list.

(<https://my.cumbria.ac.uk/Student-Life/Learning/Resources/Eresources/Endnote-Fusion---Reference-Management-System/>)

- Click on **Access the eresource**

If you are not logged in to the University network, you will be directed to the usual University login page, where you log on as normal with your University email and password.

If you are directed to the Reworks login page. **Use login from my institution.**



Log in to EndNote Fusion

 Use login from my institution

OR

Email

Password

[Forgot your password?](#)

Log In

New to EndNote Fusion? [Create account](#)

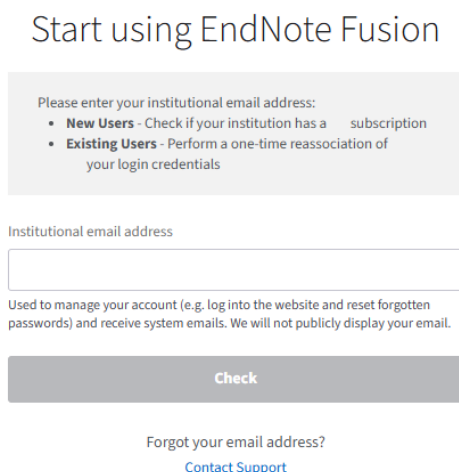
Select **Login from my institution.**

Find and select Cumbria on the list.

You will then be taken to the Start using Reworks screen below.

If you are **already logged in** to the University (e.g. have logged into the student hub or OneSearch), you are directed to the **Start using Endnote Fusion** page - see Step1, below.

- Set up your account in the **Start using EndNote Fusion** box.



Start using EndNote Fusion

Please enter your institutional email address:

- New Users** - Check if your institution has a subscription
- Existing Users** - Perform a one-time reassociation of your login credentials

Institutional email address

Used to manage your account (e.g. log into the website and reset forgotten passwords) and receive system emails. We will not publicly display your email.

Check

[Forgot your email address?](#)

[Contact Support](#)

Sign in with your University email e.g S1234567@uni.cumbria.ac.uk.

And click **“Check”**

You will be sent an email titled **“Associate your EndNote Fusion credentials”**

***Check your junk or clutter folders if you can’t see the email in your inbox**

Click the link to activate your account

From now on when you access EndNote Fusion and you are already logged on to the University network, your account will open automatically. If you haven't yet logged on then you will get the usual University login box. If you end up on the EndNote Fusion login page use the Institutional login, as above.

Managing References

The next step is to start collecting your references.

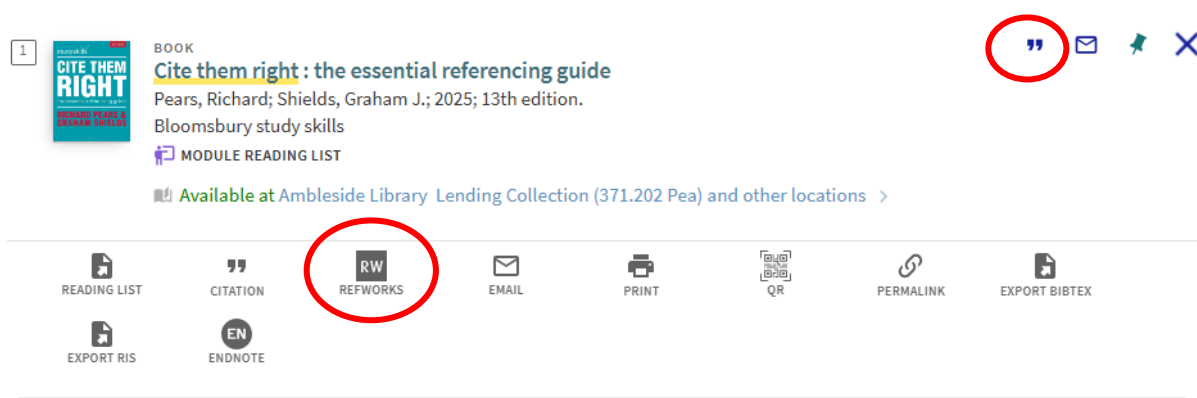
5 steps to efficient reference collecting.

1. Import the references
2. View them in citation view
3. Edit them to correct or add missing details
4. Add a link or upload any pdfs
5. Move them into your folders

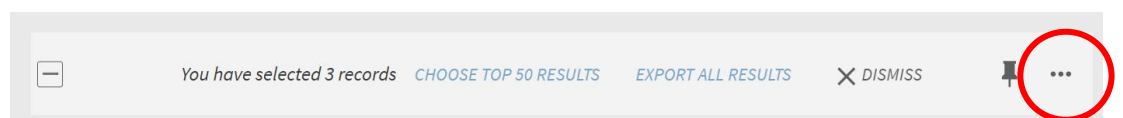
1. Import the references

There are several ways to import references, this guide will start with a direct import from OneSearch. Importing from other databases is covered later or in the help sheets on the EndNote Fusion webpage.

- Run your search in OneSearch.
- Select the “ cite option to open up the options menu and select Refworks.
Note: This icon will soon be renamed to Endnote Fusion



- To import multiple items, select all the ones you want, this will trigger the Option bar at the top of the results. Here you can import your selection or the top 50 or all of your results.



- Click on the three dots ... to access the **Refworks** option above.
Note: This icon will soon be renamed to Endnote Fusion
- Your results will be imported into your EndNote Fusion account. You can view your references in the “**Last imported**” folder

✓ Import Process Complete

Import Summary

1/1 references imported

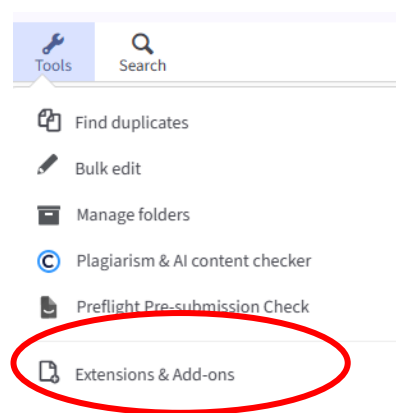
Go to Last Imported

Import References

OR Use the “Save to EndNote Fusion” browser extension to export references

This works in OneSearch, for individual pdfs, lists of articles or web pages. EndNote Fusion creates the reference for you including a link back to the resource.

- Select **Tools** from the top menu.
- Then **Extensions and Add-ons**



Currently, the extension is only available for Chrome and Edge with plug-ins for other browsers coming soon. This guide will be updated once they become available.

Save references from the web

Use the EndNote Fusion browser extensions to add references

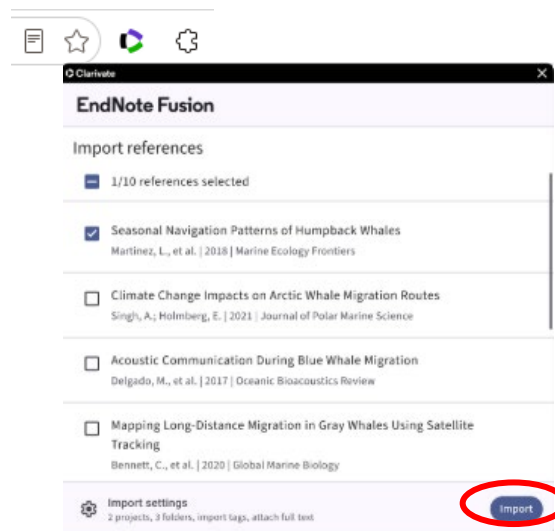
Add to Chrome

Add to Edge

Firefox coming soon...

Safari coming soon...

- To add an item, click on the **EndNote Fusion** extension in your browser toolbar.
- A pop-up will appear to complete your import



2. View in Citation view

- Select **Citation view** (click on **Normal view** at the top right)



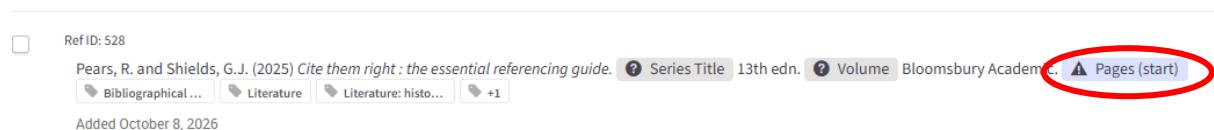
Click on the Cog to set your referencing style. For most courses this will be:

Cite Them Right 13th edition – Harvard

Some subjects will use other styles, check your guidance.

You will only need to do this the once – it will then save it.

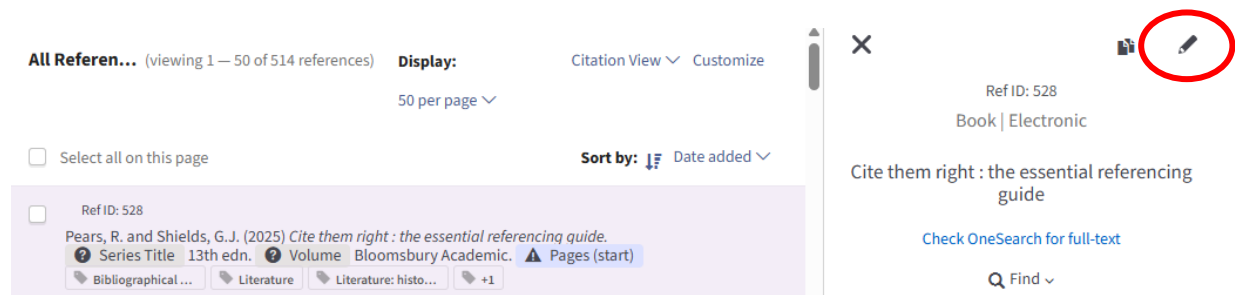
This will display your references in *Cite them right* format and highlight any missing sections.



Missing information will be highlighted in blue for essential parts and grey for optional information such as edition. However, as you can see in the example above it has flagged page numbers that aren't needed for a book reference. Check parts highlighted in blue for all your references to see if there are parts that will be needed for a correct reference format. This is where you need to know your referencing style and edit as you go along.

3. Edit the record

- Click on the record you would like to edit to see the full details menu on the right side of the screen. Click on the **edit 'pencil'** icon in the upper right pane.



- Make any changes. For example, removing the place of publication.
- **Save** your changes.

EndNote Fusion just formats the information it has available. The way that information is pulled across and presented can vary. So it's important to have a good grasp of *Cite them Right* format so that you can see where changes are needed.

It is easier to make these changes as you go along with the original source open to supply any missing information that hasn't carried over. If you use the EndNote Fusion add-in for Word (p 10) to manage the citations in your essay, it will generate the reference based on this data and can't be corrected in your final assignment.

Some things to watch out for

- **OneSearch** doesn't always bring across all of the authors, you may have to add them.
- The Author field should be Surname, First name. If these appear in the wrong order change them around.
- Sometimes it imports an email address as well as the name – delete it.
- Edition information needs to be numeric e.g. 10th NOT Tenth. EndNote Fusion adds the **edn.** suffix automatically for you.
- For the place of publication, check that it is a city (usually London for Great Britain) and not just GB (From September 2025 the 13th edition no longer includes place for books).
- Check the Start and finish page numbers have not also brought across the number of pages as well. If it does – delete them.
- Sometimes it includes the journal title abbreviation as well, which isn't needed.
- Nor is the place of publication for a journal.

4. Add a link or pdf

References imported from OneSearch bring a link back to see which database holds it. References imported directly from the databases such as CINAHL or ScienceDirect bring a link to the article direct. The EndNote Fusion browser extension sometimes brings the pdf as well.

To add a link

- Add the DOI or paste the source's URL into the URL field

To add a pdf

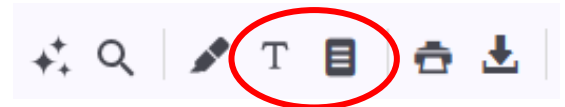
- Download the pdf and store on your desktop
- Click on add an attachment in the edit box
- Browse for the pdf and **add it**. This stores the pdf with the record. It takes a while but the "still working" line displays after it has actually loaded.

Attachments

Add file(s)

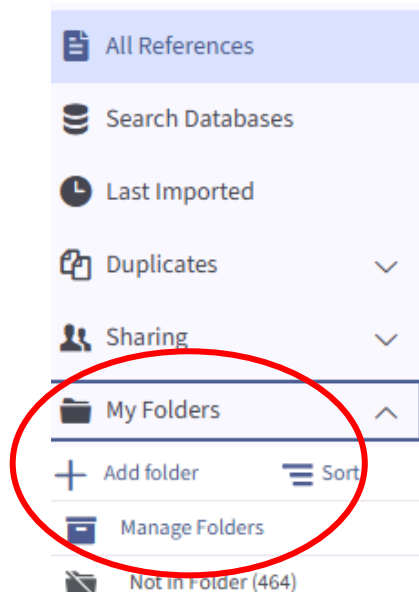
Annotating pdfs

If you open the saved pdf in EndNote Fusion you are able to highlight and add comments.



5. Move it to a folder

Create and use folders to keep your references organised by topic.

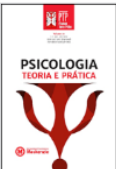


- Click **My Folders**, then click on **Add a Folder**. Name the folder. Click **Save**.
- Your folders are listed in the left column. Click on the folder name to open.
- Drag and drop your references from *last imported* to the folder of choice.
- To make a sub-folder, rename, delete: click on the 3-dot More icon associated with the folder.
- References not in a folder will be found in **All References**.

Importing from other sources

Ebsco databases such as CINAHL and Education Source

Carry out your search and select a few articles that might be useful by clicking on the **Bookmark** icons. View your saved items in your MyEBSCO menu in the top right corner



Peer reviewed | Academic Journal

Academic Procrastination Among University Students: A Scoping Review.

By: [Oliveira da Fonseca, Laimara](#); [Muniz dos Santos, Mylena](#); [Resende, Gisele Cristina](#); +1 more • In: *Psicologia: Teoria e Prática*, 2025, volume 27, issue 2, pages 1-20 (20p) • Academic Search Complete

Academic *procrastination* (AP) refers to the tendency to delay starting or completing tasks, such as readings or exams. Although research on this phenomenon spans several fields, the literature lacks studies that clearly define its sp... [Show more](#)

Subjects: [Procrastination](#); [College students](#); Empirical research; Affect (Psychology); +4 more

[Access now \(PDF\)](#) [AI Ask beta](#)

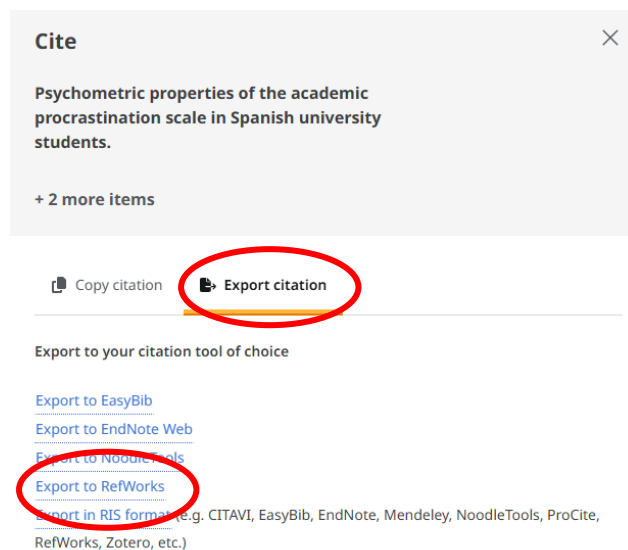


In your saved items list within your MyEBSCO account, tick the items you want to export to EndNote Fusion and select the **Cite icon** “

Click the Export citation tab within the pop-up menu

Select the “**Export to Refworks**” option to transfer the records to your EndNote Fusion account

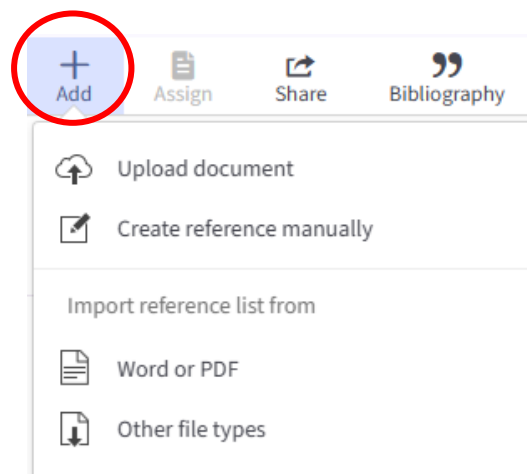
Note: This will be soon changed to Export to EndNote Fusion



Other databases will work in the same way as this, just look for a **Save** or **Export** option and select EndNote Fusion. Other examples are in the guides on the [EndNote Fusion page](#).

Other ways to add content

Choose the add reference icon at the top of the page



[Browse for a saved document and upload.](#)

 Upload document

Select the **Upload document** option

Once selected it will create the reference and if the document is a pdf it will add it to the record.

Manually enter the bibliographic details.

 Create reference manually

Select the material type from the drop down menu.

NB. For Government reports etc. accessed on the internet use the “Report” option as this includes the URL and date accessed fields. For print materials use “monograph”.

Start typing the details of your article. Endnote Fusion may suggest articles or you can use the **lightning symbol** to look up details.



Ref Type	Journal Article
Title	
Authors	
Abstract	
Tags	
Attachments	

Journal Article

Instant Message

Journal Article

Law/Statute

Lecture/Presentation

Magazine Article

If there are not matching suggestions, you can continue to fill out the fields manually and click ‘save’ and add your reference to a folder.

Import from other files.

You can also import reference lists from Word documents and other files such as RIS formats for importing from other sources.

-  Word or PDF
-  Other file types

Create a Bibliography (Reference list) using EndNote Fusion

- Select the folder or references you want to use in the bibliography.
- Click on “ in the menu bar then click on **Create Bibliography**.
- Select (or change) the style with the style menu. Most students will need **Cite them right 13th edition-Harvard**.
- Click on **Copy to Clipboard** and paste the bibliography into Word, Google Docs, or other software.

+

 Add

📄

 Assign

🔗

 Share

”

 Bibliography

🗑️

 Delete

🏷️

 Add Tags

🔍

 Find Full-text

All References (viewing 1 —

+

 Create bibliography

Create a bibliography in your preferred output style

☐ Select all on this page

Bibliography from All references in 'All References' (514)

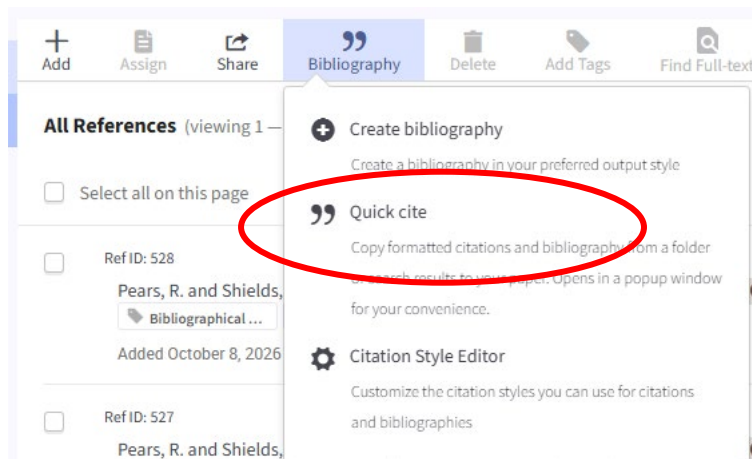
Cite Them Right, 13th edition - Harvard

Differentiate authors with the same surname by: Surname and first name

Working with citations in your documents

Create individual citations to insert in your assignments

- Select the folder that holds the references for your assignment.
- Click on  to select 'Quick cite'



- Choose your citation style.

(Cite them right 13th edn)

- Click **Continue**

EndNote Fusion

Citation Style Insert Citations Bibliography

1 | Choose your citation style

Choose the type of citation you'd like to add to your paper.

Cite Them Right, 13th edition - Harvard

Continue...

- You will see a list of your references which you can select from
- EndNote Fusion generates the citation which you can copy by selecting the clipboard button and then paste into your document.
- At the end of your assignment you can

Continue to bibliography

2 | Insert citations

Choose one or more references to cite in your paper. Click to copy the citation to your clipboard.

(Pears and Shields, 2025)

☒ **Cite them right : the essential referencing guide**
Pears, Richard; Shields, Graham J., 0001

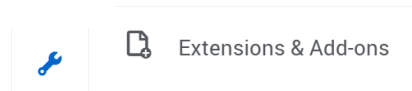
This will create a reference list of everything you have cited, which you can paste onto your document

NB. Always check the references to make sure the entries have been formatted in the correct style, (no system is perfect!).

Citation tools

EndNote Fusion provides other citation tools you can use to do the job above for you – no copy and paste!

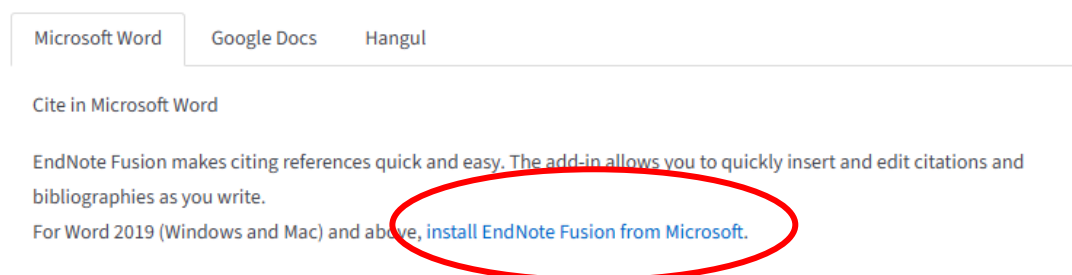
Under **Tools**, select **Extensions and Add-ons**



Scroll down to view the **EndNote Fusion writing tools**.

You can follow the link to install EndNote Fusion in Microsoft Word or click the Google Docs tab to get the Add-on

EndNote Fusion writing tools



University of Cumbria devices have EndNote Fusion for Word pre-installed. If you have downloaded Microsoft365 from the University, this should also be available in Word.

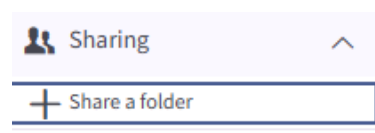
See our separate [Guide to Using the EndNote Fusion Add-in](#)

Other features

Share folders

Sharing allows you to grant access to your folders to other staff and students, even those who aren't EndNote Fusion users. This can be useful for group projects or if you're collaborating with another person on a large review.

- Click on **Sharing** and **Share a folder**.
- Browse and select your folder



- Then either create a **Public URL** to send – this is read only and can be viewed by people without an EndNote Fusion account.
- Or **Invite more people to share** where you can give people with EndNote Fusion accounts editing rights.

The screenshot shows the 'Sharing Settings' dialog box with a close button (X) in the top right corner. It is divided into three main sections:

- Settings for:** A dropdown menu currently showing 'Ai in Med ed (18)'.
- Access:** Two radio button options:
 - ☒ Only invited people may access.
 - ☐ Anyone within your organization may join this folder.
- Public URL:** A section with the text 'Anyone with the url will be able to see the contents of this folder' and a blue button labeled 'Create Public URL'.

Below these sections, there is a 'Shared with:' section showing 'No one (invite people below)'. Underneath is an 'Invite more people to share' section containing an input field with the placeholder text 'Enter email addresses, separated by commas or semicolons' and a dropdown menu currently set to 'Can read'. A blue 'Done' button is located at the bottom right of the dialog.

If someone has shared a folder with you it will appear in **My Folders** and you will need to accept the access.

Alumni Access

Change your account when you leave the University. This will give you access to your account for as long as the University subscribes to EndNote Fusion.

- Click on your name to access **Settings**
- Under your *Profile* select *Role* and change to *Alumni*.
- If you have Associated your account with your University Login (Credentials), *Remove Credentials*.
- Change your email address to a personal one (you won't have access to your University one!)

For any questions about alumni accounts, please contact Libsys@cumbria.ac.uk.

For more information, features and details see the EndNote Fusion Help Centre:
<https://fusion-endnote.zendesk.com/hc/en-us/categories/47933937371665-Help-Guides>