

# Endnote @ HKU

## For Windows Platform

Discover • Organize • Write & Cite • <http://lib.hku.hk/endnote>

### I

#### Basic Set Up

The Why, Who, Where and How	2
... and Create an Endnote Library	

### II

#### Build Your Library

1. Direct Export - Find@HKUL	5
<u>Extra:</u> Change citation styles	7
Edit references	8
2. Direct Export - Academic Search Complete (ASC)	9
<u>Extra:</u> Open Link: locate and attach PDF	11
3. Direct Export - Google Scholar	13
<u>Extra:</u> View it@HKUL	15
Remove duplicates	16
4. Manual Input	17
<u>Extra:</u> Backup your Endnote Library	21

### III

#### Cite While You Write

1. What is CWYW?	22
2. The Endnote Toolbar in Microsoft Word	23
3. How to use CWYW?	24

### IV

#### Manage a Large Library

1. Difference between custom and smart groups	30
2. Create a custom group	31
3. Create a smart group	32
<u>Extra:</u> Questions on Endnote	33

# I

# Basic Set Up

## 1. Why Endnote?

A **citation management software** that helps you **organize** your readings and **cite** the sources while writing your paper.

Keep a record of your reading materials in an **Endnote library**

The screenshot displays the EndNote X9 interface. The top window shows a list of references with columns for Author, Year, Title, Journal, and Reference Type. The bottom window shows a Word document titled 'Giant pandas - Word' with text about giant pandas. Red lines connect specific parts of the software to explanatory text blocks.

Author	Year	Title	Journal	Reference Type
	1970	Da xiong mao = Dai panda = The giant panda	Dai panda	Book
	2015	Climate change challenges the current conservation ...	Biological Co...	Journal Article
Angel, Heather	2008	Panda : an intimate portrait of one of the world's mo...		Book
Bashir, Tawqir; Khan, Afiful...	2012	Factors determining occupancy of Ganges River dolp...	Mammalia: In...	Journal Article
Bearer, Scott; Linderman, ...	2008	Effects of fuelwood collection and timber harvestin...	Biological Co...	Journal Article
Christiansen, Per	2008	Feeding ecology and morphology of the upper canines...	Journal of Mo...	Journal Article
Johnson, Kenneth G.; Schal...	1988	Comparative Behavior of Red and Giant Pandas in th...	Journal of M...	Journal Article
Liu, Xuehua; Cheng, Xiangn...	2011	Potential solar radiation pattern in relation to the mont...	Ecological M...	Journal Article
Nicholls, Zhou, M				

The Word document contains the following text:

Giant pandas are an important endangered species in China. Human activity has been encroaching on the panda habitat in the Wolong Nature Reserve. The reserve was established in 1962 with an area of 20,000 ha. (Bearer et al., 2008) In 1975, the reserve expanded to its current size of 200,000 ha. It is the largest among the 25 nature reserves in China designated for giant panda conservation. Only about 1050 to 1100 pandas are believed to exist in the wild, of which most inhabit the designated nature reserves. Approximately 110 giant pandas, 10% of the total wild population, inhabit the Wolong reserves. (Angel, 2008, p.76)

Wolong Nature Reserve is located in Wenchuan County, Sichuan Province, southwestern China. Wolong is situated between the Sichuan Basin and the Qinghai-Tibet Plateau and is characterized by high mountains and deep valleys.

It encompasses several climatic zones, and has high habitat diversity. Besides the giant pandas, 12 other animal species and 47 plant species in the reserve are on China's national protection list (Figure 1).

Angel, H. (2008). *Panda : an intimate portrait of one of the world's most elusive creatures*. Newton: David & Charles.

Bearer, S., Linderman, M., Huang, J., An, L., He, G., & Liu, J. (2008). Effects of fuelwood collection and timber harvesting on giant panda habitat use. *Biological Conservation*, 141(2), 385-393. doi:10.1016/j.biocon.2007.10.009

Insert **in-text citations** to acknowledge the work of another person.

Automatically create the **reference list** in your essay.

**Format** the essay according to a selected **citation style**, e.g. APA style.



### What if you do not acknowledge others' works?

This will constitute plagiarism.  
Find out more at <http://www.hku.hk/plagiarism>

## 2. Who can download?

HKU has taken out an **Endnote site license** which permits **current HKU staff and students** to use Endnote both on campus and on their personal PC.

## 3. Where is the Endnote@HKU website?

**URL: [lib.hku.hk/endnote](http://lib.hku.hk/endnote)**

**Download** a copy of Endnote      **Learn** how to use Endnote

HKUL / Endnote@HKUL / Endnote@HKU

### Endnote@HKU

Endnote@HKU

HKU has signed a site licence agreement with EndNote, which permits all current HKU staff and students to use the software both on campus and at home. Upon accepting the agreement in the request form, HKU staff and students must abide by the [Conditions of Use](#) of the EndNote software.

**Download Endnote**

**Training and Support**

What is EndNote?

EndNote is a bibliographical management software package designed to help you to organize bibliographic references and create a bibliography. Endnote allows you to search, retrieve relevant citations, and builds your bibliography, all within one program.

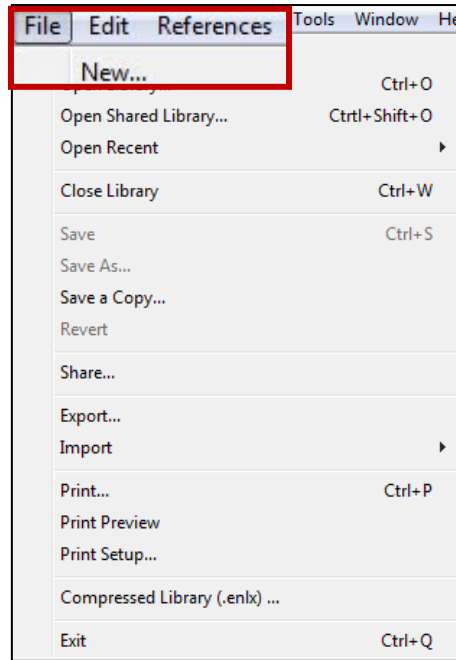
## 4. How to download and install Endnote?

Refer to the **Downloading and Installation Guide** :  
Endnote@HKU > Download Endnote > Installation Guide for Windows (X9)

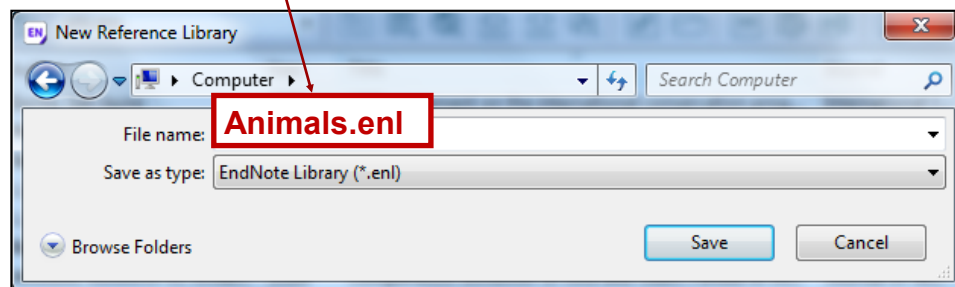
**Important:** Please read the **Conditions of Use!**

## 5. Create an Endnote Library

- 1 Select from the top bar menu: **File > New**



- 2 Enter a **filename**, e.g. animals. The default extension is **.enl**.



**Note:** For HKUL PCs, save all your files to the **S:drive**.



### How many libraries can I create?

- You can create as many libraries you like.
- Normally we create one library for each distinct research topic. Then, use the Groups feature to manage the references.

# II

## Build Your Library

### 1. Direct Export - Find@HKUL



#### Step 1 Search Find@HKUL and select records

- 1 Enter your **search statement**
- 2 **Mark** the desired records
- 3 Go to **my favorites**

**Find@HKUL**

NEW SEARCH HKU LIBRARIES ELECTRONIC RESOURCES READINGLIST @HKUL QUICK GUIDE ASK A LIBRARIAN ...

**Giant panda** Books & Articles ADVANCED SEARCH

0 selected PAGE 1 27,331 Results Personalize

**1** **frontiers** **ARTICLE** **Metagenomic Study Suggests That the Gut Microbiota of the Giant Panda (*Ailuropoda melanoleuca*) May Not Be Specialized for Fiber Fermentation**  
Guo, Wei ; Mishra, Sudhanshu ; Zhao, Jiangchao ; Tang, Jingsi ; Zeng, Bo ; Kong, Fanli ; Ning, Ruihong ; Li, Miao ; Zhang, Hengzhi ; Zeng, Yutian ; Tian, Yuanliangzi ; Zhong, Yihang ; Luo, Hongdi ; Liu, Yunhan ; Yang, Jiandong ; Yang, Mingyao ; Zhang, Mingwang ; Li, Yan ; Ni, Qingyong ; Li, Caiwu ; Wang, Chengdong ; Li, Desheng ; Zhang, Hemin ; Zuo, Zhili ; Li, Ying  
Switzerland: Frontiers Media SA  
Frontiers in microbiology, 2018, Vol.9, p.229  
## Bamboo-eating **giant panda** ( ) is an enigmatic species, which possesses a carnivore-like short and simple gastrointestinal tract (GIT... ##  
PEER REVIEWED OPEN ACCESS  
Download PDF Full text available View Issue Contents

**2** **Journal of Mammalogy** **ARTICLE** **Activity Patterns of the Giant Panda (*Ailuropoda melanoleuca*)**  
Jindong Zhang ; Vanessa Hull ; Jinyan Huang ; Shiqiang Zhou ; Weihua Xu ; Hongbo Yang ; William J. McConnell ; Rengui Li ; Dian Liu ; Yan Huang ; Zhiyun Ouyang ; Hemin Zhang ; Jianguo Liu  
US: American Society of Mammalogists  
Journal of Mammalogy, 2015, Vol.96 (6), p.1116-1127  
## .... Activity patterns of the elusive and endangered **giant panda** (*Ailuropoda melanoleuca*) are not well understood... ##

**3** **my favorites**

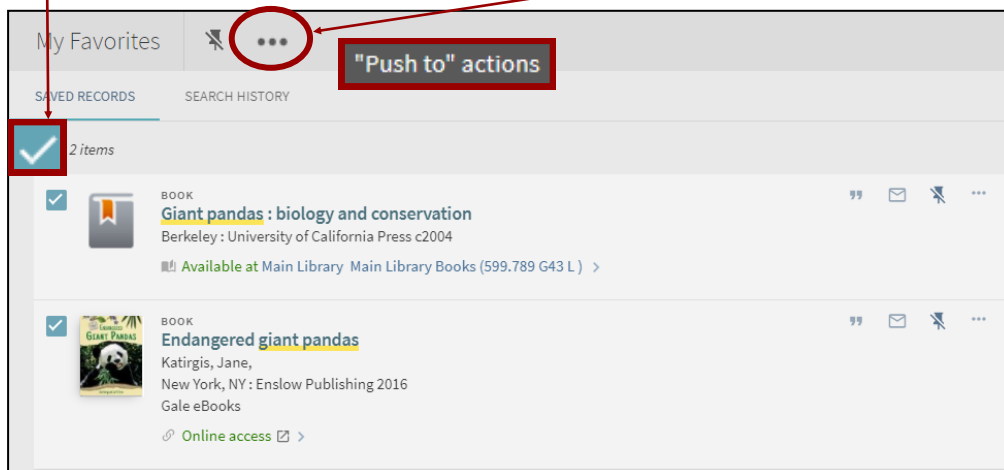
Refine results  
Expand My Results  
Sort by Relevance  
Show Only  
Peer-reviewed Journals (7,201)  
Full Text Online (27,276)  
Available in the Library (61)  
Open Access  
Resource Type  
Articles (13,562)  
Newspaper Articles (10,941)  
Reviews (799)  
Journals (716)  
Book Chapters (404)  
Show More

PAGE 1

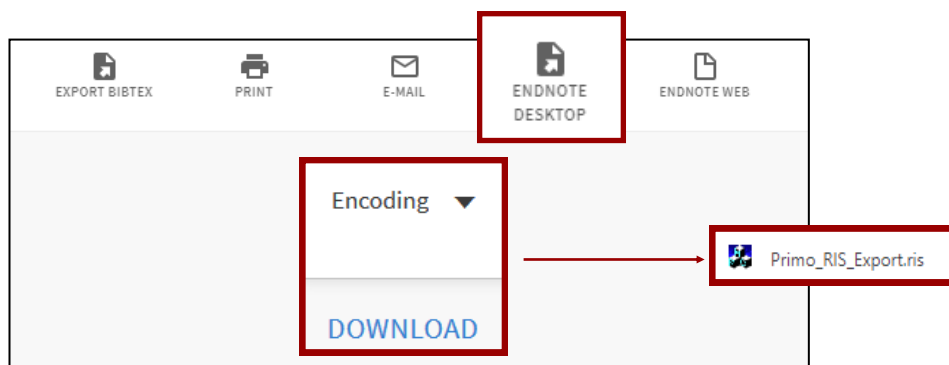
## Step 2 Export records to Endnote

1 Select the records

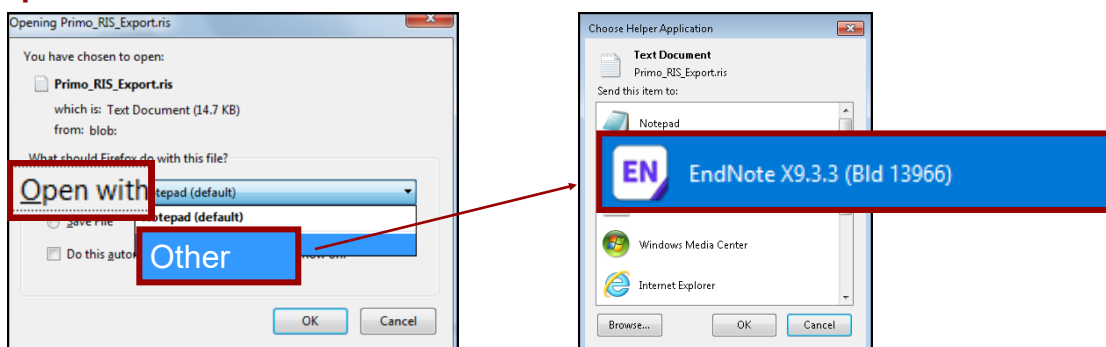
2 Open "Push to" actions



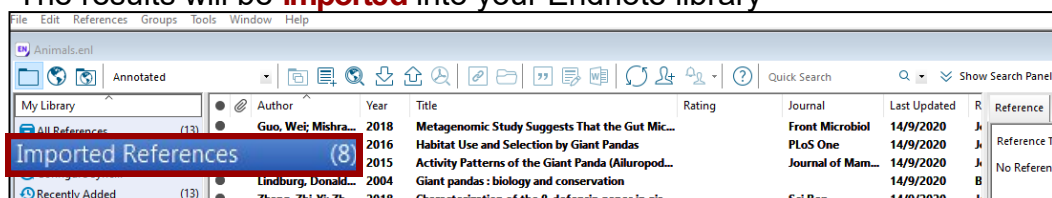
3 Select **ENDNOTE DESKTOP** and click on **DOWNLOAD**



4 First time user should select **Other > Endnote X9.3.3 (Bld 13966)** against **Open With**



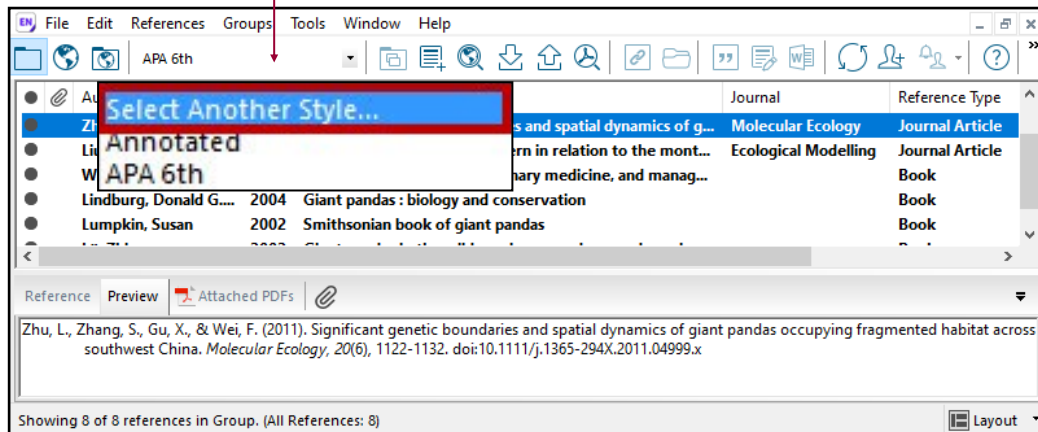
5 The results will be **imported** into your Endnote library



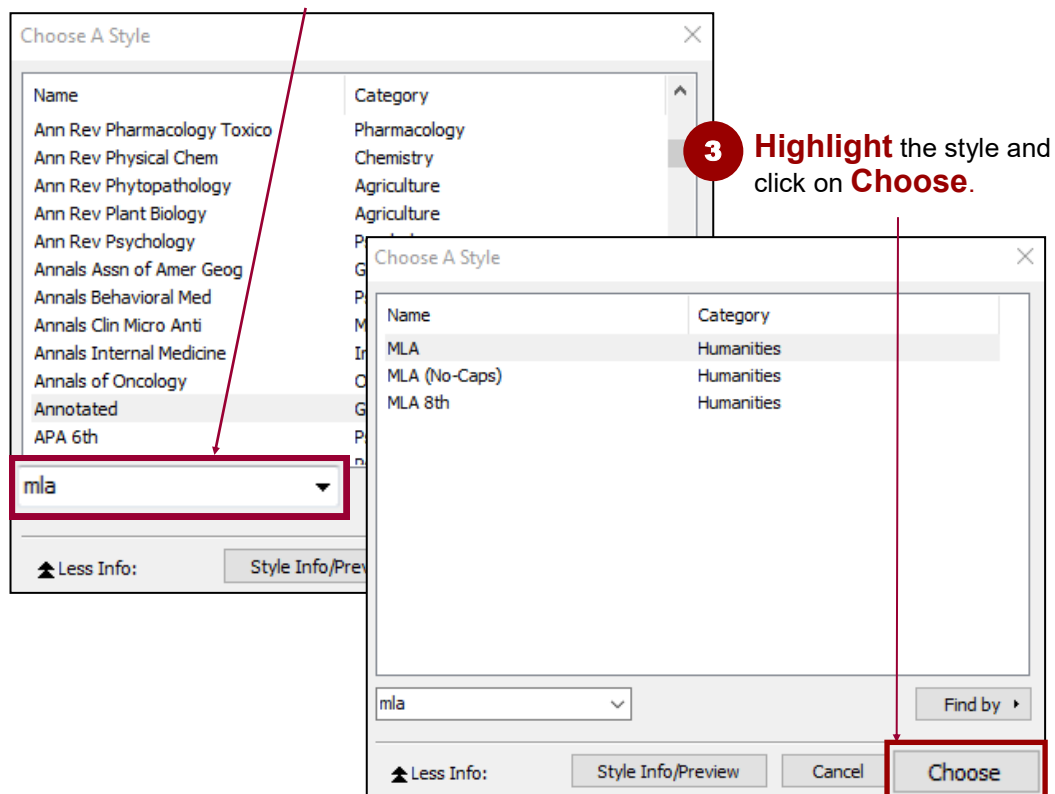


## Change citation styles

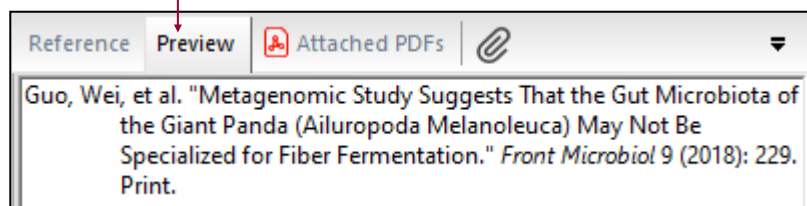
- 1 Open the **pull-down menu** for Output Style. Choose **Select Another Style**.



- 2 Enter name of your citation style and then press **Enter**.



- 4 In the **preview pane**, the citation will be changed to the selected style.





## Edit references

- 1 Examine the book “Panda: back from the brink”. In the preview pane below, **circle the problem area(s)**:

	Author	Year	Title	Journal	Reference Type
●	Guo, Wei; Mishra...	2018	Metagenomic Study Suggests That the Gut Mic...	Front Microbiol	Journal Article
●	Jindong, Zhang; ...	2015	Activity Patterns of the Giant Panda (Ailuropod...	Journal of Mam...	Journal Article
●	Raven-Ellison, Da...	2016	Mission Panda Rescue: All About Pandas and Ho...		Book
○	Wildt, David E.; Zh...	2006	Giant Pandas: Biology, Veterinary Medicine and M...		Book
●	Zhang, Zhi-Yi; Zh...	2018	Characterization of the $\beta$ -defensin genes in gia...	Sci Rep	Journal Article
○	Zhou, Mengqi	2012	Panda : back from the brink		Book

Reference Preview PDF Attached PDFs

Zhou, M. (2012). *Panda : back from the brink* (Adapted, rev. ed. ed.). Glasgow: Saraband.

- 2 This is an example of APA 6th Citation Style for Editions other than the First:

Harris, L. A. (2001). *Canadian copyright law* (3rd ed.). Toronto, ON: McGraw Hill Ryerson.

- 3 Open and amend the reference

Reference Attached PDFs

Reference Type: Book

Rating

Author  
Zhou, Mengqi

Year  
2012

Title  
Panda : back from the brink

Series Editor  
Kerrigan, Michael

Series Title

Place Published  
Glasgow

Publisher  
Saraband

Volume

Number of Volumes

Series Volume

Number of Pages

Pages

## 2. Direct Export - Academic Search Complete (ASC)



### Step 1 Search ASC and select records

**1 Access ASC:** HKUL Homepage > Electronic Resources > Academic Search Complete

**2** Enter a **search statement** in ASC  
e.g. *dolphin AND conservation*

Searching: Academic Search Complete | Choose Databases

dolphin

AND conservation

Select a Field (optional)

Select a Field (optional)

Select a Field (optional)

Search

Clear ?

Basic Search Advanced Search Search History

**3** On the result list, click on **To Print, Email or Save Multiple Items** to select the desired records.

Search Results: 1 - 50 of 1,265

Relevance Page Options Share

Add to folder:

Results (1-50)

Add search to folder:

dolphin AND conservation

1. Fatal asphyxia due to laryngeal displacement in a Guiana dolphin (*Sotalia guianensis*), Brazil.

Asfixia por deslocamento laríngeo associado a consumo de presa de golfinho-da-Guiana (*Sotalia guianensis*), Brasil. By: Bueno Mariani, Daniela; Plácido Guimarães, Juliana; Guedes Batista, Renata; Brum, Andrei; Regina Groch, Kátia; Díaz-Delgado, Josué; Vergara Parente, Jociery Einhardt. *Ciência Rural*. 2020, Vol. 50 Issue 2, p1-6. 6p. DOI: 10.1590/0103-8478cr20190068.

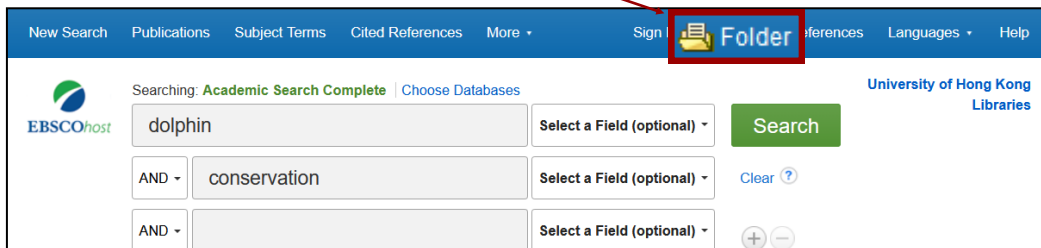
**Subjects:** BOTTLENOSE dolphin; DOLPHINS; NATURE conservation; ASPHYXIA; PREDATION; INTERNATIONAL agencies; GUYANA; BRAZIL; Finfish Fishing; Foreign affairs

PDF Full Text (4.7MB)

**Note:** To select all records on the page, click on Share > **Results (1-50)**.  
Select another 50 results on p.2.

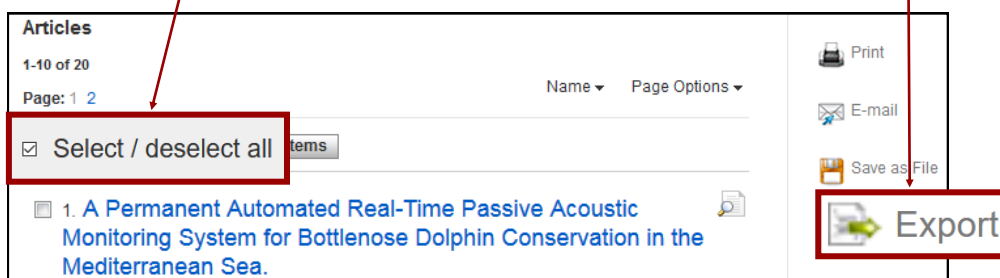
## Step 2 Direct Export to Endnote

- 1 Once all records are marked, click on the **Folder** icon.

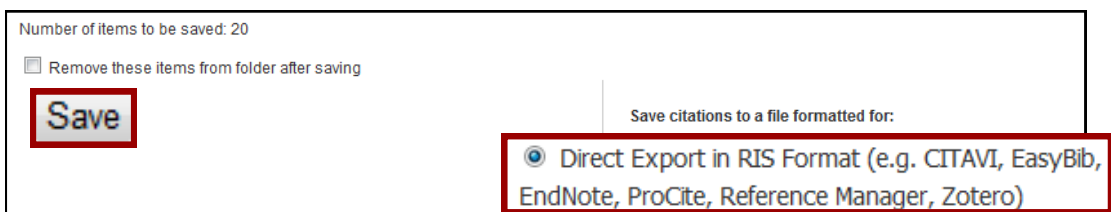


- 2 Tick the checkbox to select all records

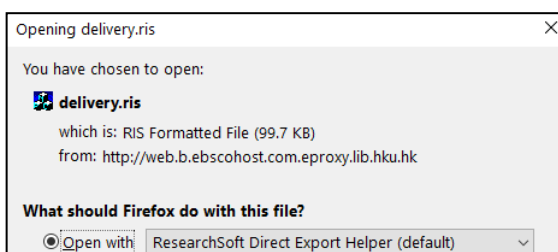
- 3 Click on the **Export** icon.



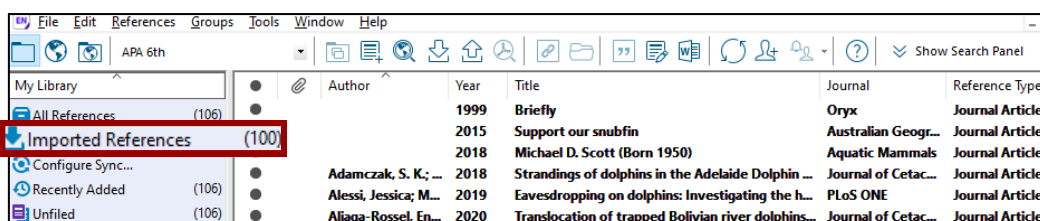
- 4 Select **Direct Export in RIS Format** and then click on the **Save** button.



- 5 Click on **Open with** ResearchSoft Direct Export Helper (default).



- 6 The records will be **imported** into your Endnote library.

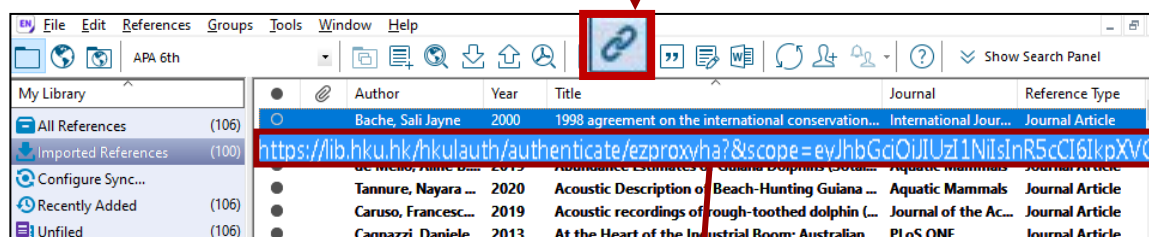


## Open Link: Locate and attach PDF

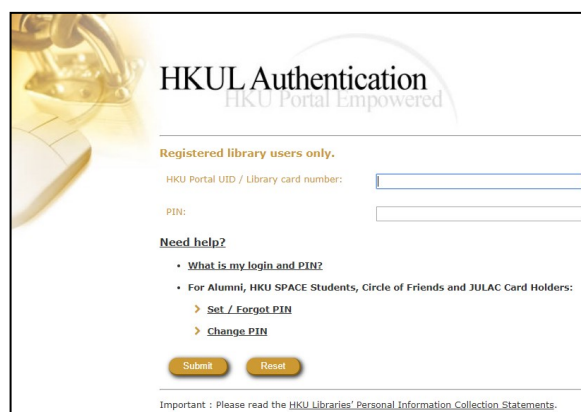
Point directly to the article website and get full text, if available and attach PDF to your library

### Step 1: Locate PDF full text

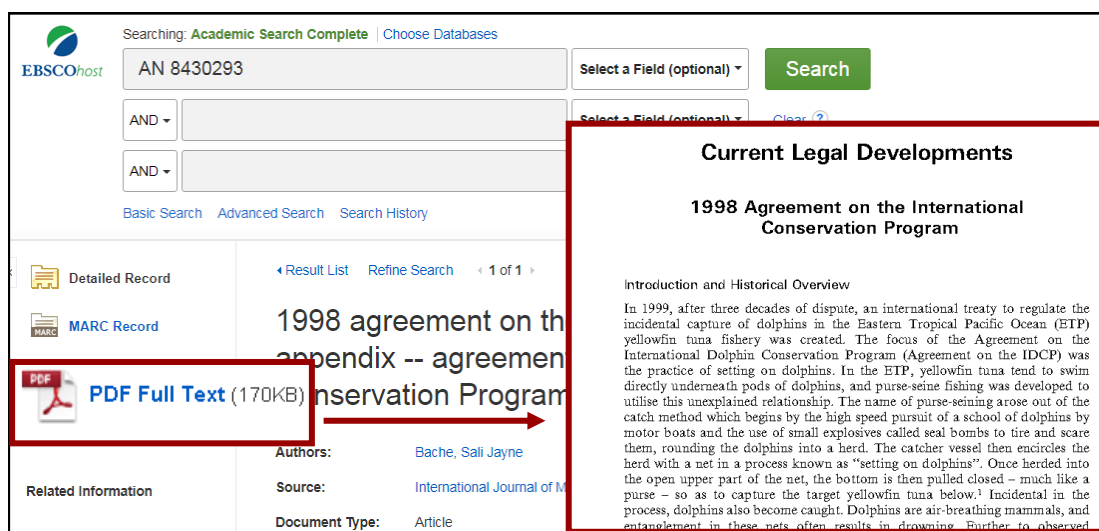
- 1 Highlight** the reference and press on the **Open Link icon**  
(Or, use the shortcut key **CRTL + G**)



- 2 Publisher recognizes HKUL proxy string and prompts for HKUL Authentication**



- 3 Save the PDF from the database**

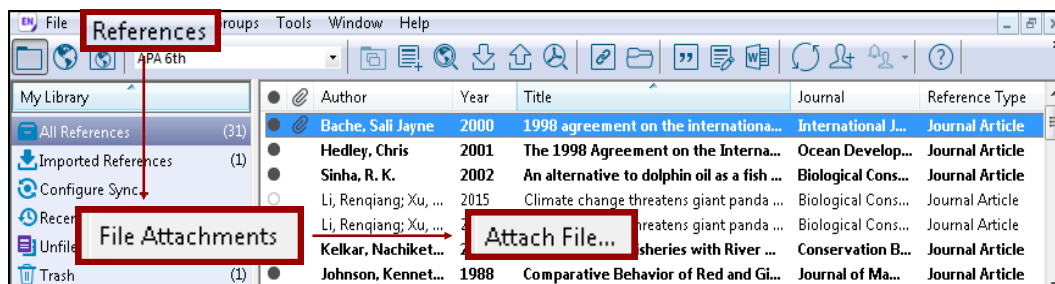


## Step 2: Link to PDF full text

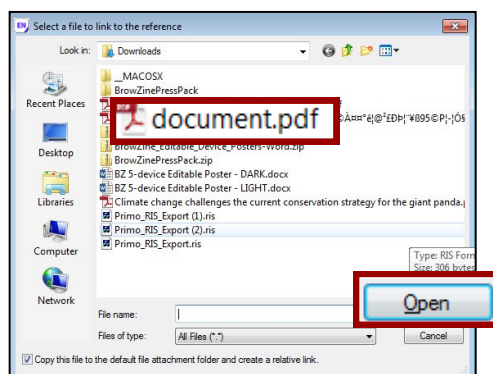
- 1 Highlight the reference in your library.

Author	Year	Title	Journal	Reference Type
Bache, Sali Jayne	2000	1998 agreement on the internationa...	International J...	Journal Article
Hedley, Chris	2001	The 1998 Agreement on the Interna...	Ocean Develop...	Journal Article
Sinha, R. K.	2002	An alternative to dolphin oil as a fish ...	Biological Cons...	Journal Article
Li, Renqiang; Xu, ...	2015	Climate change threatens giant panda ...	Biological Cons...	Journal Article
Li, Renqiang; Xu, ...	2015	Climate change threatens giant panda ...	Biological Cons...	Journal Article
Kelkar, Nachiket...	2010	Coexistence of Fisheries with River ...	Conservation B...	Journal Article
Johnson, Kennet...	1988	Comparative Behavior of Red and Gi...	Journal of Ma...	Journal Article

- 2 From top bar menu, select **References > File Attachments > Attach File**.



- 3 Select the PDF file you have saved in Step 1 and click on **Open**.



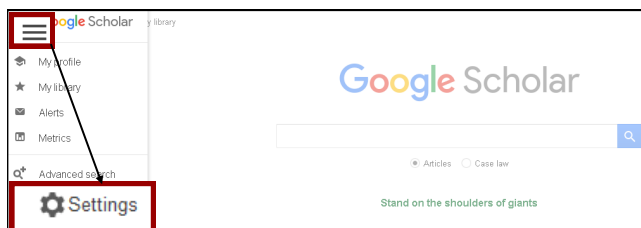
- 4 A paper clip icon will be displayed against the reference.

Author	Year	Title	Journal	Reference Type
Bache, Sali Ja...	2000	1998 agreement on the international conservation program		
Sinha, R. K.	2002	An alternative to dolphin oil as a fish attractant in th...	Biological Co...	Journal Article
Li, Renqiang; Xu, Ming; Wo...	2015	Climate change threatens giant panda protection in the...	Biological Co...	Journal Article
Li, Renqiang; Xu, Ming; Wo...	2015	Climate change threatens giant panda protection in the...	Biological Co...	Journal Article
Kelkar, Nachiket; Krishnas...	2010	Coexistence of Fisheries with River Dolphin Conserv...	Conservation...	Journal Article
Johnson, Kenneth G.; Schal...	1988	Comparative Behavior of Red and Giant Pandas in th...	Journal of M...	Journal Article

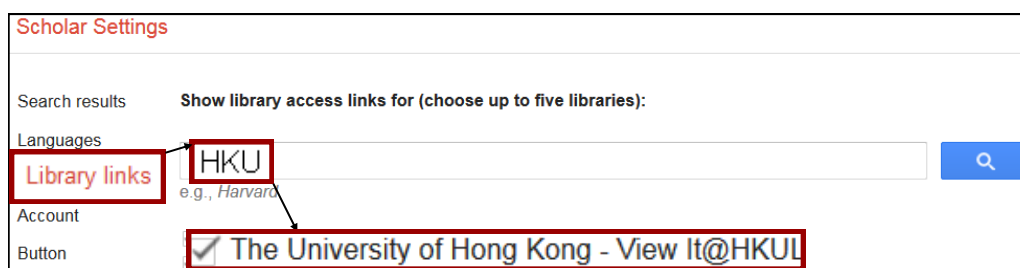
### 3. Direct Export - Google Scholar

#### Step 0 Set up Scholar preferences

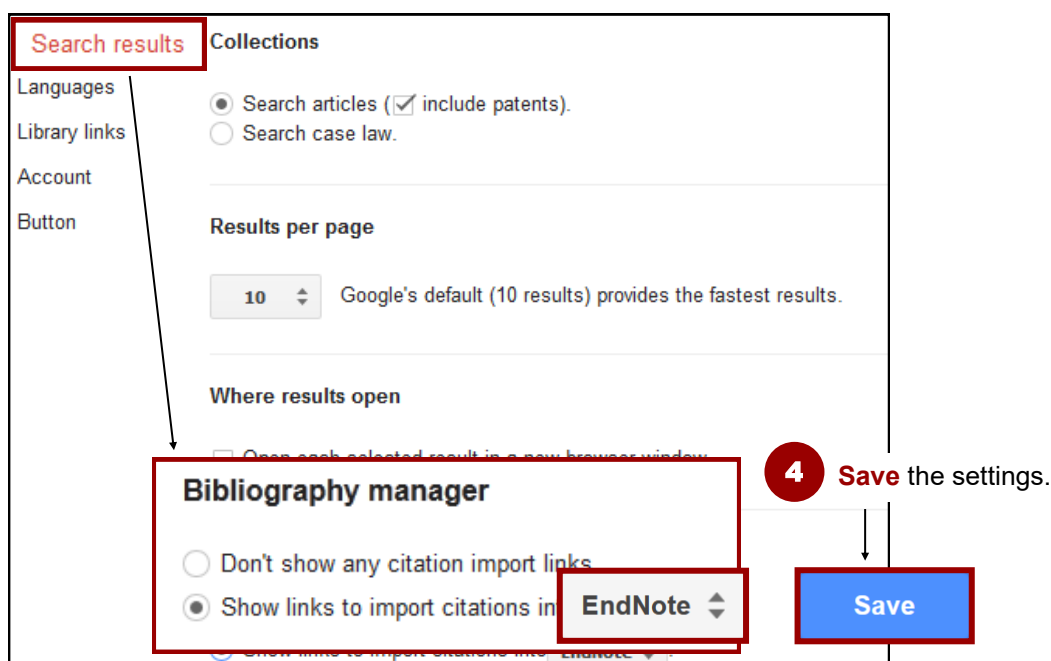
- 1** Go to <http://scholar.google.com> and click on **Settings**

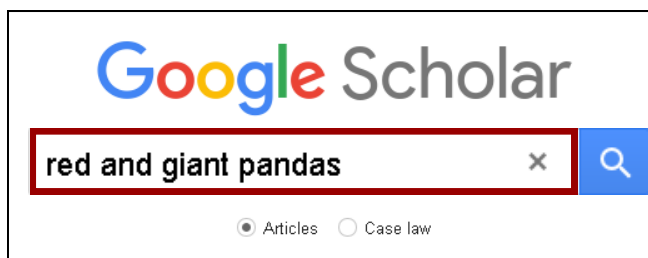


- 2** Under **Library links**
1. Search for **HKU**
  2. Select **The University of Hong Kong - View it**

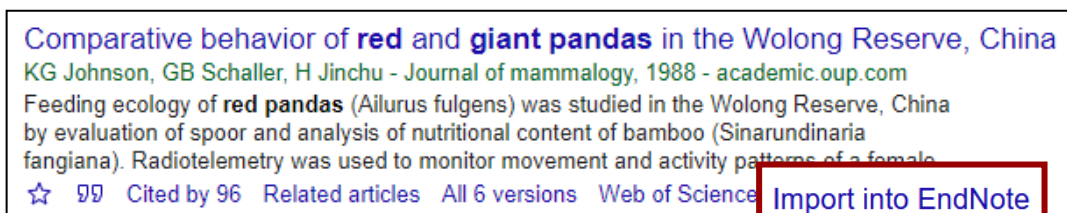


- 3** Under **Search results > Bibliography manager**
1. Select **Show links to import citations into**
  2. Choose **Endnote** from the pull-down menu.



**Step 1 Search****Step 2 Direct Import into Endnote****Method A Import one record at a time**

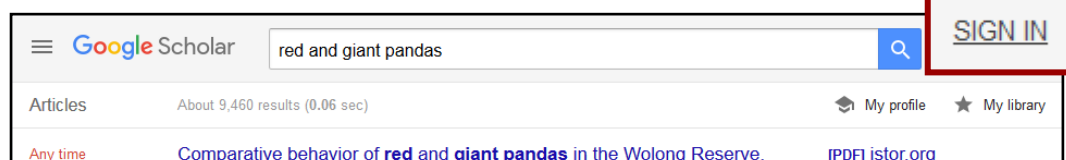
- 1 Click on **Import into EndNote**.



- 2 Go to **Step 6 to 7** in Method B.

**Method B Import multiple records at a time**

- 1 **Sign in** to your Google account.



- 2 Click on the **Star button** to select the desired records on the result list.

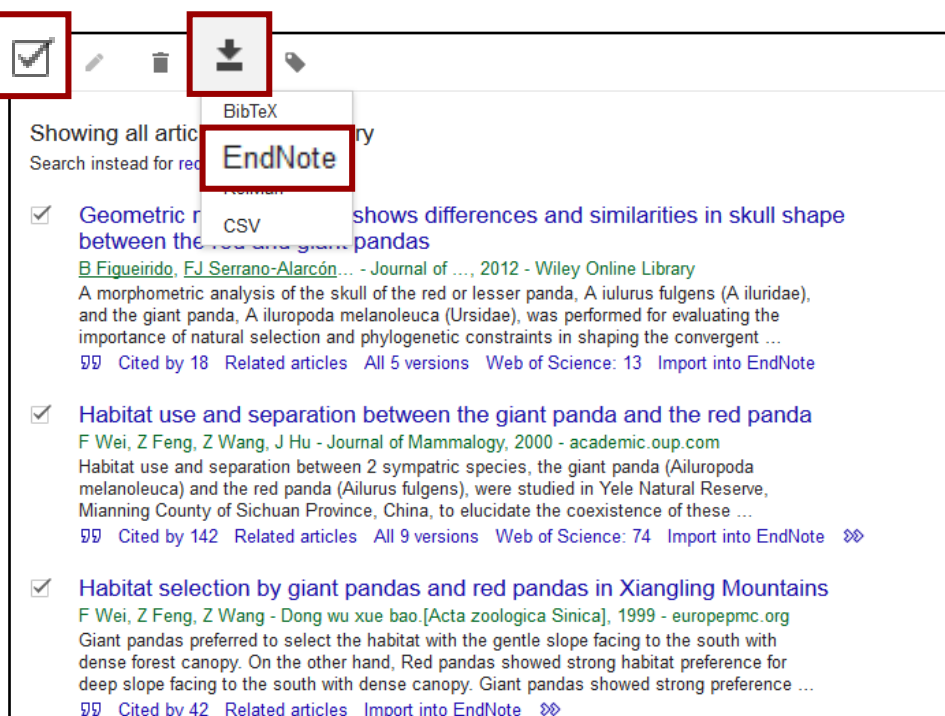


- 3 Click on the **My library** icon.

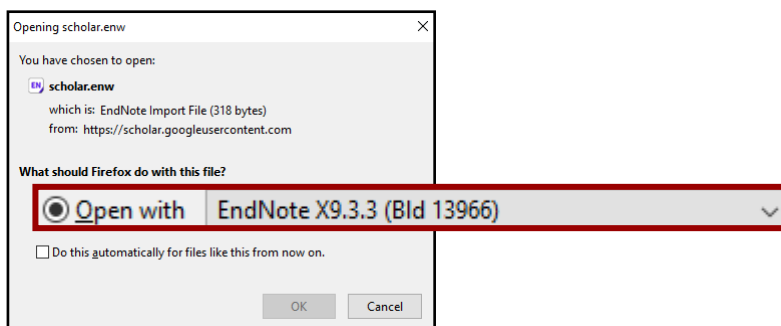


- 4 On the My Library page, **select** the records.

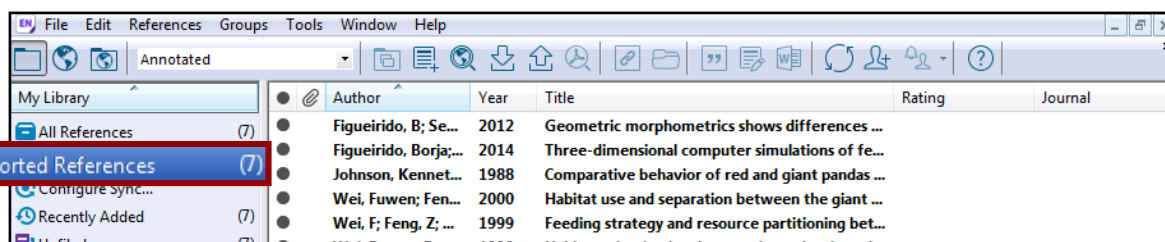
- 5 Click on **Export** and choose **EndNote**.



- 6 Open with Endnote X9.3.3 (Bld 13966) (default).



- 7 The record will be **imported** into Endnote.



EXTRA

### View It@HKUL

Click on "**View It@HKUL**" to find fulltext.  
(Note: Do not click on the title.)

Comparative behavior of **red** and **giant pandas** in the Wolong Reserve, China

KG Johnson, GB Schaller, H Jinchu - Journal of mammalogy, 1988 - academic.oup.com

Feeding ecology of **red pandas** (*Ailurus fulgens*) was studied in the Wolong Reserve, China by evaluation of spoor and analysis of nutritional content of bamboo (*Sinarundinaria fangiana*). Radiotelemetry was used to monitor movement and activity patterns of a female ...

☆ Cited by 83 Related articles All 5 versions Web of Science: 52 Import into EndNote

[PDF] jstor.org

**View It@HKUL**



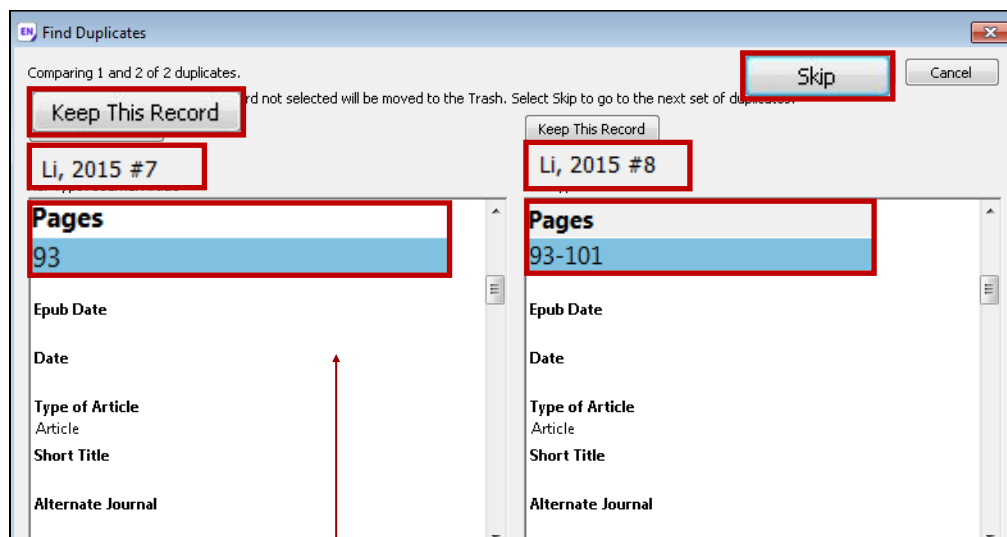
## Remove Duplicates

- 1 From the top bar menu, choose **References > Find Duplicates**



- 2 Although the two records refer to the **same reference**, Endnote assigns each with a **unique record number**.

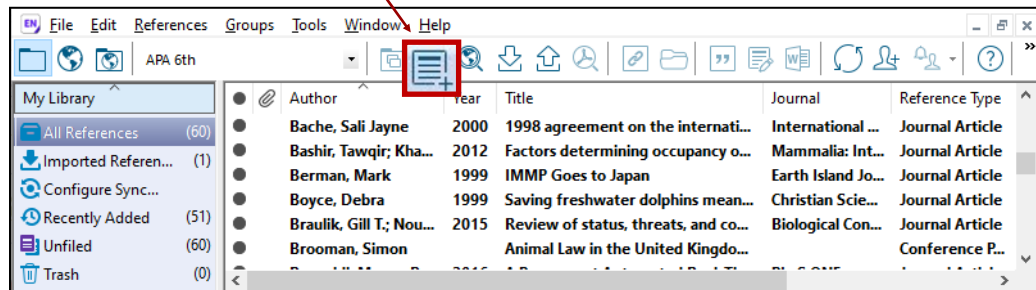
(Note: If you are citing the same reference multiple times, select the reference under a unique record number. Otherwise, the cited reference may be treated as two different citations.)



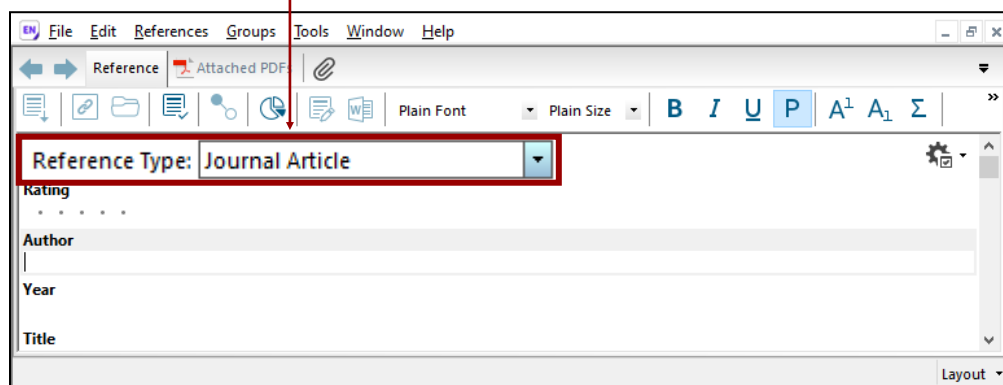
- 3 Different data of the records is **highlighted** for comparison. Select the record you would like to **keep**. To keep both records, click on **Skip**. (Note: Make sure the deleted record has not been cited in any of your papers.)

## 4. Manual Input

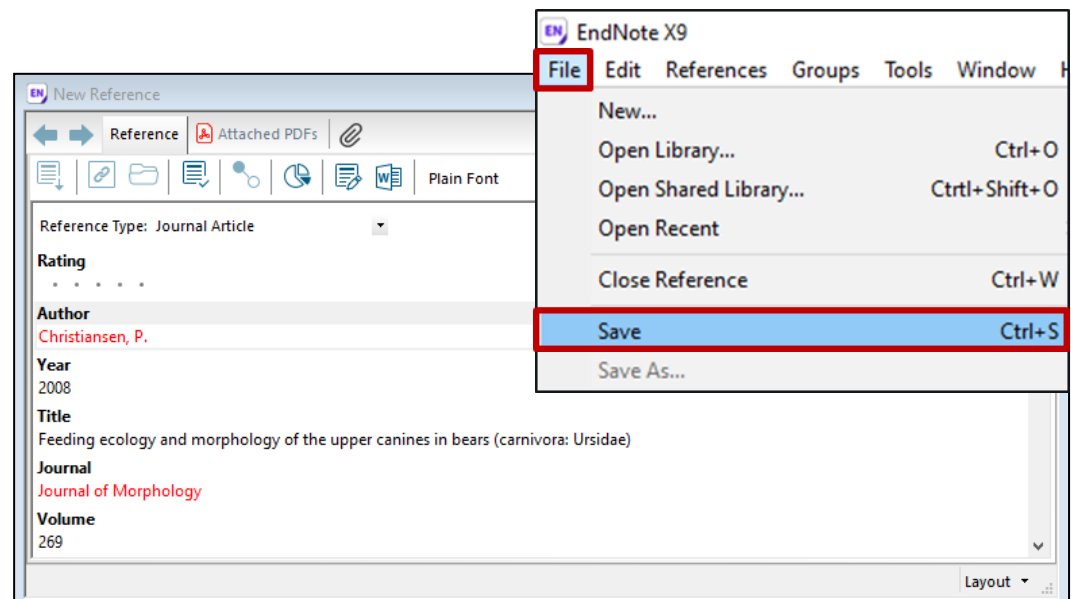
- 1 Click on the **New Reference** icon from the Endnote top icon bar.



- 2 Select the **reference type**, e.g. book, journal article



- 3 Enter the **citation information**, e.g. author, title, year. Press **Ctrl+S** to save the changes, or click on **File > Save**





## Special Note Author Names

### Personal names

- **First** Middle Last (**no comma**)

Author  
Nelson W.S. Chow

- **Last**, First Middle (**comma** after the last name)

Author  
Chow, Nelson W.S.

### Corporate author

- **Organization**, (1 comma after the organization name)

Author  
The University of Hong Kong,

- **Department,, Organization** (2 commas after the department name)

Author  
Centre of Asian Studies,, The University of Hong Kong

### More than one author

- Enter **one author per line**.

Author  
Bearer, Scott  
Linderman, Marc

### Auto-complete

- For author names that are **already in the library**, Endnote will **auto-complete** the name after you have typed in the first few letters.
- If the **author is a new name**, it will appear in **red**, but will change to **black** when the reference is saved.



## Special Note Dates and Page Numbers

### Dates

- Enter dates **as you would like them to appear** in your formatted list or bibliography. EndNote does not reformat dates.

**Issue Date**  
Aug 10 → Austin, C. (2009, Aug 10). Happy 4th birthday! Now what about kids? *South China Morning Post*, p. 1.

**Issue Date**  
August 10 → Austin, C. (2009, August 10). Happy 4th birthday! Now what about kids? *South China Morning Post*, p. 1.

**Issue Date**  
10 August → Austin, C. (2009, 10 August). Happy 4th birthday! Now what about kids? *South China Morning Post*, p. 1.

### Page Numbers

- Format** for page ranges:

- complete

**Pages**  
1331-1336

- abbreviated

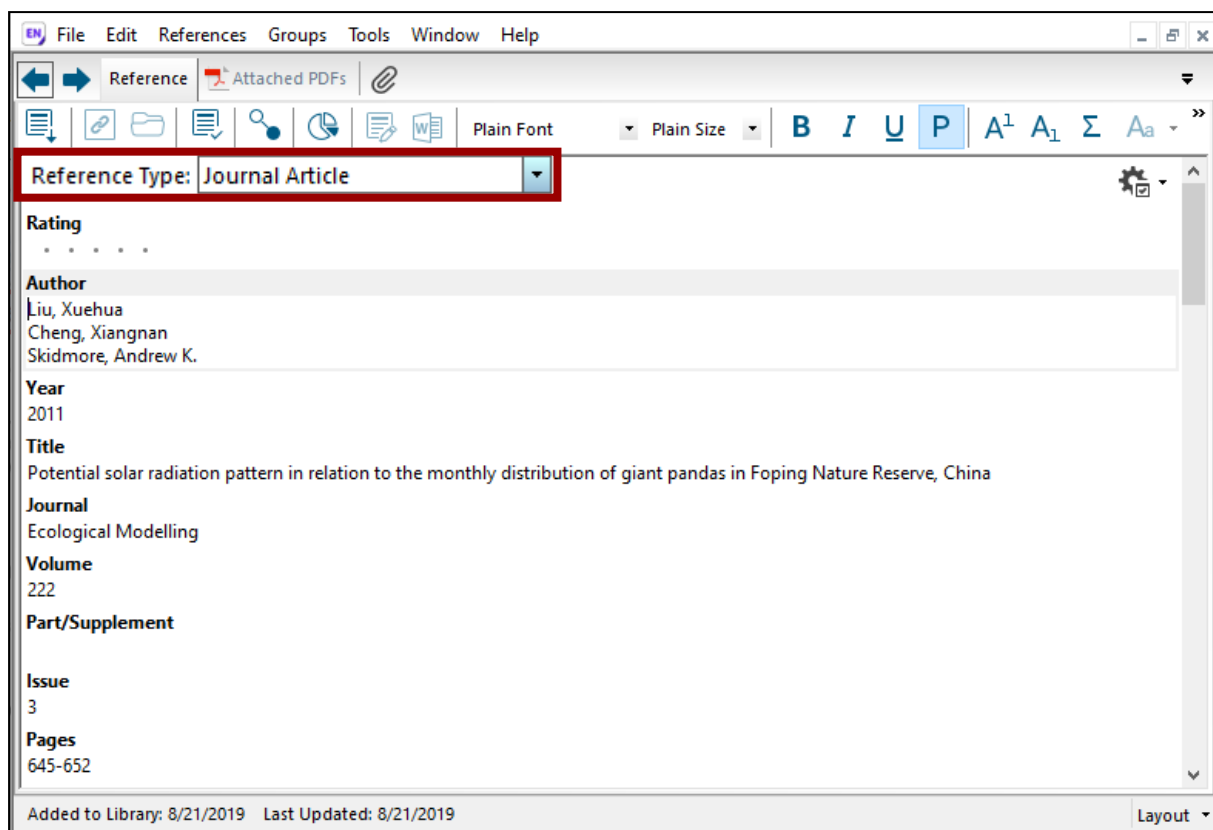
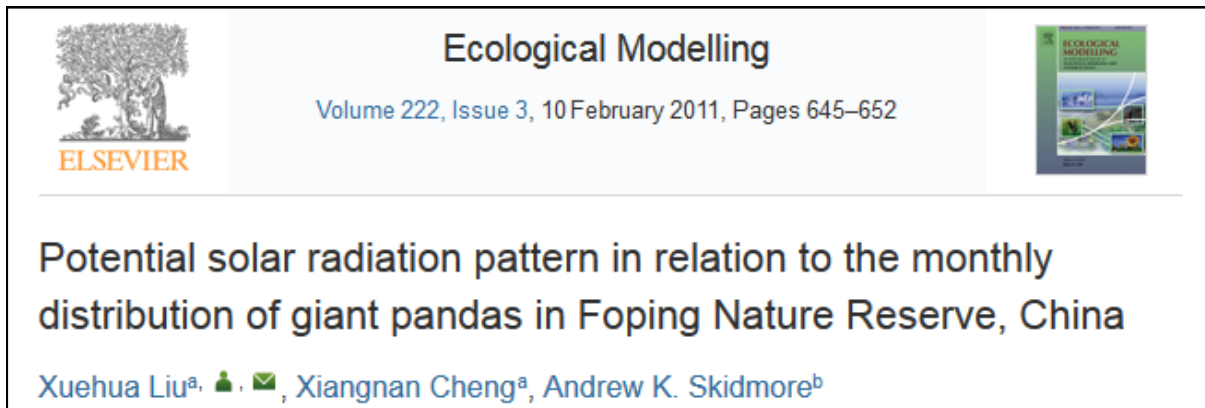
**Pages**  
1331-6

- Do not use commas in page number in the thousands**

**Pages**  
1331 ✓

**Pages**  
1,331 ✗

## Manual Input: A journal article



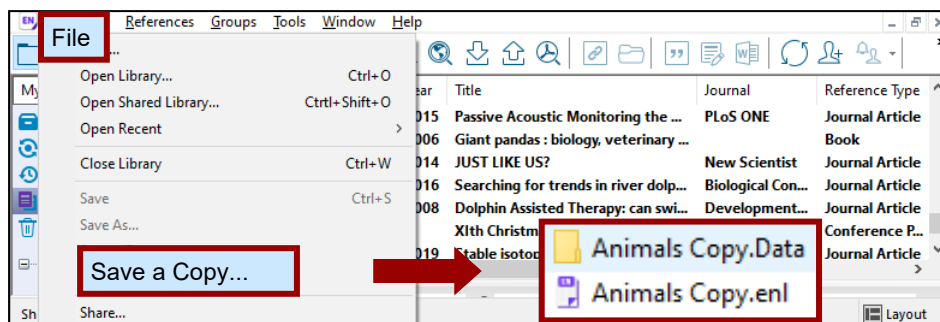


## Back up your Endnote Library!

### Method 1: Save a Copy

Produce a copy of both the enl and the Data folder.

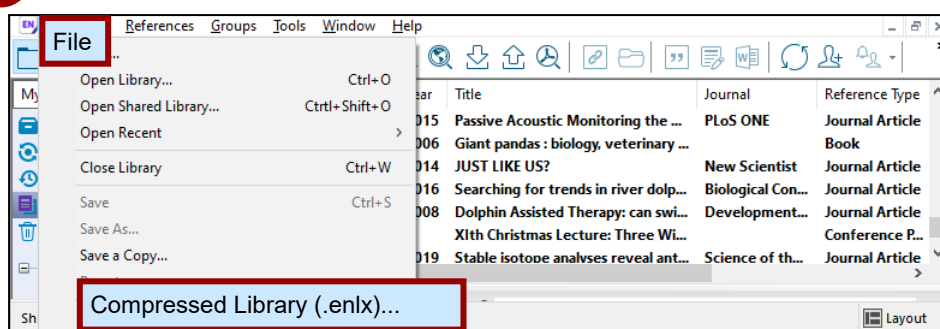
Select **File > Save a Copy**



### Method 2: Compressed Library

Save as a single file, making it convenient to send it by email.

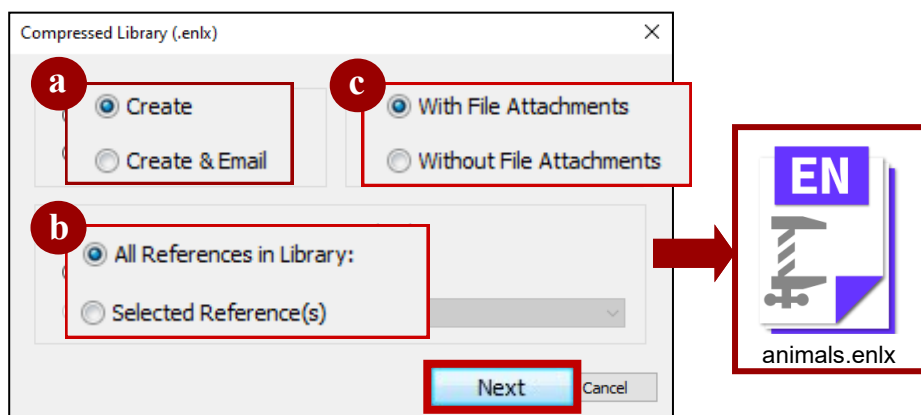
#### 1 Select **File > Compressed Library**



#### 2 Select your **options**

- (a) Create/ Create and Email?
- (b) All references or selected references from a group?
- (c) With or without the file attachments?

**Note:** If recipient of the compressed library does not have access rights to the pdf full text, choose "Without file attachments".





# Cite While You Write (CWYW)

## 1. What is CWYW?

Endnote's **CWYW** (Cite While You Write) helps you:

- Insert **in-text citations**

The effects of humans on biodiversity and landscapes have been widely recognized. As the human population continues to increase, demands on natural resources grow larger; few places on Earth are unaffected by human a (Bearer, et al., 2008). Even many nature reserves, or "protected areas", are not well protected from human interference. Nature reserves are a traditional approach to biodiversity conservation, but their effectiveness is limited by increasing human pressures.(Figure 1)<sup>43</sup>

The objective to protect wildlife and other species is often in serious conflict with the needs for socioeconomic development by local re (Christiansen, 2008). Although increase in human population pressure has been recognized as a major threat to environmental protection and biodiversity conservation , the mechanisms underlying complex interactions between population and environment or population and biodiversity are largely unknown (Wildt, 2006).

- Build the **Reference List**

Bearer, S., Linderman, M., Huang, J. Y., An, L., He, G. M., & Liu, J. Q. (2008). Effects of fuelwood collection and timber harvesting on giant panda habitat use. *Biological Conservation*, 141(2), 385-393.<sup>44</sup>  
Christiansen, P. (2008). Feeding ecology and morphology of the upper canines in bears (carnivora : Ursidae). *Journal of Morphology*, 269(7), 896-908.<sup>45</sup>  
Wildt, D. E. (Ed.). (2006). *Giant pandas: Biology, veterinary medicine, and management*. Cambridge: Cambridge University Press.<sup>46</sup>

- Insert **figures and charts**

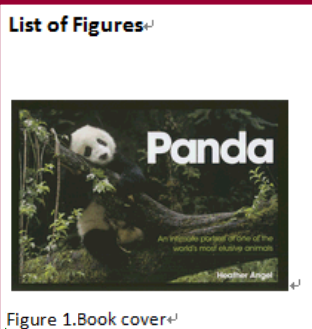
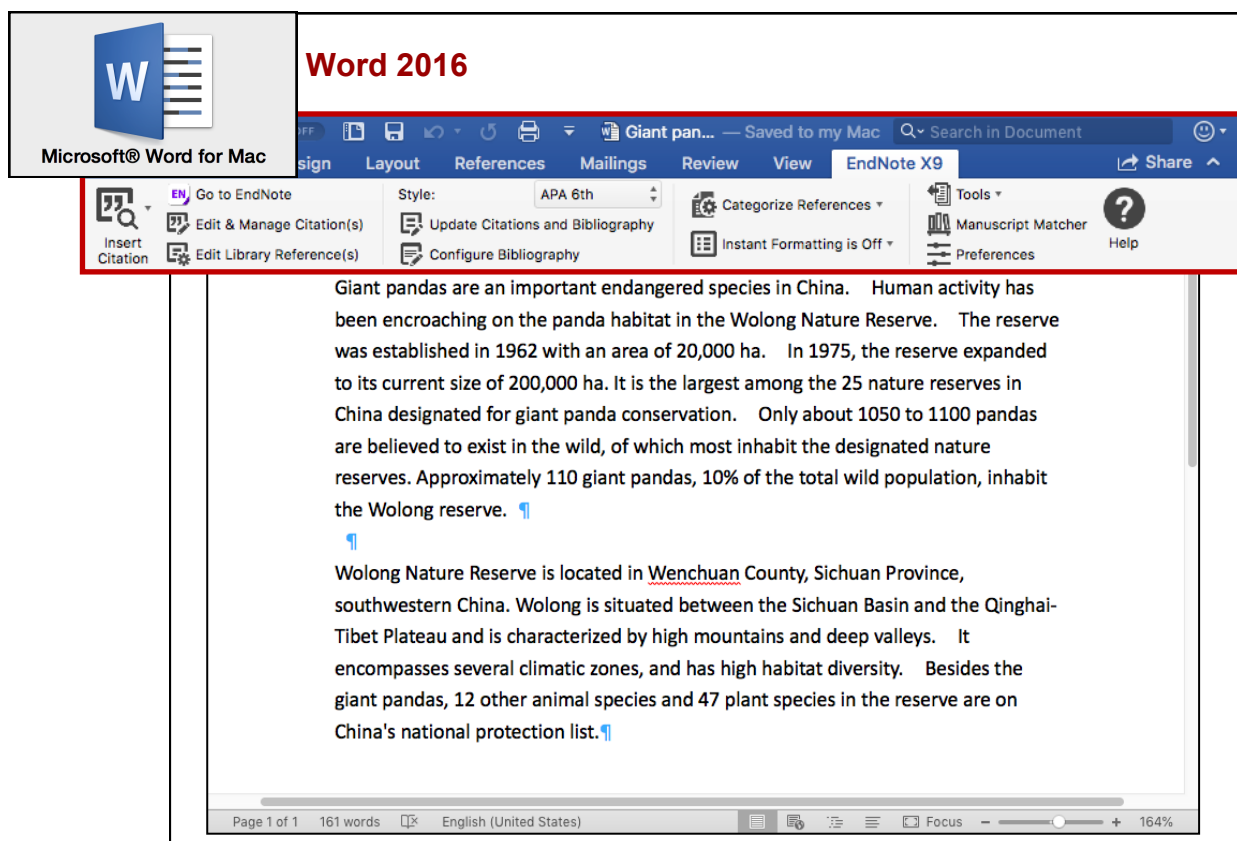
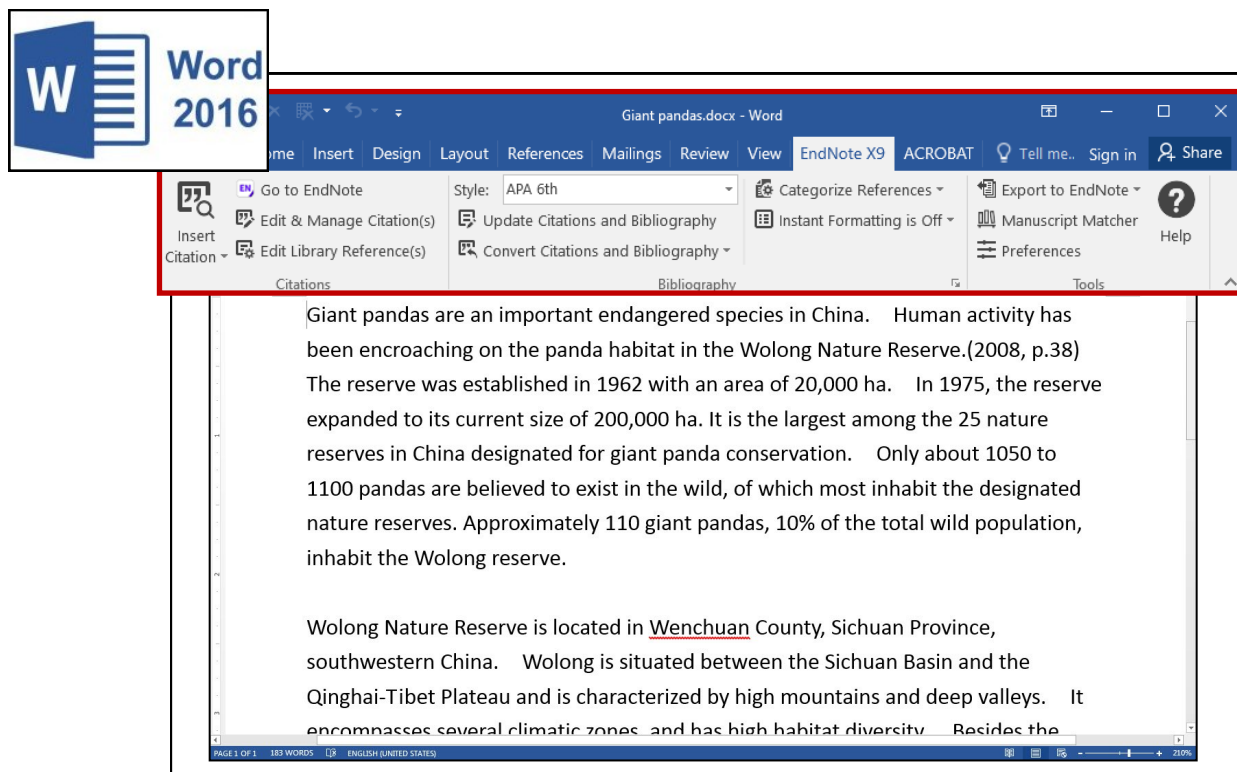


Figure 1. Book cover<sup>47</sup>

- Format the **citation style** of the entire essay

## 2. The Endnote Toolbar in Microsoft Word

An **Endnote toolbar** will appear in Word once Endnote is installed on your PC.



### 3. How to use CWYW?

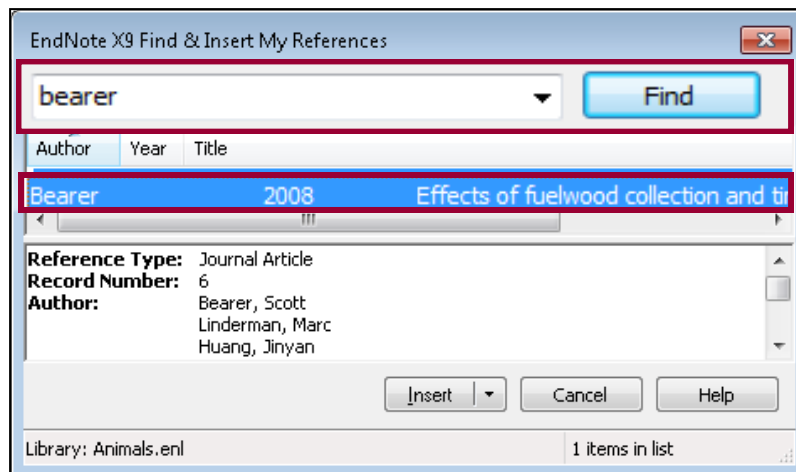
#### Step 1 Insert a citation

##### Method A Insert Citation

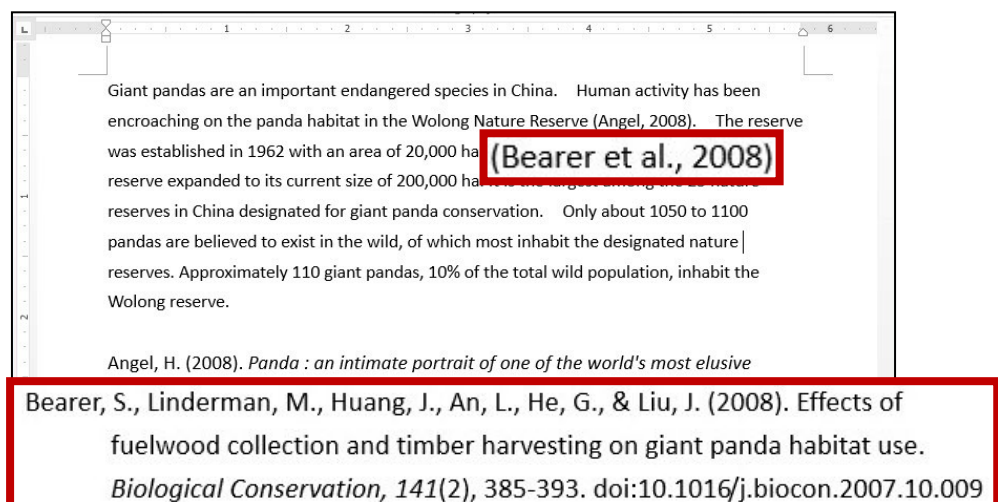
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**



- 2 Find your citation. Then, highlight the **desired citation**, and click on **Insert**.



- 3 The **in-text citation** and the **reference** will be inserted into your document.



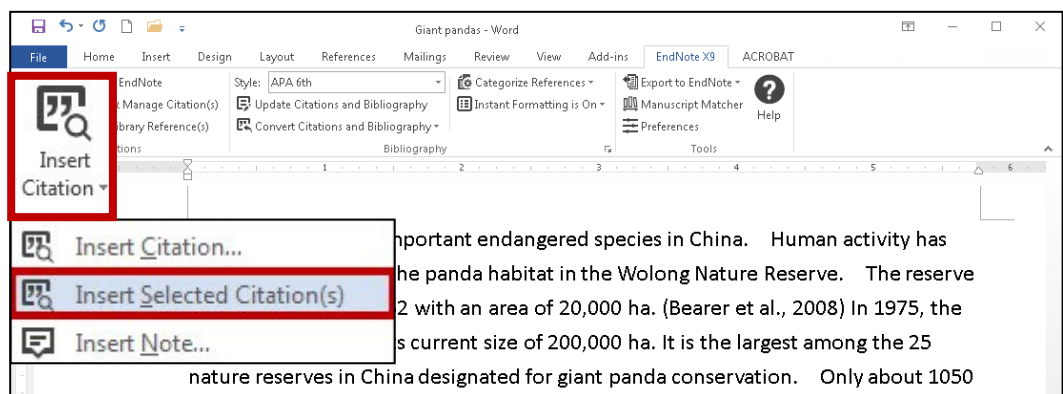
## Step 1 Insert a citation

### Method B Insert Selected Citation

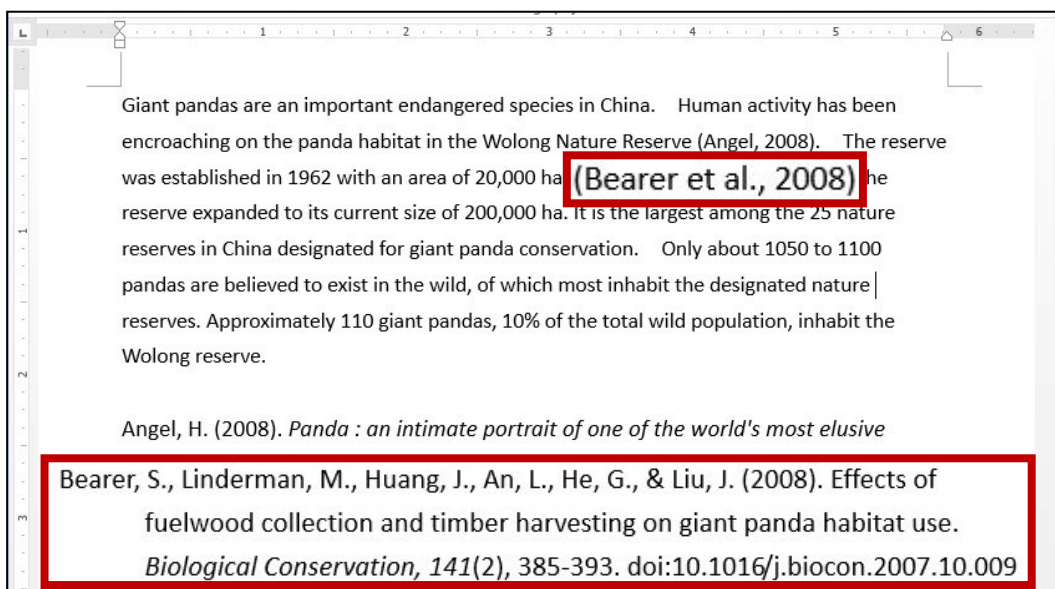
- 1 In **Endnote**, highlight the **desired citation**.

Author	Year	Title	Journal	Reference Type	Rating
	1970	Da xiong mao = Dai panda = The giant panda	Dai panda	Book	
	2015	Climate change challenges the current conservation s...	Biological Conservati...	Journal Article	
Bearer, Scott; Li...	2008	Effects of fuelwood collection and timber harvesting ...	Biological Conservati...	Journal Article	
Christiansen, Per	2008	Feeding ecology and morphology of the upper canines i...	Journal of Morphology	Journal Article	
Johnson, Kennet...	1988	Comparative Behavior of Red and Giant Pandas in the...	Journal of Mammalogy	Journal Article	
Liu, Xuehua; Che...	2011	Potential solar radiation pattern in relation to the month...	Ecological Modelling	Journal Article	
Nicholls, Henry	2010	The way of the panda : the curious history of China's ...		Book	
Zhou, Mengqi	2012	Panda : back from the brink		Book	

- 2 In your Word document, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Selected Citation(s)**



- 3 The **in-text citation** and the **reference** will be inserted into your document.

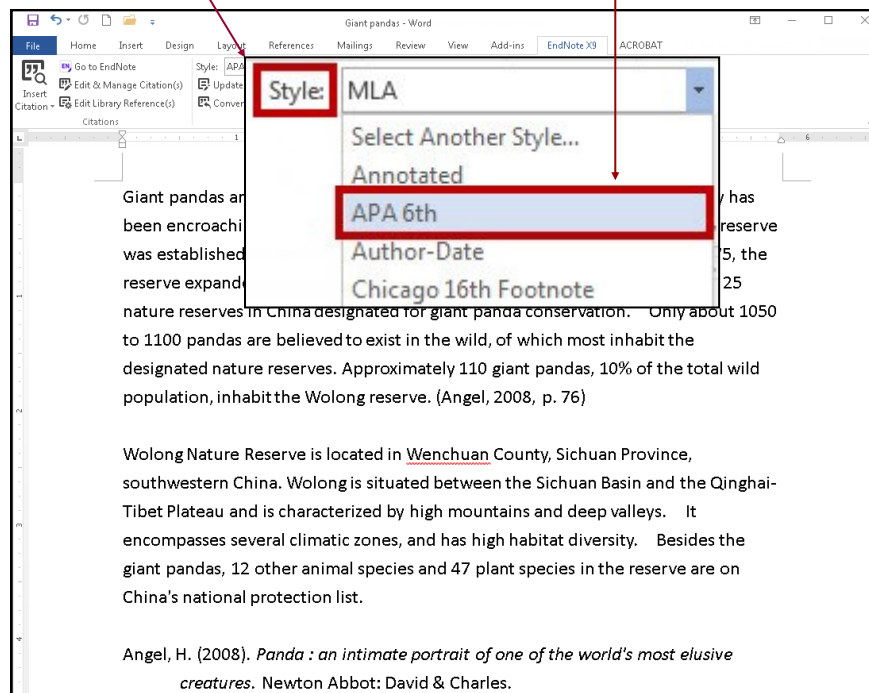




## Change the citation style

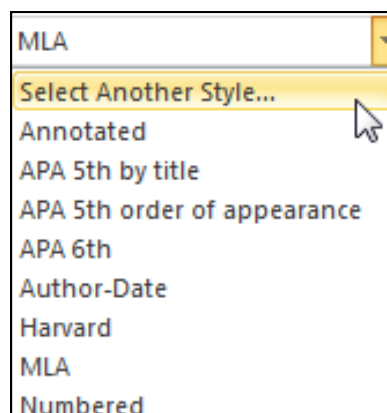
**1** In the **Bibliography** tab section, open the **Style** pull-down menu.

**2** Select your **desired citation style**, e.g. APA 6th.



## Can't find the Citation Style?

From the **Style** pull-down menu, choose **Select Another Style**.



If the style is not on the list, visit Endnote website

<http://www.endnote.com/support/enstyles.asp>.

There are more than 6,000 styles there!

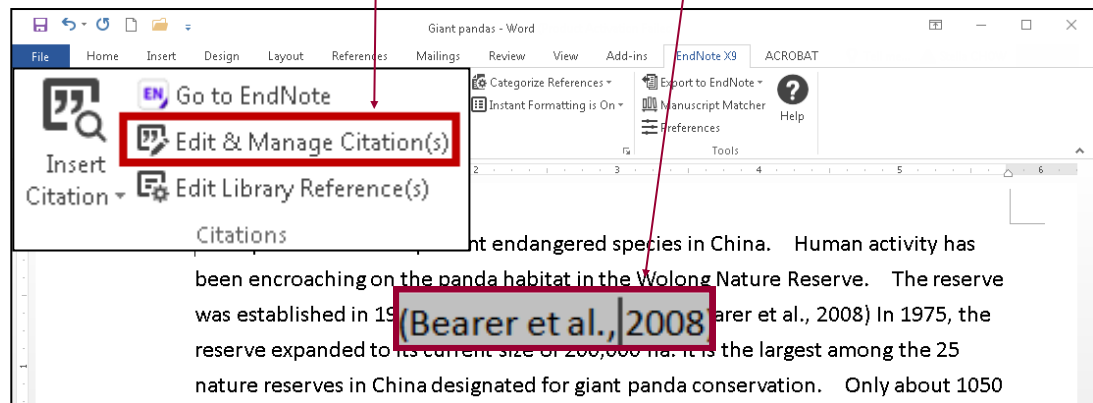
## Step 2 Edit & Manage Citation(s)

1

**Place your cursor** on the in-text citation you would like to edit. The citation will turn grey.

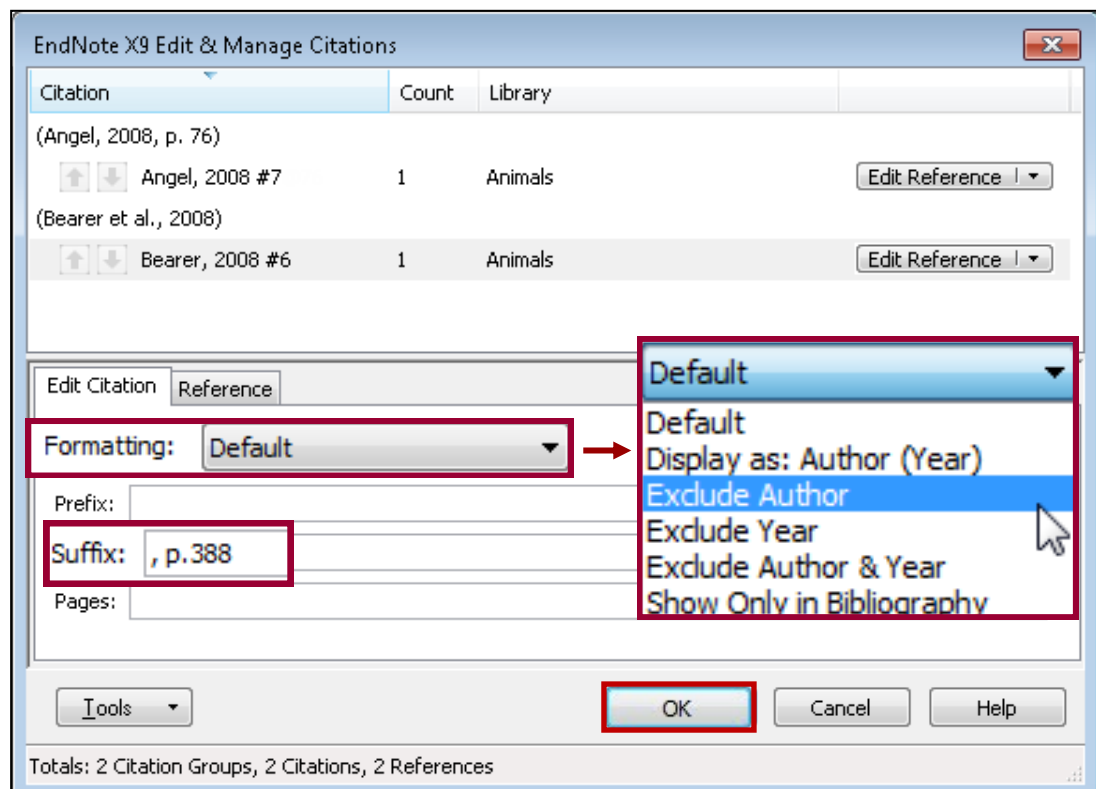
2

From the Citations tab section, click on **Edit & Manage Citation(s)**.

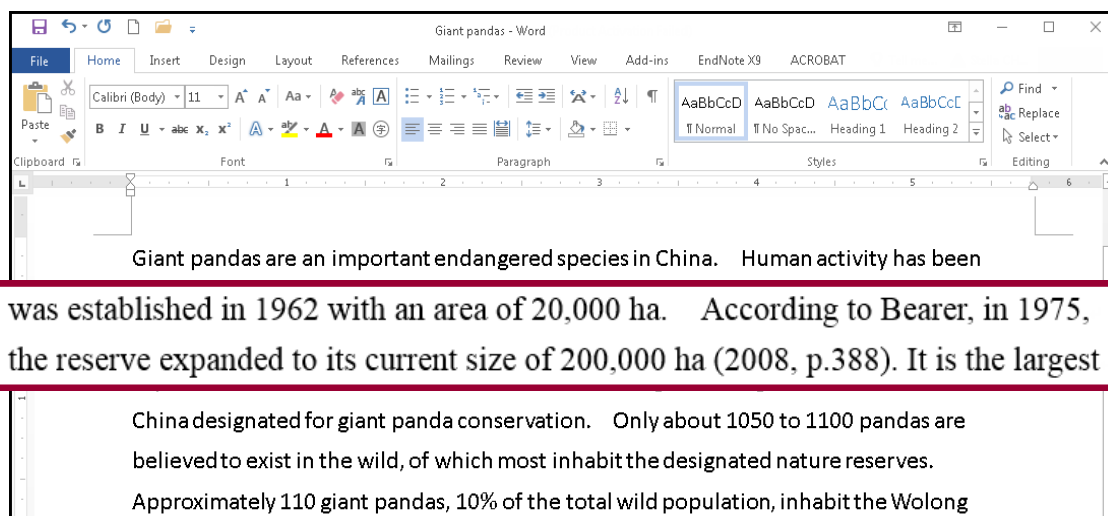


3

Specify your options, e.g. Exclude Author, add page numbers  
(Note: Use **Suffix** to add page numbers if **Pages** does not work.)



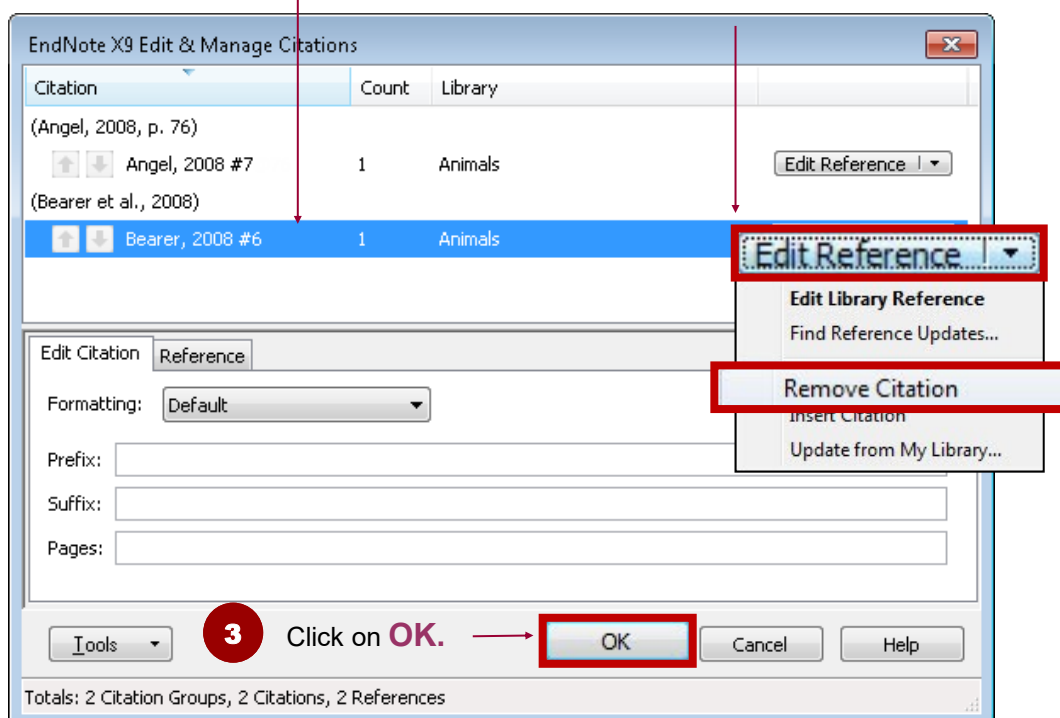
- 4 The in-text citation will be changed accordingly.



### Removing a Citation

**Important:** **DO NOT** remove citations using the delete function in Word. To remove citation:

- 1 From the **Edit & Manage Citation(s)** menu, highlight the **desired citation**.
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



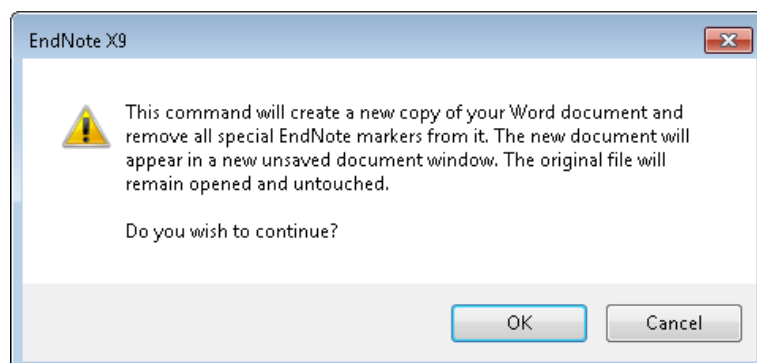
### Step 3 Remove Field Codes

Before submitting your paper, you may wish to remove the Endnote field codes. The recipient can then view the document properly without using Endnote.

- 1 To remove field codes, select:  
**Convert Citations and Bibliography > Convert to Plain Text**



- 2 A new Word document will be created. Click on **OK** and save the file under a **new filename**.



# IV

## Manage a Large Library

**Scenario:** Your Endnote library contains references on different topics or purposes. To get more organized, you would like to create subsets and group the references.

**Solution:** **Groups** feature is a great way to organize your references, especially for huge Endnote libraries. There are two types of groups: Custom and Smart Groups.

### 1. Difference between Custom and Smart Groups

	Custom Groups	Smart Groups
Create the group	<b>Manually</b> add references to a group.	<b>Specify criteria</b> - references meeting the criteria will automatically be added to the group.
Updates	Done <b>manually</b> <ul style="list-style-type: none"> <li>The group will not be updated unless you manually add or remove references.</li> </ul>	Updates <b>automatically</b> <ul style="list-style-type: none"> <li>Dynamically update the group as new references are added to the library.</li> </ul>
Applications (Some examples)	<ul style="list-style-type: none"> <li>Keep a <b>list of good readings</b></li> <li>Remind yourself that <b>this list requires special attention.</b></li> </ul>	<ul style="list-style-type: none"> <li>Group references <b>matching certain keywords</b></li> <li>Group references by <b>publication period.</b></li> </ul>
Number of groups	Maximum <b>5,000</b> groups (custom and smart groups combined)	

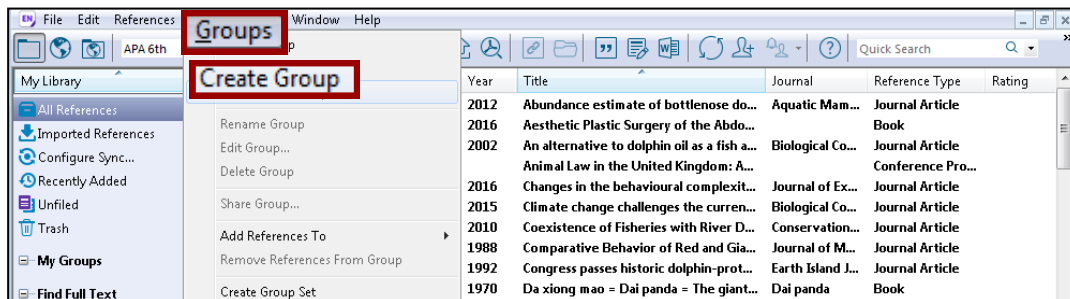
## 2. Create a Custom Group



- (a) **Create a custom group** by the name “5-star readings”
- (b) **Add** 3 references to this custom group

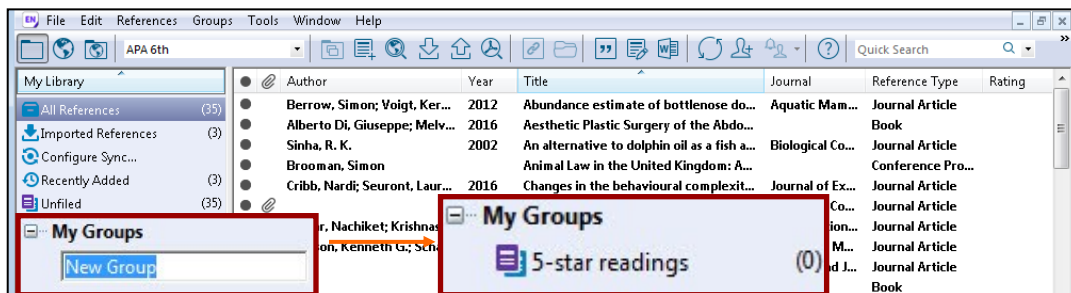
1

From top bar menu, select **Groups > Create Group**



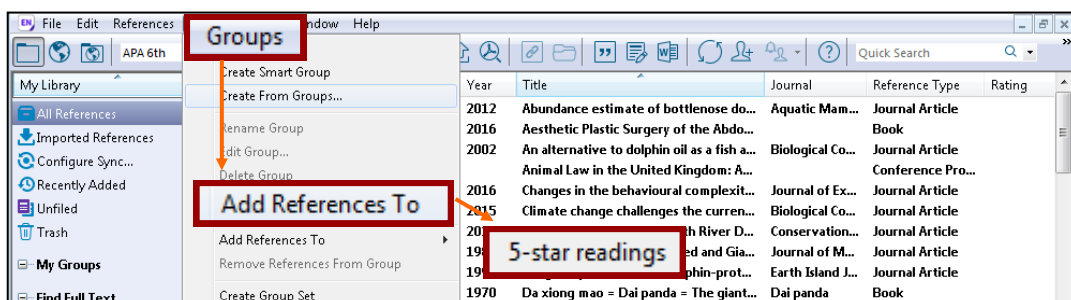
2

**Enter name** of the group.



3

Find the references and then add them to this group by selecting **Groups > Add References To > A custom group** (Note: Or, you can **Drag and drop** it to the group)

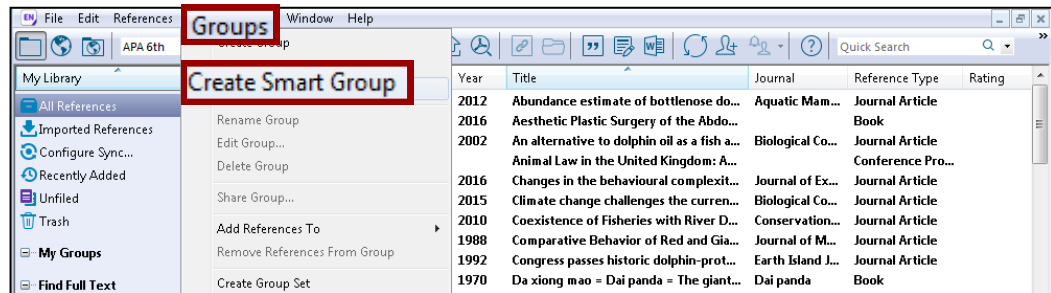


### 3. Create a Smart Group

**Create two smart groups:**

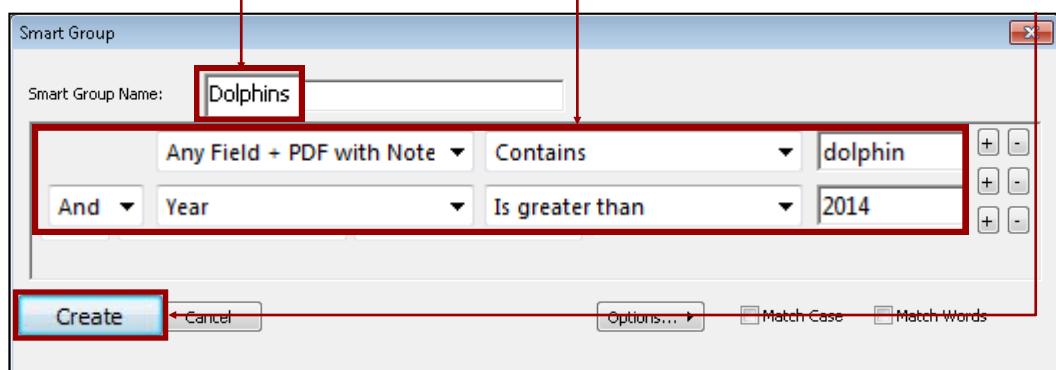
- (a) Dolphins
- (b) Pandas

**1** From top bar menu, select **Groups > Create Smart Group**

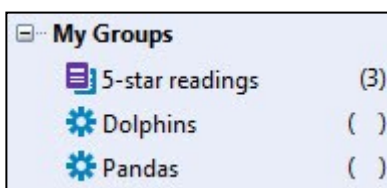
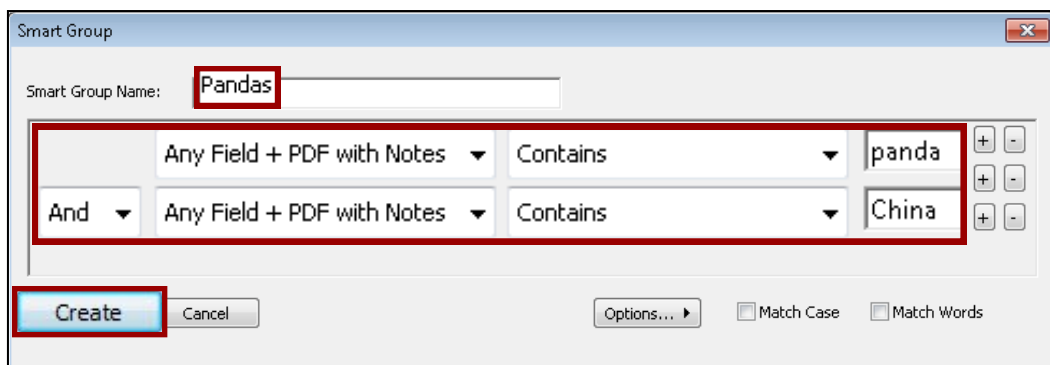


**2** Create the smart group for **Dolphins**

- (a) Change **group name**
- (b) Enter **search criteria**
- (c) Click on **Create**



**3** Create the smart group for **Panda**



**Number of references** in the smart groups:

Dolphins = \_\_\_\_\_

Panda = \_\_\_\_\_

**Note:** Removing a reference from a smart group will move it to the trash.



## Questions on Endnote?



**On-site:** Information Counter, Level 3, Main Library  
**Telephone:** 3917-2203  
**Email:** [libis@hku.hk](mailto:libis@hku.hk)



**Training and Support:** [libguides.lib.hku.hk/endnote](http://libguides.lib.hku.hk/endnote)

Learn from the online tutorials, videos and quick guides!