

Endnote @ HKU

For Mac Users

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

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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**

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

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

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

The screenshot displays the EndNote 20 interface. On the left, a sidebar shows the 'All References' list with 192 entries. The main window shows a document titled 'Giant pandas.docx' with a reference list at the bottom. A red box highlights an in-text citation '(Angel, 2008, p.76)' in the document text. Red lines connect the explanatory text to the 'All References' list, the reference list in the document, and the in-text citation.



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 licence** which permits **current HKU staff and students** to use Endnote both on campus and on their home PC.

3. Where is the Endnote@HKU website?

URL: 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?

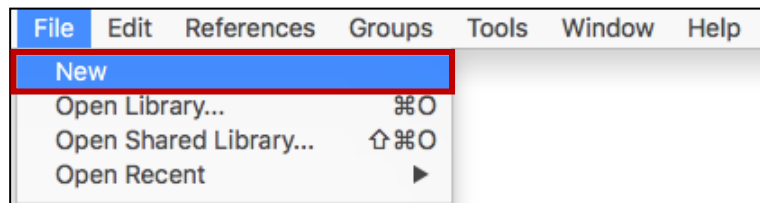
Refer to the **Downloading and Installation Guide**:
Endnote@HKU > Download Endnote > Installation Guide for Mac (20)

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

5. Create an Endnote Library

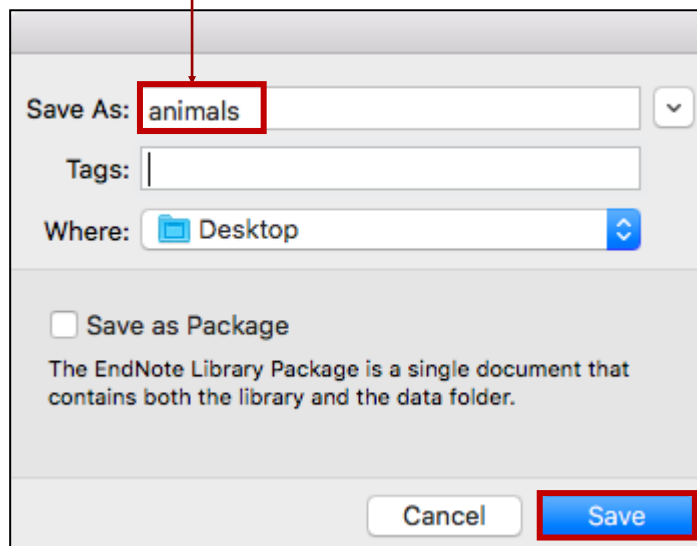
1

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



2

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



3

Click **Save**.



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

Important: Please use **Firefox** or **Google Chrome** for exporting records to Endnote.

1. Direct Export - Find@HKUL



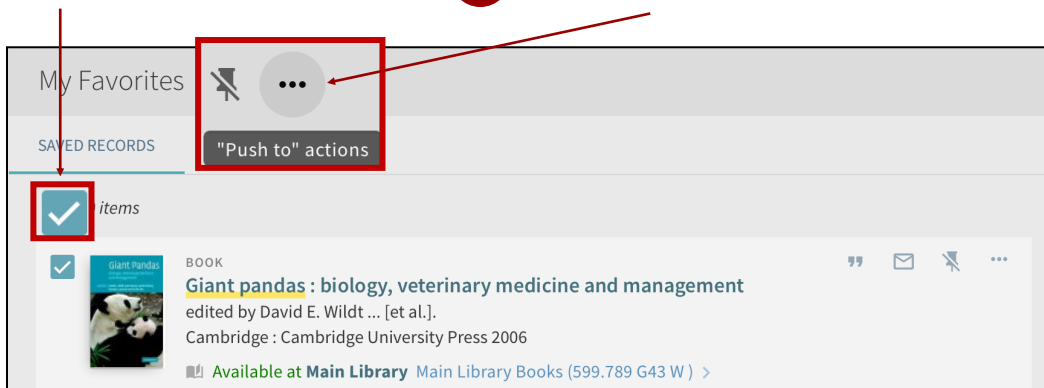
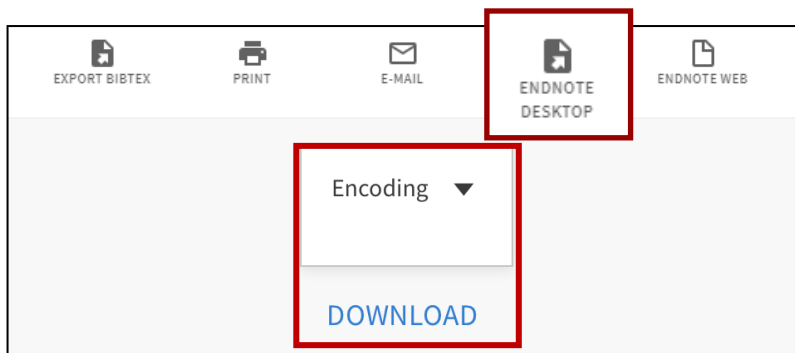
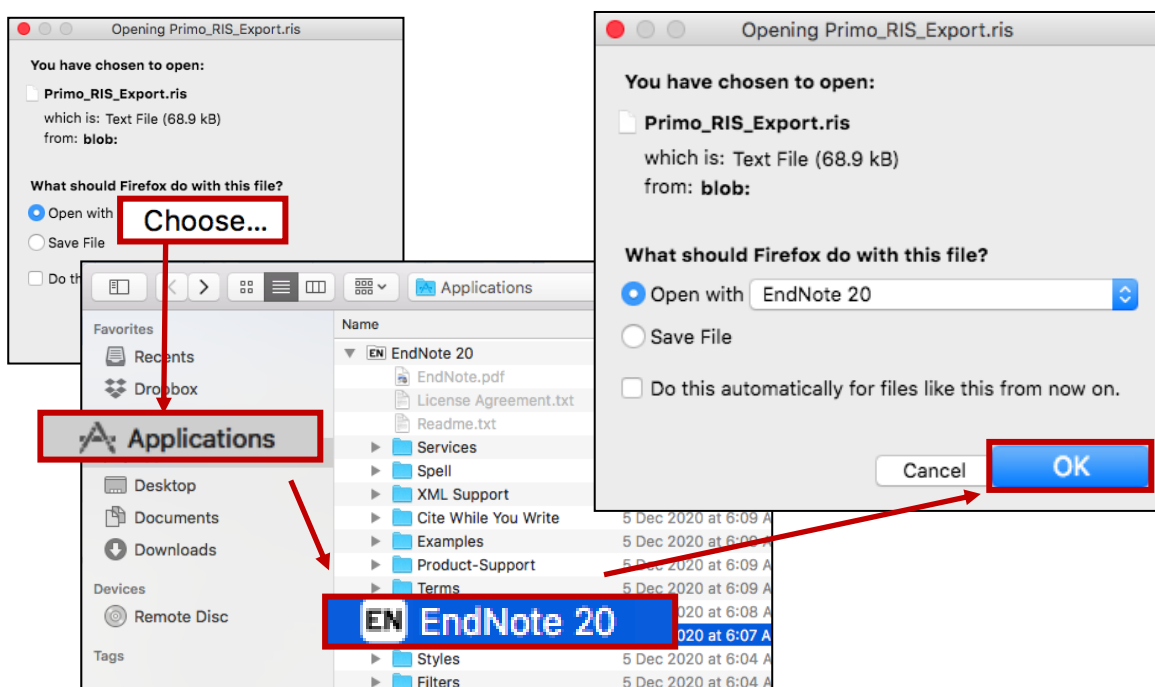
Step 1 Search Find@HKUL and select records

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

The screenshot shows the Find@HKUL search results page. The search term "giant panda" is entered in the search bar. The results list includes two articles. Annotations with red boxes and arrows indicate the steps:

- Step 1:** The search bar containing "giant panda" is highlighted.
- Step 2:** The "Mark" button (represented by a pushpin icon) next to the first article is highlighted.
- Step 3:** The "My Favorites" button (represented by a pushpin icon) in the top right corner is highlighted.

The first article is titled "Metagenomic Study Suggests That the Gut Microbiota of the Giant Panda (Ailuropoda melanoleuca) May Not Be Specialized for Fiber Fermentation". The second article is titled "Activity Patterns of the Giant Panda (Ailuropoda melanoleuca)".

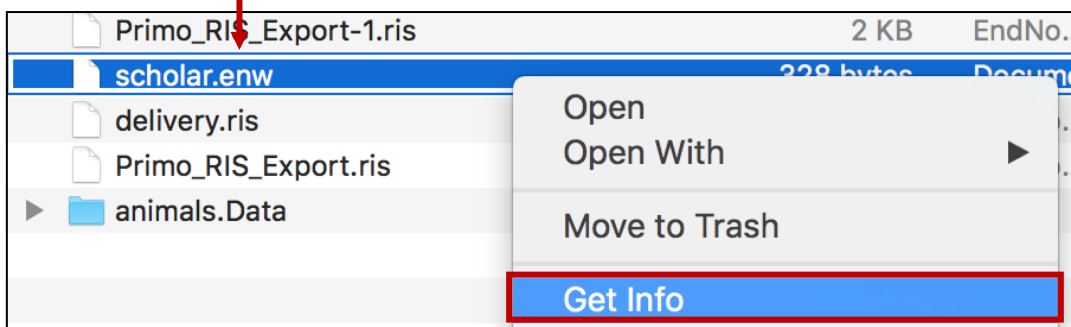
Step 2 Export records to Endnote**1 Select the records****2 Open “Push to” actions****3**Select **ENDNOTE DESKTOP** and click on **DOWNLOAD****4**For Firefox browser, click on **Choose**. Then, under Applications, select **Endnote 20**. Click **OK**.**5**The results will be **imported** into your Endnote library



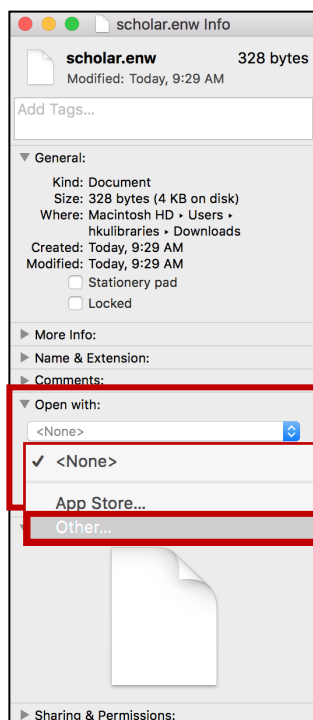
Open RIS and ENW EndNote files on a Mac

1 Go to **Finder** to locate downloaded RIS or ENW file.

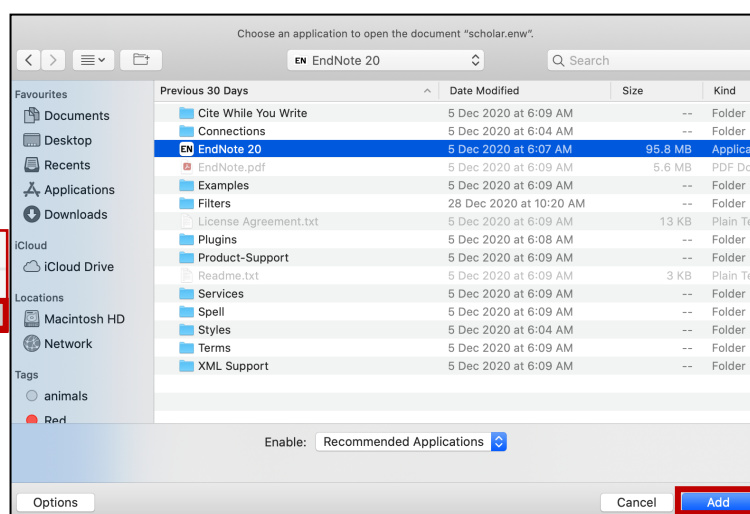
2 **Right click** RIS or ENW file. Then, select **Get Info**.



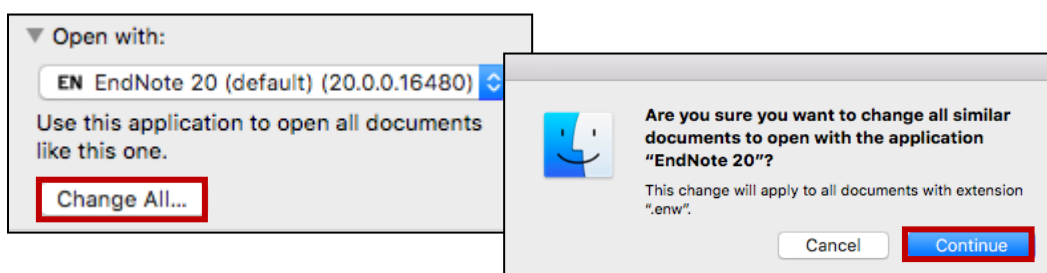
3 A pop-up panel will open. Under open with, choose **Other** from the pull-down menu.



4 Choose **Endnote 20** from the applications and then click **Add**.



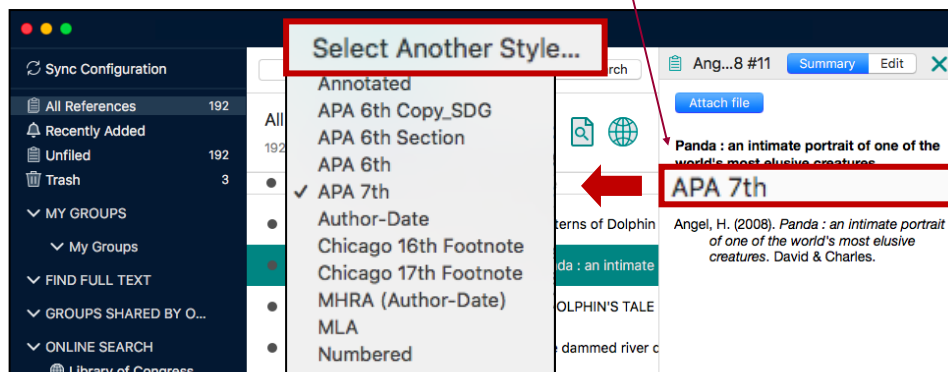
5 Click on **Change All** and then press **continue** on the pop up window.





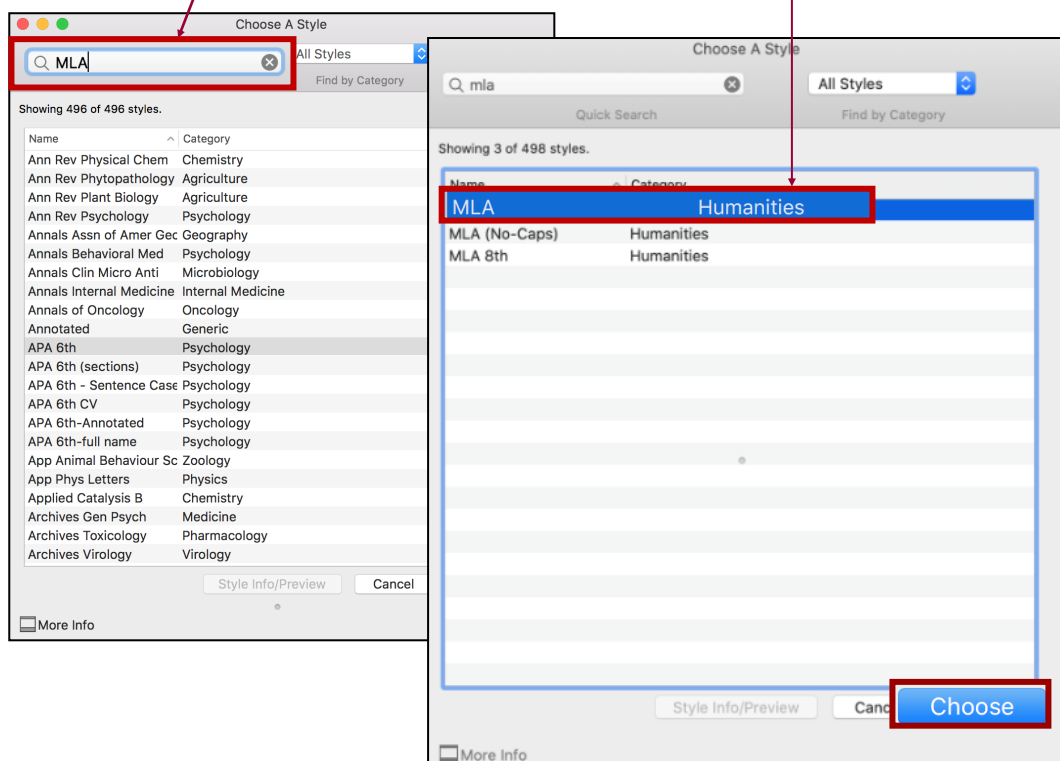
Change citation styles

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

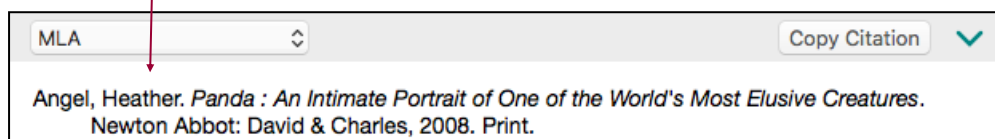


- 2 Enter name of your citation style and then press **Enter**.

- 3 Highlight the style and click on **Choose**.



- 4 In the **Preview panel**, the citation will be changed to the selected style.





Edit references

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

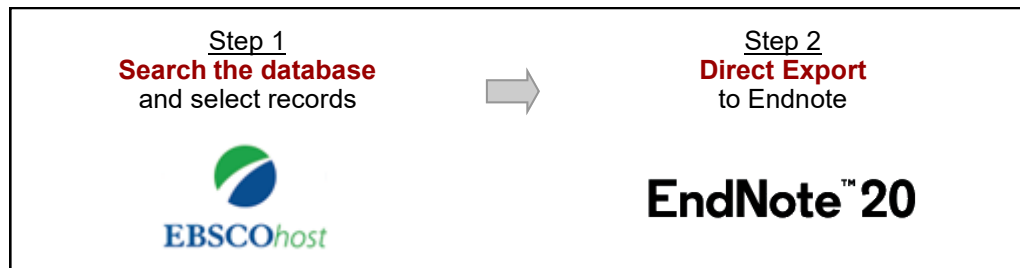
The screenshot shows the Endnote software interface. On the left, there is a list of references under the heading 'All References' with 192 references. The list includes entries by Yang, Xin; Chen... (2017), Ywasaki Lima, J... (2017), Zhang, Baowei;... (2007), and Zhou, Mengqi (2012). The entry for Zhou, Mengqi (2012) is highlighted. On the right, the preview panel for 'Zhou, 2012 #26' is shown. It includes an 'Attach file' button and the title 'Panda : back from the brink'. Below the title, the citation is displayed in APA 7th style: 'Zhou, M. (2012). Panda : back from the brink (Adapted, rev. ed. ed.). Saraband.' There are also buttons for 'Summary', 'Edit', and 'Copy Citation'.

- 2 This is an example of APA 7th Citation Style for Editions other than the First:
Harris, L. A. (2001). *Canadian copyright law* (3rd ed.). McGraw Hill Ryerson.

- 3 Select **Edit**. Amend the reference and click **Save**.

The screenshot shows the Endnote software interface with the 'Edit' and 'Save' buttons highlighted in red boxes. The preview panel for 'Zhou...#26' is visible, showing fields for Number of Volumes, Series Volume, Number of Pages, Pages, Editor, Edition (Adapted, rev. ed.), Date, Type of Work, Translator, Short Title, and Abbreviation. The list of references on the left is the same as in the previous screenshot, with the entry for Zhou, Mengqi (2012) highlighted.

2. Direct Export - Academic Search Complete (ASC)



Step 1 Search ASC and select records

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

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

The screenshot shows the Academic Search Complete search interface. The search term 'dolphin' is entered in the first field, and 'conservation' is entered in the second field, with 'AND' selected as the Boolean operator. The interface includes a 'Search' button, a 'Clear' button, and a 'Choose Databases' link. Below the search fields are links for 'Basic Search', 'Advanced Search', and 'Search History'.

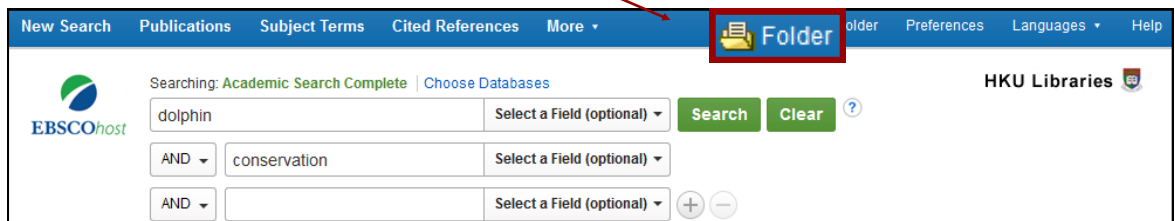
- 3** On the result list, click on **To Print, Email or Save Multiple Items** to select the desired records.

The screenshot shows the search results page for the query 'dolphin AND conservation'. The first result is '1. Fatal asphyxia due to laryngeal displacement by large size a Guiana dolphin (Sotalia guianensis), Brazil.' The result is from the 'Academic Journal' and includes a PDF full text link (4.7MB). The 'Share' button is highlighted, and a dropdown menu is shown with options to 'Add to folder' and 'Add search to folder'. The 'Add to folder' option is selected, and a folder named 'Results (1-50)' is shown. The 'Add search to folder' option is also selected, and the search term 'dolphin AND conservation' is entered.

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

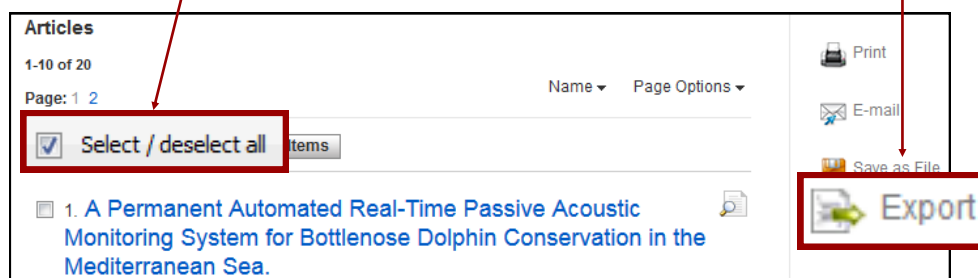
Step 2 Direct Export to Endnote

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

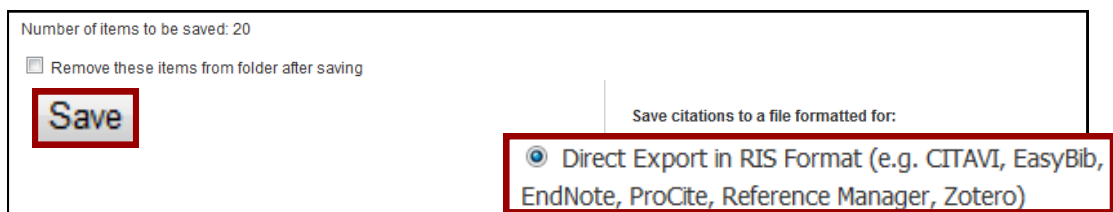


- 2 Tick the **checkbox** to select all records

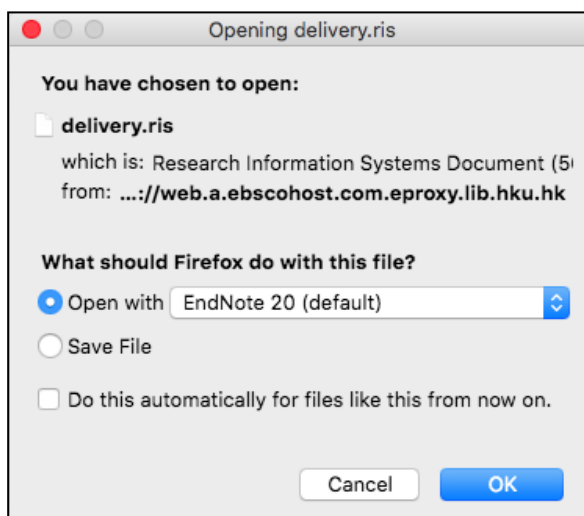
- 3 Click on the **Export** icon.



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



- 5 For Firefox browser, choose **EndNote 20** for opening the file. Then, click **OK**.



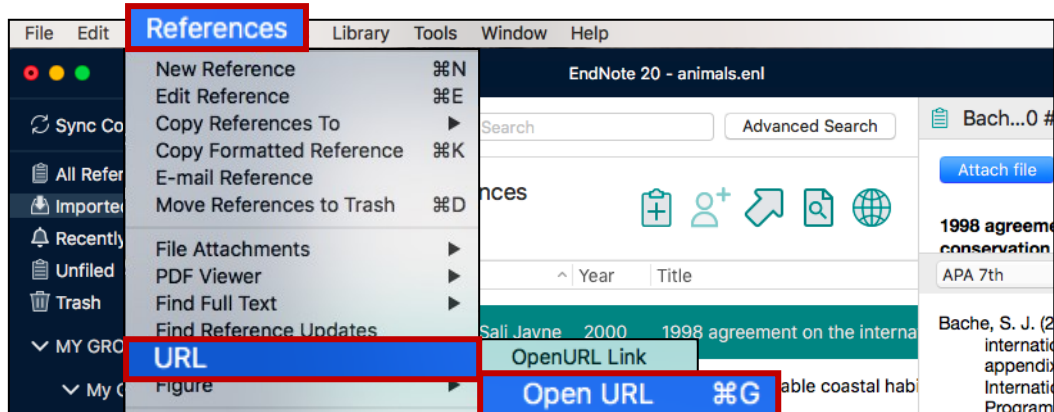
- 6 The records will be **imported** into your Endnote library.

Open Link: Locate and attach PDF

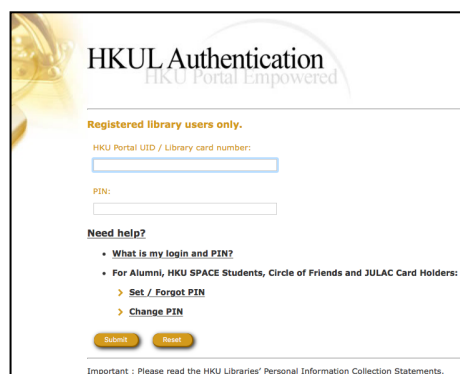
Point directly to the article website and get full text, if available and attach PDF to your library

Step 1: Locate PDF full text

- 1 **Highlight** the reference. Then, select **References > URL > Open URL**
(Or, use the shortcut key **Command + G**)



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

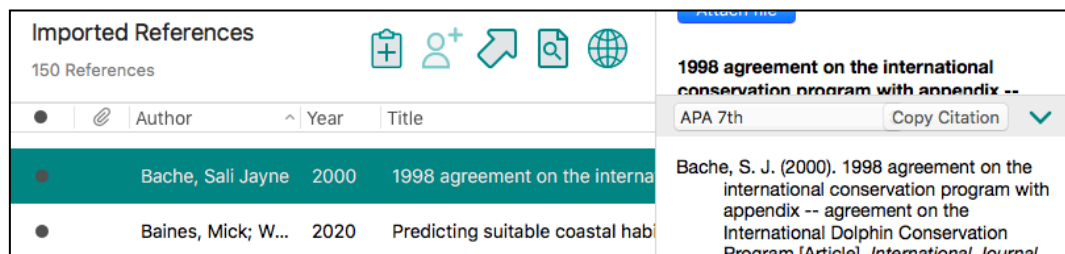


- 3 Save the PDF from the database

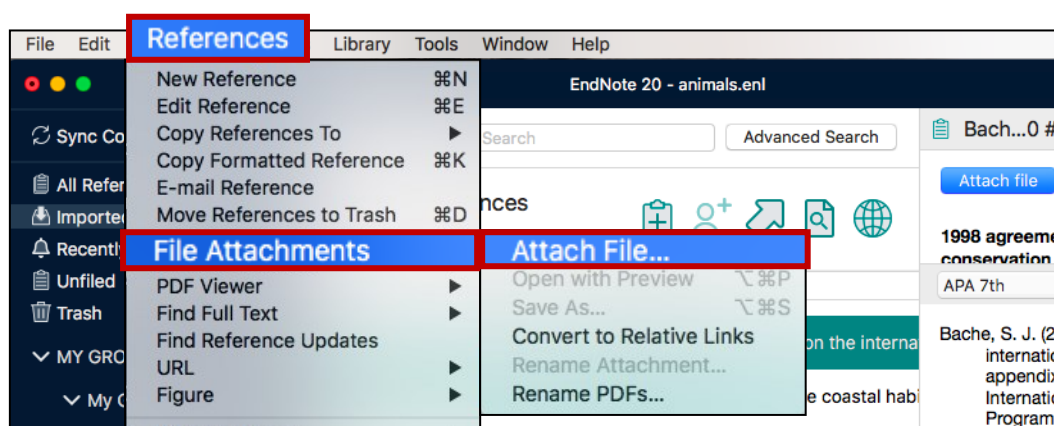


Step 2: Link to PDF full text

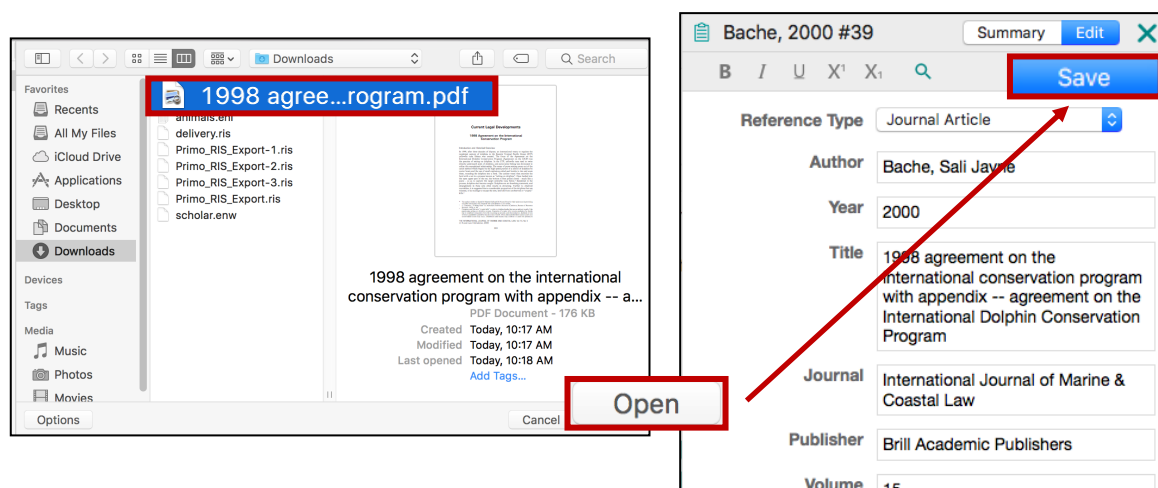
- 1 Highlight the reference in your library.



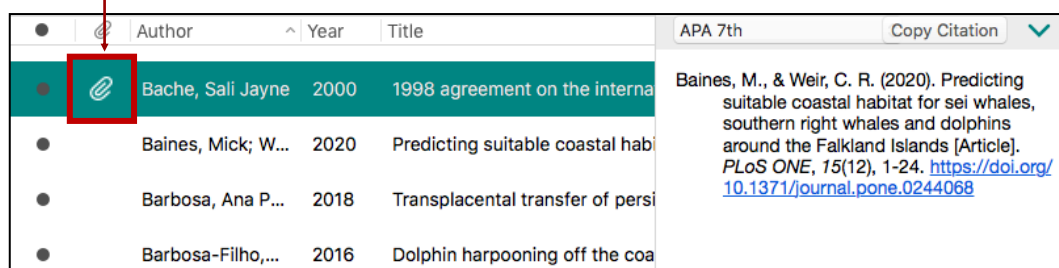
- 2 From top bar menu, select **References > File Attachments > Attach File**.



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



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

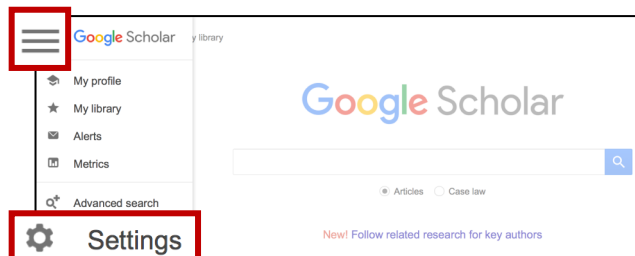


3. Direct Export - Google Scholar

Step 0 Set up Scholar preferences

1

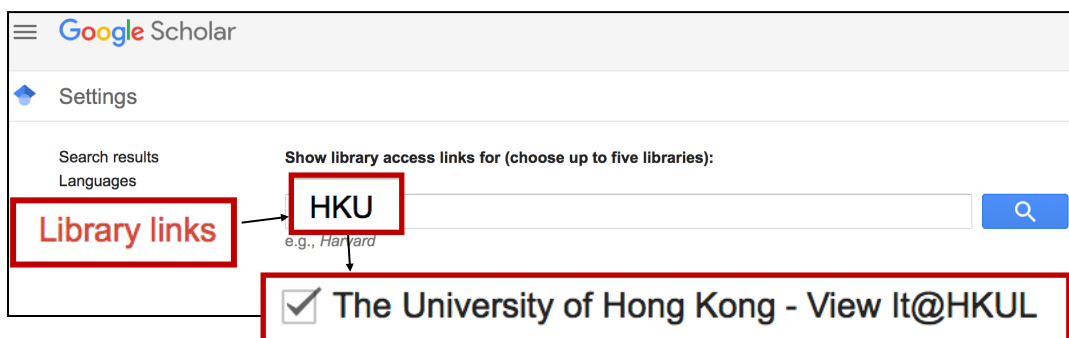
Go to <http://scholar.google.com> and click on **Settings**



2

Under **Library links**

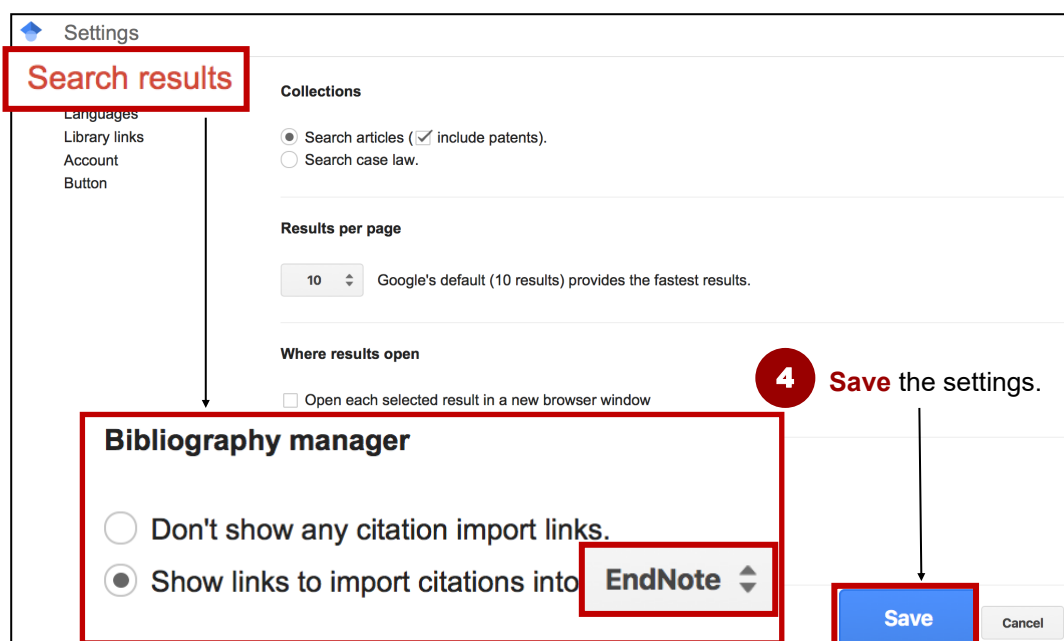
1. Search for **HKU**
2. Select **The University of Hong Kong - View it @HKUL**

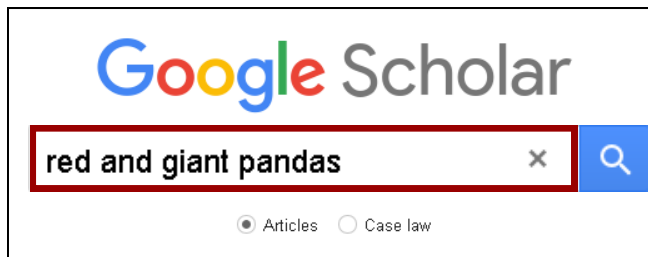


3

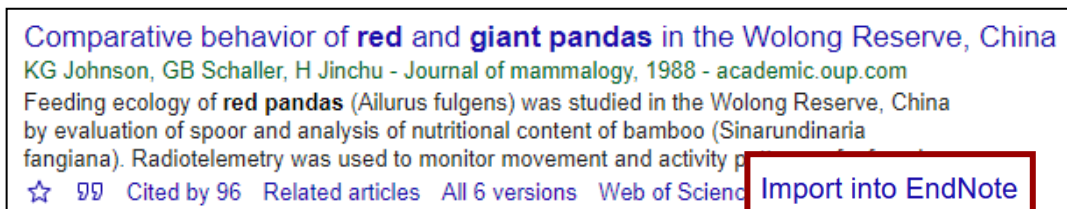
Under **Search results > Bibliography manager**

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.

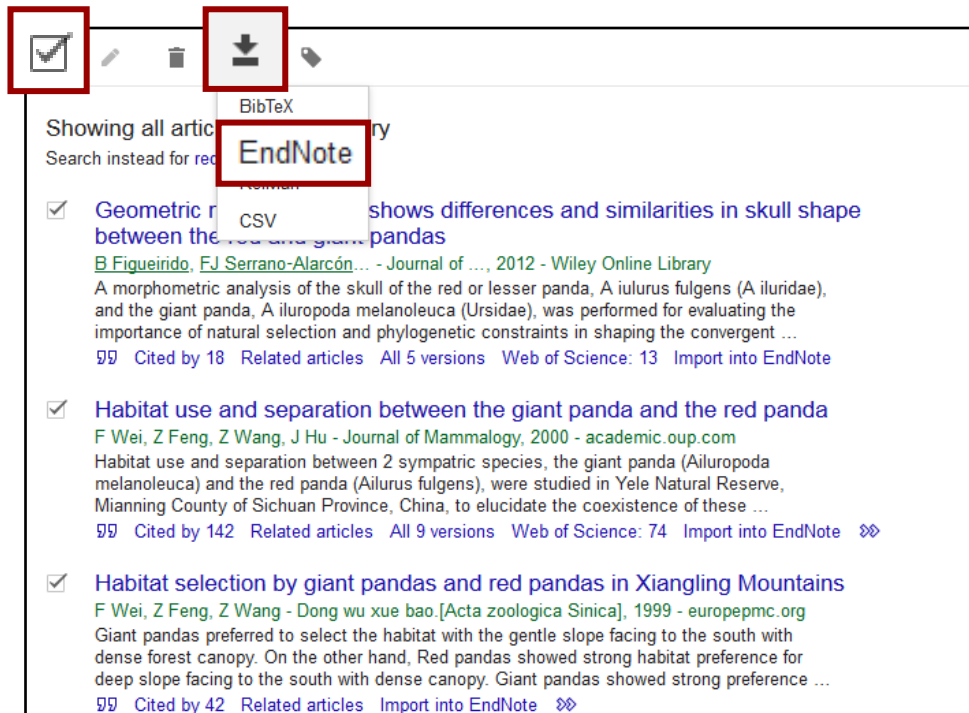


- 3 Click on the **My library** icon.

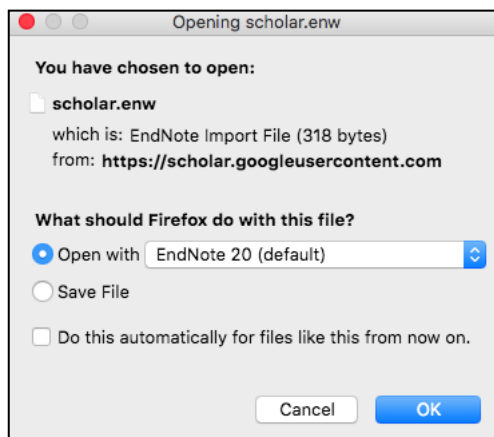


- 4 On the My Library page, **select** the records.

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



- 6 For Firefox browser, **Open with** Endnote 20



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



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
Abstract 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
[☆](#) [Cited by 75](#) [Related articles](#) [All 4 versions](#) [Import into EndNote](#)

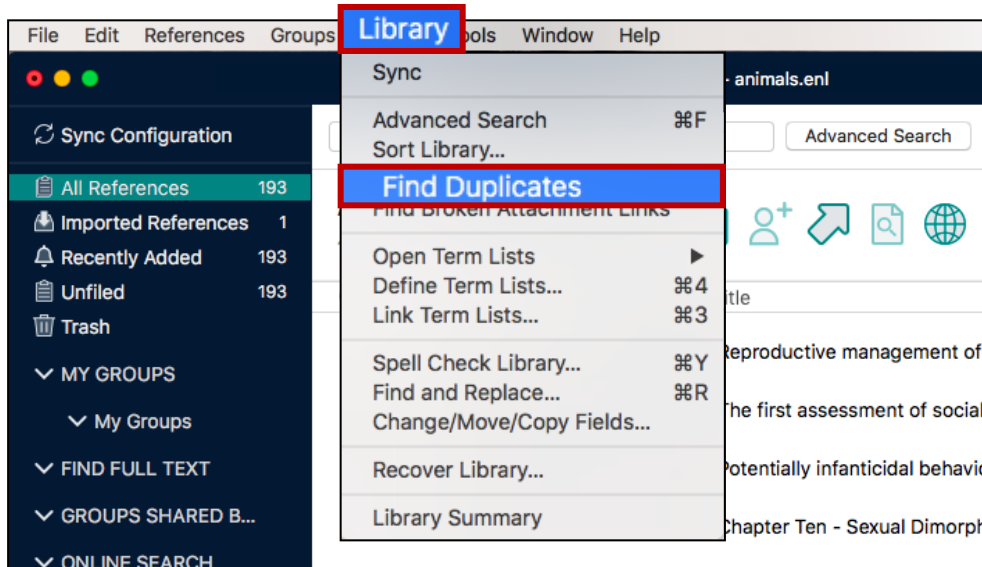
[View It@HKUL](#)

[View It@HKUL](#)



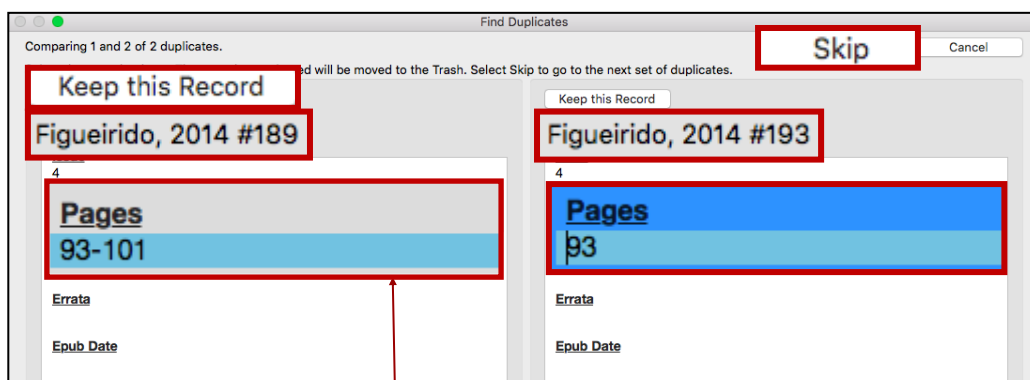
Remove Duplicates

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



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

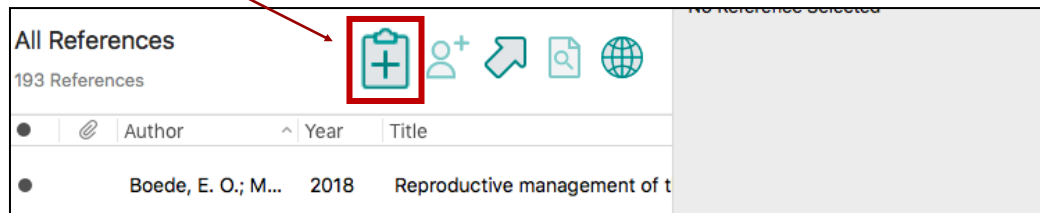
(Note: If you are citing the same reference multiple times, select the reference under a unique record number. Otherwise, the cited reference may be treated as two different citations.)



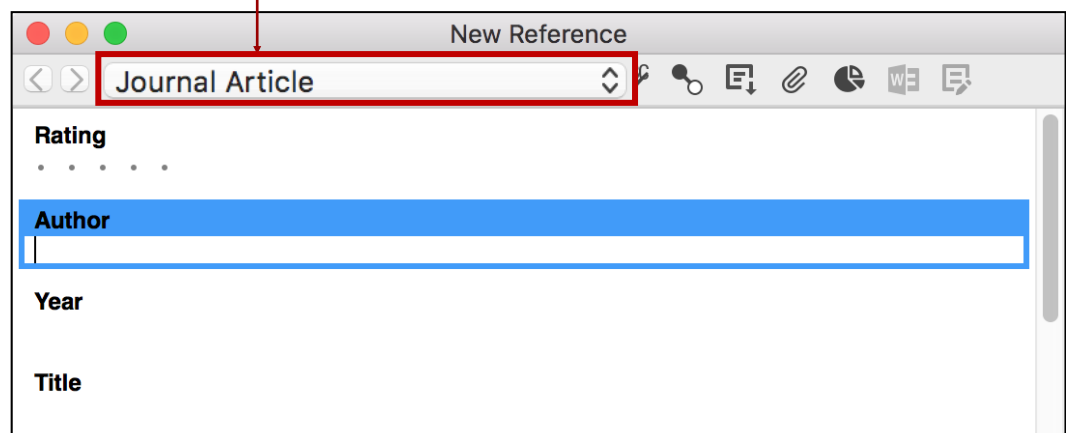
- 3 Different data of the records is **highlighted** for comparison. Select the record you would like to **keep**. To keep both records, click on **Skip**.
(Note: Make sure the deleted record has not been cited in any of your papers.)

4. Manual Input

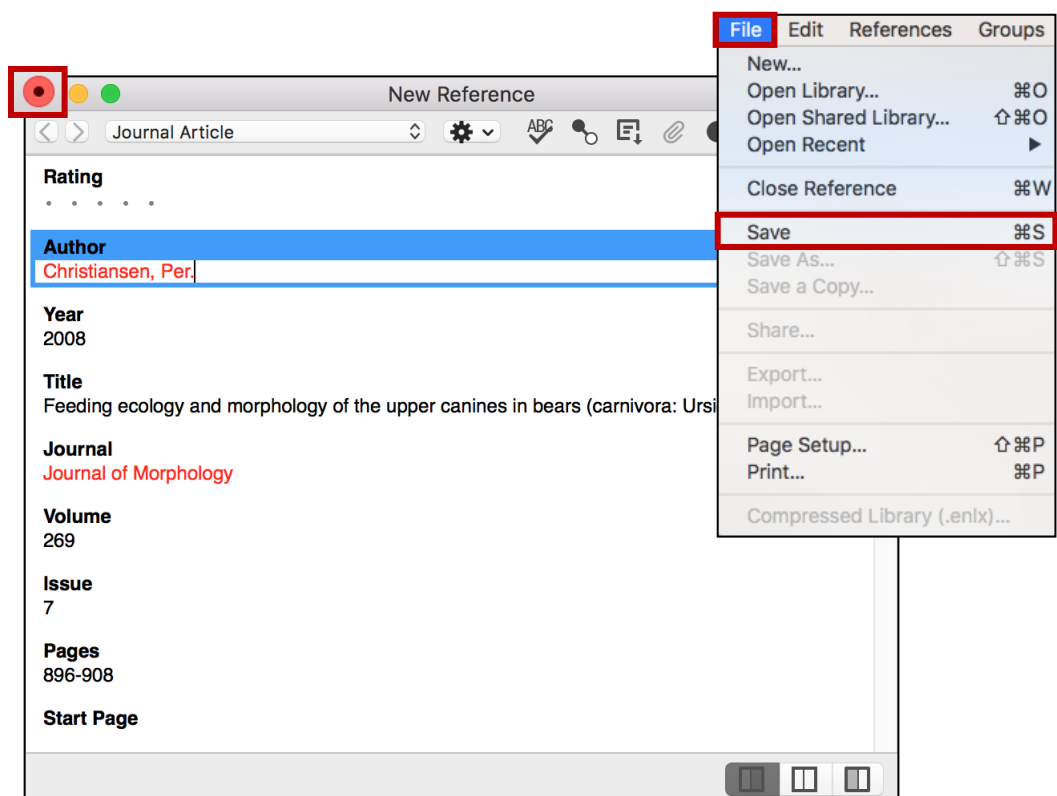
- 1 Click on the **New Reference** icon from the Endnote top icon bar.



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



- 3 Enter the **citation information**, e.g. author, title, year. Click **File > Save**. Close the box.





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 Center 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.

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

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

Year 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**





Pages 1331



Pages 1,331



Manual Input: A journal article

 ELSEVIER	Ecological Modelling Volume 222, Issue 3, 10 February 2011, Pages 645–652	
Potential solar radiation pattern in relation to the monthly distribution of giant pandas in Foping Nature Reserve, China		
Xuehua Liu ^a ,  ,  , Xiangnan Cheng ^a , Andrew K. Skidmore ^b		



New Reference

< >
Journal Article
⚙
ABC
🔍
📄
🔗
📊
📁
🗨

Rating

Author
 Liu, Xuehua
 Cheng, Xiangnan
 Skidmore, Andrew K.

Year
 2011

Title
 Potential solar radiation pattern in relation to the monthly distribution of giant pandas in Foping Nature Reserve, China

Journal
 Ecological Modelling

Volume
 222

Issue
 3

Pages
 645-652

📄 📄 📄

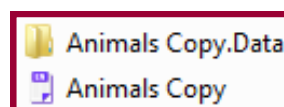
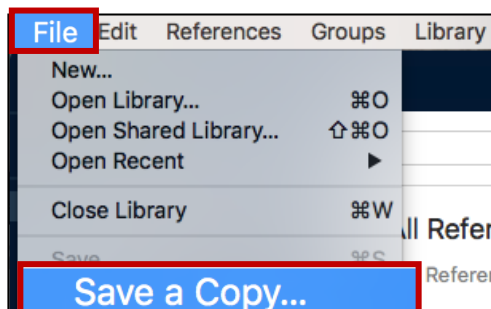


Back up your Endnote Library!

Method 1: Save a Copy

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

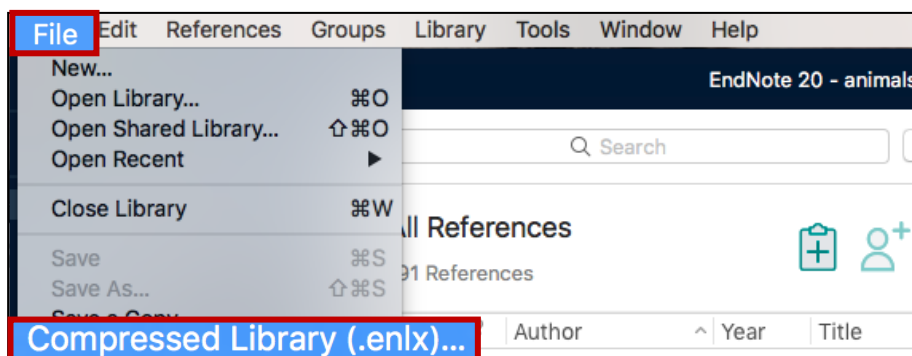
Select **File > Save a Copy**



Method 2: Compressed Library

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

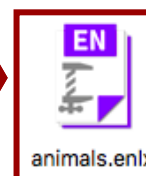
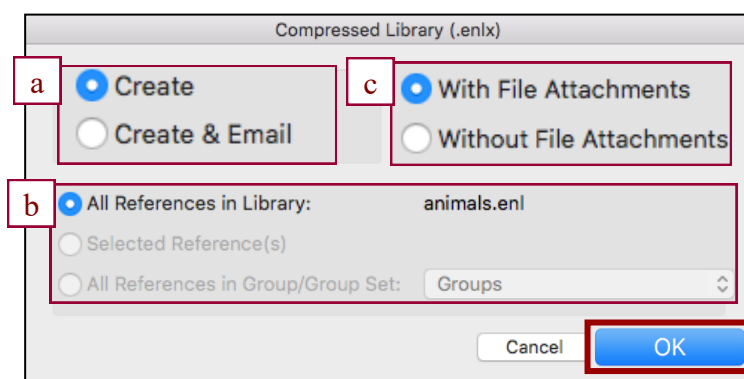
1 Select **File > Compressed Library**



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)⁴³

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), 385-393.⁴⁴

Christiansen, P. (2008). Feeding ecology and morphology of the upper canines in bears (carnivora : Ursidae). *Journal of Morphology*, 269(7), 896-908.⁴⁵

Wildt, D. E. (Ed.). (2006). *Giant pandas: Biology, veterinary medicine, and management*. Cambridge: Cambridge University Press.⁴⁶

- Insert **figures and charts**

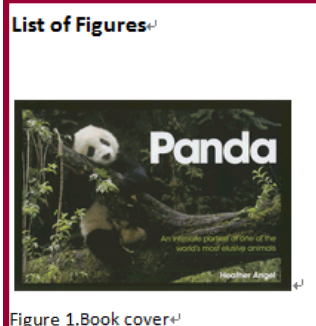
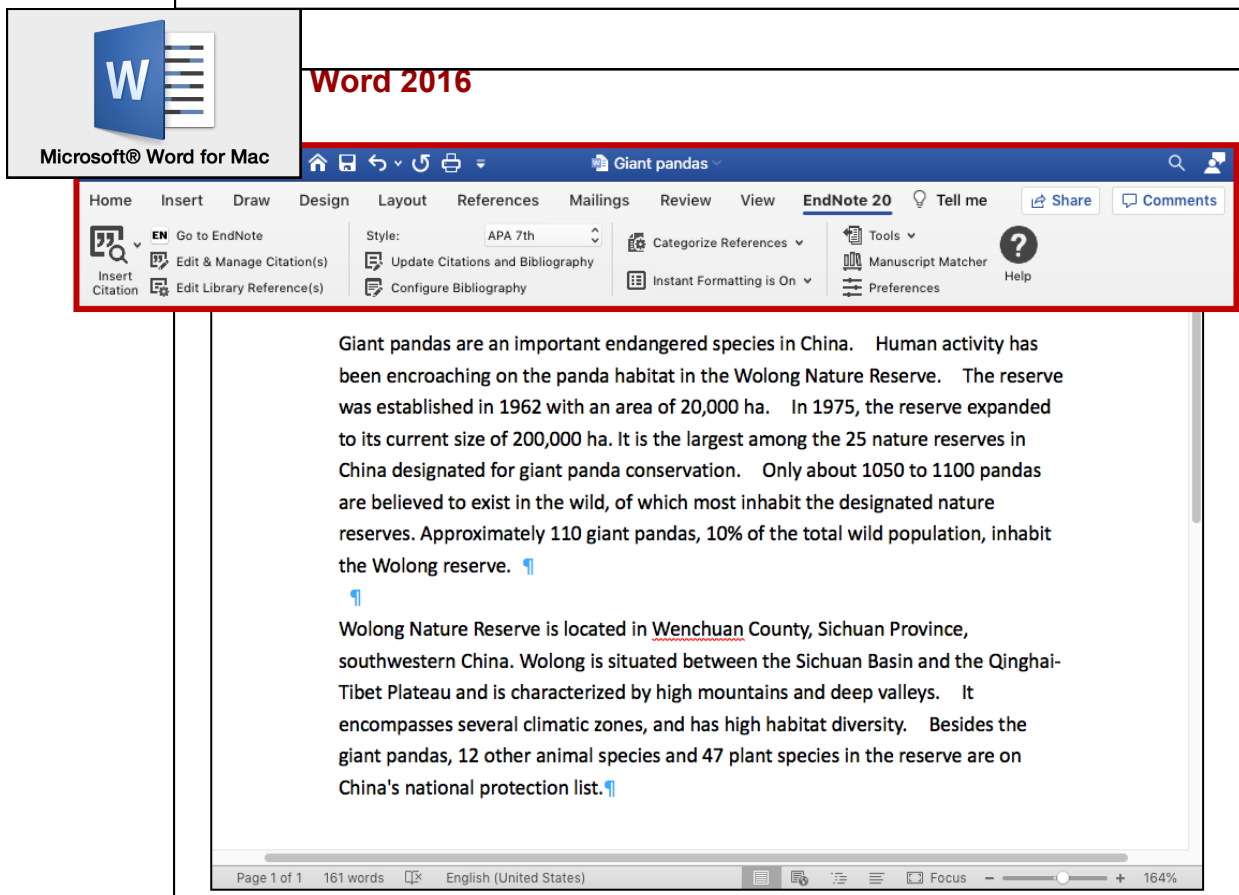
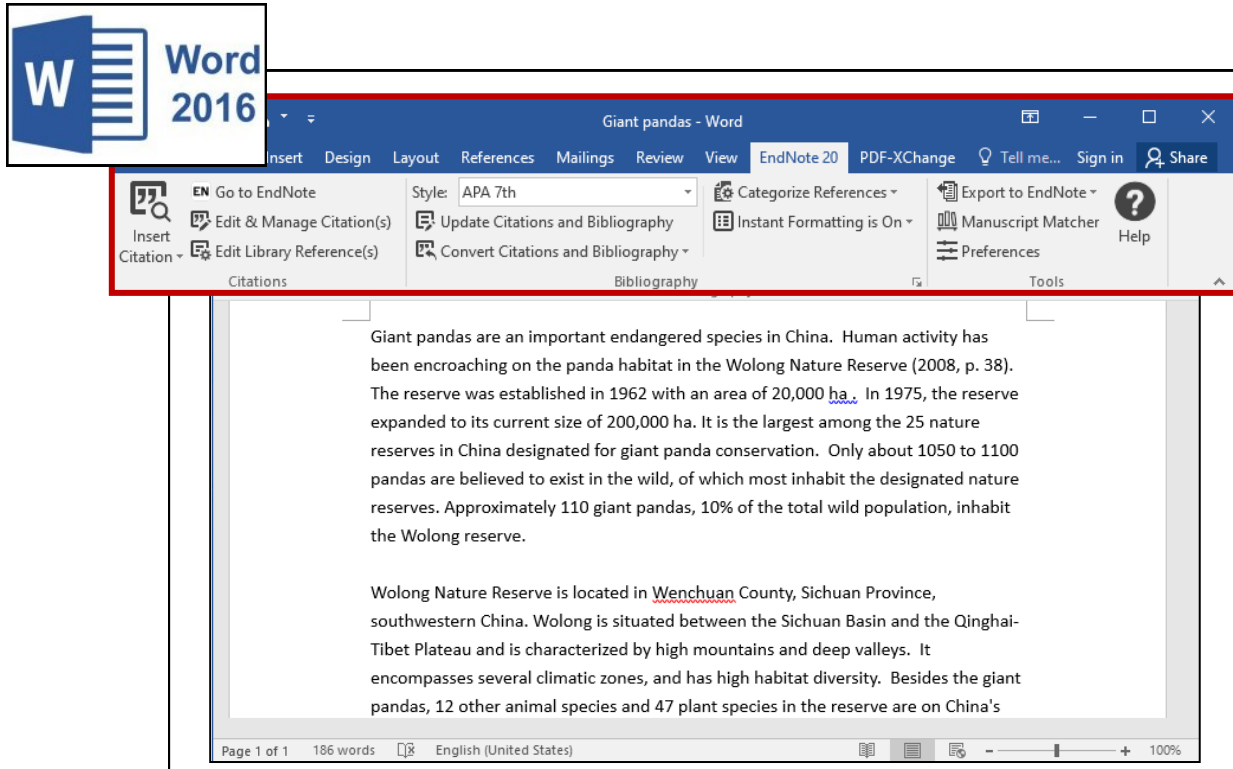


Figure 1. Book cover⁴⁷

- 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.

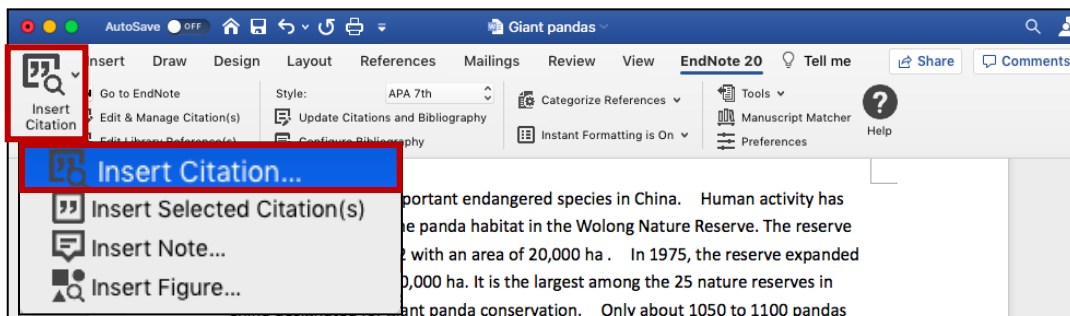


3. How to use CWYW?

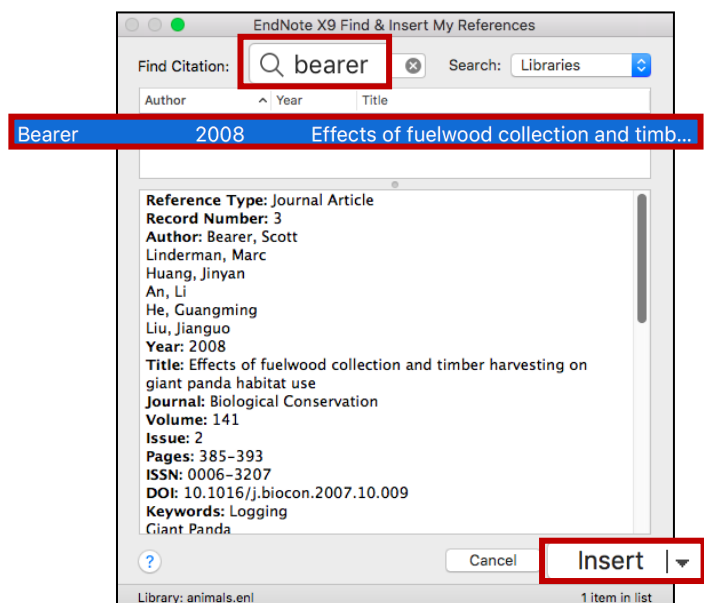
Step 1 Insert a citation

Method A Insert Citation

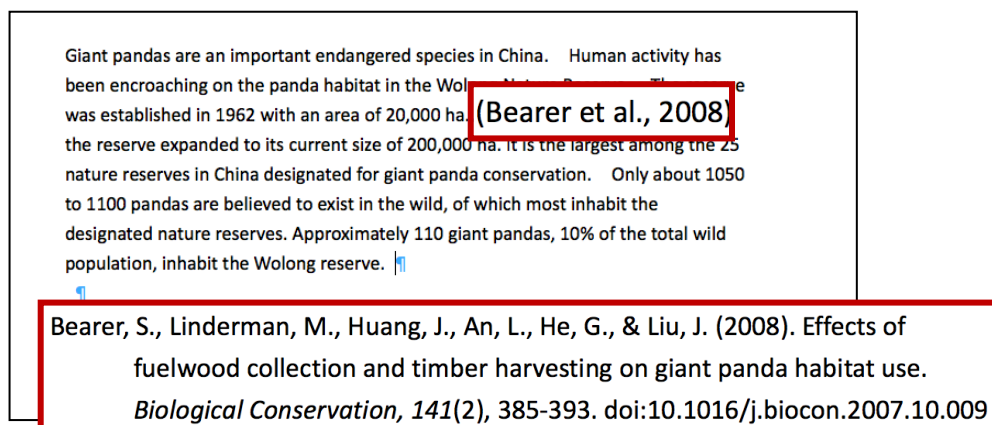
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**



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



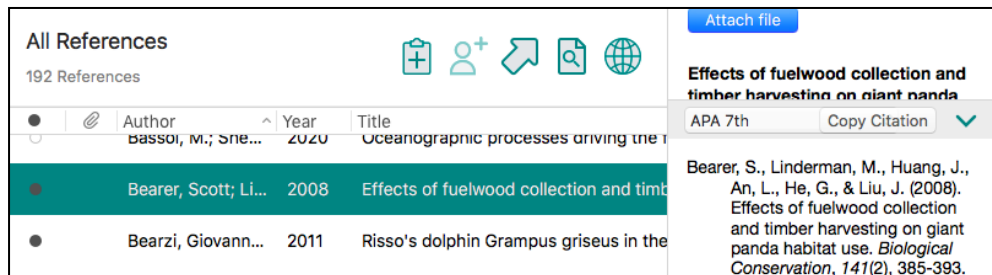
- 3 The **in-text citation** and the **reference** will be inserted into your document.



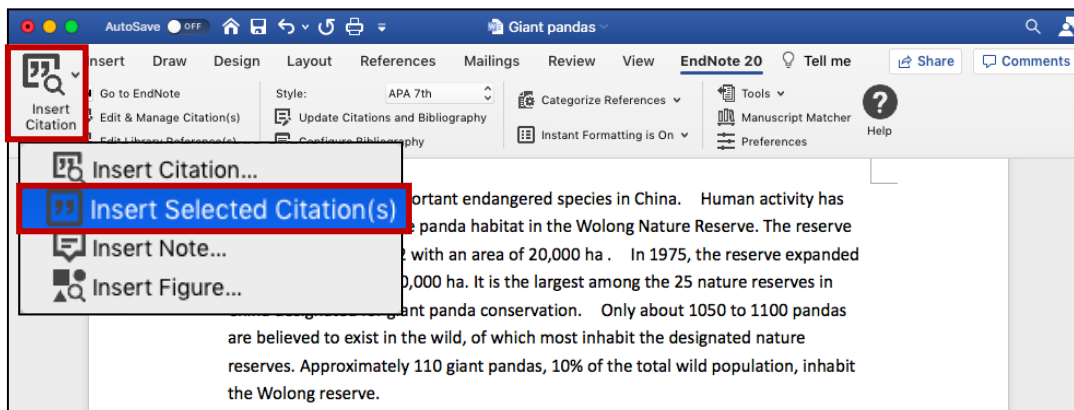
Step 1 Insert a citation

Method B Insert Selected Citation

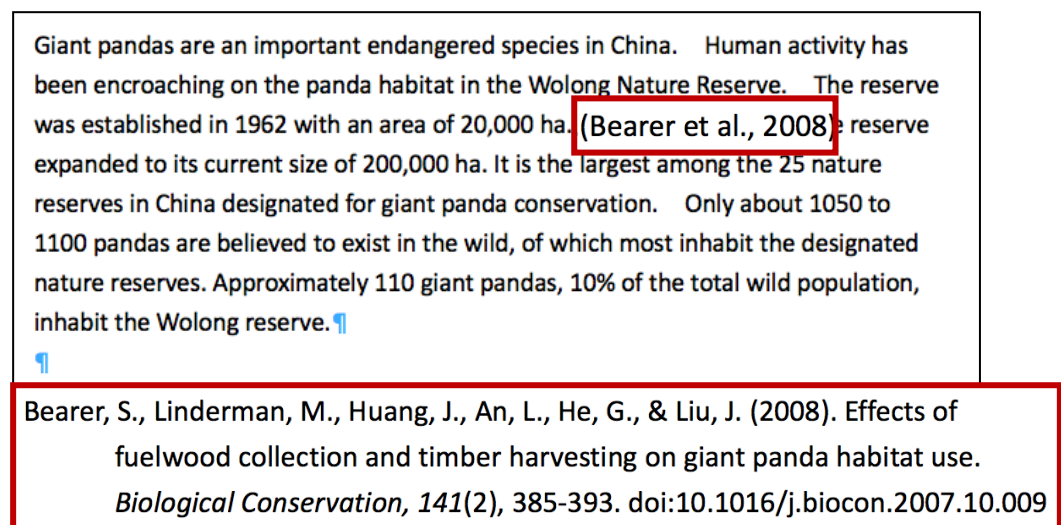
- 1 In **Endnote**, highlight the **desired citation**.



- 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.

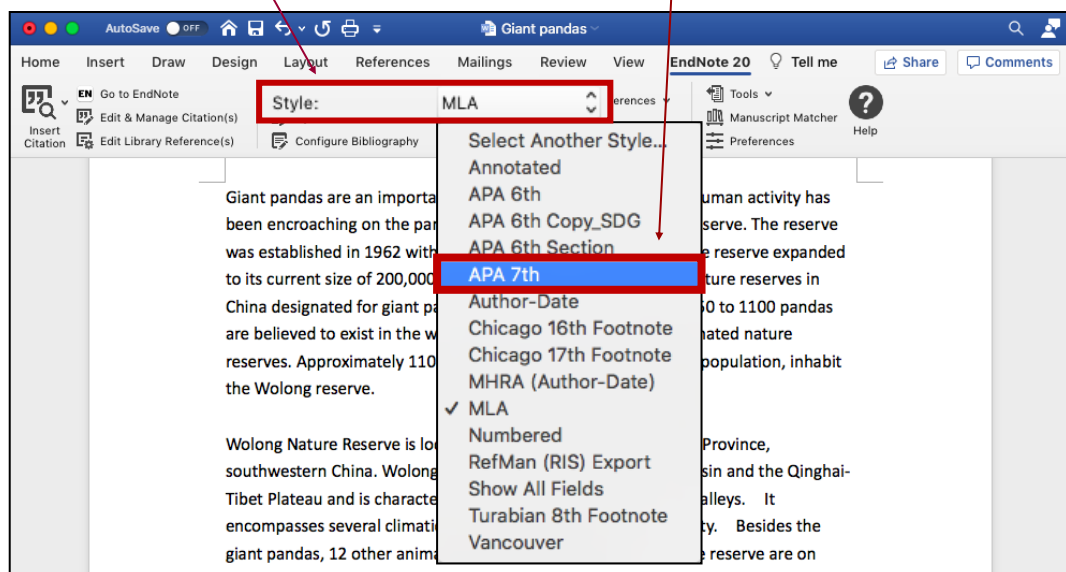




Change the citation style

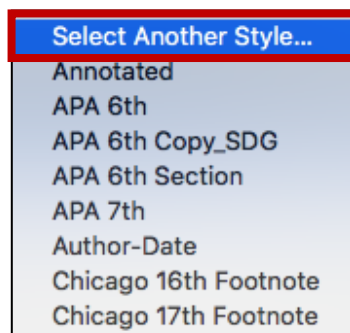
1 In the **Bibliography** tab section, open the **Style** pull-down menu.

2 Select your **desired citation style**, e.g. APA 7th.



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!

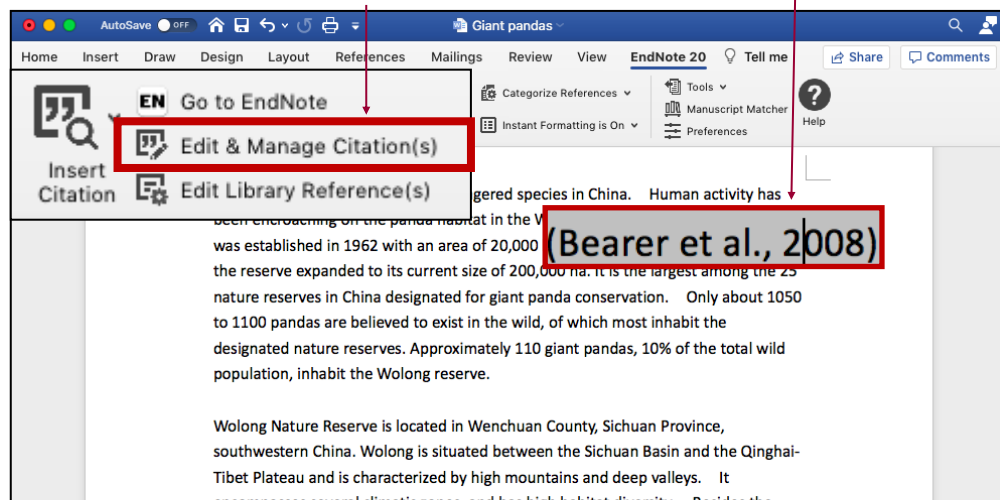
Step 2 Edit & Manage Citation(s)

1

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

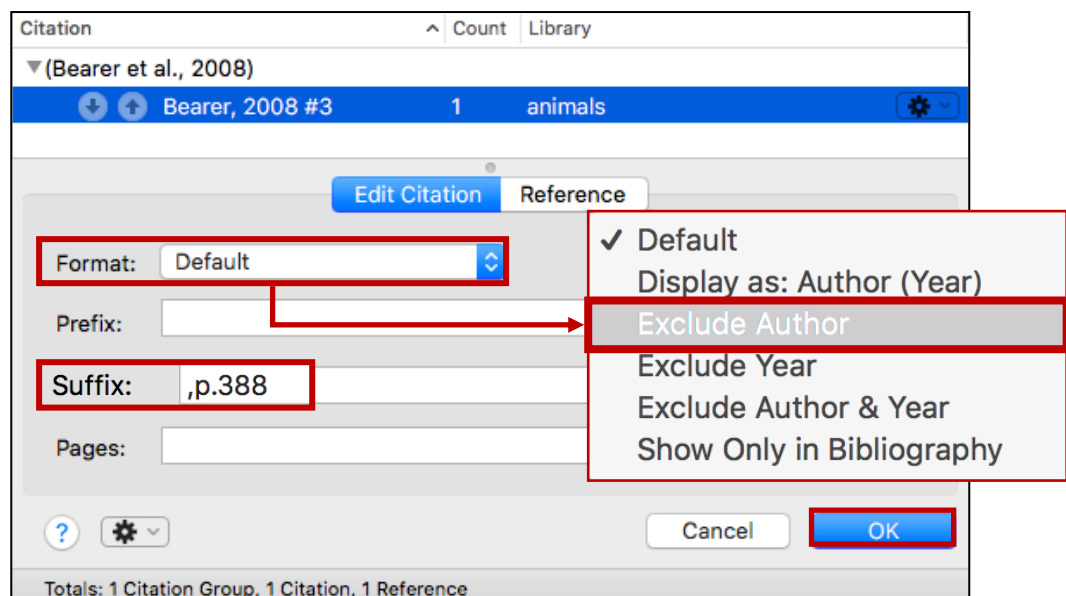
2

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.

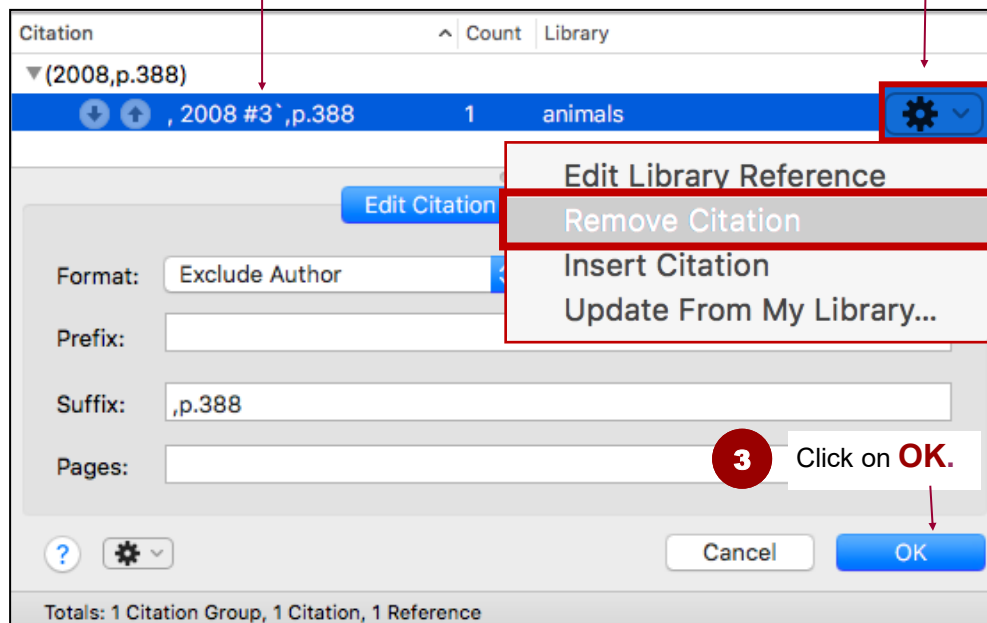
Giant pandas are an important endangered species in China. Human activity has
 was established in 1962 with an area of 20,000 ha. According to Bearer, in 1975,
 the reserve expanded to its current size of 200,000 ha (2008, p.388). It is the largest
 expanded to its current size of 200,000 ha. It is the 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 reserve. ¶



Removing a Citation

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

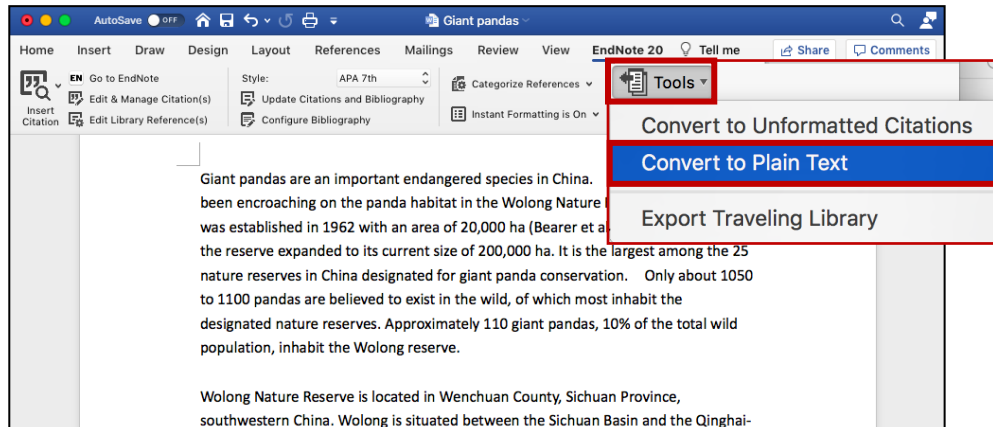
- 1 From the **Edit & Manage Citation(s)** menu, highlight the **desired citation**.
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



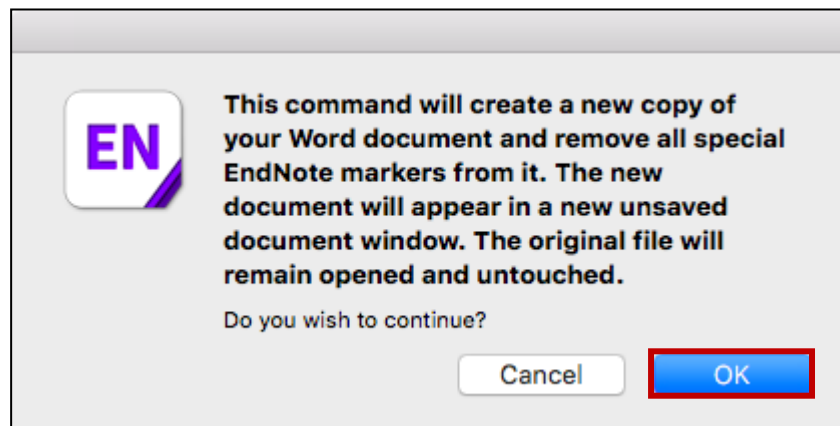
Step 3 Remove Field Codes

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:
Tools > 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

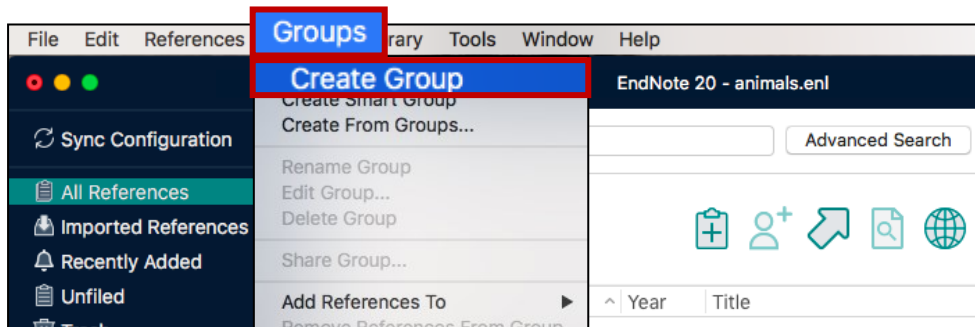
	Custom Groups	Smart Groups
Create the group	Manually add references to a group.	Specify criteria - references meeting the criteria will automatically be added to the group.
Updates	Done manually <ul style="list-style-type: none"> The group will not be updated unless you manually add or remove references.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

2. Create a Custom Group

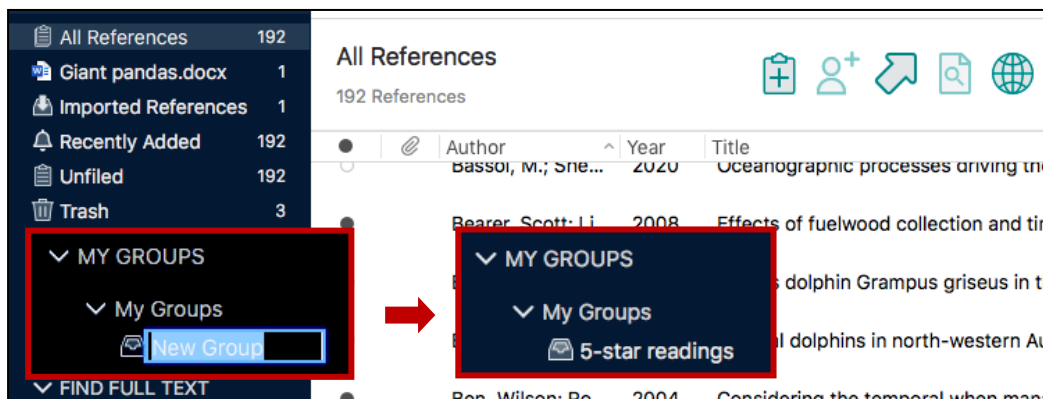


- (a) **Create a custom group** by the name “5-star readings”
- (b) **Add** 3 references to this custom group

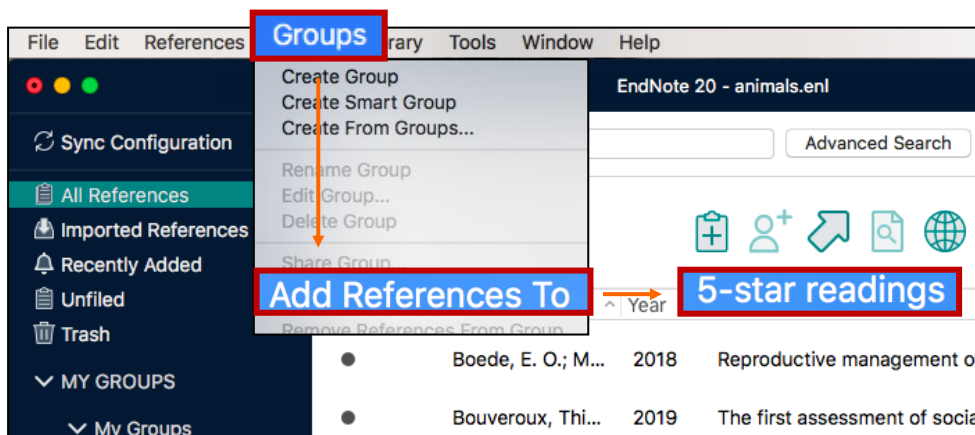
- 1 From top bar menu, select **Groups > Create Group**



- 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)

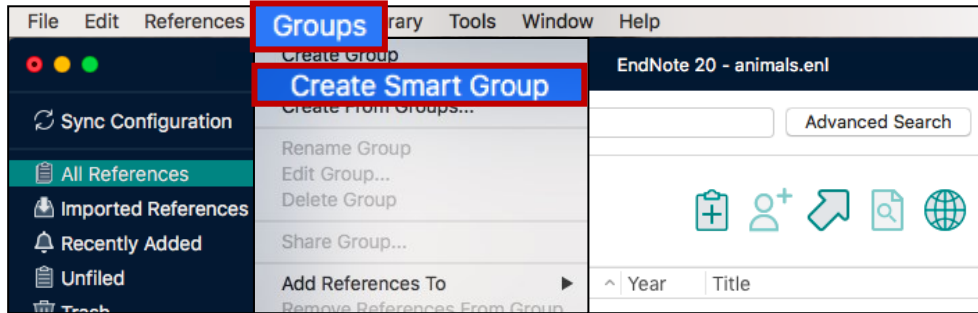


3. Create a Smart Group

Create two smart groups:

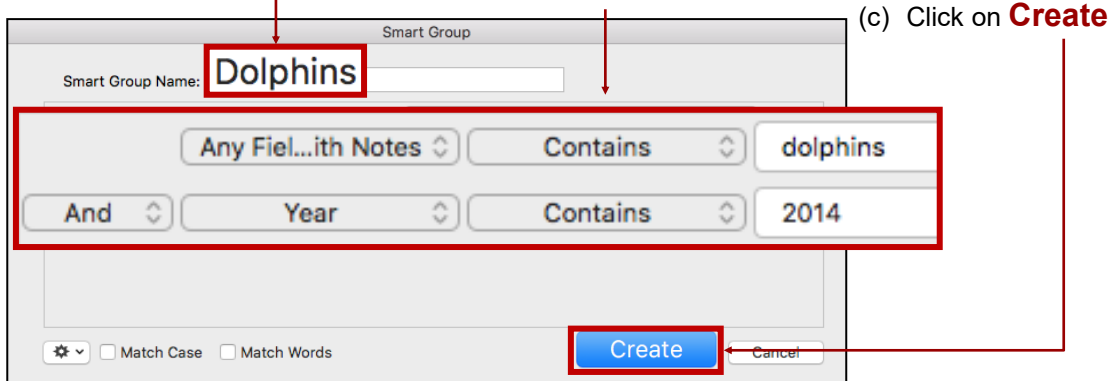
- (a) Dolphins
- (b) Pandas

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

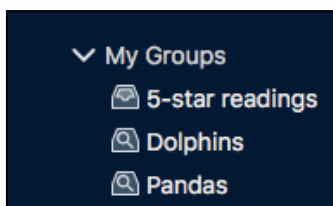
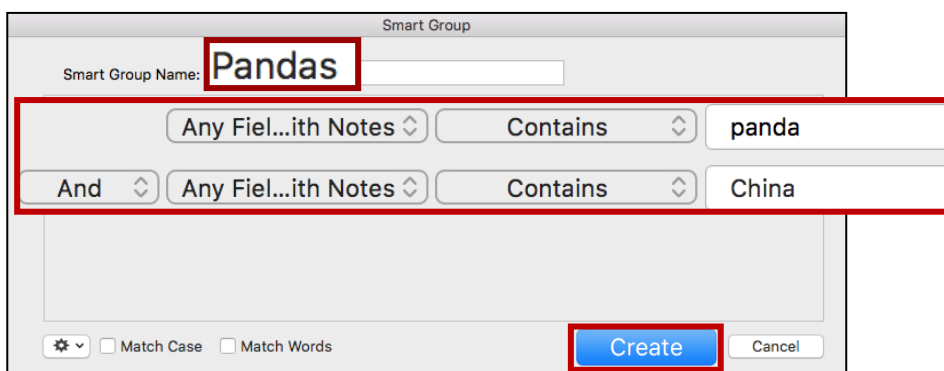


2 Create the smart group for **Dolphins**

- (a) Change **group name**
- (b) Enter **search criteria**



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



Training and Support: libguides.lib.hku.hk/endnote

Learn from the online tutorials, quick guides and videos!