

Endnote @ HKU

For Windows Platform

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**

The screenshot displays the EndNote software interface. On the left, a sidebar lists various sources like 'Recently Added', 'Unfiled', 'Trash', and 'MY GROUPS'. The main window shows a table of references with columns for Author, Year, and Title. Below this, a Microsoft Word document is open, showing a paragraph about giant pandas. The text includes in-text citations: '(Durnin, 2005)', '(Katirgis, 2016)', and '(Anthes, 2013, p. 78)'. A red box highlights the citation '(Anthes, 2013, p. 78)'. Below the Word document, a list of references is shown, including 'Anthes, E. (2013). A dolphin's tale. Scientific American, 308(3), 78.' and 'Durnin, M. E. (2005). Monitoring behavior, ecology, and demographic patterns of free-ranging giant pandas in the Wolong Nature Reserve (China). International Journal of Primatology, 26(1), 1-15.'

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

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?

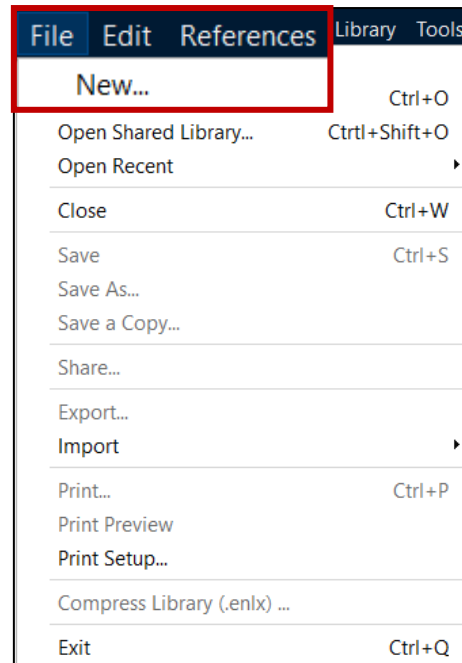
Refer to the **Downloading and Installation Guide** :
Endnote@HKU > Download Endnote > Installation Guide for Windows (20)

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

5. Create an Endnote Library

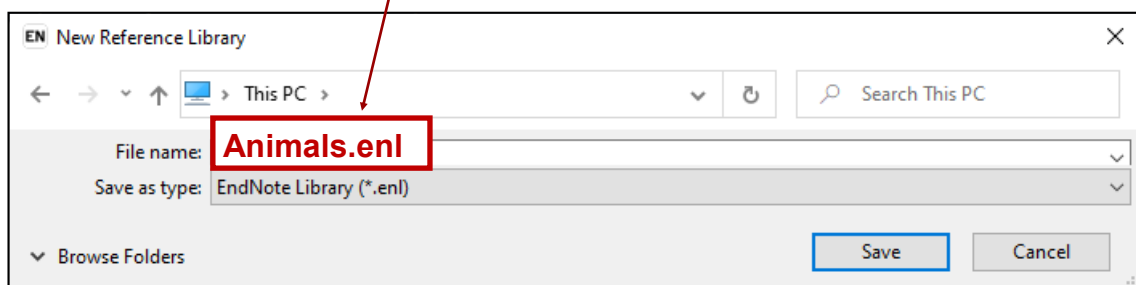
1

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



2

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



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

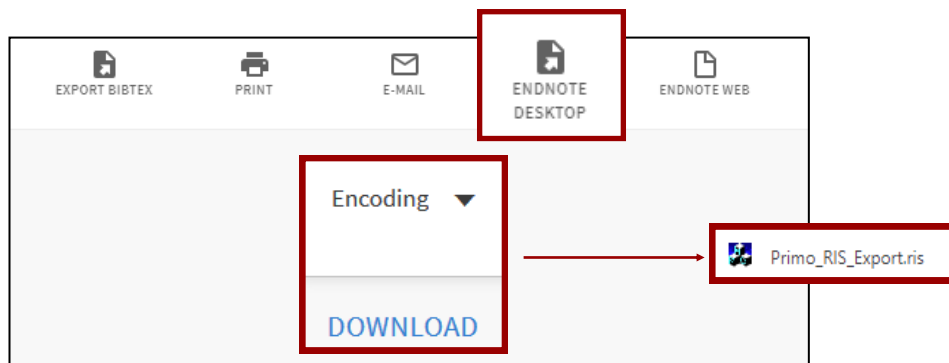
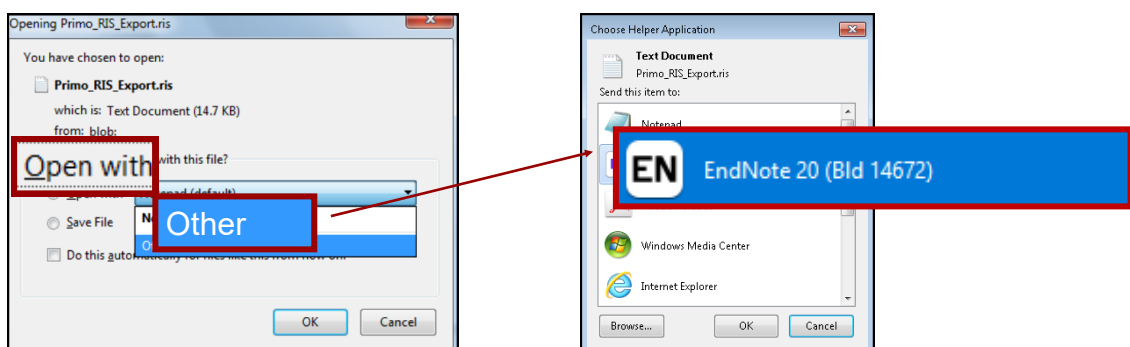
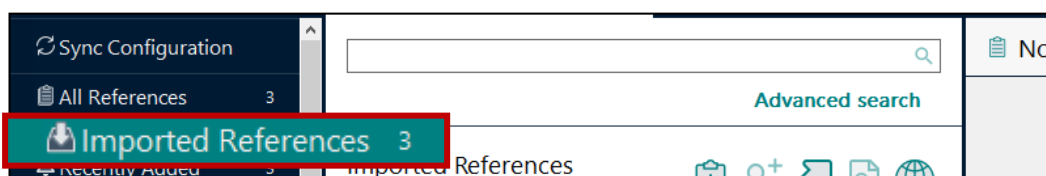
1. Direct Export - Find@HKUL



Step 1 Search Find@HKUL and select records

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

The screenshot shows the Find@HKUL search results page. The search bar contains the text "Giant panda". The results list includes two articles. Red boxes and arrows highlight the search bar, the "my favorites" button in the top right, and the "mark" icons (blue pushpins) next to the search results. The first article is "Why is the giant panda black and white?" by Caro, Tim; Walker, Hannah; Rossman, Zoe; Hendrix, Megan; Stankowich, Theodore. The second article is "Activity Patterns of the Giant Panda (Ailuropoda melanoleuca)" by 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.

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, first time user should select **Other > Endnote 20 (Bld 14672)** against **Open With****5** The results will be **imported** into your Endnote library



Change citation styles

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

The screenshot shows the Endnote software interface. On the left, there is a list of references under the heading 'All References' with 25 references. The first reference is highlighted: 'Anthes, Emily 2013 A dolphins tale'. On the right, there is a panel for the selected reference 'A..., 2013 #24 Summary'. In this panel, the 'Output Style' dropdown menu is open, showing a list of styles: 'Annotated', 'APA 6th', 'APA 7th' (which is selected with a checkmark), and 'Author-Date'. The 'Select Another Style...' option is visible at the top of the dropdown menu.

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

The screenshot shows the 'Choose A Style' dialog box. It has two columns: 'Name' and 'Category'. The 'Name' column lists various citation styles, including 'Ann Rev Physical Chem', 'Ann Rev Phytopathology', 'Ann Rev Plant Biology', 'Ann Rev Psychology', 'Annals Assn of Amer Geog', 'Annals Behavioral Med', 'Annals Clin Micro Anti', 'Annals Internal Medicine', 'Annals of Oncology', 'Annotated', 'APA 6th', 'APA 6th - Sentence Case', and 'APA 6th (sections)'. The 'Category' column lists corresponding categories like 'Chemistry', 'Agriculture', 'Psychology', 'Geography', 'Psychology', 'Microbiology', 'Internal Medicine', 'Oncology', 'Generic', and 'Psychology'. At the bottom, there is a search bar with 'mla' entered. Below the search bar, there are buttons for 'Less Info:', 'Style Info/Preview', and 'Choose'.

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

This screenshot is a closer view of the 'Choose A Style' dialog box. The search bar at the bottom contains 'mla'. The 'Choose' button at the bottom right is highlighted with a red box. Other buttons visible are 'Less Info:', 'Style Info/Preview', and 'Cancel'.

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

The screenshot shows the Endnote software interface with the citation preview panel. The 'Output Style' dropdown menu is now set to 'MLA'. The citation text below the dropdown is: 'Caro, Tim, et al. "Why Is the Giant Panda Black and White?" *Behavioral ecology* 28.3 (2017): 657-67. Print.'



Edit references

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

All References
25 References

	Author	Year	Title
●	Wei, Wei; Swai...	2018	Giant panda distributional and h
●	Yang, Biao; Qi...	2020	Gap Analysis of Giant Panda Con
●	Zhang, Zhi-Yi; ...	2018	Characterization of the β -defensi
●	Zhou, Mengqi	2012	Panda : back from the brink
●	Zhou, W.; Nie, ...	2019	Ecological context influences sce

APA 7th Copy citation

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

- 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**.

Advanced search

All References
25 References

	Author	Year	Title
●	Tuanmu, Mao-...	2012	Climate-change impacts on unde
●	Wang, Zhi-Qia...	2016	Molecular cloning and pharmacc
●	Wei, Wei; Swai...	2018	Giant panda distributional and h
●	Yang, Biao; Qi...	2020	Gap Analysis of Giant Panda Con
●	Zhang, Zhi-Yi; ...	2018	Characterization of the β -defensi
●	Zhou, Mengqi	2012	Panda : back from the brink
●	Zhou, W.; Nie, ...	2019	Ecological context influences sce

Zh..., 2012 #6 Summary

Edit **Save**

Place Published Glasgow

Publisher Saraband

Volume

Number of Volumes

Series Volume

Number of Pages

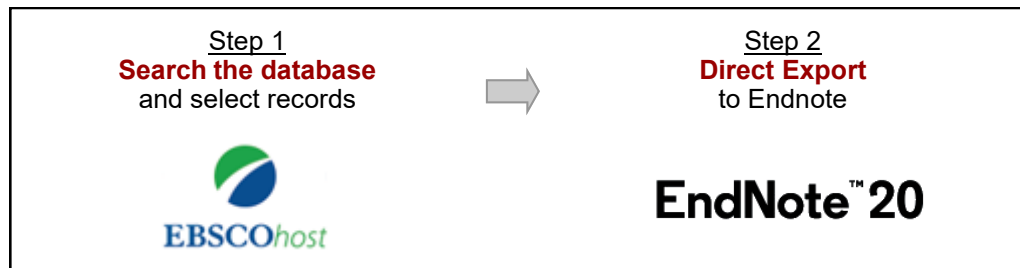
Pages

Editor

Edition Adapted, rev. ed.

Date

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*

Searching: Academic Search Complete | Choose Databases

EBSCOhost

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

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

Academic Journal

Asfixia por deslocamento laríngeo associado a consumo de presa de golfinho (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)

Add to folder:

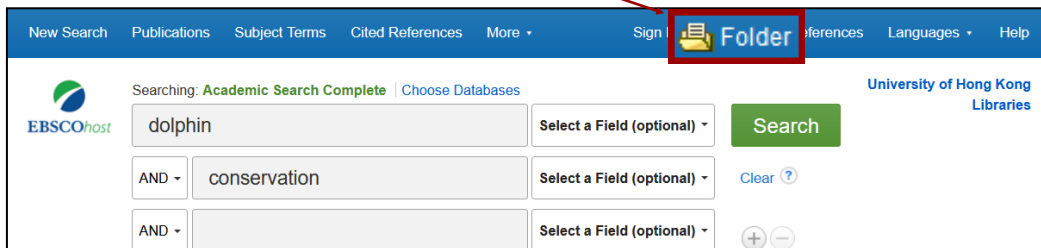
Results (1-50)

Add search to folder: dolphin AND conservation

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

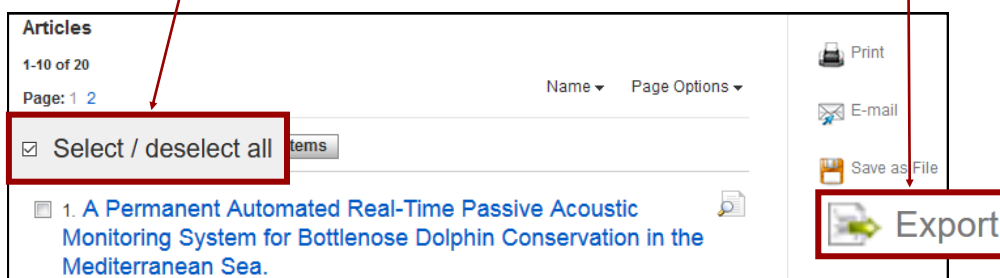
Step 2 Direct Export to Endnote

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

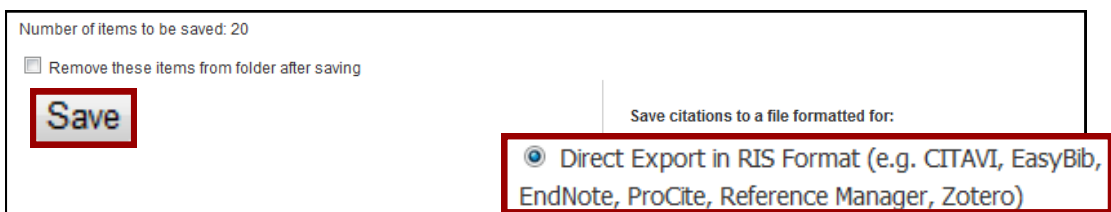


- 2 Tick the checkbox to select all records

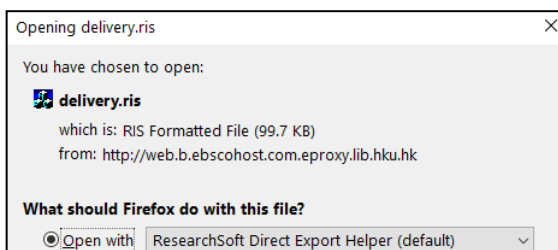
- 3 Click on the **Export** icon.



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



- 5 For Firefox browser, 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

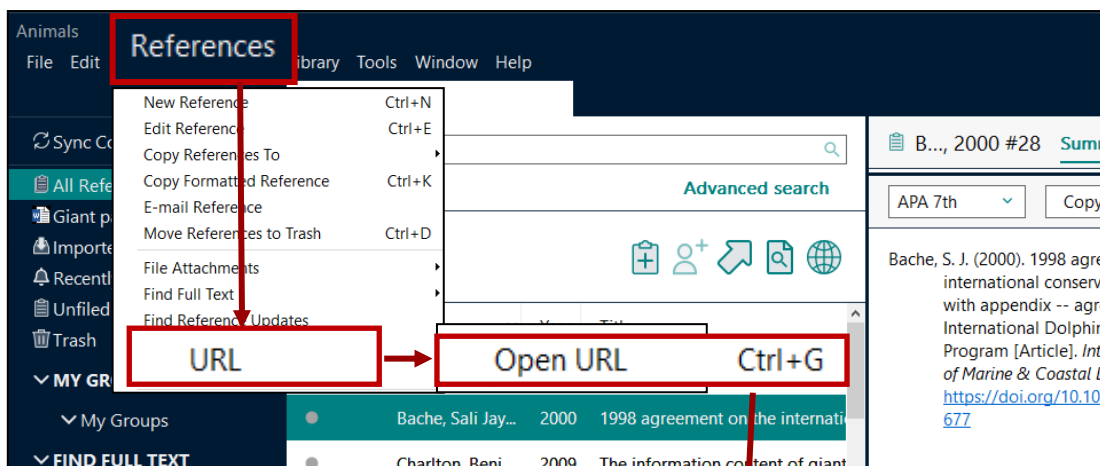
Step 1: Locate PDF full text

1

Highlight the reference.

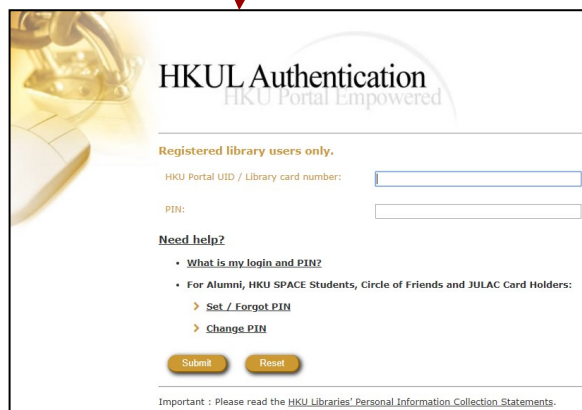
Select from the top bar menu: **References > URL > Open URL**

(Or, use the shortcut key **CRTL + G**)



2

Publisher recognizes HKUL proxy string and prompts for HKUL Authentication



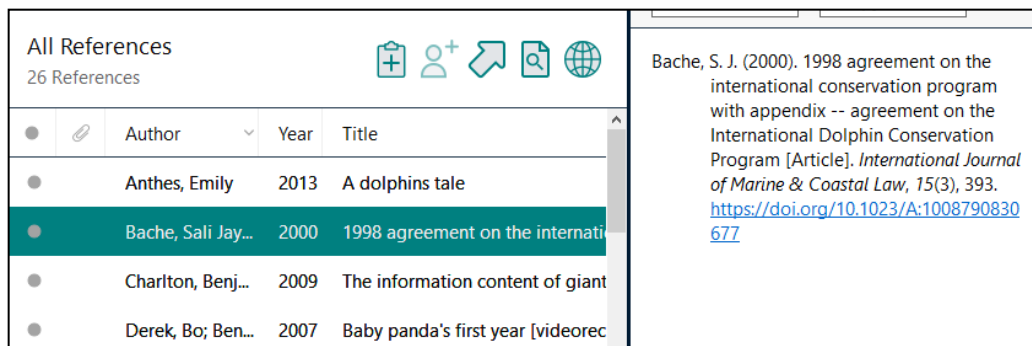
3

Save the PDF from the database

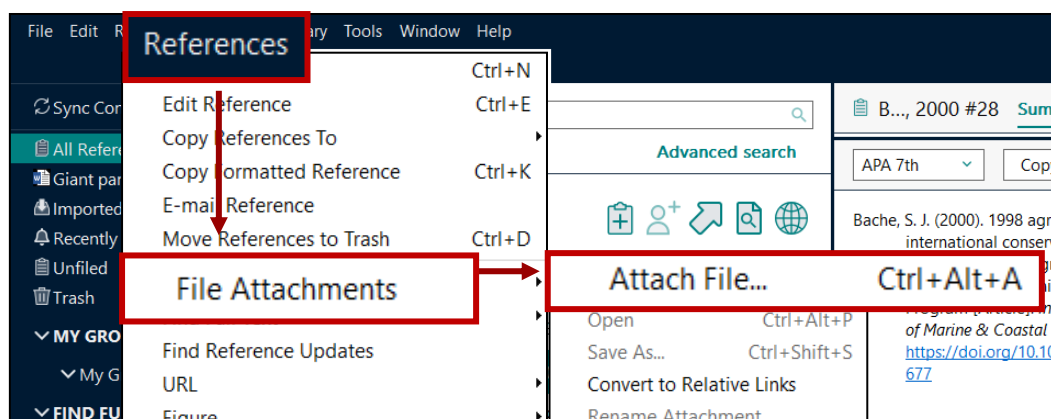


Step 2: Link to PDF full text

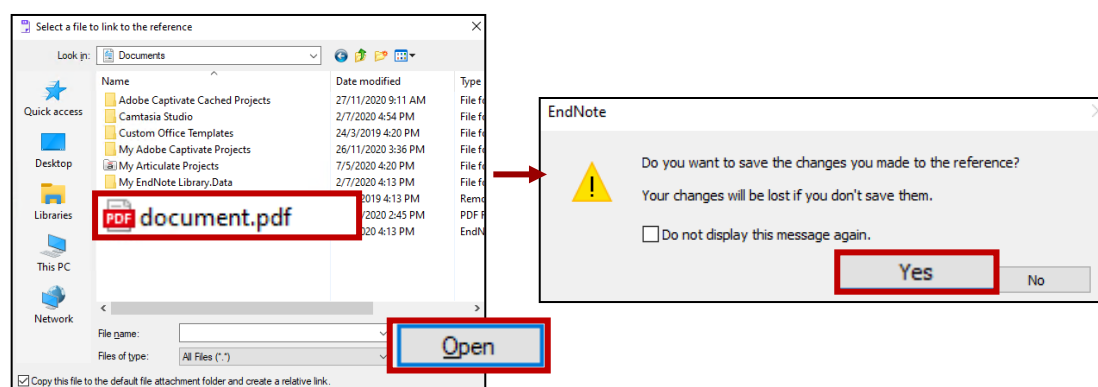
- 1 Highlight the reference in your library.



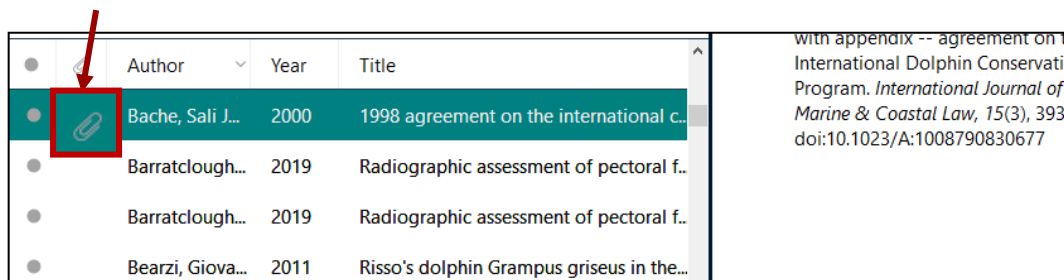
- 2 From top bar menu, select **References > File Attachments > Attach File**.



- 3 Select the PDF file you have saved in Step 1, click on **Open** and **Yes** to save changes.



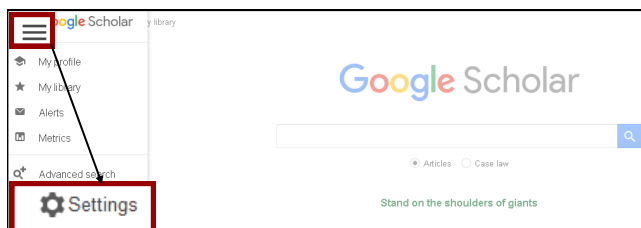
- 4 A **paper clip icon** will be displayed against the reference.



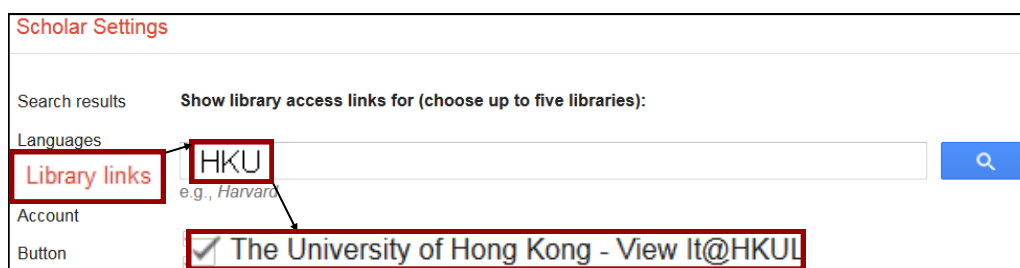
3. Direct Export - Google Scholar

Step 0 Set up Scholar preferences

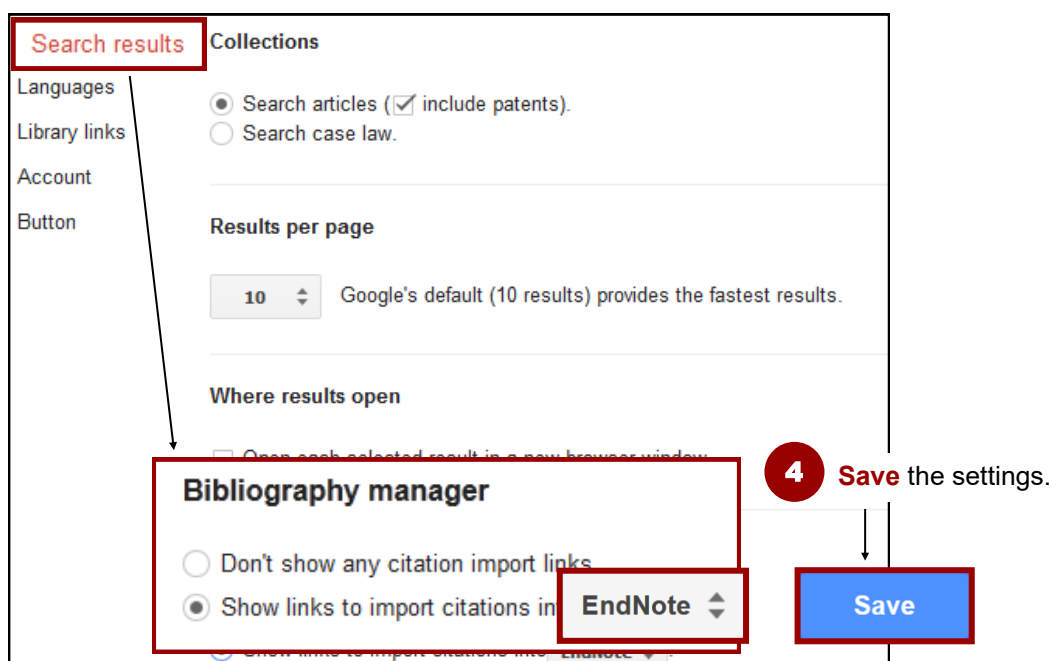
- 1** Go to <http://scholar.google.com> and click on **Settings**

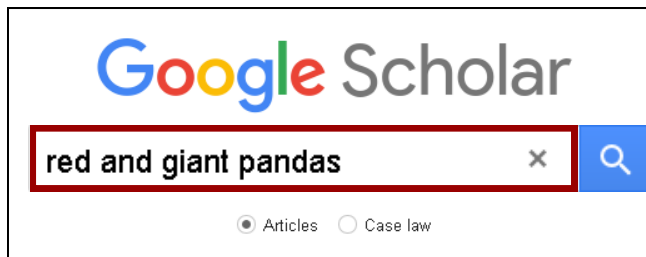


- 2** Under **Library links**
1. Search for **HKU**
 2. Select **The University of Hong Kong - View it**

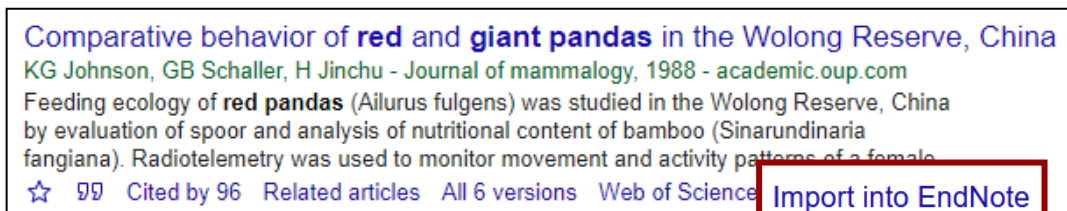


- 3** Under **Search results > Bibliography manager**
1. Select **Show links to import citations into**
 2. Choose **Endnote** from the pull-down menu.



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

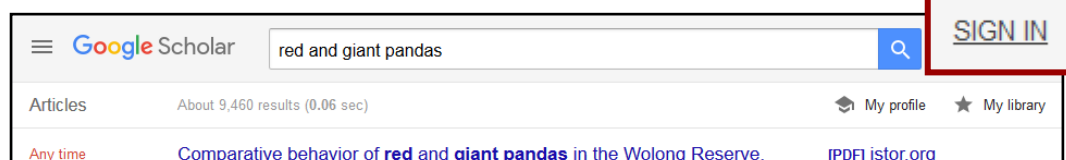
- 1 Click on **Import into EndNote**.



- 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.

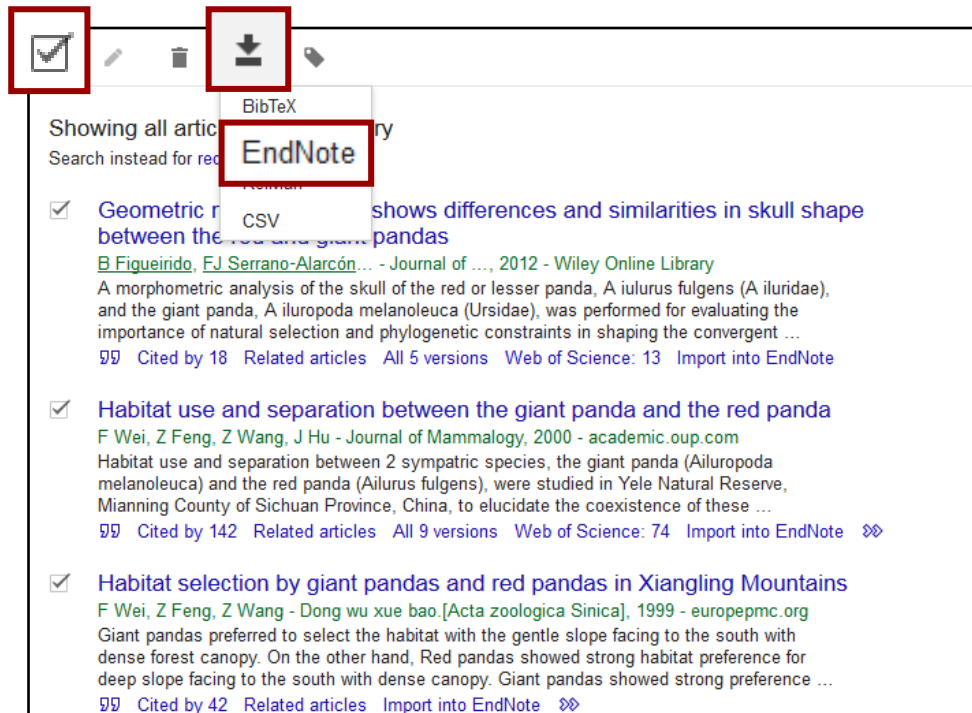


- 3 Click on the **My library** icon.

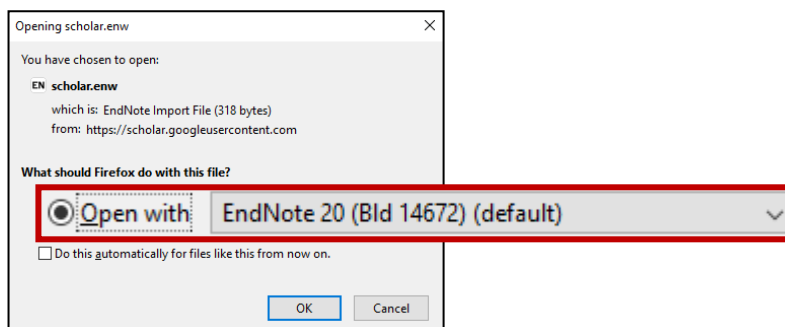


- 4 On the My Library page, **select** the records.

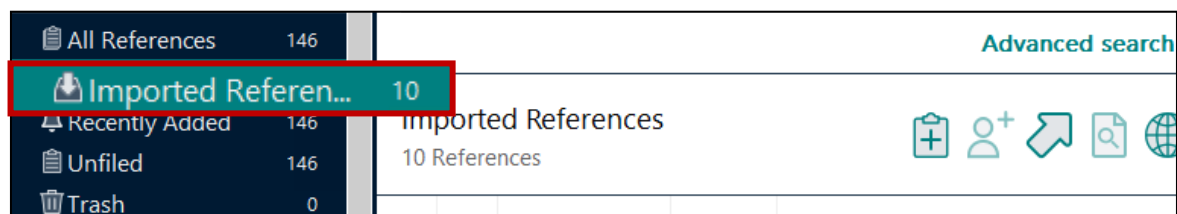
- 5 Click on **Export** and choose **EndNote**.



- 6 For Firefox browser, **Open with** Endnote 20 (Bld 14672)



- 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
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

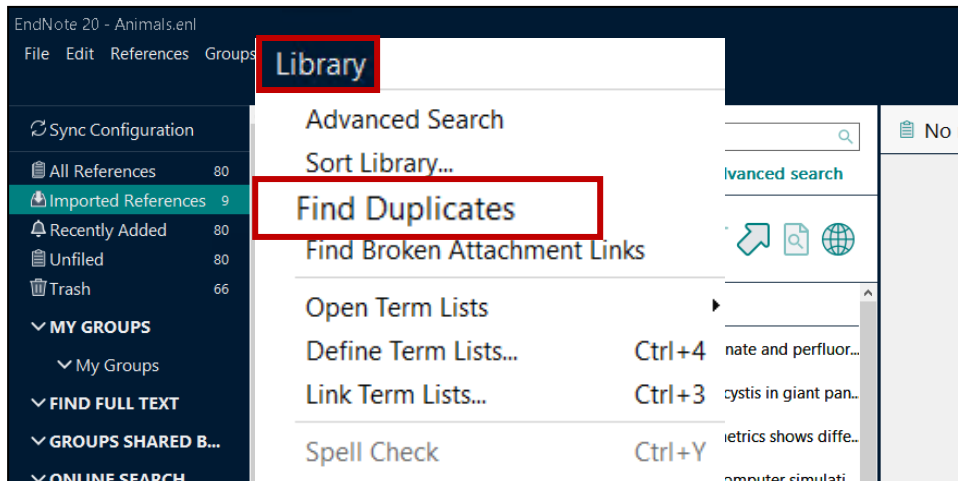
[PDF] jstor.org

View It@HKUL

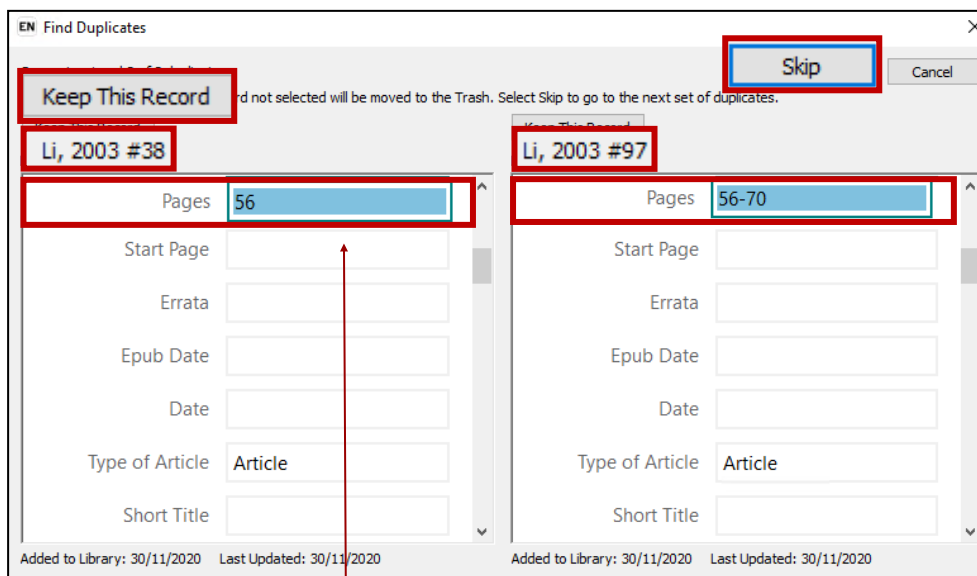


Remove Duplicates

- 1 From the top bar menu, choose **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.)



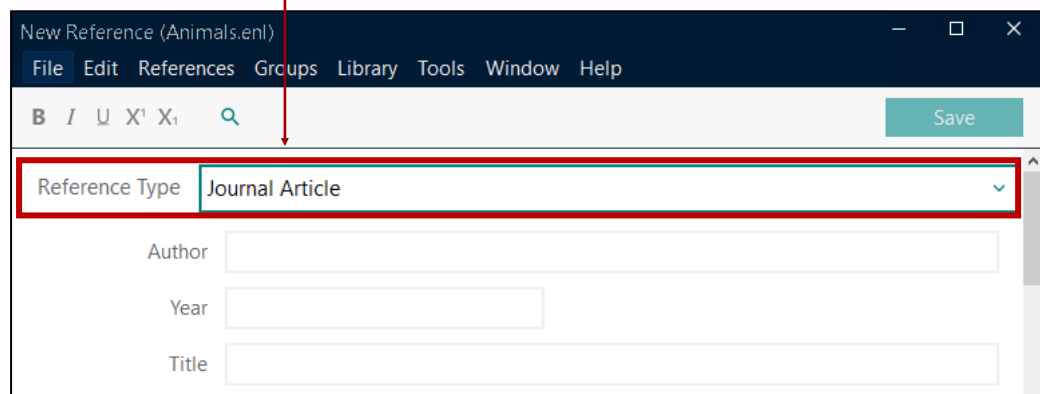
- 3 Different data of the records is **highlighted** for comparison. Select the record you would like to **keep**. To keep both records, click on **Skip**.
(Note: Make sure the deleted record has not been cited in any of your papers.)

4. Manual Input

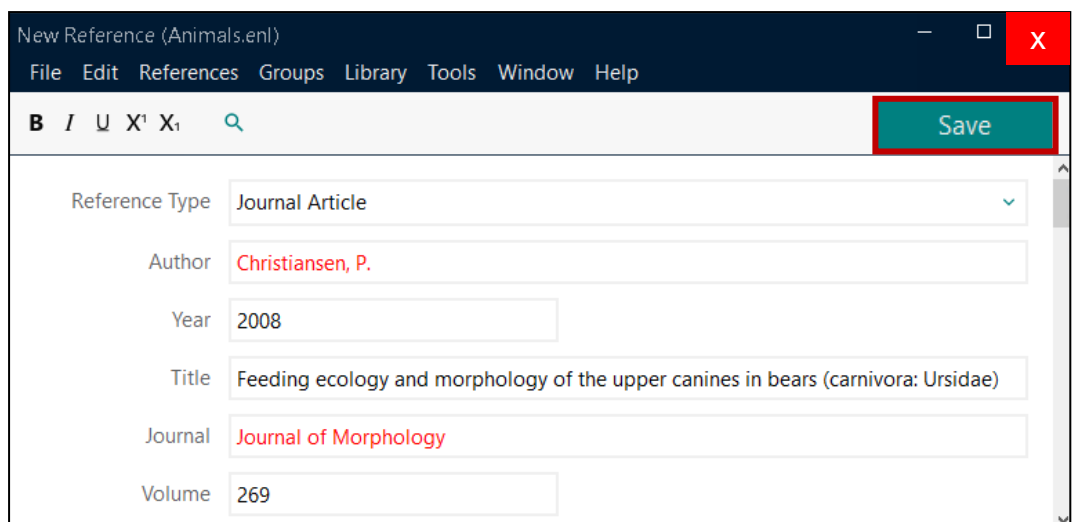
- 1 Click on the **New Reference** icon from the Endnote top icon bar.



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



- 3 Enter the **citation information**, e.g. author, title, year. Click **Save** to save the changes. 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 in page number in the thousands**

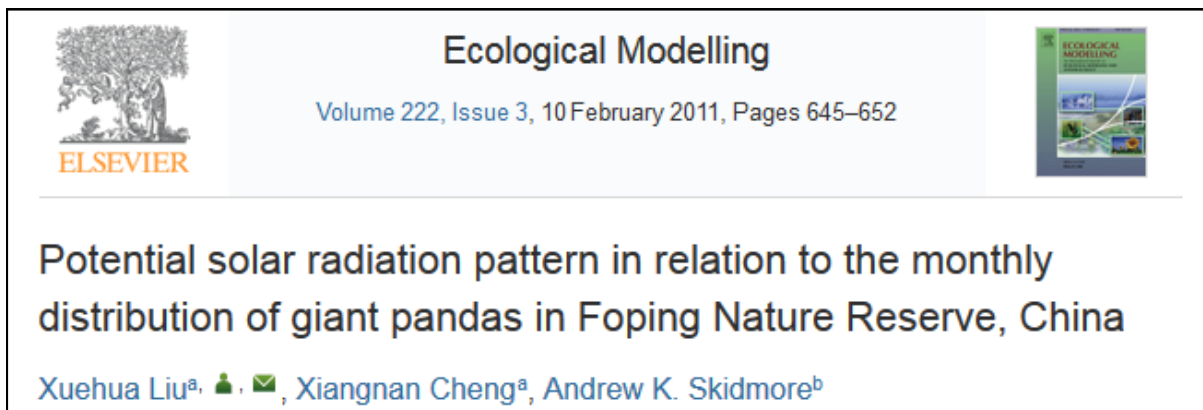
Pages 1331



Pages 1,331



Manual Input: A journal article



New Reference (My EndNote Library)

File Edit References Groups Library Tools Window Help

B I U X¹ X₁ 🔍 Save

Reference Type Journal Article

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

Part/Supplement

Issue 3

Pages 645-652

Start Page

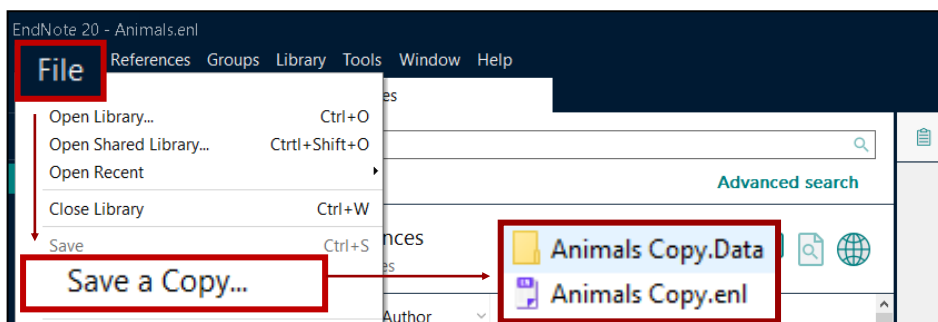


Back up your Endnote Library!

Method 1: Save a Copy

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

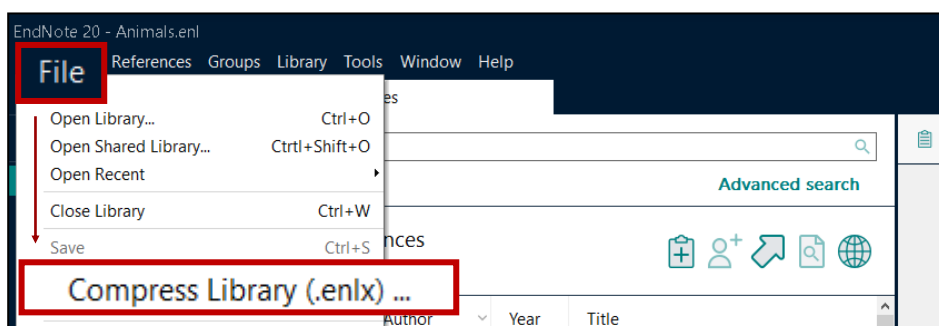
Select **File > Save a Copy**



Method 2: Compressed Library

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

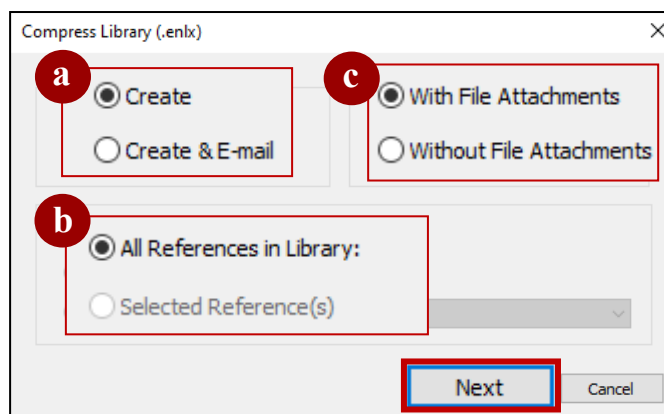
1 Select **File > Compressed Library**



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**

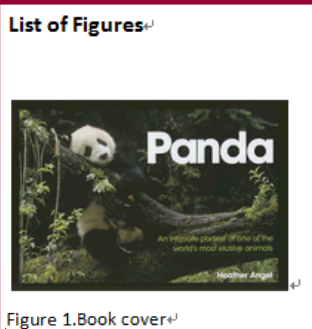
The effects of humans on biodiversity and landscapes have been widely recognized. As the human population continues to increase, demands on natural resources grow larger; few places on Earth are unaffected by human a (Bearer, et al., 2008). Even many nature reserves, or "protected areas", are not well 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

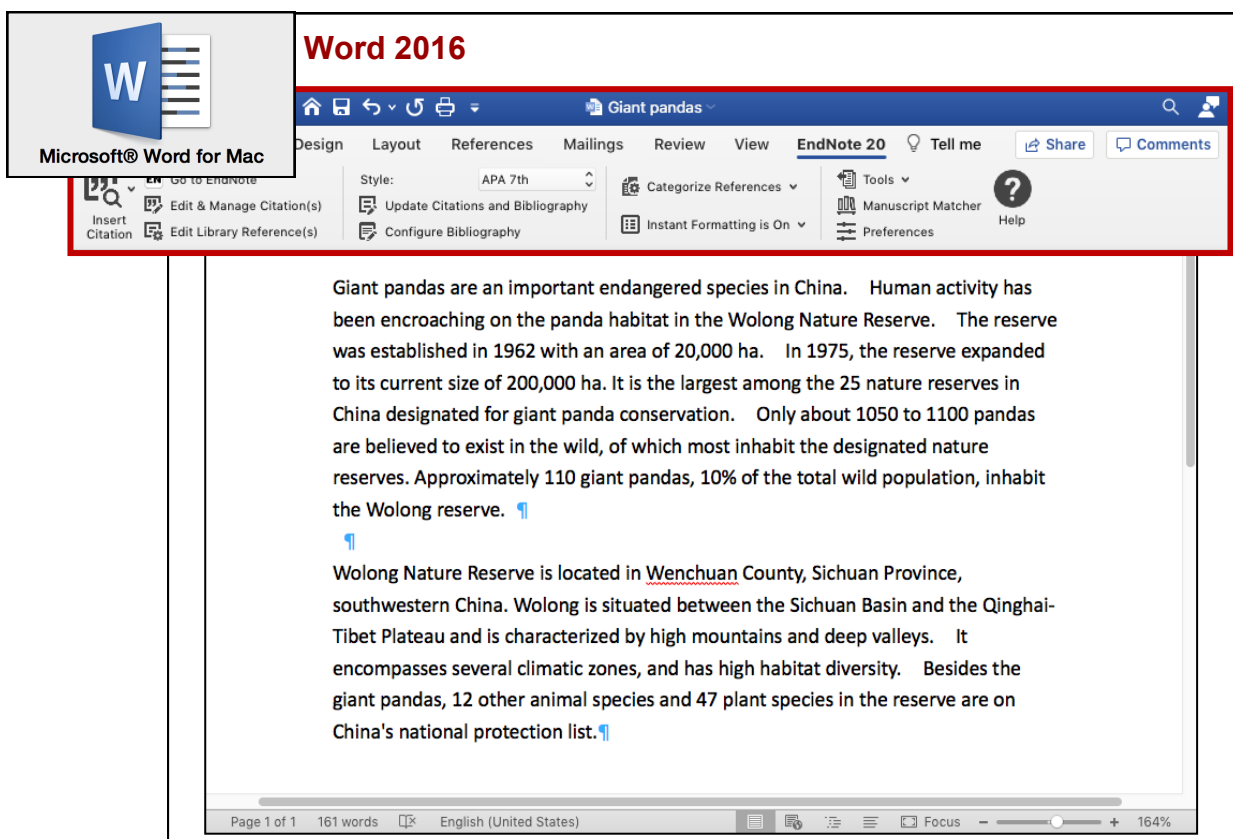
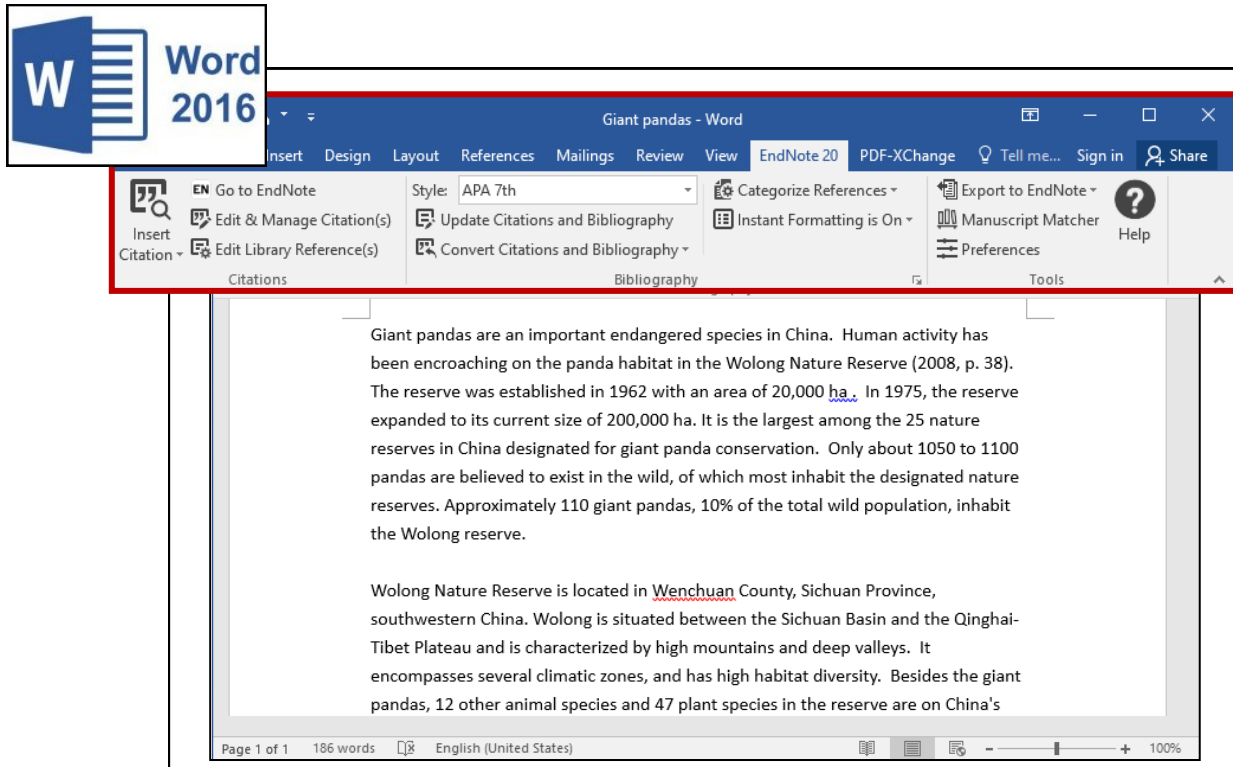
- Insert **figures and charts**



- 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?

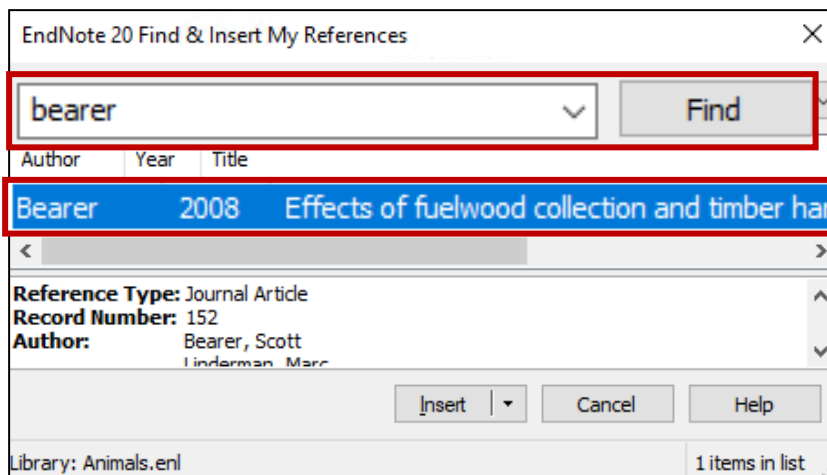
Step 1 Insert a citation

Method A Insert Citation

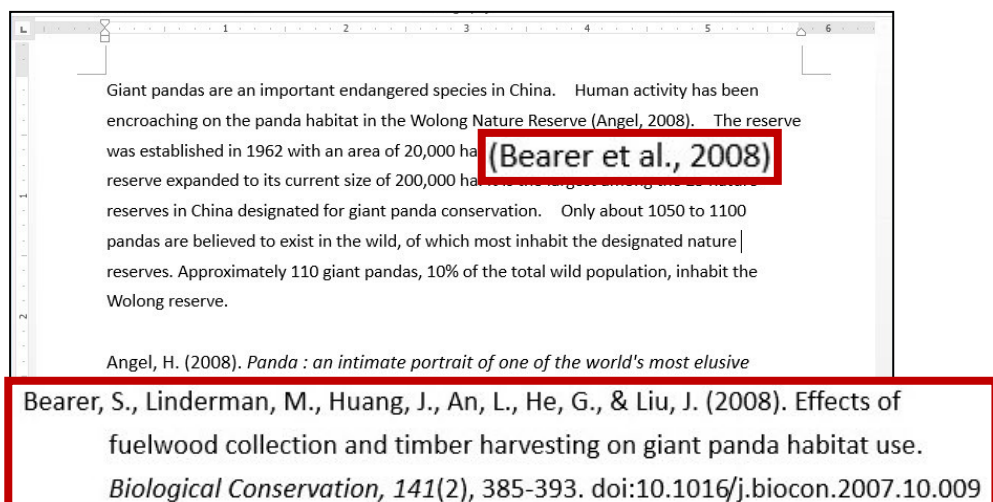
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**

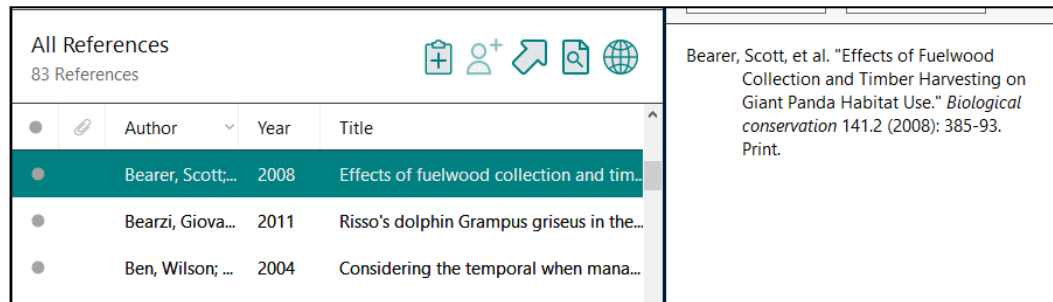
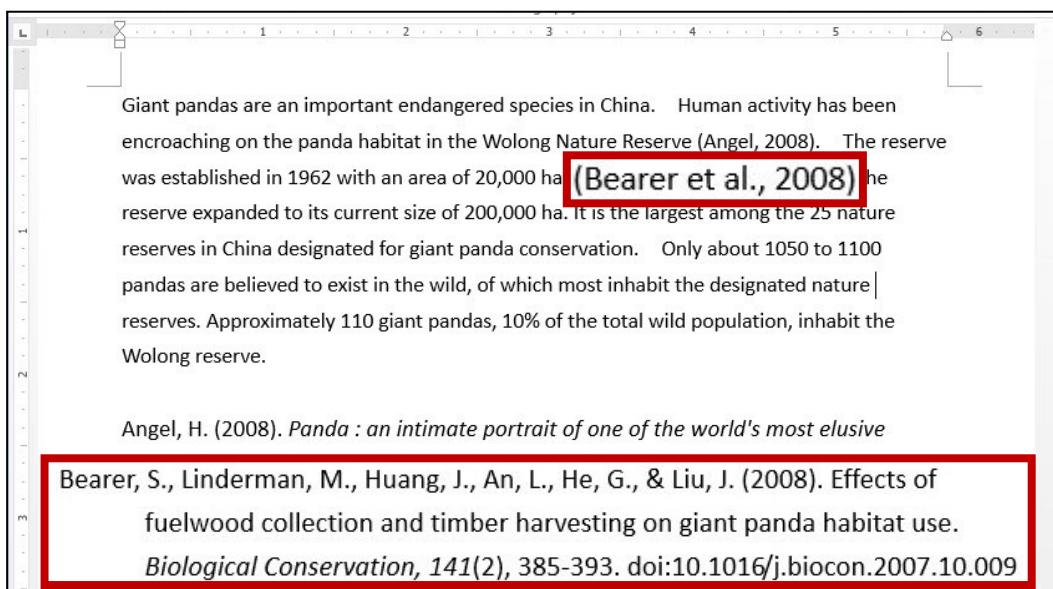


- 2 Find your citation. Then, highlight the **desired citation**, and click on **Insert**.



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



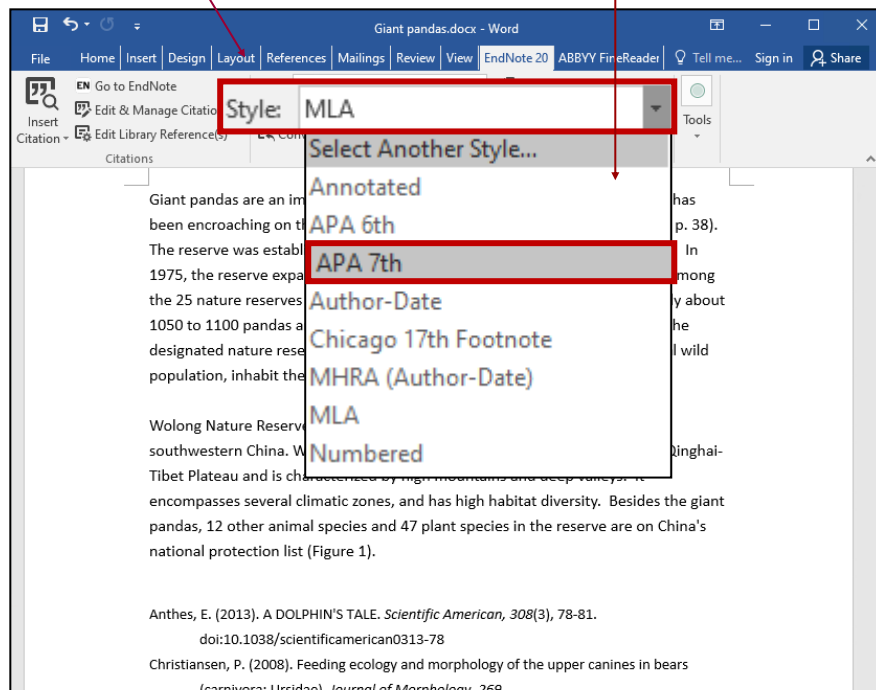
Step 1 Insert a citation**Method B** Insert Selected Citation**1** In **Endnote**, highlight the **desired citation**.**2** In your Word document, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Selected Citation(s)****3** The **in-text citation** and the **reference** will be inserted into your document.



Change the citation style

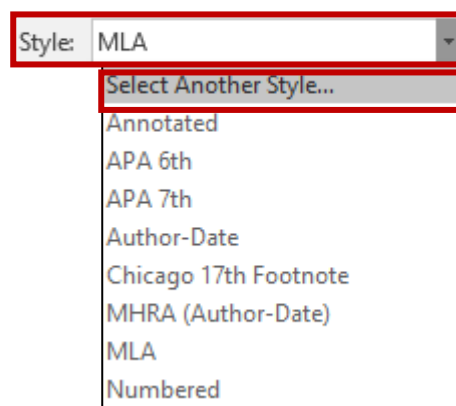
1 In the **Bibliography** tab section, open the **Style** pull-down menu.

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>.

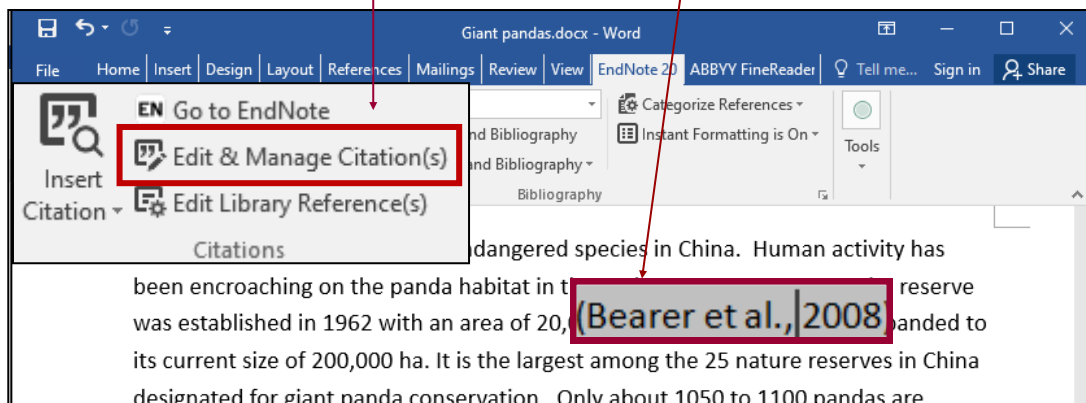
There are more than 6,000 styles there!

Step 2 Edit & Manage Citation(s)**1**

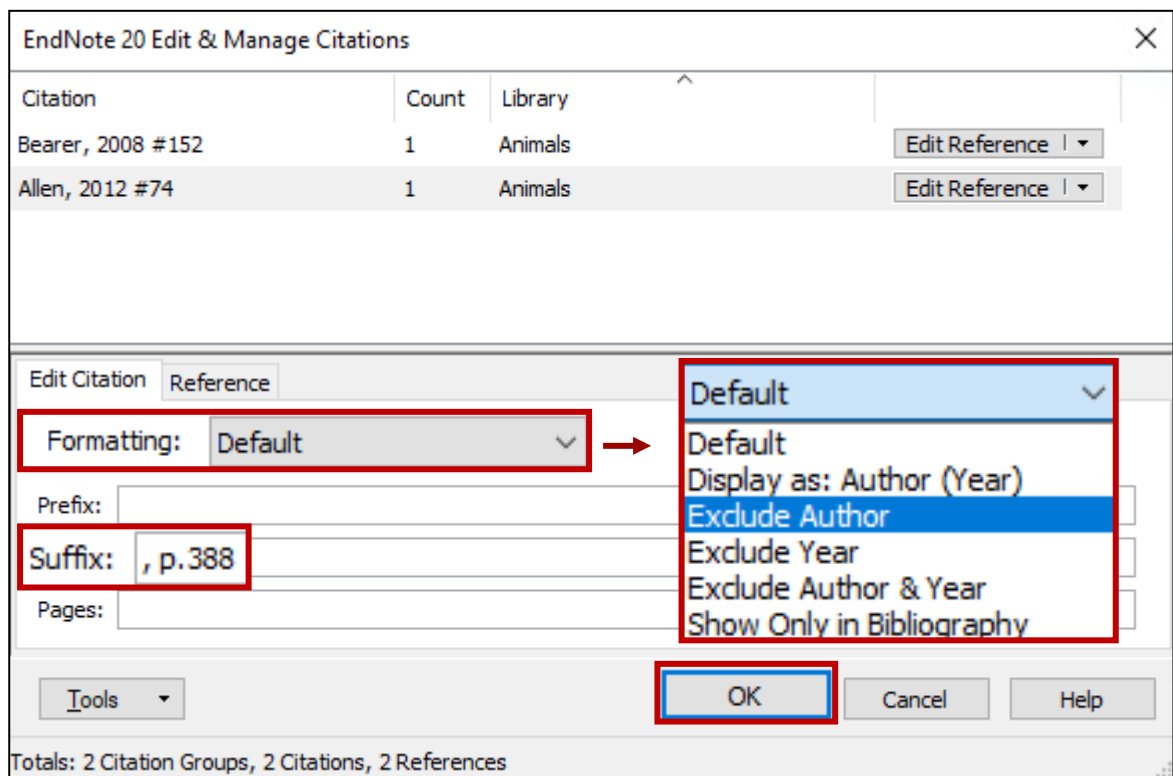
Place your cursor on the in-text citation you would like to edit. The citation will turn grey.

2

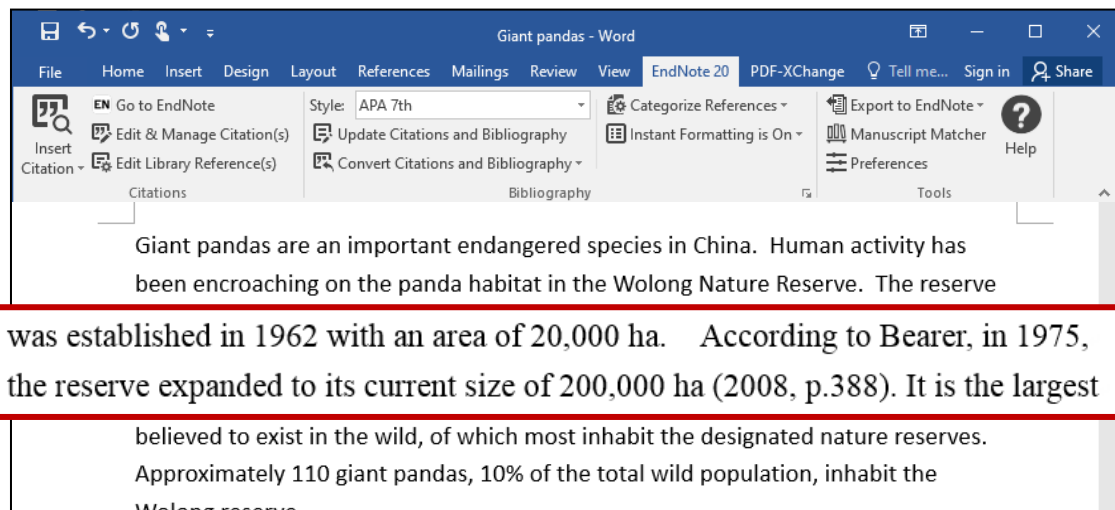
From the Citations tab section, click on **Edit & Manage Citation(s)**.

**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.

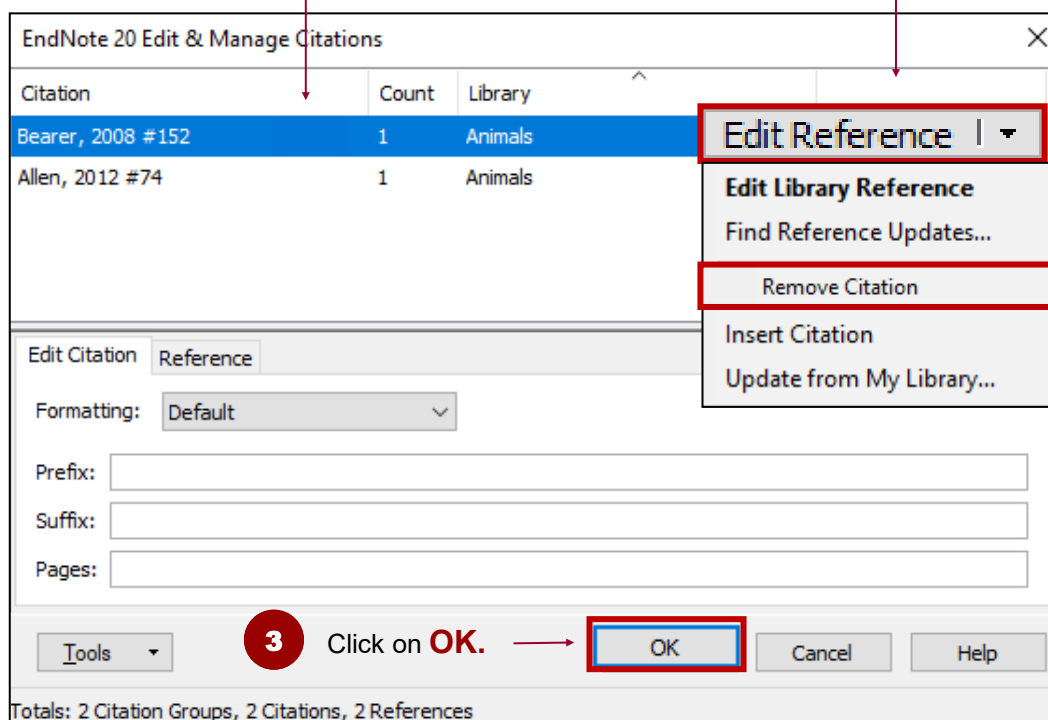


Removing a Citation

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**.

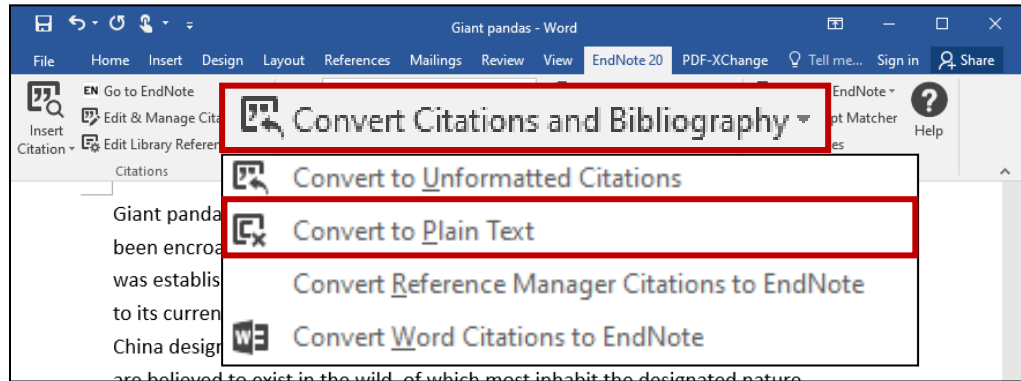
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



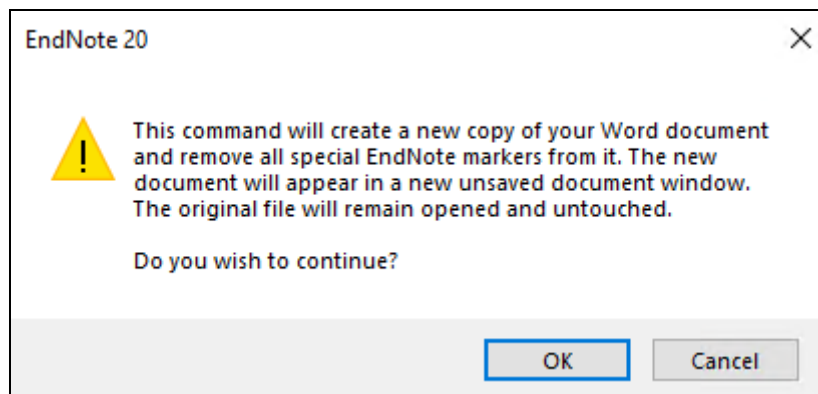
Step 3 Remove Field Codes

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	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)	

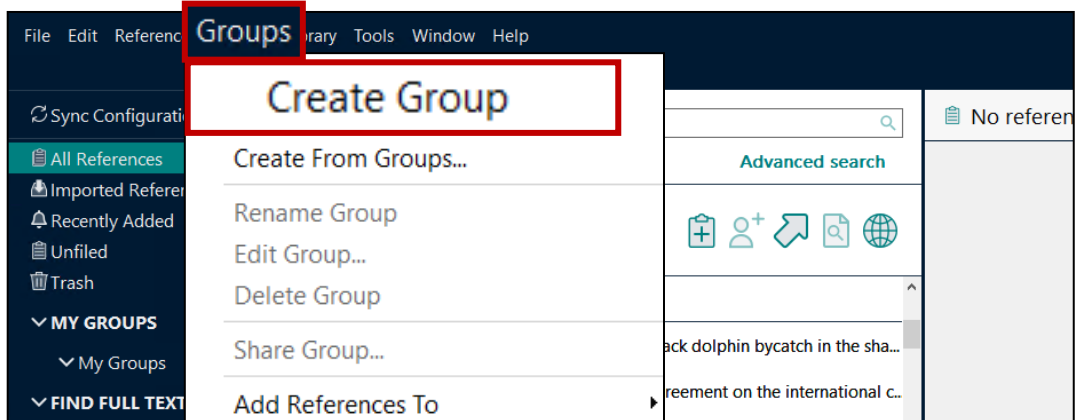
2. Create a Custom Group



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

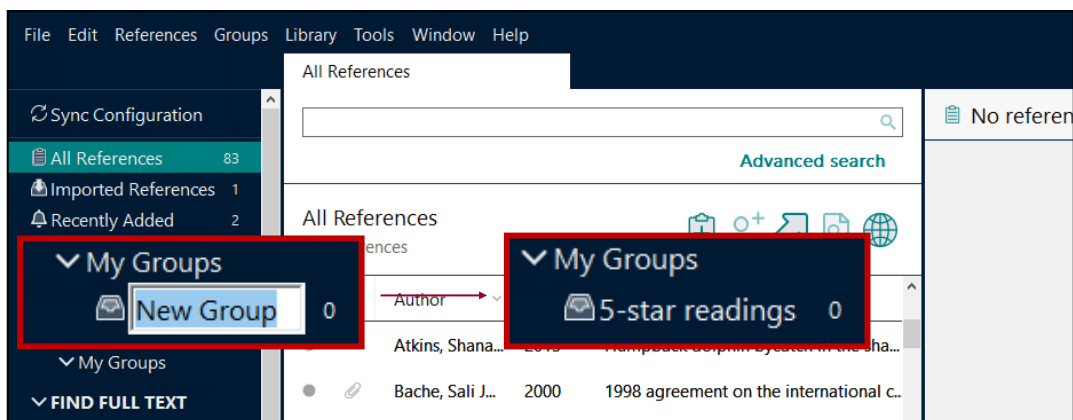
1

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



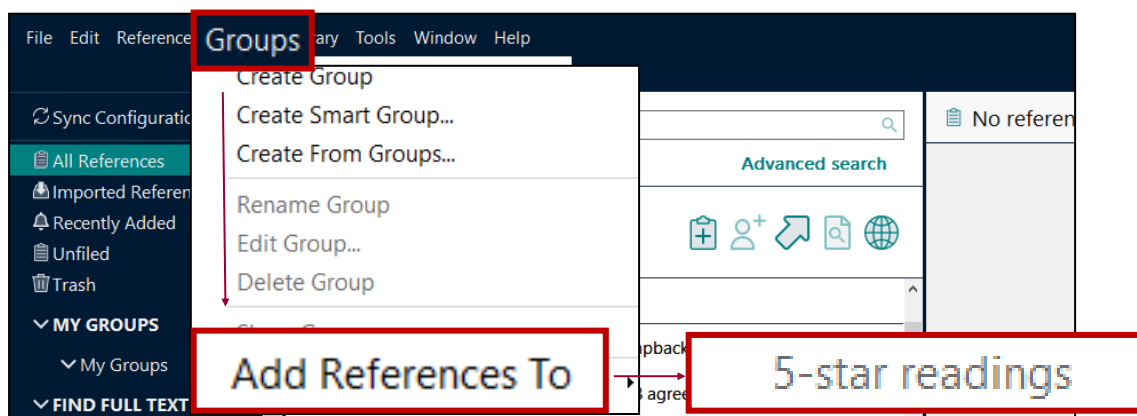
2

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)

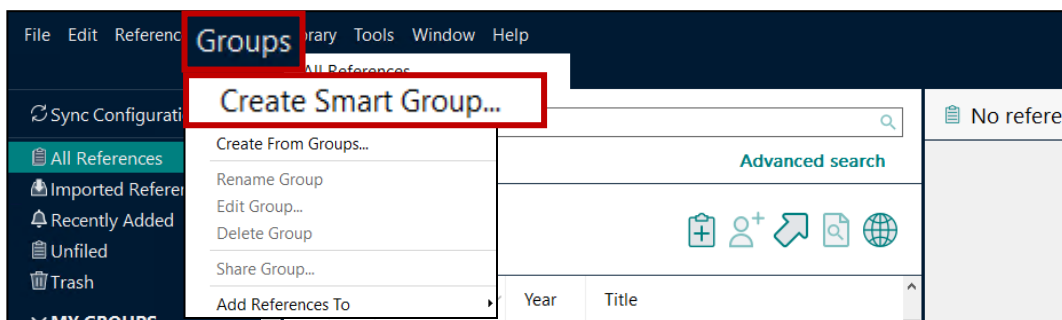


3. Create a Smart Group

Create two smart groups:

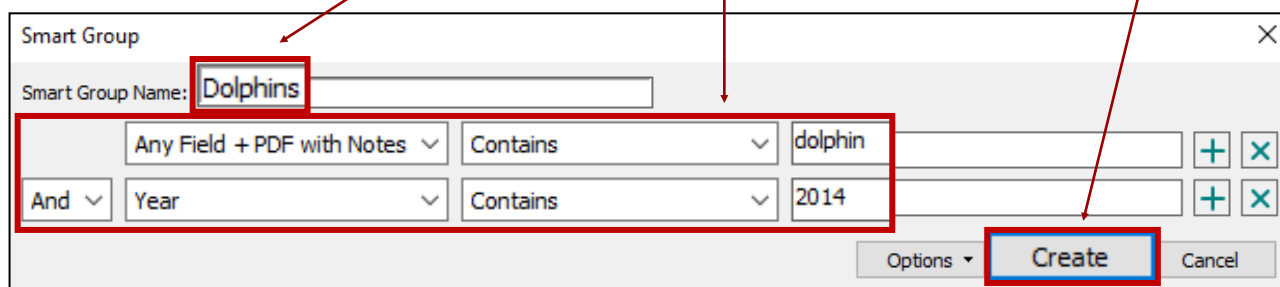
- (a) Dolphins
- (b) Pandas

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

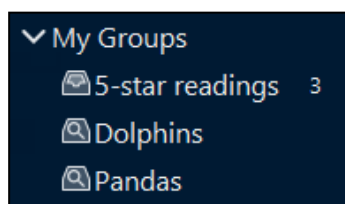
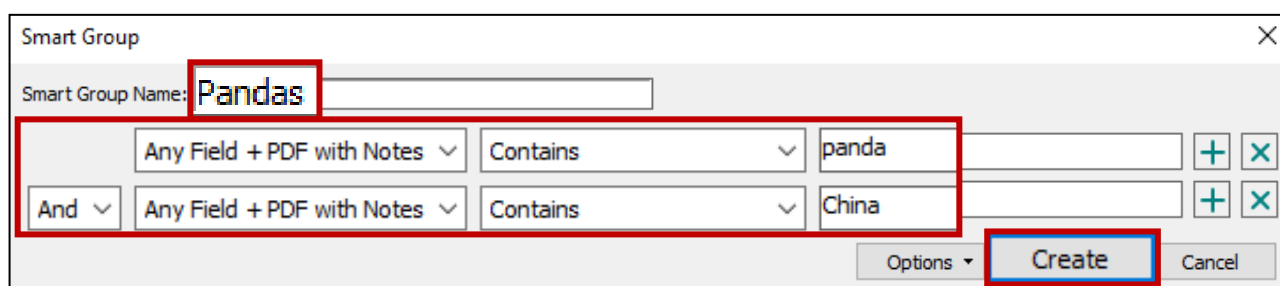


2 Create the smart group for **Dolphins**

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



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

Learn from the online tutorials, videos and quick guides!