

# 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 is a sidebar with navigation options: 'Recently Added' (12), 'Unfiled' (82), 'Trash' (69), 'MY GROUPS' (with a sub-option 'My Groups'), 'FIND FULL TEXT', 'GROUPS SHARED BY ...', and 'ONLINE SEARCH' (listing 'Library of Congress', 'LISTA (EBSCO)', 'PubMed (NLM)', and 'Web of Science'). The main window is titled 'All References' and shows a list of 82 references. A red dot marks a reference by 'Caro, M.; W...' from 2017, titled 'Why is the giant panda black and whit...'. Below this, another reference by 'Choudhury, ...' from 2019 is visible. The bottom part of the screenshot shows a Microsoft Word document titled 'Giant pandas - Word'. The document contains two paragraphs. The first paragraph discusses the Wolong Nature Reserve and includes an in-text citation '(Anthes, 2013, p. 78)' which is highlighted with a red box. The second paragraph describes the location of the Wolong Nature Reserve. At the bottom of the Word window, a list of references is visible, 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)*. *Behavioral Ecology and Sociobiology*, 57(1), 1-11.'

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

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**

## 4. How to download and install EndNote?

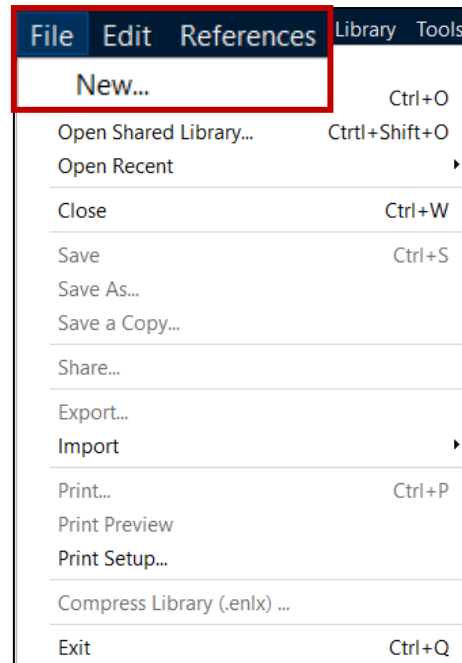
Refer to the **Downloading and Installation Guide** :  
EndNote@HKU > Download EndNote > Installation Guide for Windows (20)

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

## 5. Create an EndNote Library

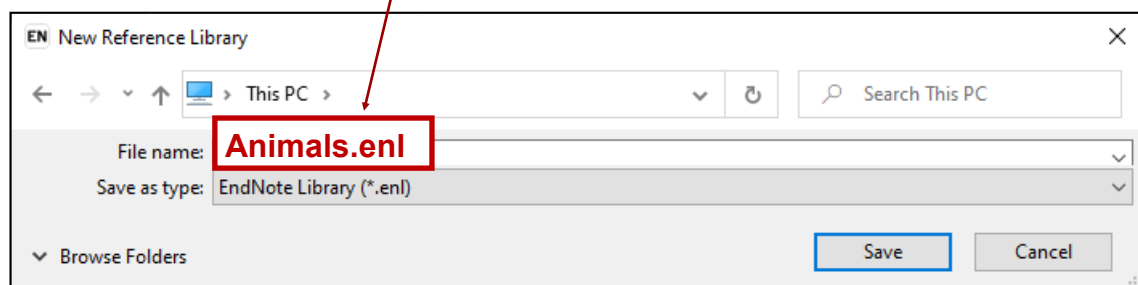
1

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



2

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



3

Click **Save**, a new library will be created in a new window.

**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

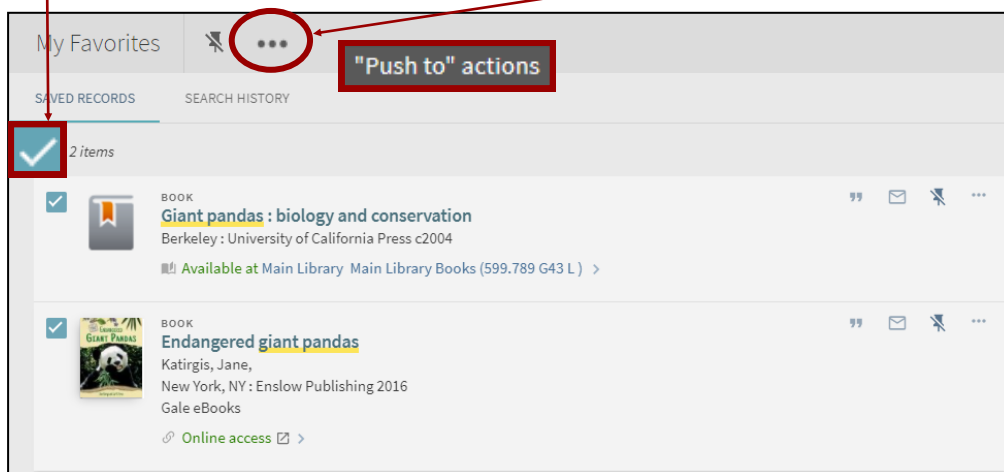
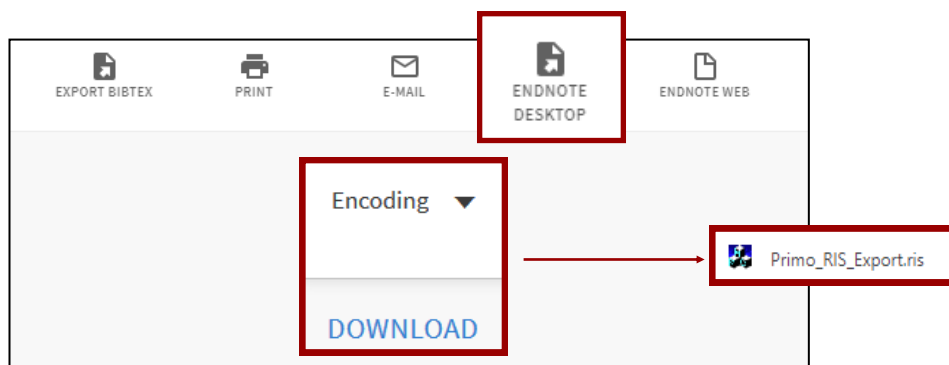
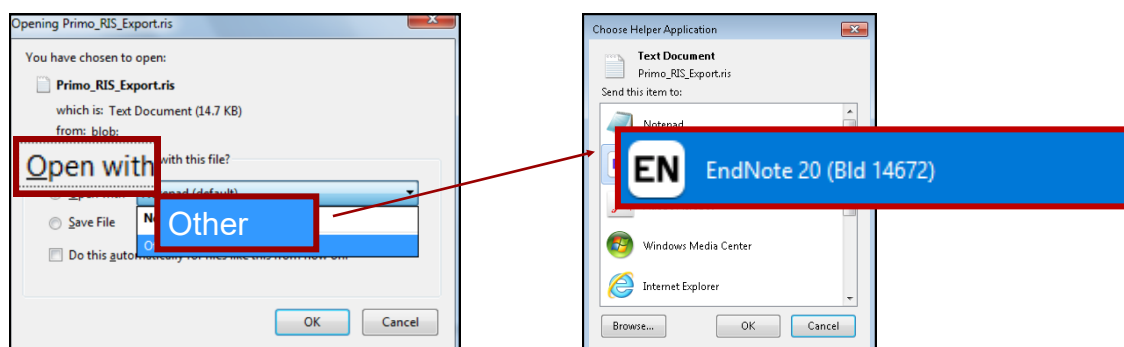
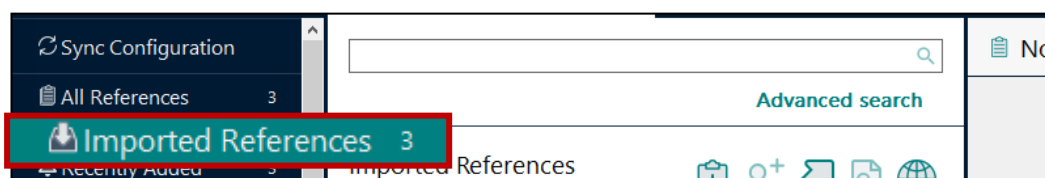
The screenshot shows the Find@HKUL search results page for the query "Giant panda". Three numbered instructions are overlaid on the page:

- 1 Enter your search statement**: Points to the search bar containing "Giant panda".
- 2 Mark the desired records**: Points to the "Add to Favorites" (star) icon next to the first search result.
- 3 Go to my favorites**: Points to the "My Favorites" (star) icon in the top right navigation bar.

The search results show two articles:

- 1** Why is the giant panda black and white? Caro, Tim ; Walker, Hannah ; Rossman, Zoe ; Hendrix, Megan ; Stankowich, Theodore. Oxford University Press (OUP). Behavioral ecology, 2017-05, Vol.28 (3), p.657-667. PEER REVIEWED OPEN ACCESS. Full text available.
- 2** 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

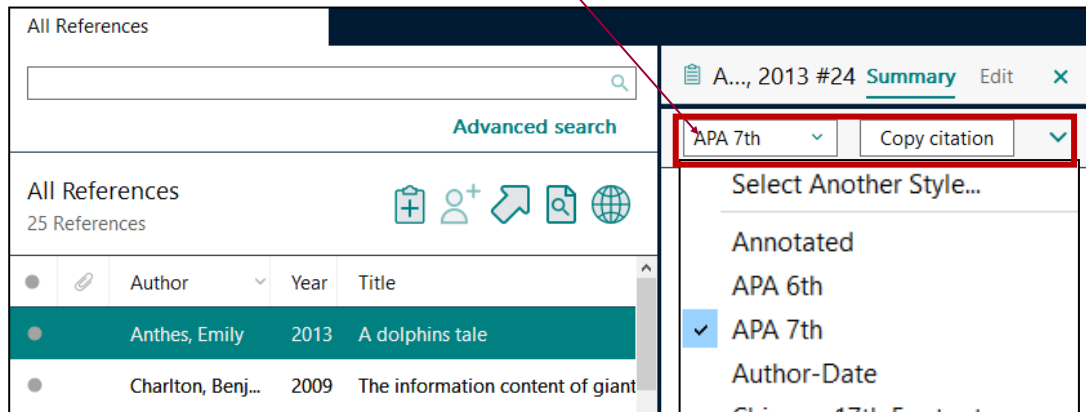
The right sidebar shows refinement options: "Refine results", "Expand My Results", "Sort by Relevance", "Show Only", "Full Text Online (29,574)", "Peer-reviewed Journals (6,968)", "Available in the Library (62)", "Open Access", "Resource Type", and "Articles (14,635)".

**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

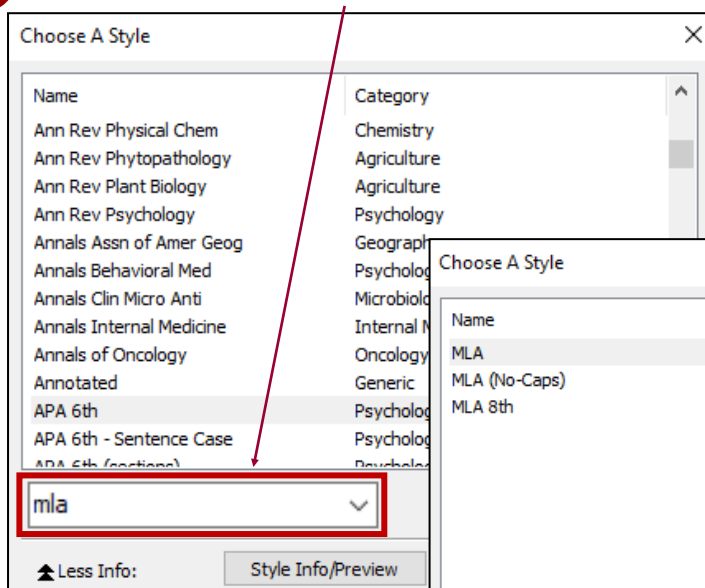


## Change citation styles

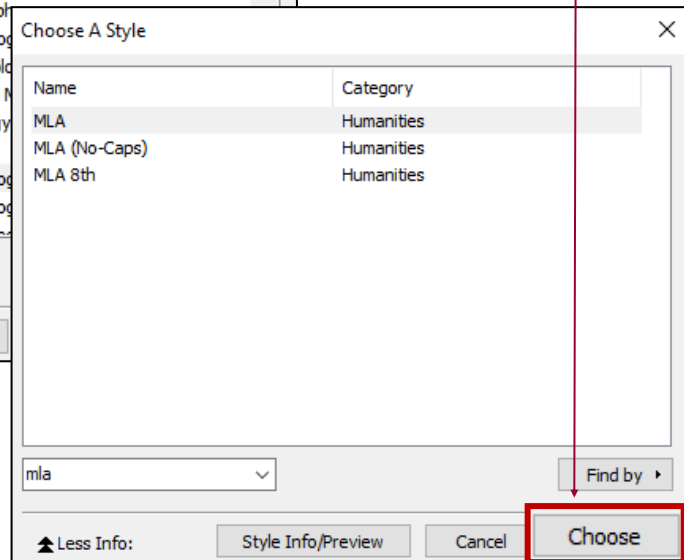
- 1 Highlight a reference. Open the **pull-down menu** for Output Style. Choose **Select Another Style**.



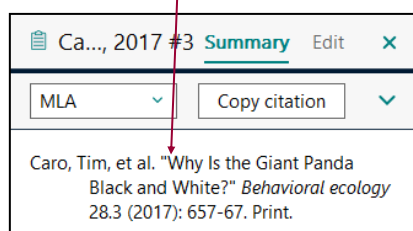
- 2 Enter name of your citation style and then press **Enter**.



- 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 interface. On the left, a table lists 25 references. The reference by Zhou, Mengqi (2012) is highlighted. On the right, the preview panel shows the citation in APA 7th style: Zhou, M. (2012). *Panda : back from the brink* (Adapted, rev. ed. ed.). Saraband.

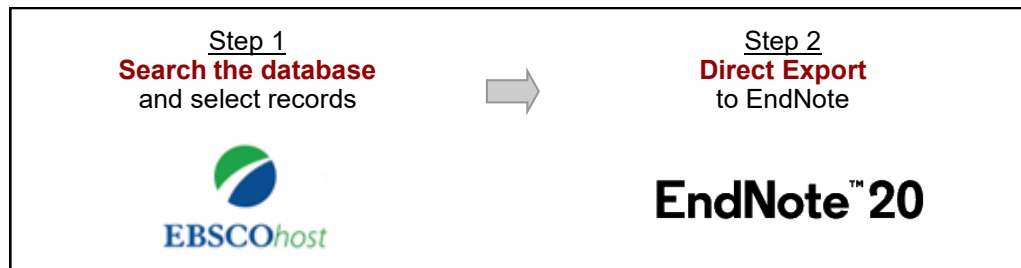
	Author	Year	Title
●	Wei, Wei; Swai...	2018	Giant panda distributional and h
●	Yang, Biao; Qi...	2020	Gap Analysis of Giant Panda Con
●	Zhang, Zhi-Yi; ...	2018	Characterization of the β-defensi
●	Zhou, Mengqi	2012	Panda : back from the brink
●	Zhou, W.; Nie, ...	2019	Ecological context influences sce

- 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 'Edit' dialog box for the reference 'Zh..., 2012 #6 Summary'. The 'Edit' button is highlighted with a red box, and a red arrow points from the instruction in step 3 to it. The 'Save' button is also highlighted with a red box. The dialog box contains fields for Place Published (Glasgow), Publisher (Saraband), Volume, Number of Volumes, Series Volume, Number of Pages, Pages, Editor, Edition (Adapted, rev. ed.), and 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's advanced search.  
e.g. *dolphin AND conservation*

The screenshot shows the EBSCOhost Academic Search Complete advanced search interface. The search term 'dolphin' is entered in the first search box, and 'AND conservation' is entered in the second search box. The 'AND' operator is selected from the dropdown menu. The 'Search' button is highlighted in red. Below the search boxes, there are links for 'Basic Search', 'Advanced Search', and 'Search History'.

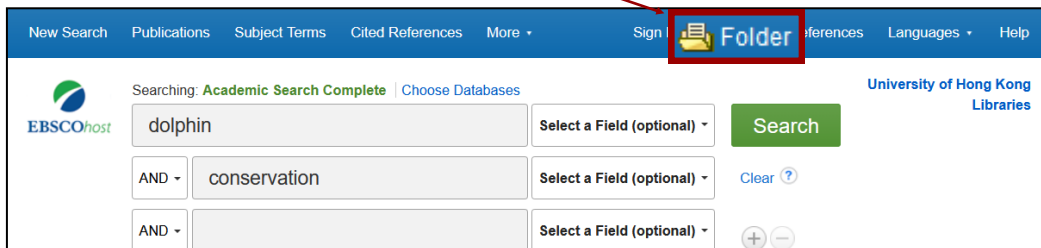
- 3 On the result list, click on **To Print, Email or Save Multiple Items** to select the desired records.

The screenshot shows the search results page for 'dolphin AND conservation'. The first result is '1. Fatal asphyxia due to laryngeal displacement a Guiana dolphin (Sotalia guianensis), Brazil.' The 'Add to folder' button is highlighted in red. A dropdown menu is open, showing 'Results (1-50)' and 'Add search to folder: dolphin AND conservation'. The 'Share' button is also highlighted in red.

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

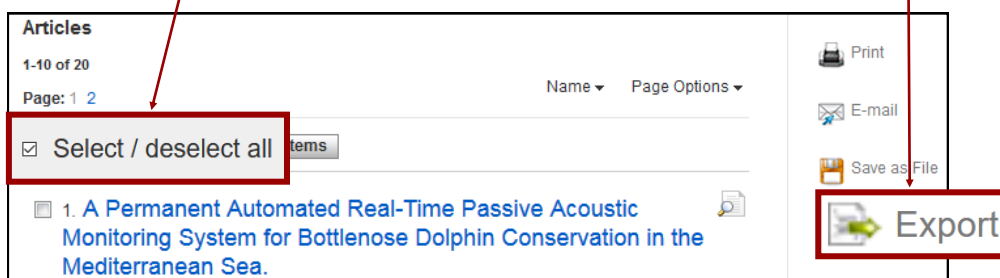
## Step 2 Direct Export to EndNote

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

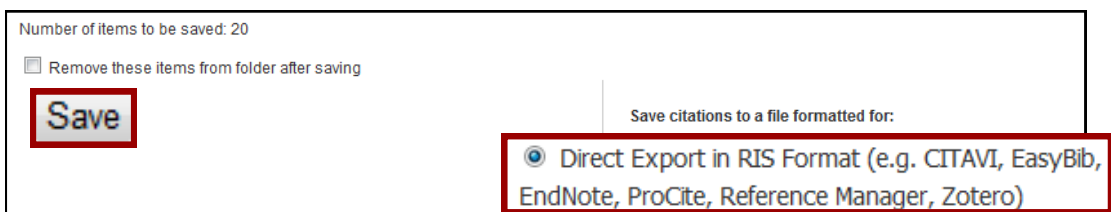


- 2 Tick the checkbox to select all records

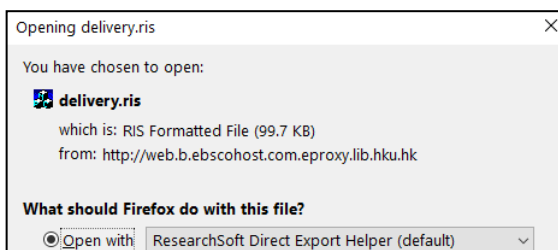
- 3 Click on the **Export** icon.



- 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

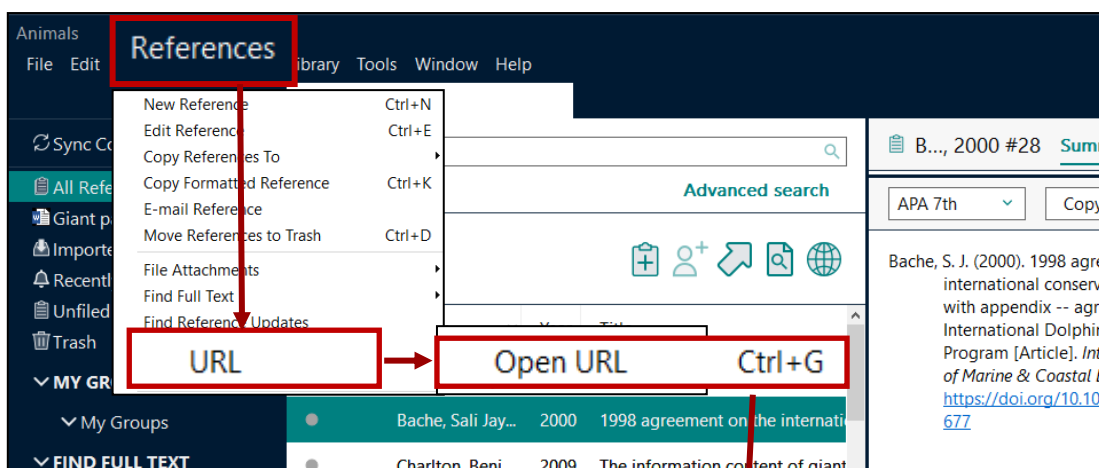
### Step 1: Locate PDF full text

1

**Highlight** the reference.

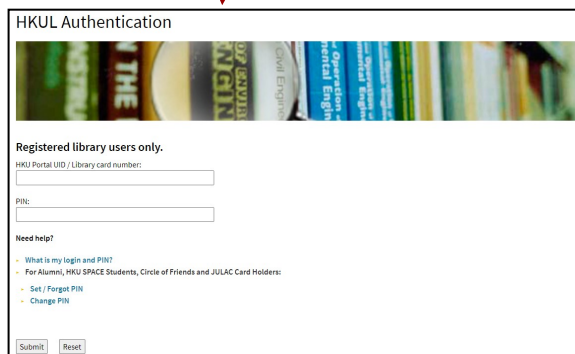
Select from the top bar menu: **References > URL > Open URL**

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



2

Publisher recognizes HKUL proxy string and prompts for HKUL Authentication



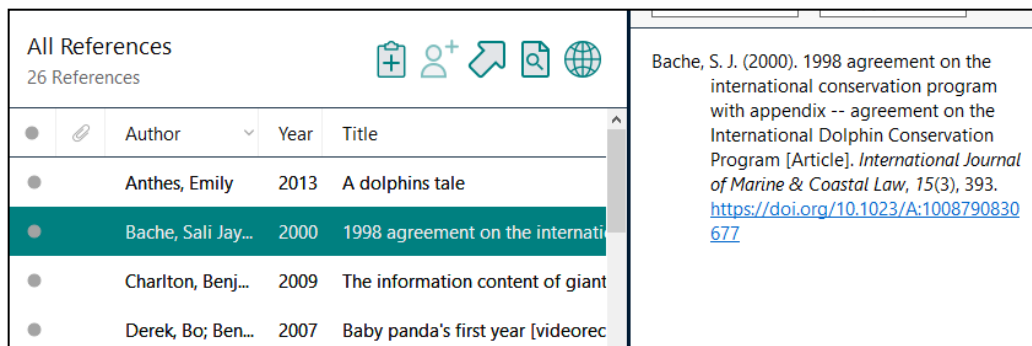
3

Save the PDF from the database

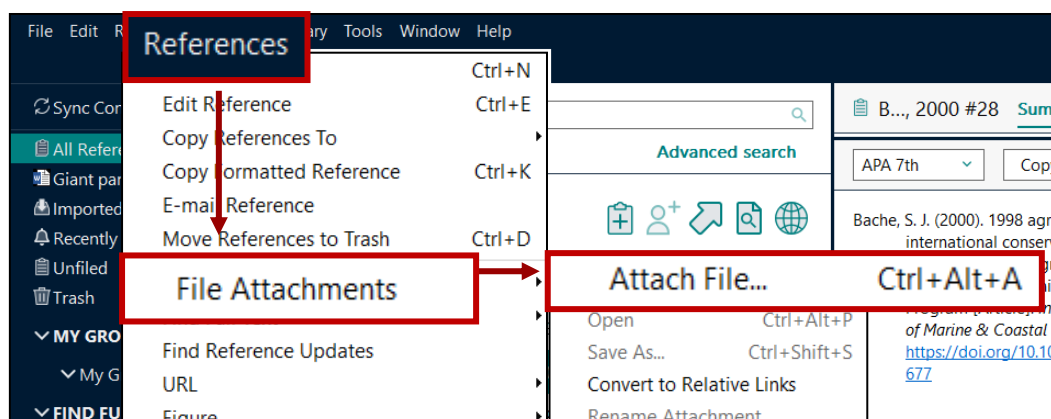


## Step 2: Link to PDF full text

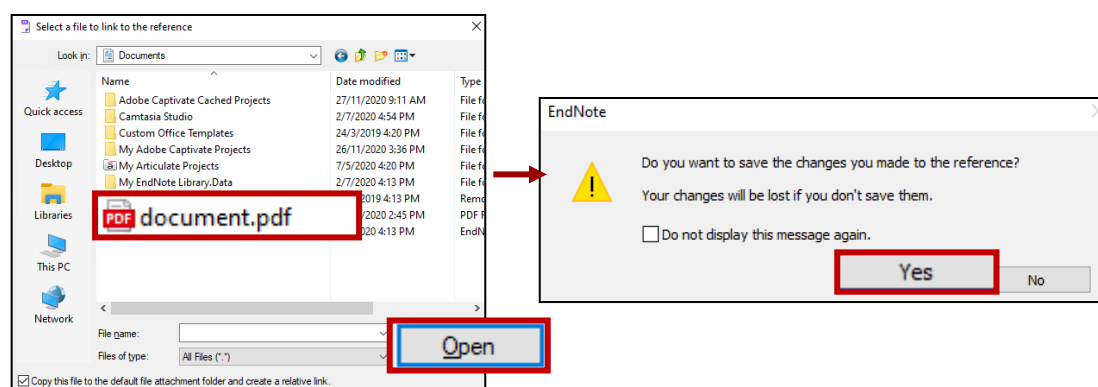
- 1 Highlight the reference in your library.



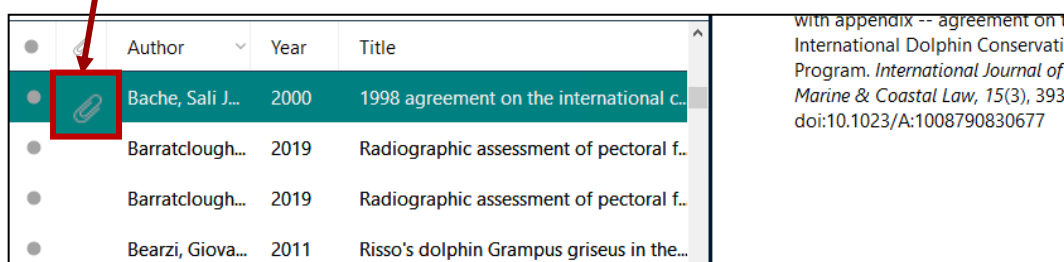
- 2 From top bar menu, select **References > File Attachments > Attach File**.



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



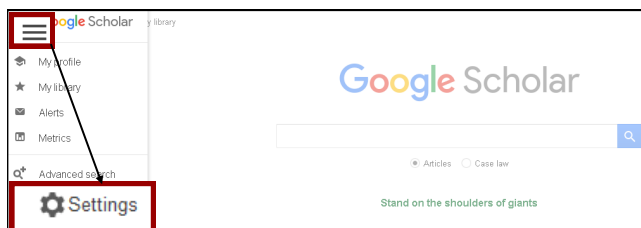
- 4 A **paper clip icon** will be displayed against the reference.



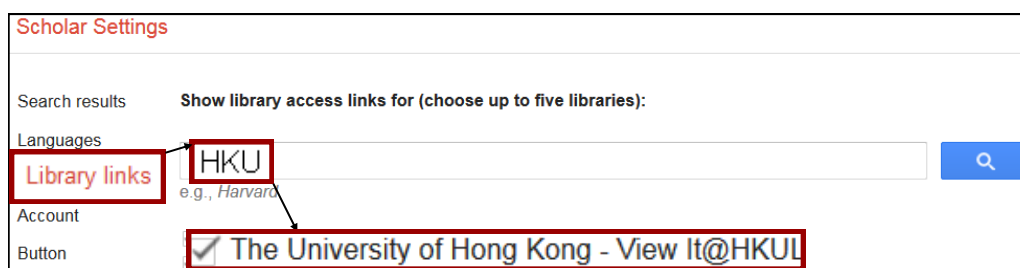
### 3. Direct Export - Google Scholar

#### Step 0 Set up Scholar preferences

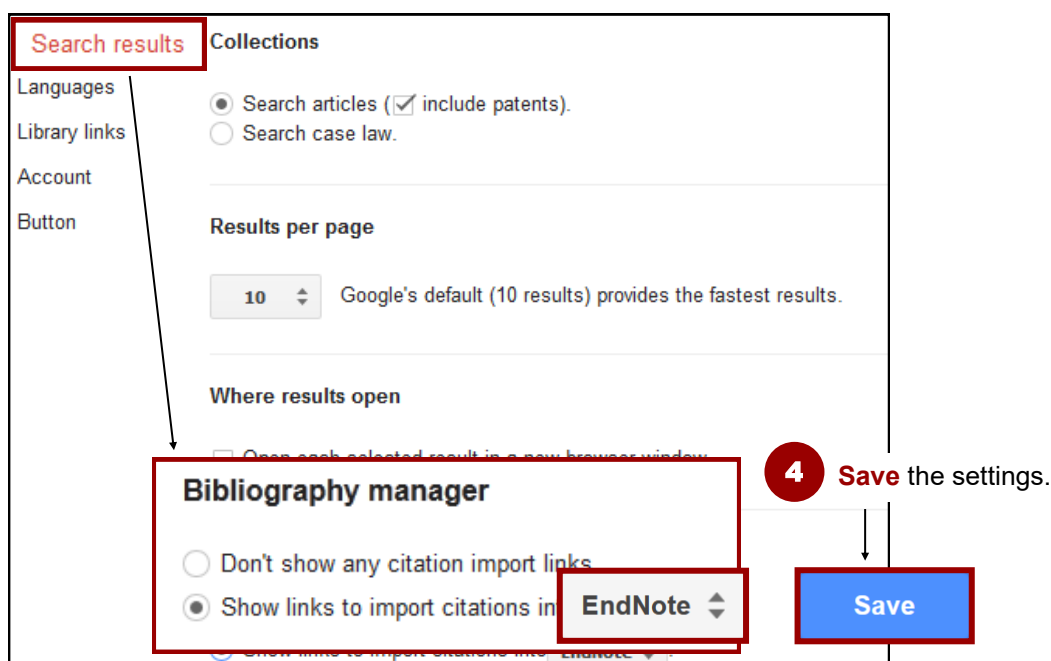
- 1** Go to <http://scholar.google.com> and click on **Settings**

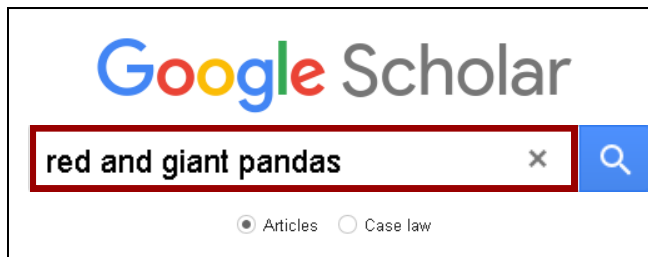


- 2** Under **Library links**
1. Search for **HKU**
  2. Select **The University of Hong Kong - View it**

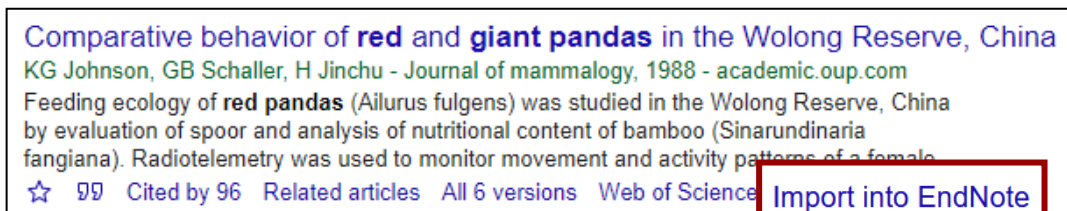


- 3** Under **Search results > Bibliography manager**
1. Select **Show links to import citations into**
  2. Choose **EndNote** from the pull-down menu.



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

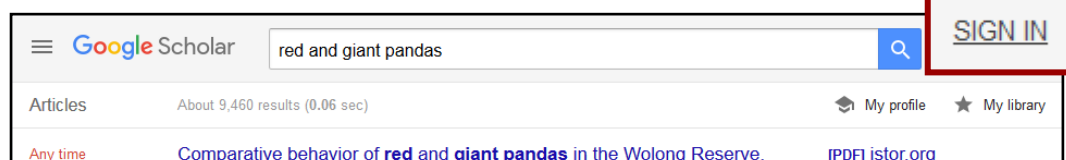
- 1 Click on **Import into EndNote**.



- 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.

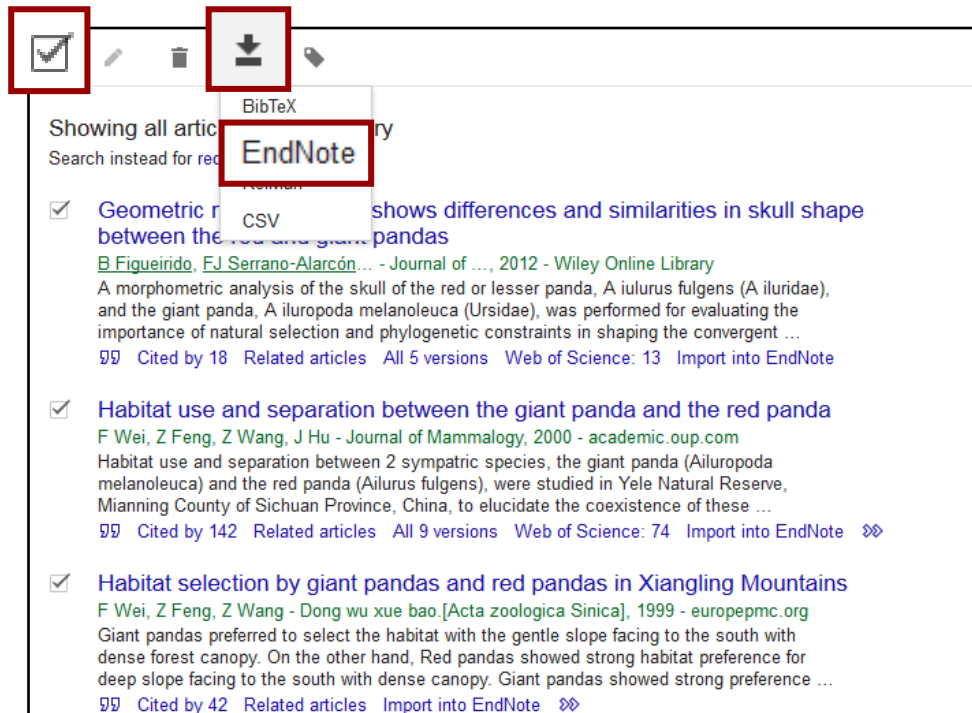


- 3 Click on the **My library** icon.

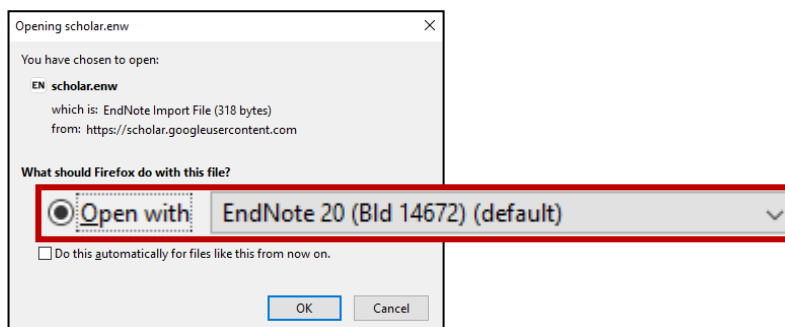


- 4 On the My Library page, **select** the records.

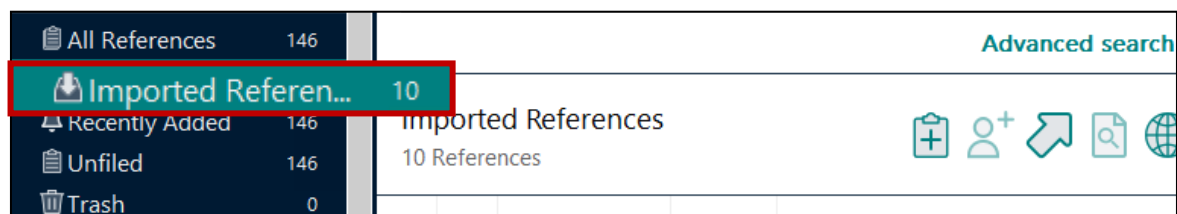
- 5 Click on **Export** and choose **EndNote**.



- 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

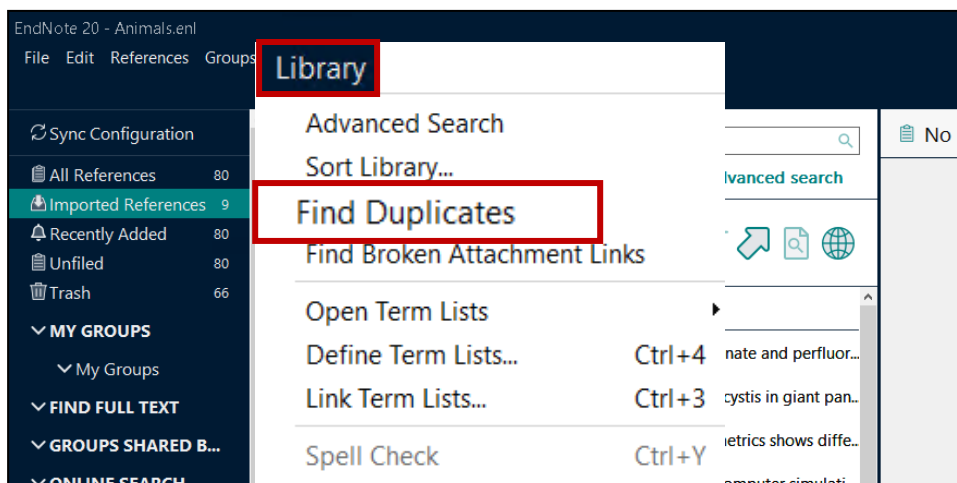
[PDF] jstor.org

**View It@HKUL**

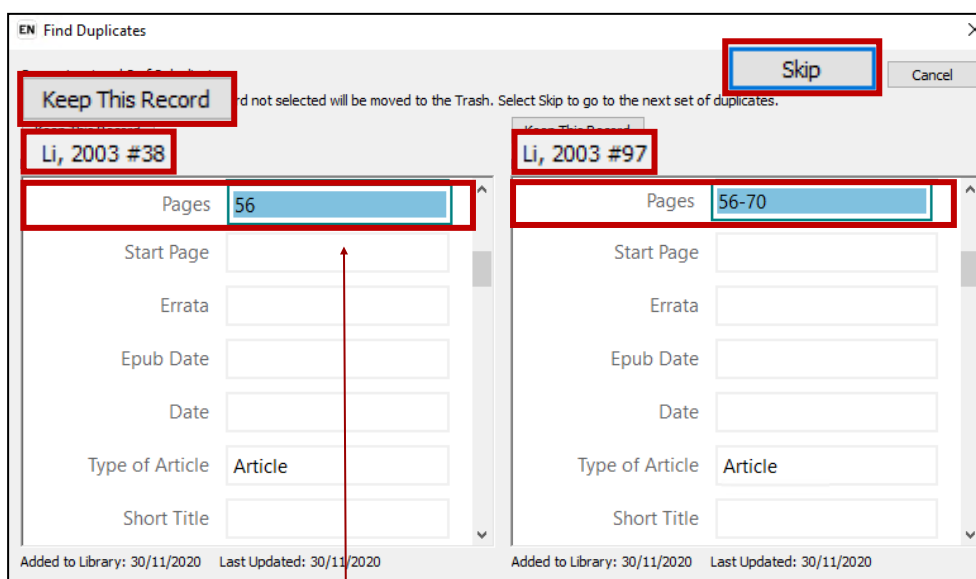


## Remove Duplicates

- 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.)



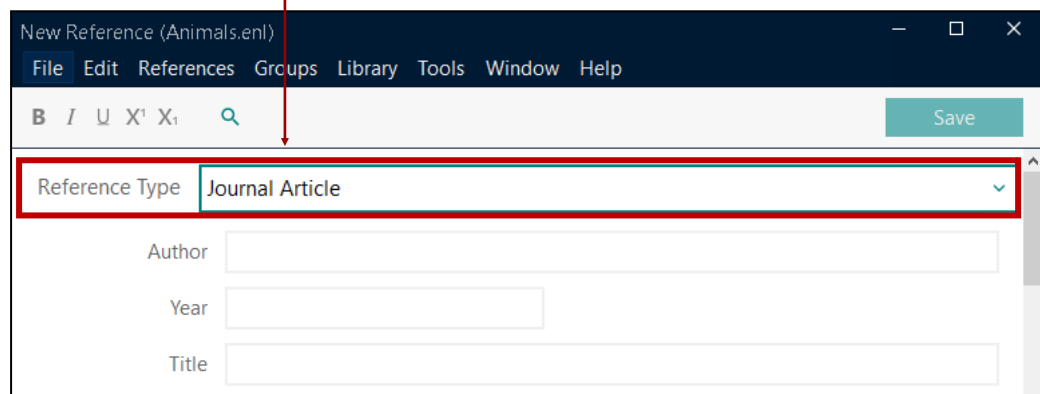
- 3 Different data of the records is **highlighted** for comparison. Select the record you would like to **keep**. To keep both records, click on **Skip**.  
(Note: Make sure the deleted record has not been cited in any of your papers.)

## 4. Manual Input

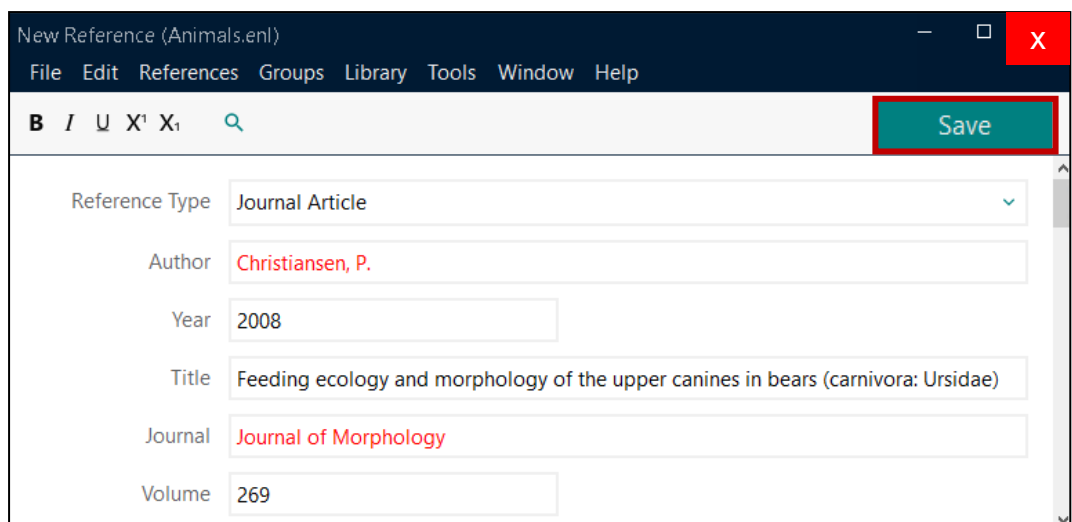
- 1 Click on the **New Reference** icon from the EndNote top icon bar.



- 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



**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<sup>a</sup>, , , Xiangnan Cheng<sup>a</sup>, Andrew K. Skidmore<sup>b</sup>




New Reference (My EndNote Library)

File Edit References Groups Library Tools Window Help

**B** *I* U X<sup>1</sup> X<sub>1</sub> 

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

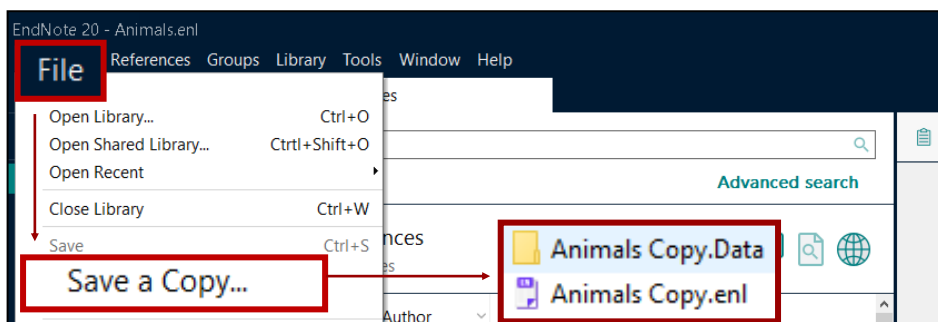


## Back up your EndNote Library!

### Method 1: Save a Copy

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

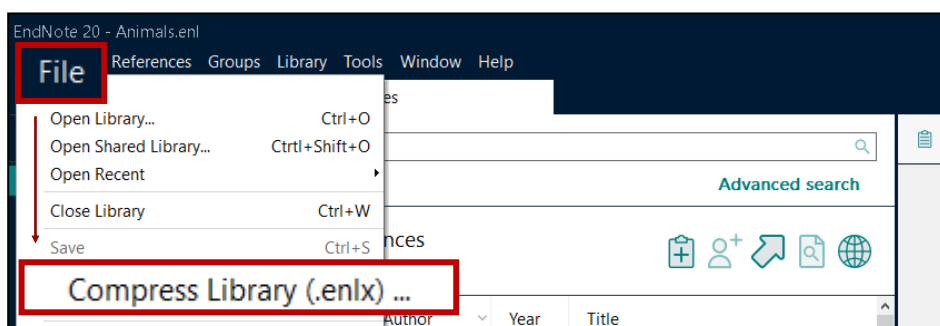
Select **File > Save a Copy**



### Method 2: Compressed Library

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

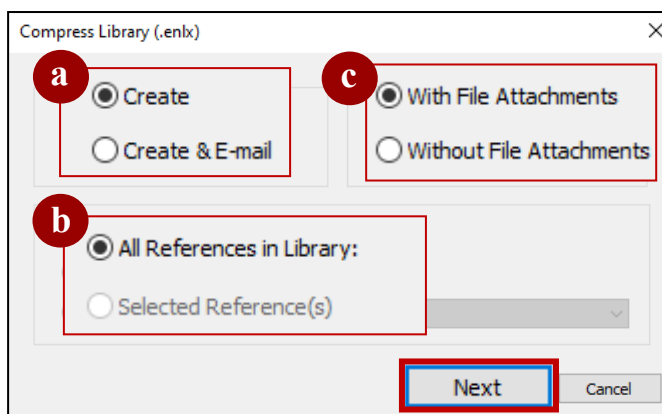
#### 1 Select **File > Compress Library**



#### 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**

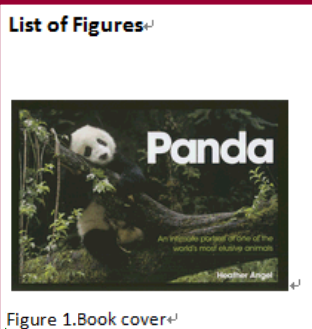
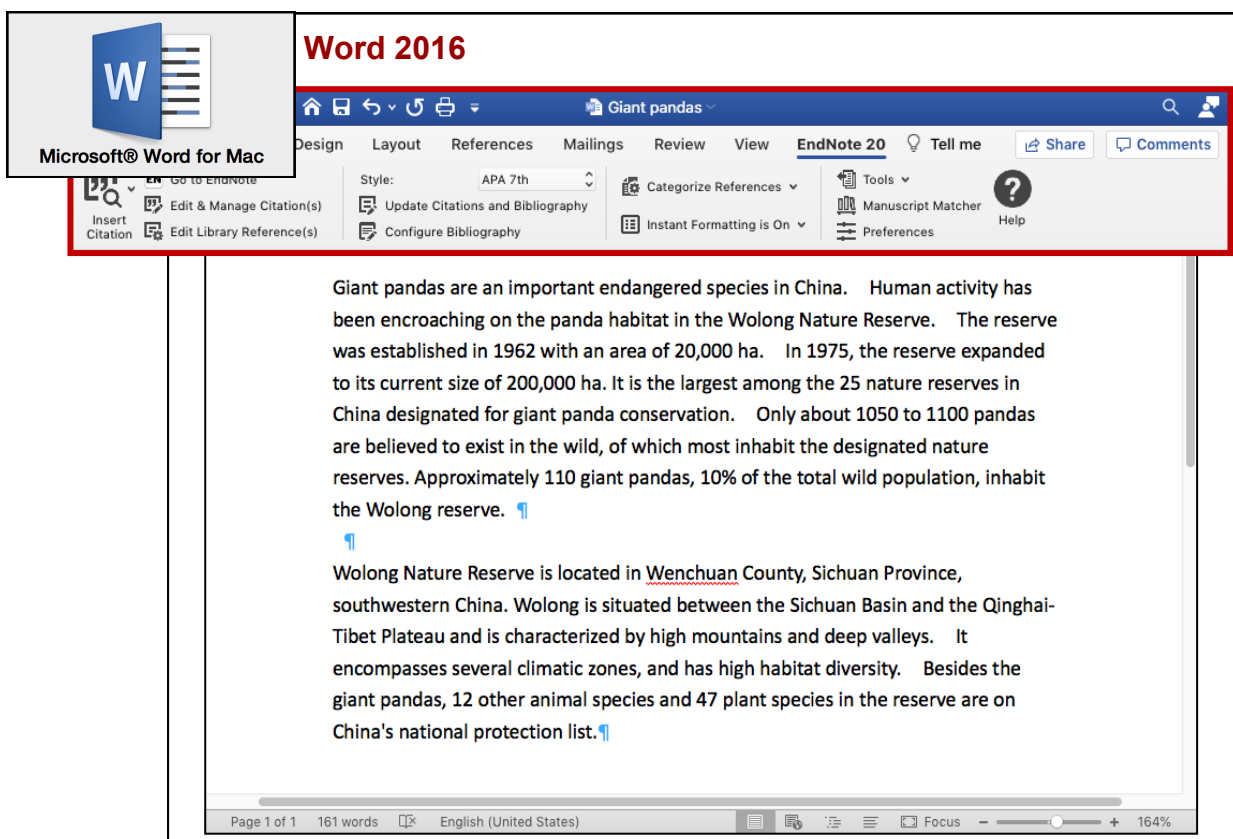
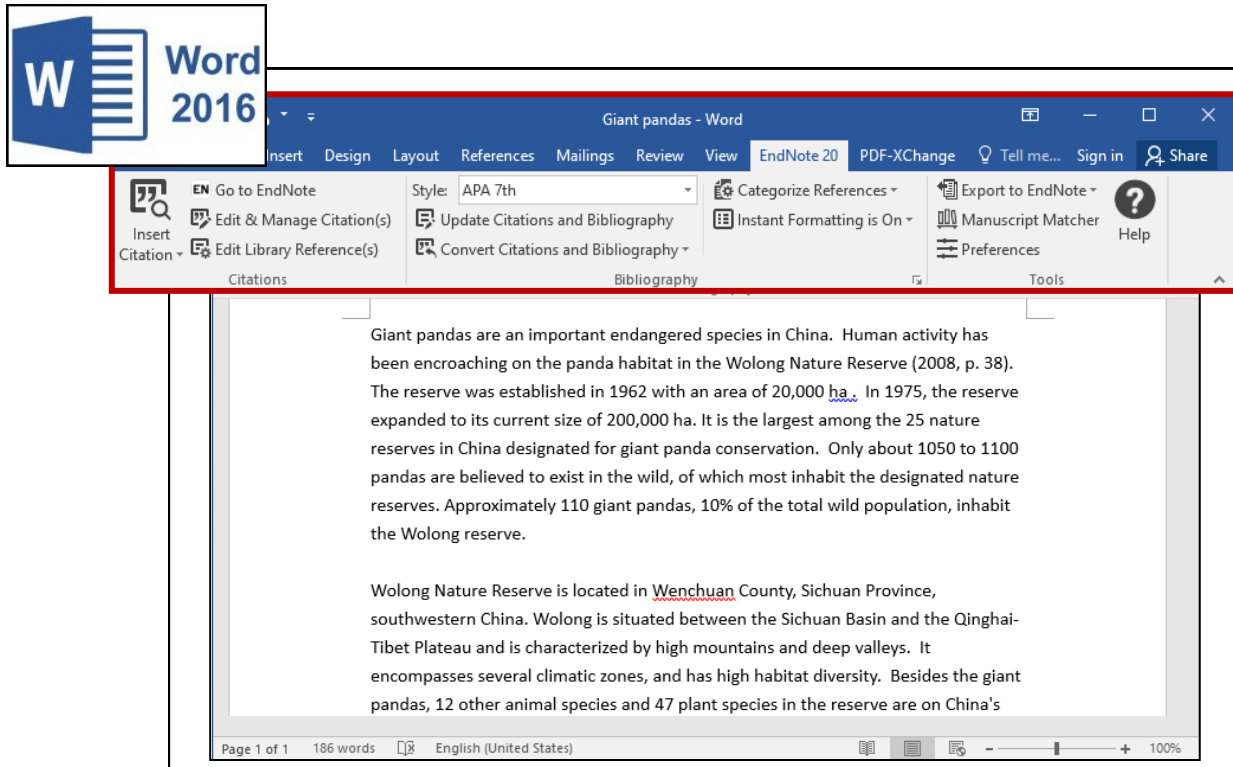


Figure 1. Book cover<sup>47</sup>

- 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?

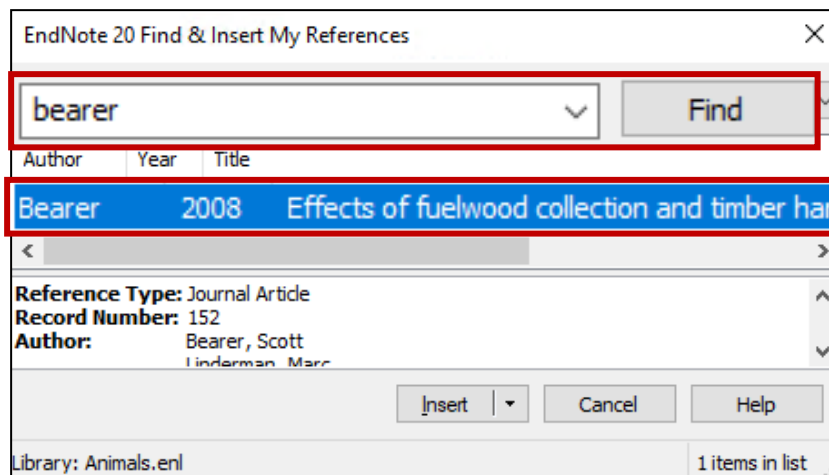
#### Step 1 Insert a citation

Method A Insert Citation

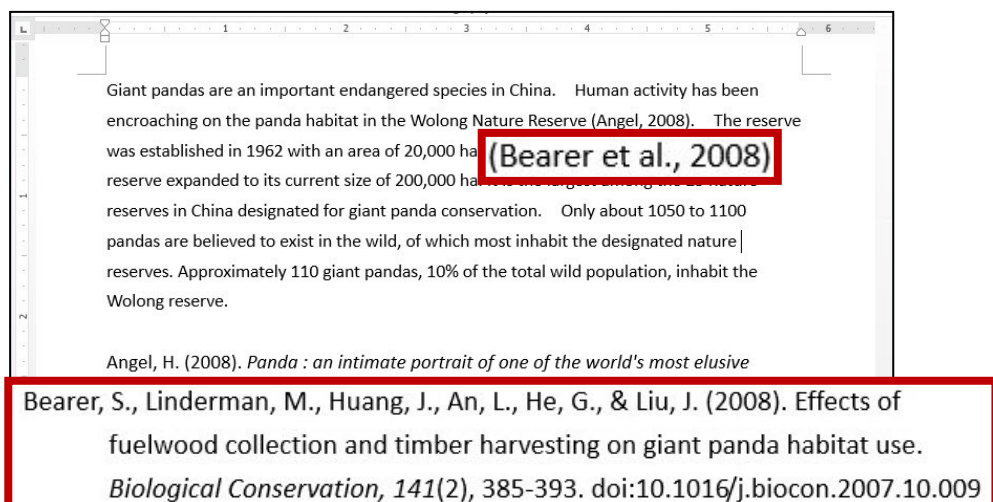
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**



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



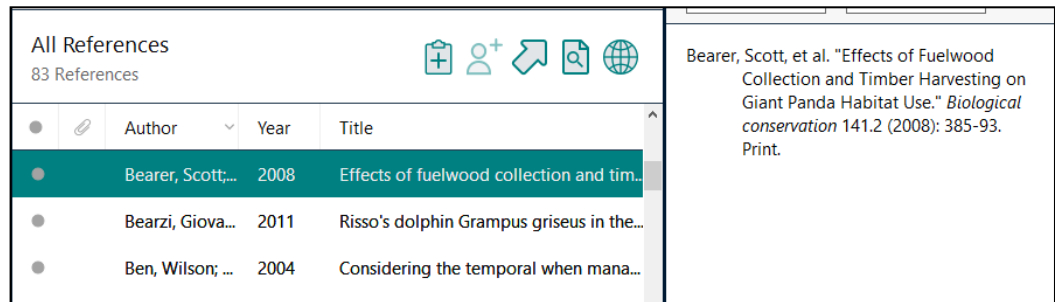
- 3 The **in-text citation** and the **reference** will be inserted into your document.



## Step 1 Insert a citation

Method B Insert Selected Citation

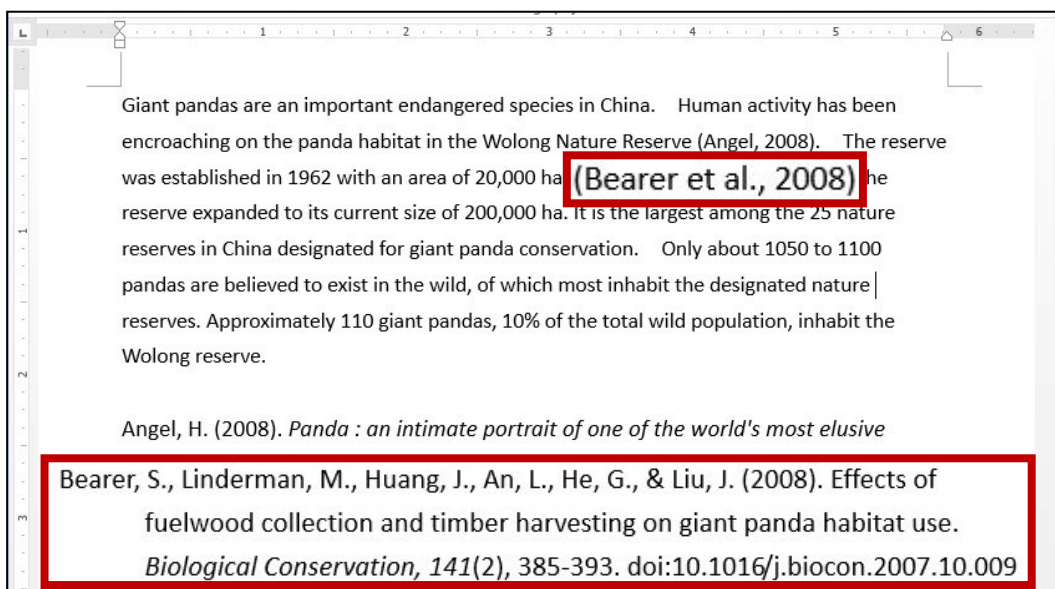
- 1 In **EndNote**, highlight the **desired citation**.



- 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.

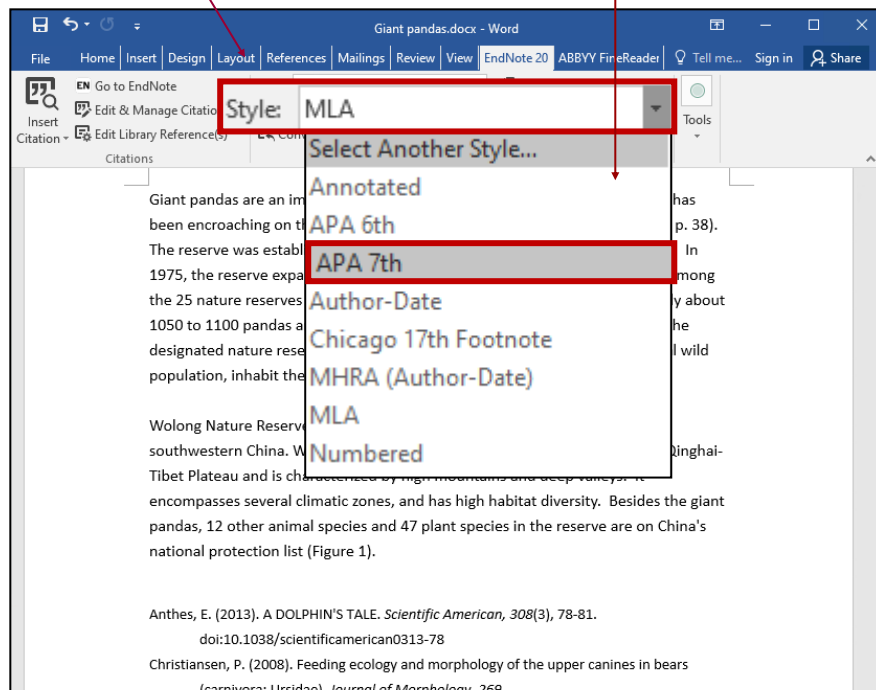




## Change the citation style

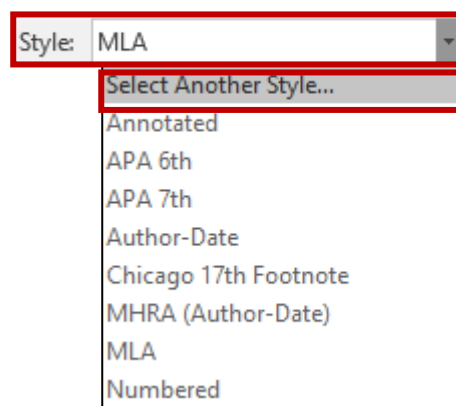
**1** In the **Bibliography** tab section, open the **Style** pull-down menu.

**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**

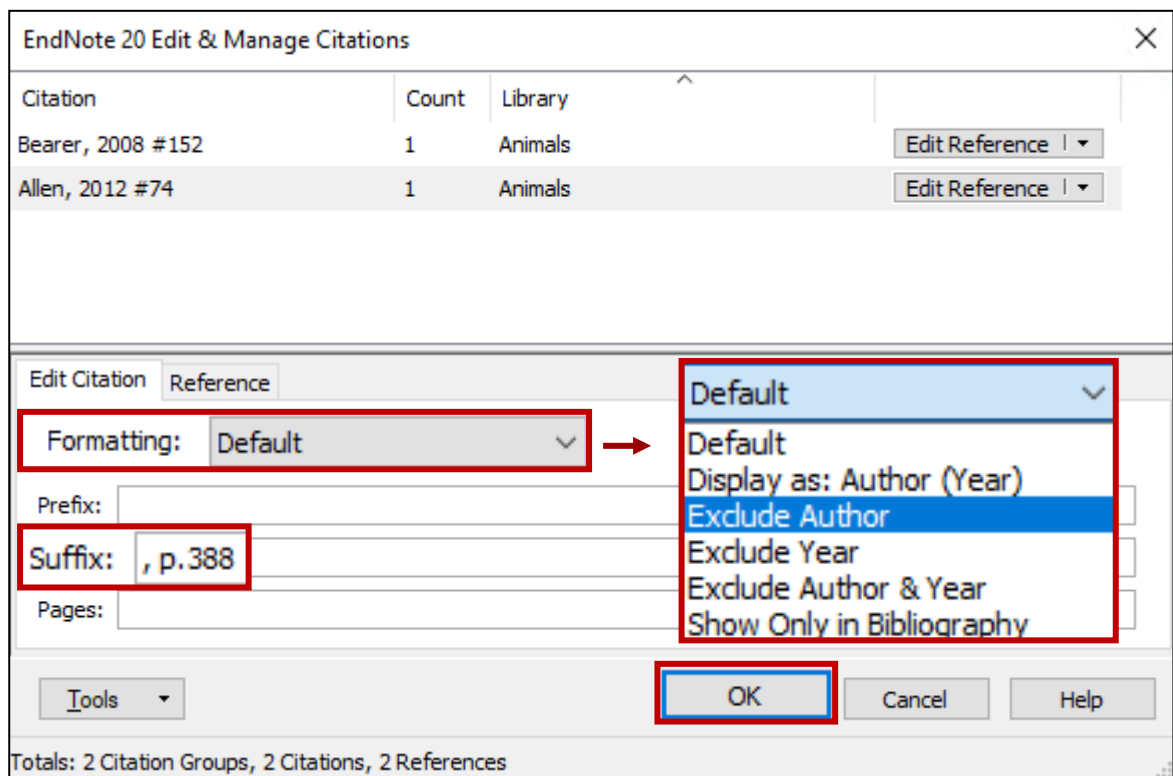
**Place your cursor** on the in-text citation you would like to edit. The citation will turn grey.

**2**

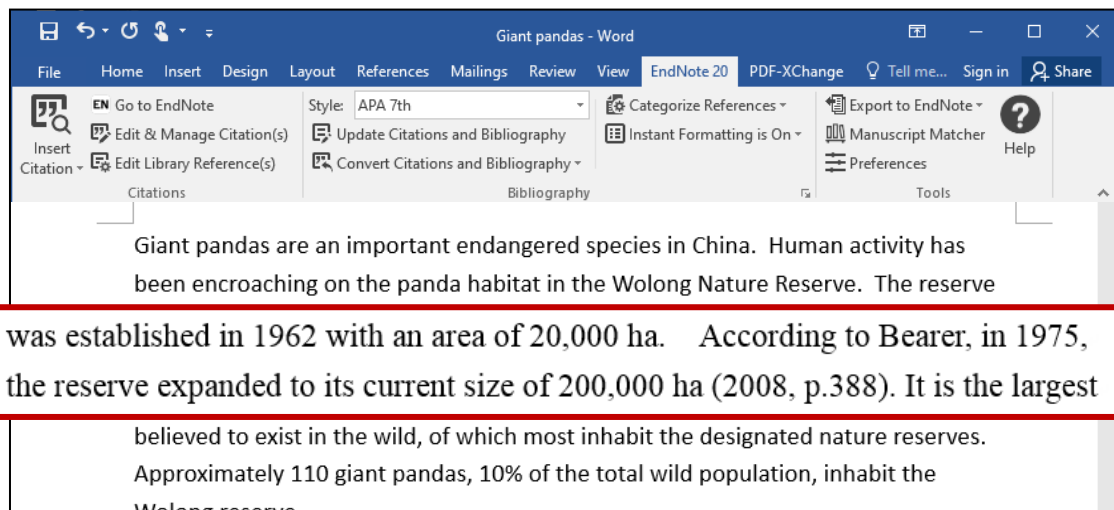
From the Citations tab section, click on **Edit & Manage Citation(s)**.

**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.

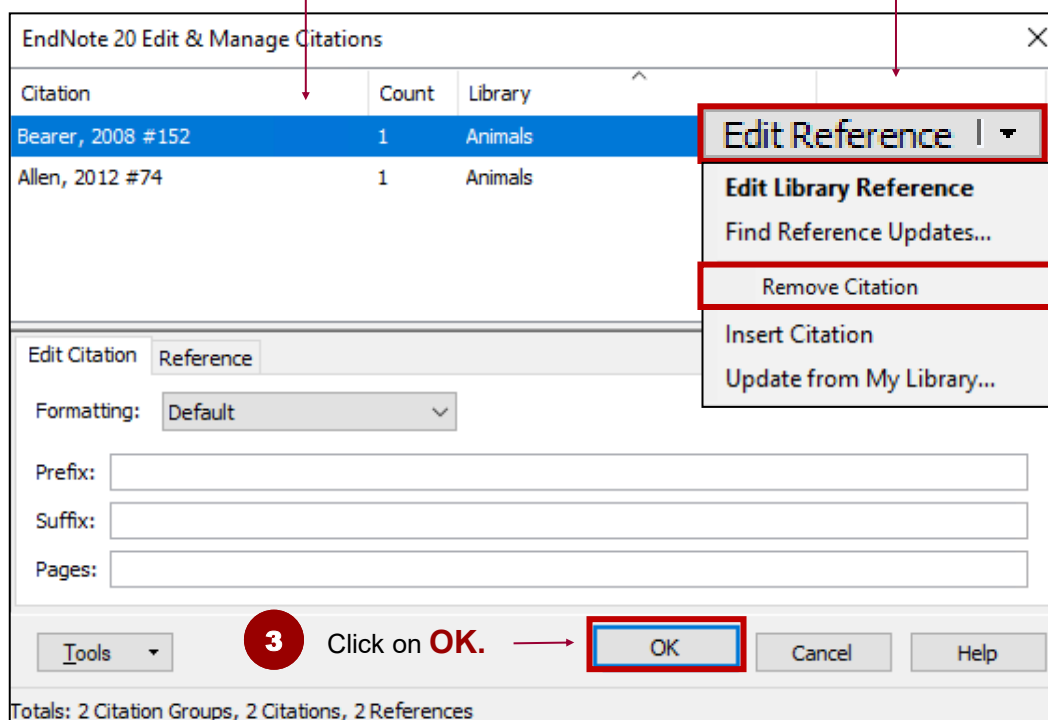


### Removing a Citation

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**.

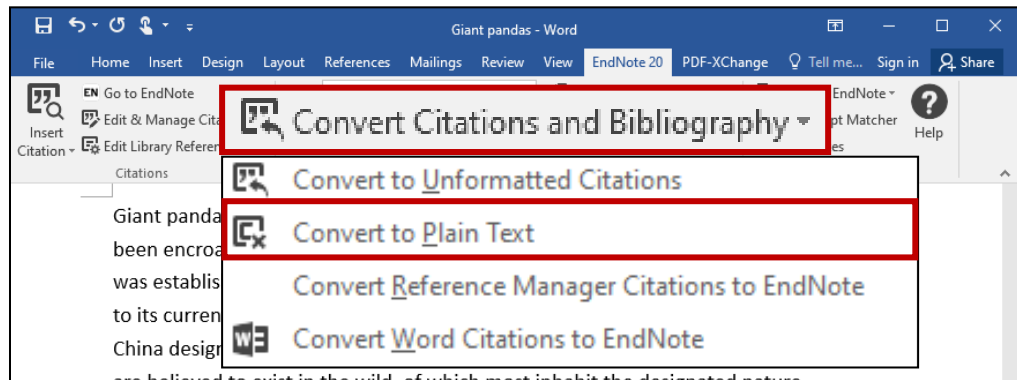
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



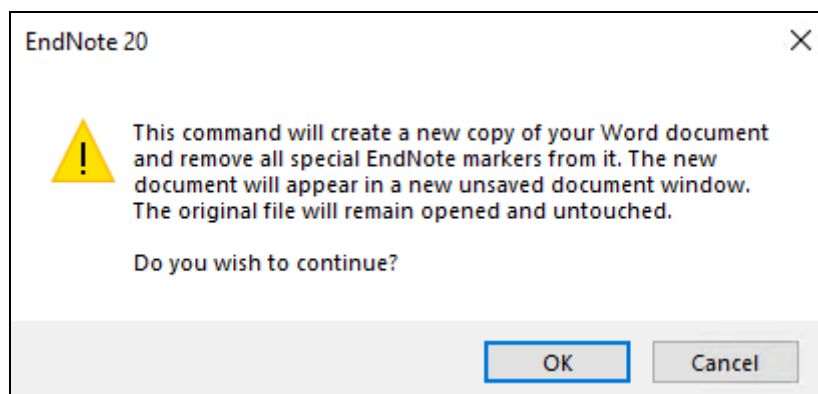
### Step 3 Remove Field Codes

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	<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)	

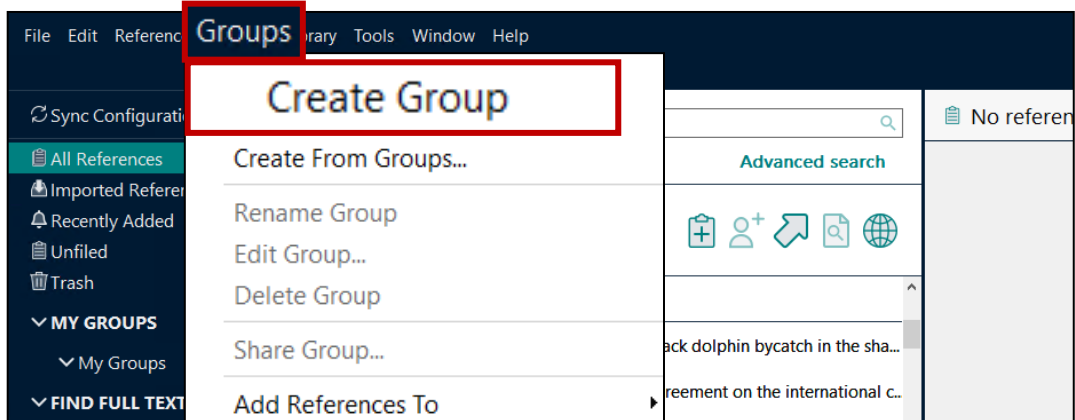
## 2. Create a Custom Group



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

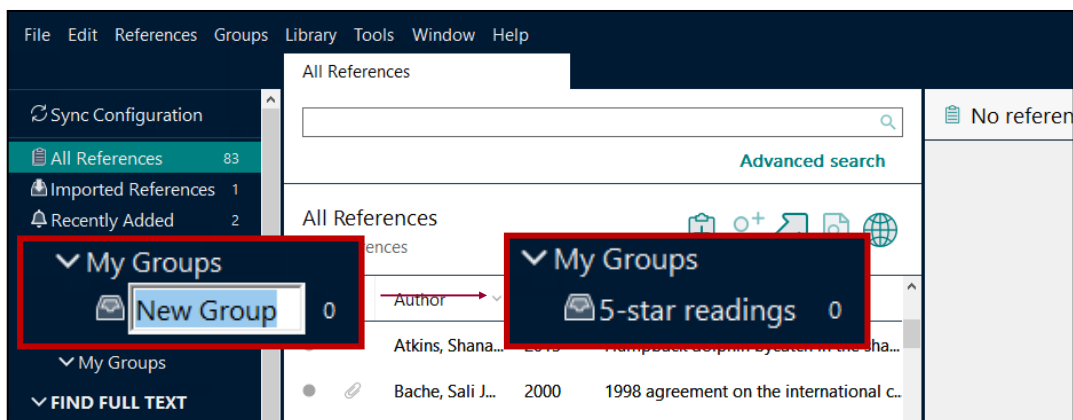
1

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



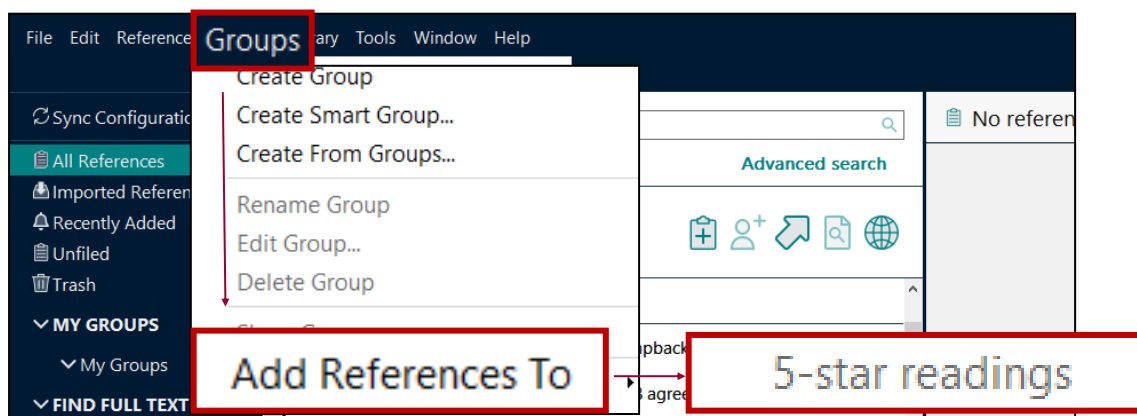
2

**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)

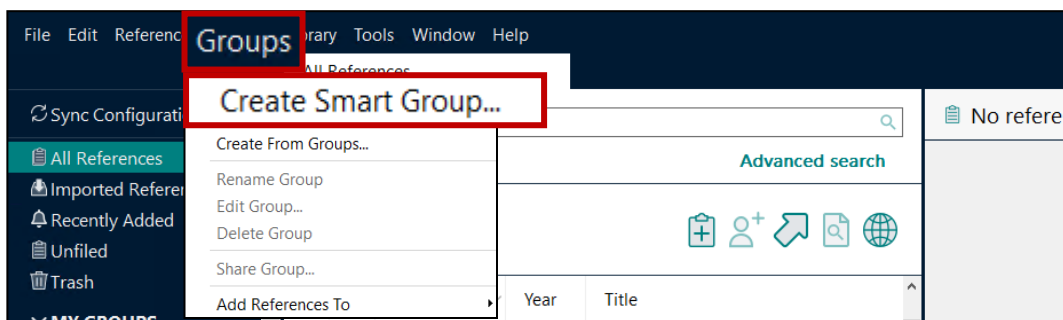


### 3. Create a Smart Group

**Create two smart groups:**

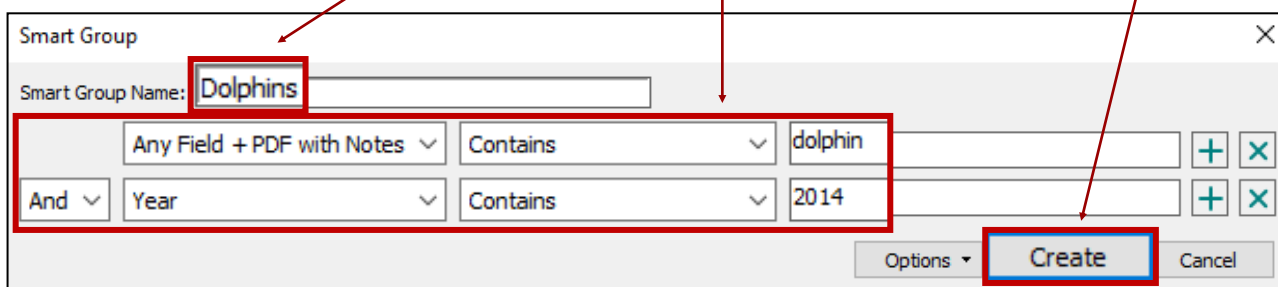
- (a) Dolphins
- (b) Pandas

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

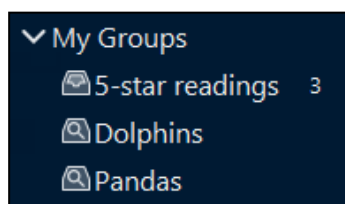
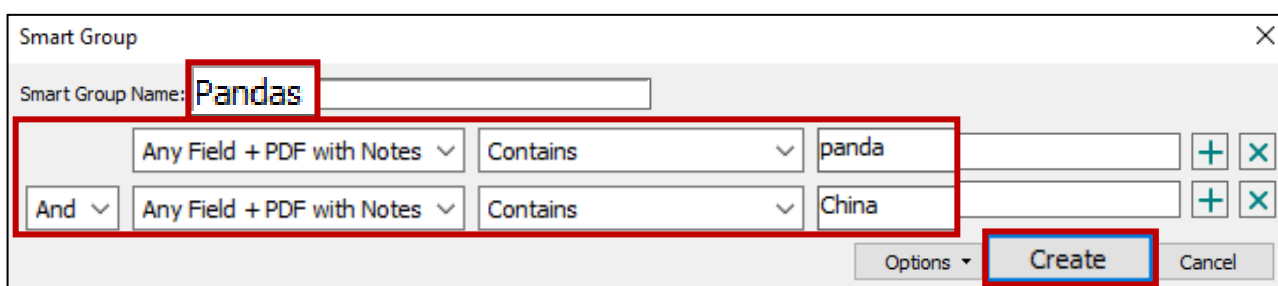


**2** Create the smart group for **Dolphins**

- (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!