

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**

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 the following text:

Giant pandas are an important endangered species in China. Human activity has been encroaching on the panda habitat in the Wolong Nature Reserve. The reserve was established in 1962 with an area of 20,000 ha (Bearer et al., 2008). In 1975, the reserve expanded to its current size of 200,000 ha. It is the largest among the 25 nature reserves in China designated for giant panda conservation. Only about 1050 to 1100 pandas are believed to exist in the wild, of which most inhabit the designated nature reserves. Approximately 1,000 pandas live in the wild population, inhabit the Wolong reserve (Angel, 2008, p.76) total wild

Wolong Nature Reserve is located in Wenchuan County, Sichuan Province, southwestern China. Wolong is situated between the Sichuan Basin and the Qinghai-Tibet Plateau and is characterized by high mountains and deep valleys. It encompasses several climatic zones, and has high habitat diversity. Besides the giant pandas, 12 other animal species and 47 plant species in the reserve are on China's national protection list.

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

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

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.



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?

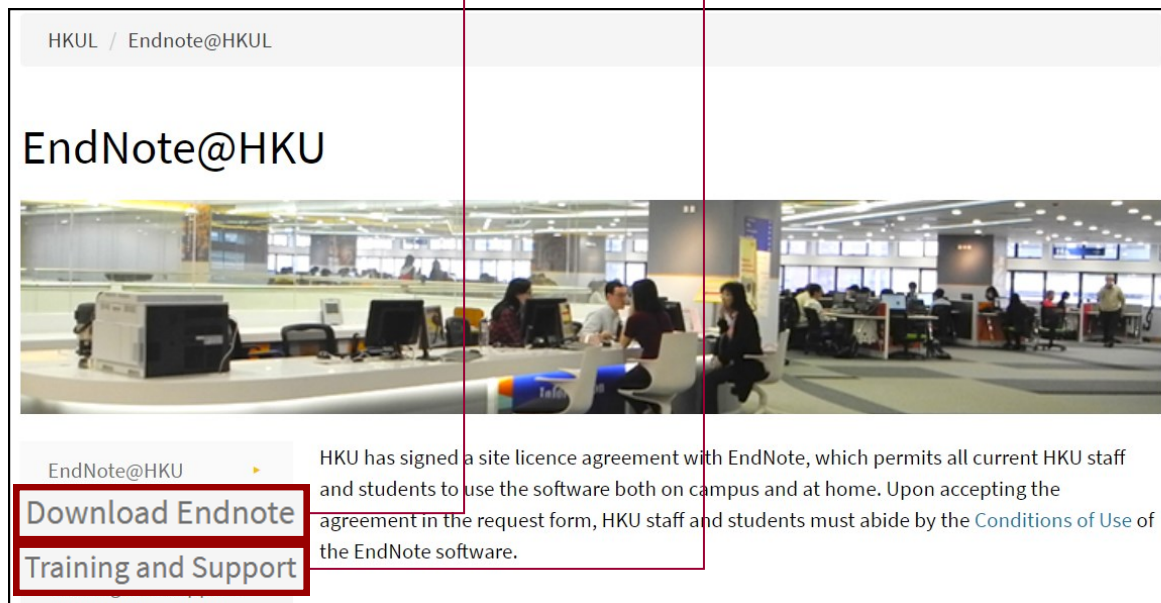
HKU has taken out an **EndNote site licence** which permits **current HKU staff and students** to use EndNote both on campus and on their home PC.

3. Where is the EndNote@HKU website?

URL: lib.hku.hk/endnote

Download a copy
of EndNote

Learn how to
use EndNote



4. How to download and install EndNote?

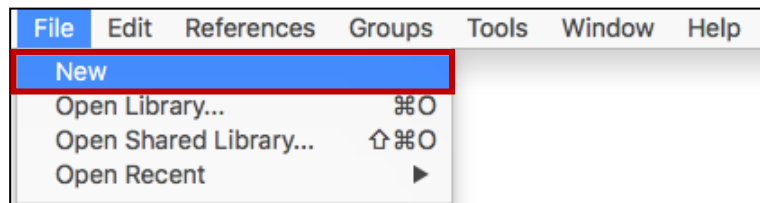
Refer to the **Downloading and Installation Guide**:
EndNote@HKU > Download EndNote > Installation Guide for Mac (20)

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

5. Create an EndNote Library

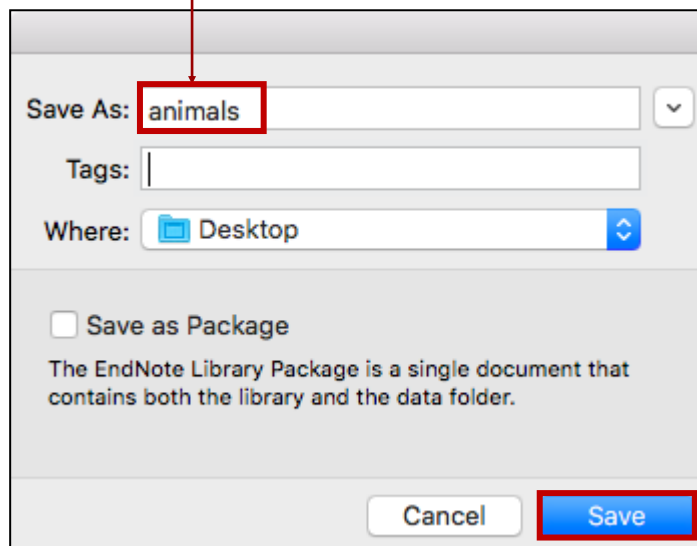
1

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



2

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



3

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



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**

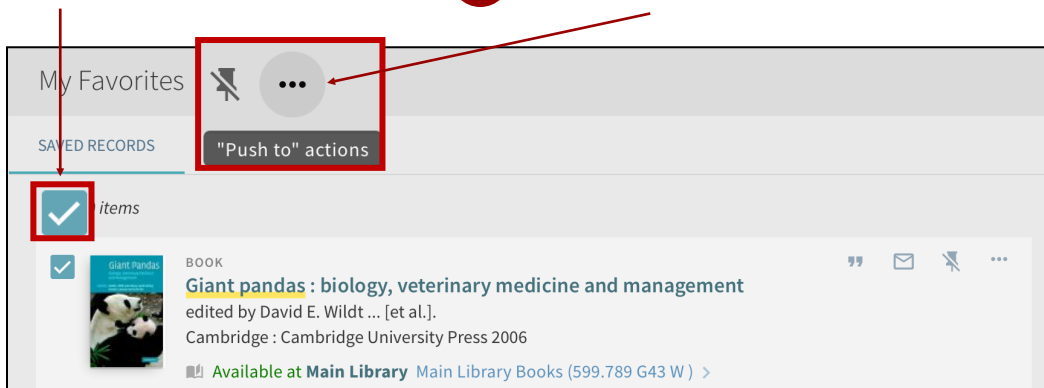
The screenshot shows the Find@HKUL search results page. The search term "giant panda" is entered in the search bar. The results list includes two articles. Annotations indicate the following steps:

- Step 1:** Enter your search statement. The search bar containing "giant panda" is highlighted with a red box.
- Step 2:** Mark the desired records. The "Mark" button (a blue pin icon) next to the first article is highlighted with a red box.
- Step 3:** Go to my favorites. The "My Favorites" button (a blue pin icon) in the top right corner is highlighted with a red box.

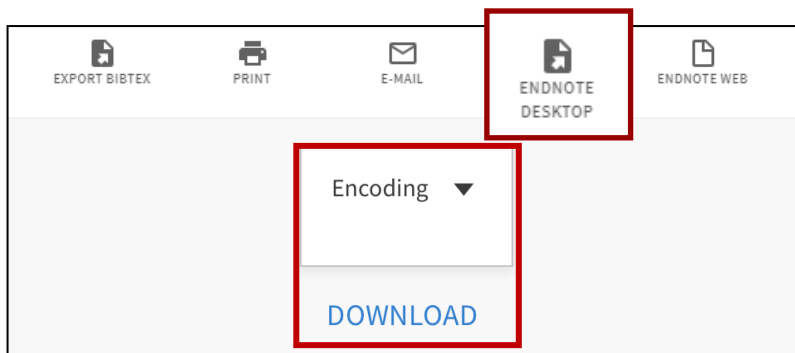
Step 2 Export records to EndNote

1 Select the records

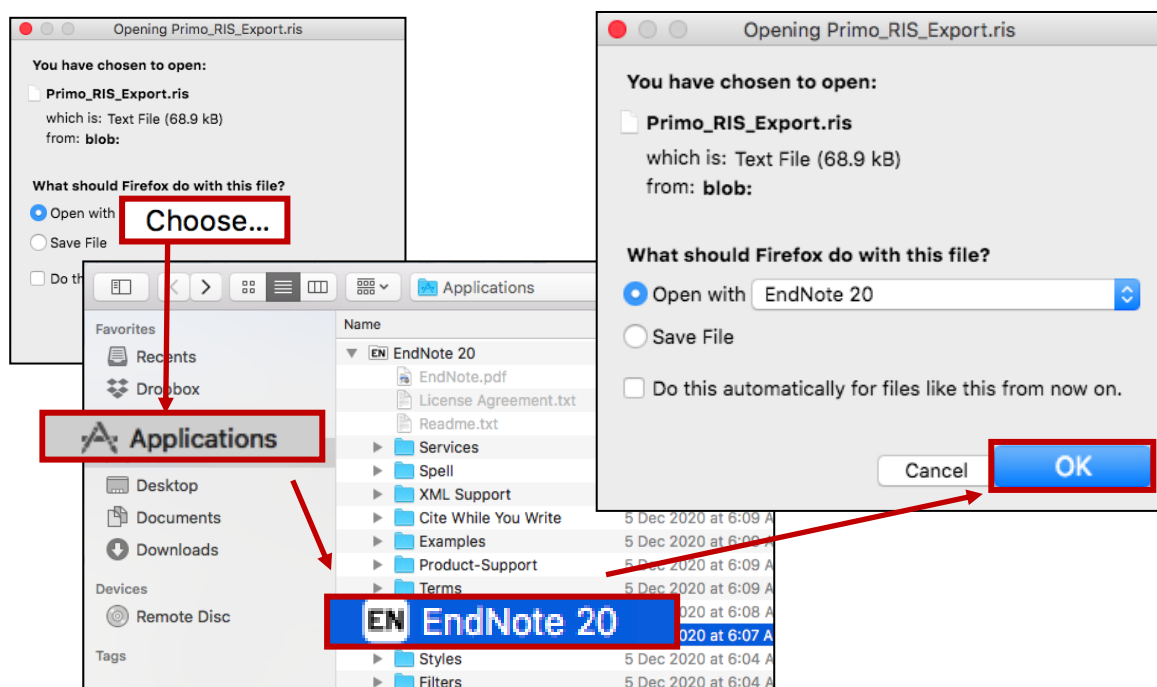
2 Open "Push to" actions



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



4 For Firefox browser, click on **Choose**. Then, under Applications, select **EndNote 20**. Click **OK**.



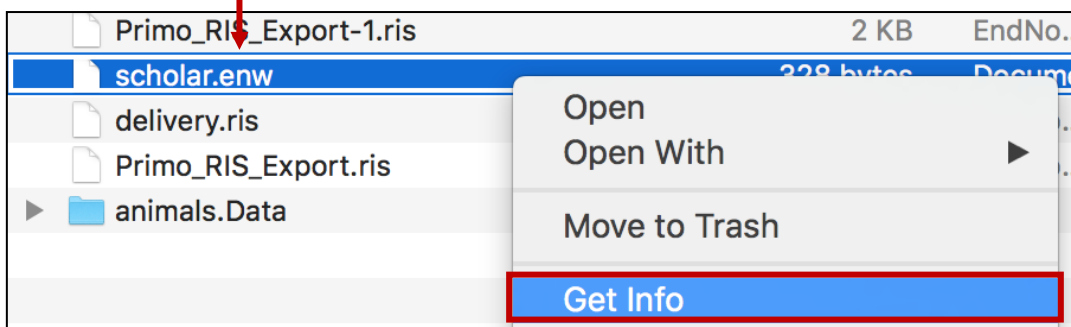
5 The results will be **imported** into your EndNote library



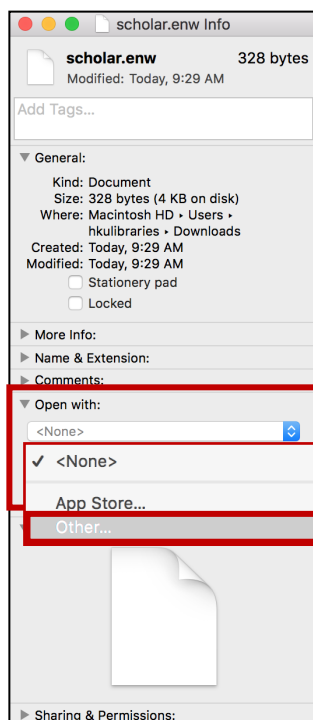
Open RIS and ENW EndNote files on a Mac

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

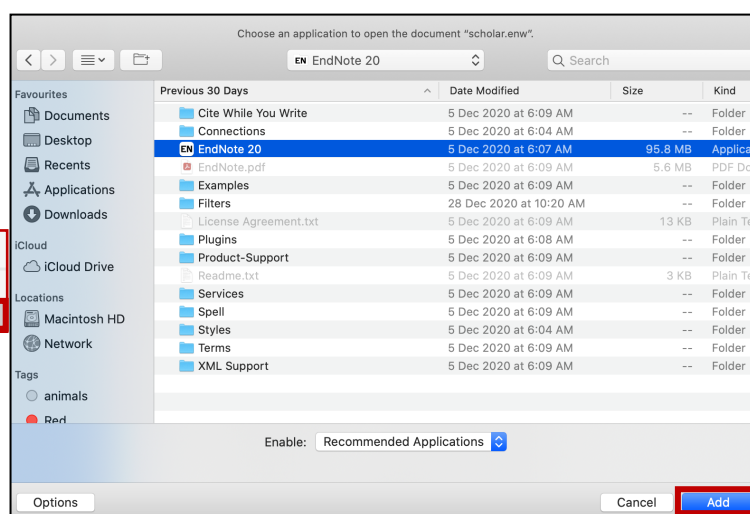
2 **Right click** RIS or ENW file. Then, select **Get Info**.



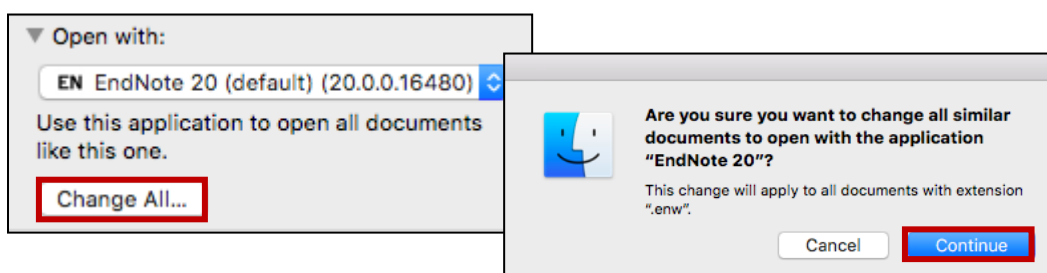
3 A pop-up panel will open. Under open with, choose **Other** from the pull-down menu.



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 **preview panel** under the **pull-down menu** for Output Style.

Search Advanced Search

All References
123 References

Author	Year	Title
Angel, Heather	2008	Panda : an intimate portrait of one of the world's most elusive creatures
Araújo, Claryana C.; Wang, Joh...	2015	The dammed river dolphins of Brazil: impacts
Bache, Sali Jayne	2000	1998 agreement on the international conserv

Attach file

Panda : an intimate portrait of one of the world's most elusive creatures

H. Angel

Publisher: David & Charles 2008

APA 7th Insert Copy

- 2 Change the citation style by clicking the default style. Choose **Select Another Style** in the pop-up bar.

Search Advanced Search

All References
123 References

Author	Year	Title
Angel, Heather	2008	Panda : an intimate portrait of one of the world's most elusive creatures
Araújo, Claryana C.; Wang, Joh...	2015	The dammed river dolphins of Brazil: impacts
Bache, Sali Jayne	2000	1998 agreement on the international conserv
Barbosa, Ana Paula Moreno; M...	2018	organic
Barbosa-Filho, M. L. V.; Costa-...	2016	Bahia, Br

Select Another Style...

- ACS
- AMA 11th-2
- Amer J Political Science
- Ann Rev Medicine
- Annals of Oncology
- Annotated
- APA 6th
- ✓ APA 7th
- Archives Virology
- Art History

Attach file

Panda : an intimate portrait of one of the world's most elusive creatures

H. Angel

Publisher: David & Charles 2008

APA 7th Insert Copy

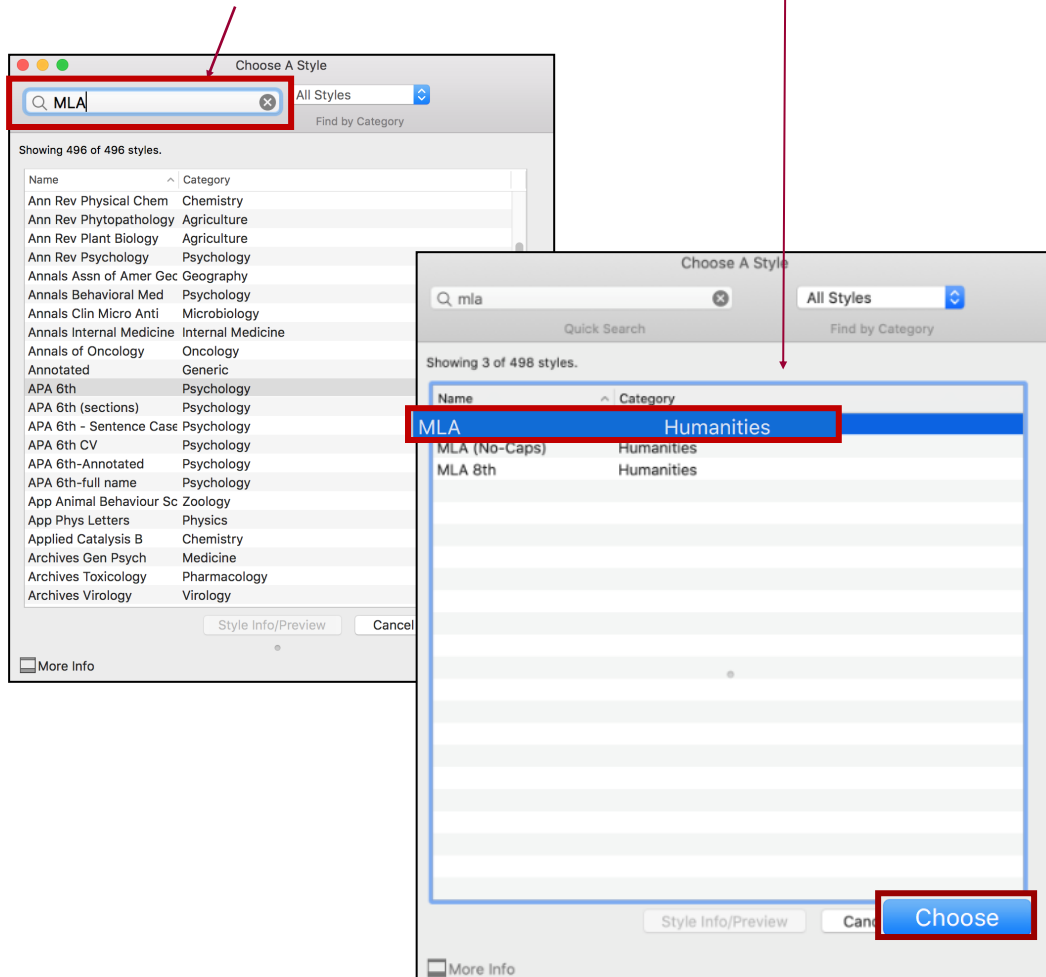
Angel, H. (2008). *Panda : an intimate portrait of one of the world's most elusive creatures*. David & Charles.



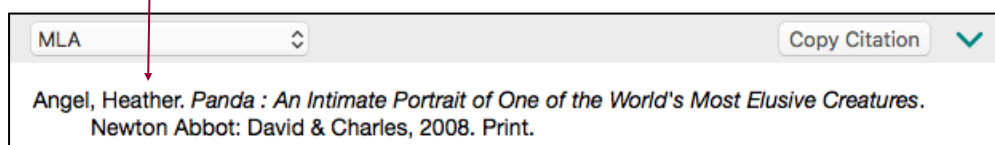
Change citation styles

3 Enter **name** of your citation style and then press **Enter**.

4 Highlight the style and click on **Choose**.



5 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 of references is displayed. The reference for 'Zhou, Mengqi' (2012) is highlighted. On the right, the preview panel for this reference is shown, displaying the citation in APA 7th style: 'Zhou, M. (2012). Panda : back from the brink (Adapted, rev. ed. ed.). Saraband.'

Author	Year	Title
Yang, Xin; Chen...	2017	The normal vaginal
Ywasaki Lima, J...	2017	Population genetic s
Zhang, Baowei;...	2007	Genetic Viability and
Zhou, Mengqi	2012	Panda : back from t

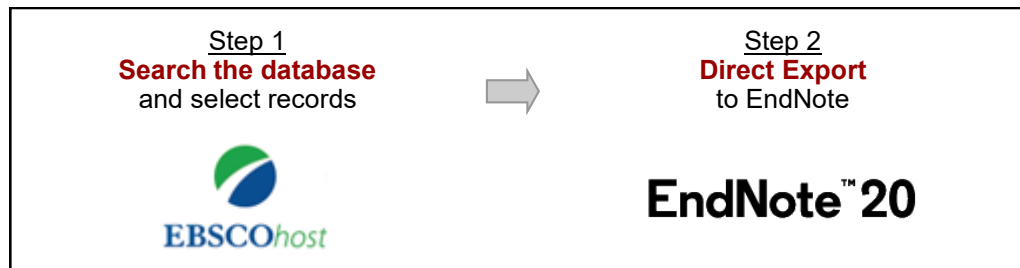
- 2 This is an example of APA 7th Citation Style for Editions **other than the First**:
Harris, L. A. (2001). *Canadian copyright law* (3rd ed.). McGraw Hill Ryerson.

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

The screenshot shows the EndNote interface with the 'Edit' and 'Save' buttons highlighted in red boxes. 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
Wright, Andrew...	2019	CPOD successful in trial for c
Xianyan, Wang;...	2018	External Injuries of Indo-Paci
Xu, Xinrong; So...	2015	The world's second largest p
Yan, Yue; Deng,...	2016	Cloning and characterization
Yang, Xin; Chen...	2017	The normal vaginal and uterin
Ywasaki Lima, J...	2017	Population genetic structure
Zhang, Baowei;...	2007	Genetic Viability and Populati
Zhou, Mengqi	2012	Panda : back from the brink

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*

Searching: Academic Search Complete | Choose Databases

dolphin Select a Field (option... Search Clear

AND conservation Select a Field (option... + -

AND Select a Field (option... 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 by large size a Guiana dolphin (*Sotalia guianensis*), Brazil.

Academic Journal

Asfixia por deslocamento laríngeo associado a consumo de presa de grande porte (*Sotalia guianensis*), Brasil. By: Bueno Mariani, Daniela; Plácido Guimarães, Juliana; Guedes Batista, Renata; Brum, Andrei; Regina Groch, Kátia; Díaz-Delgado, Josué; Vergara Parente, Jocery 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

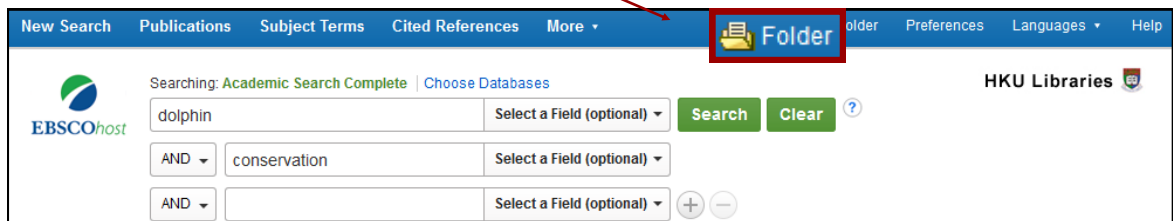
PDF Full Text (4.7MB)

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.

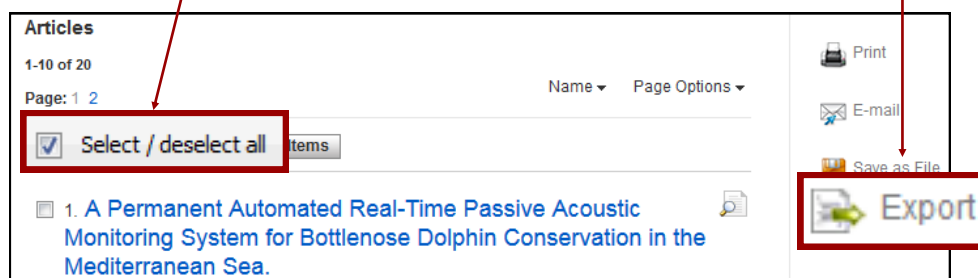
Step 2 Direct Export to EndNote

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

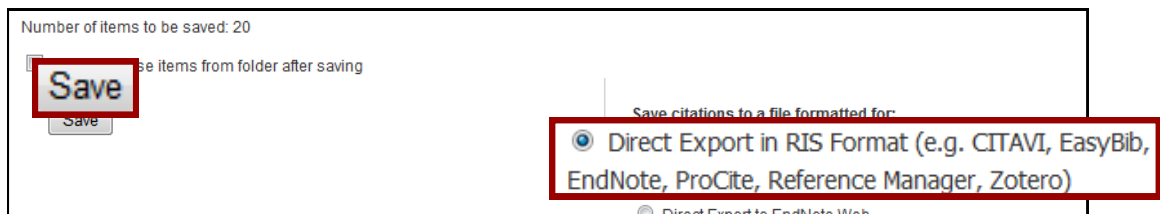


- 2 Tick the checkbox to select all records

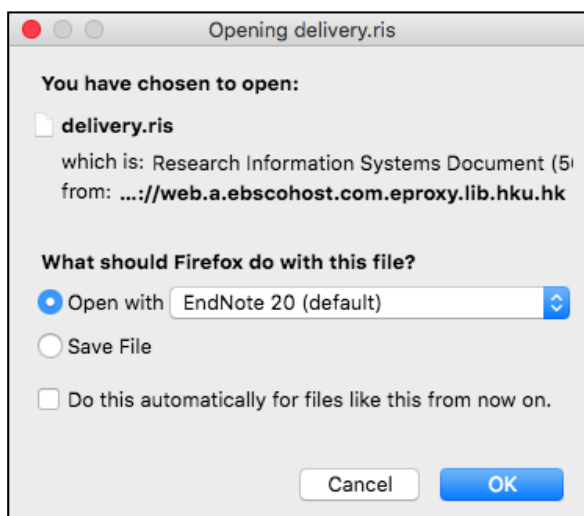
- 3 Click on the **Export** icon.



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



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



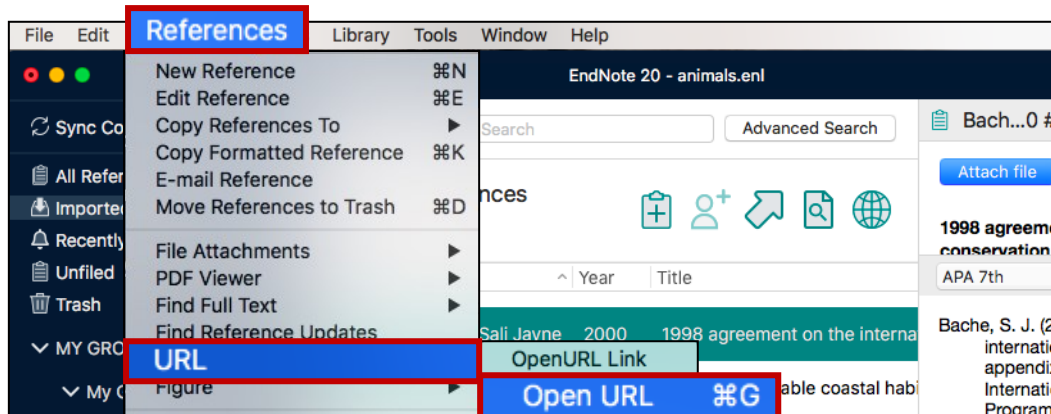
- 6 The records will be **imported** into your EndNote library.

Open Link: Locate and attach PDF

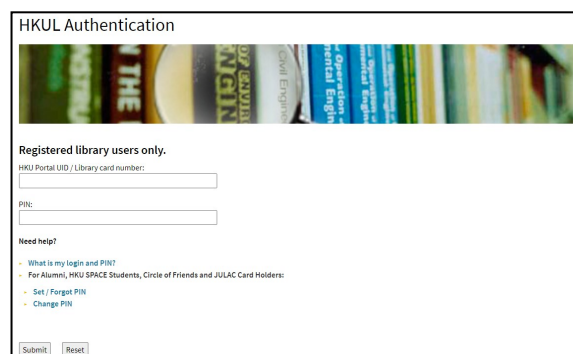
Point directly to the article website and get full text, if available and attach PDF to your library

Step 1: Locate PDF full text

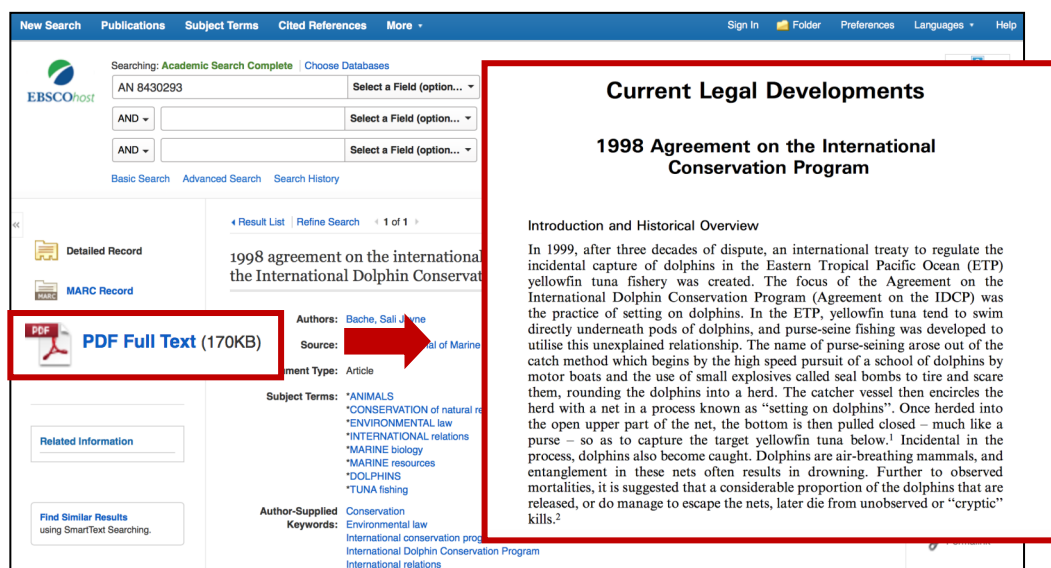
- 1 **Highlight** the reference. Then, select **References > URL > Open URL**
(Or, use the shortcut key **Command + G**)



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

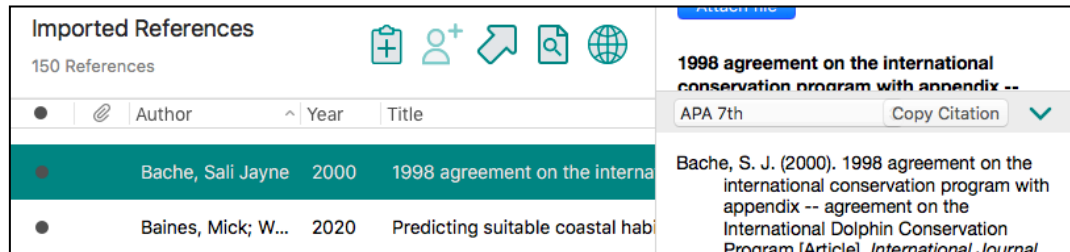


- 3 Save the PDF from the database

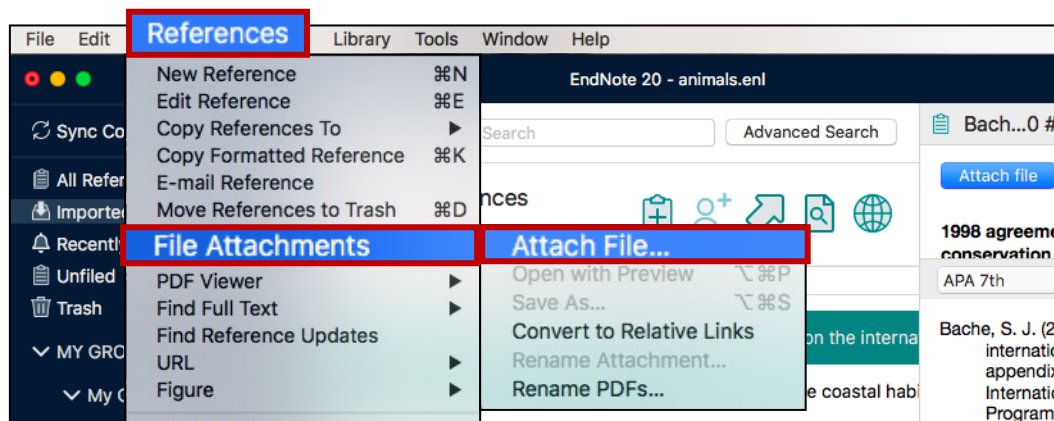


Step 2: Link to PDF full text

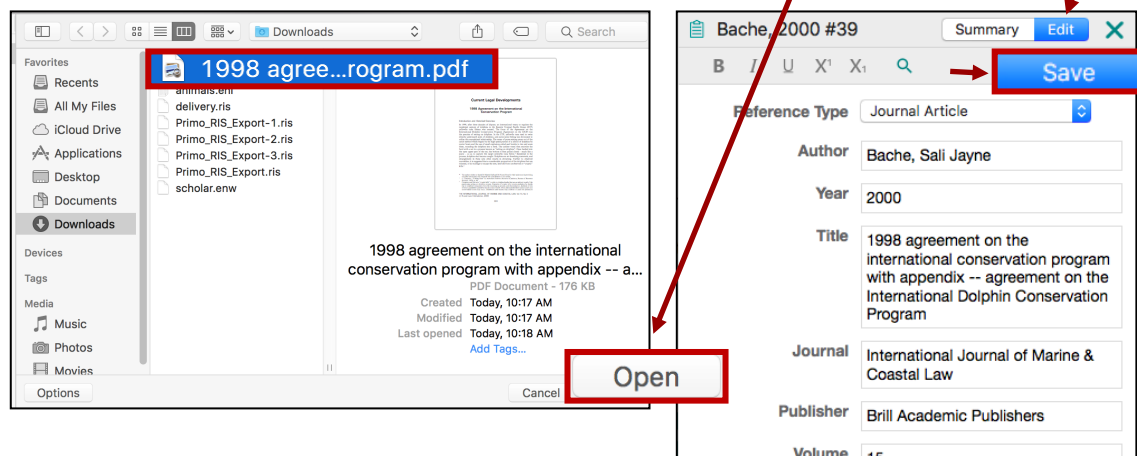
- 1** Highlight the reference in your library.



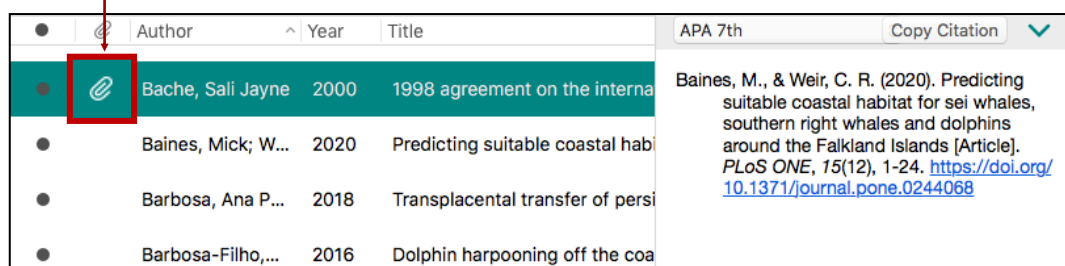
- 2** From top bar menu, select **References > File Attachments > Attach File**.



- 3** Select the PDF file you have saved in Step 1. Click on **Open**. Then, click on **Edit** in the pull-down menu, click **Save**.



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

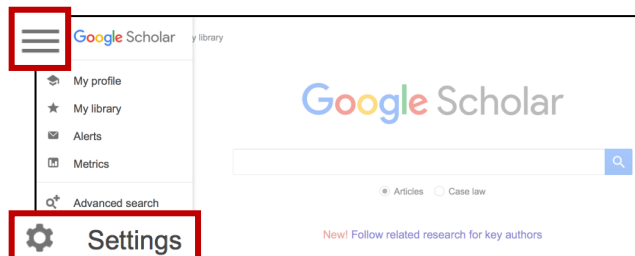


3. Direct Export - Google Scholar

Step 0 Set up Scholar preferences

1

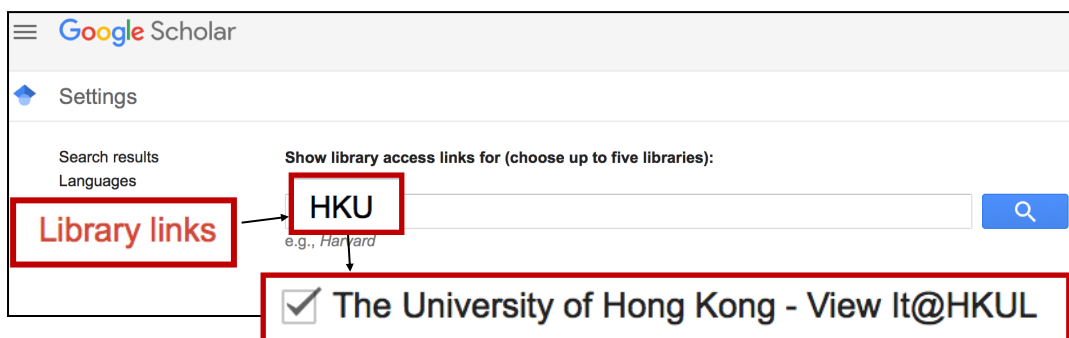
Go to <http://scholar.google.com> and click on **Settings**



2

Under **Library links**

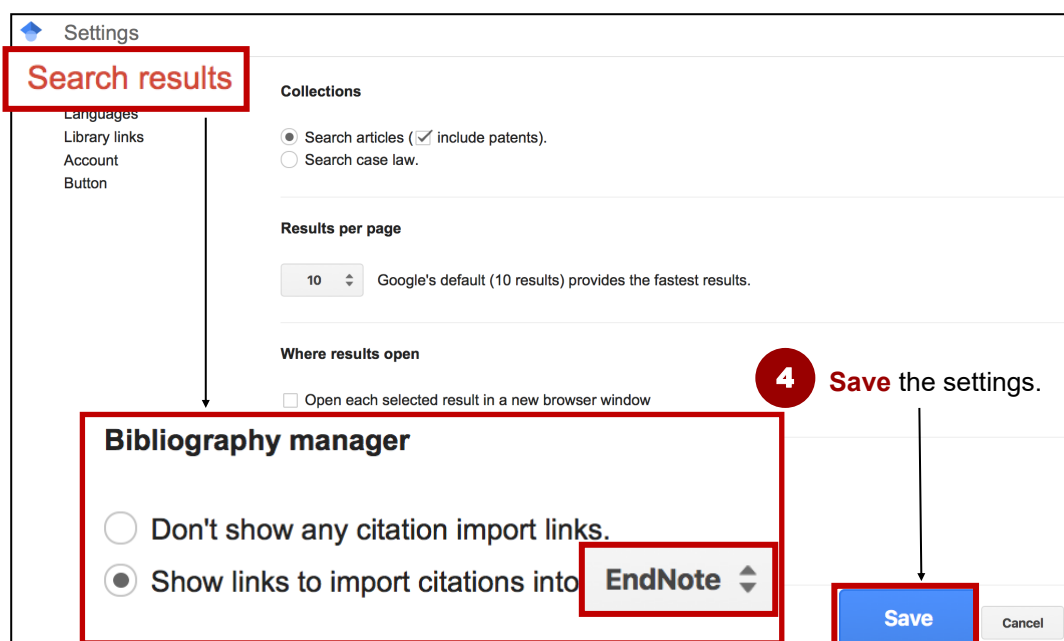
1. Search for **HKU**
2. Select **The University of Hong Kong - View it @HKUL**

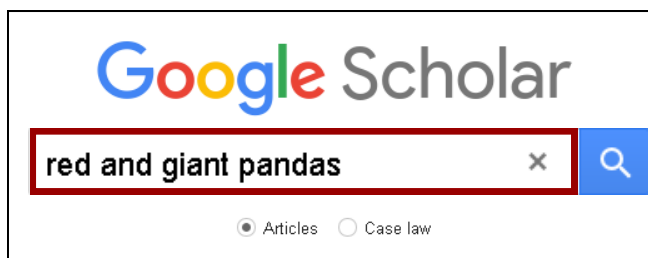


3

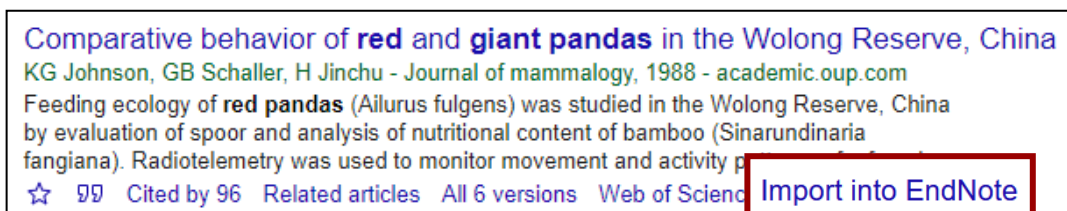
Under **Search results > Bibliography manager**

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.

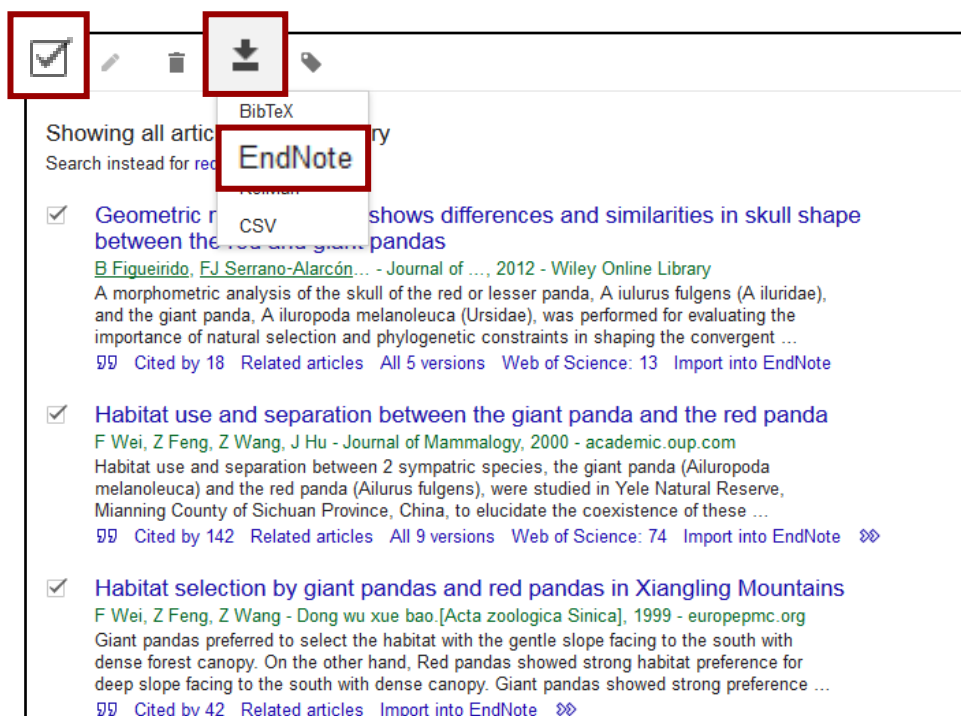


- 3 Click on the **My library** icon.

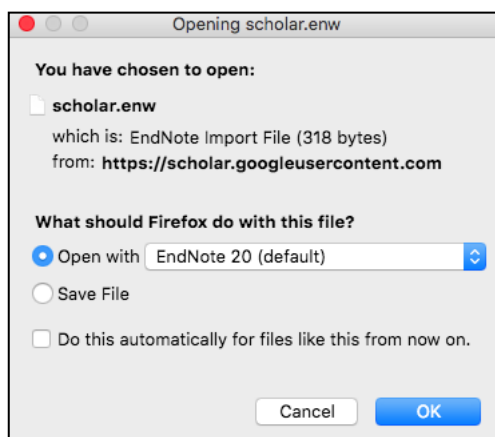


- 4 On the My Library page, **select** the records.

- 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

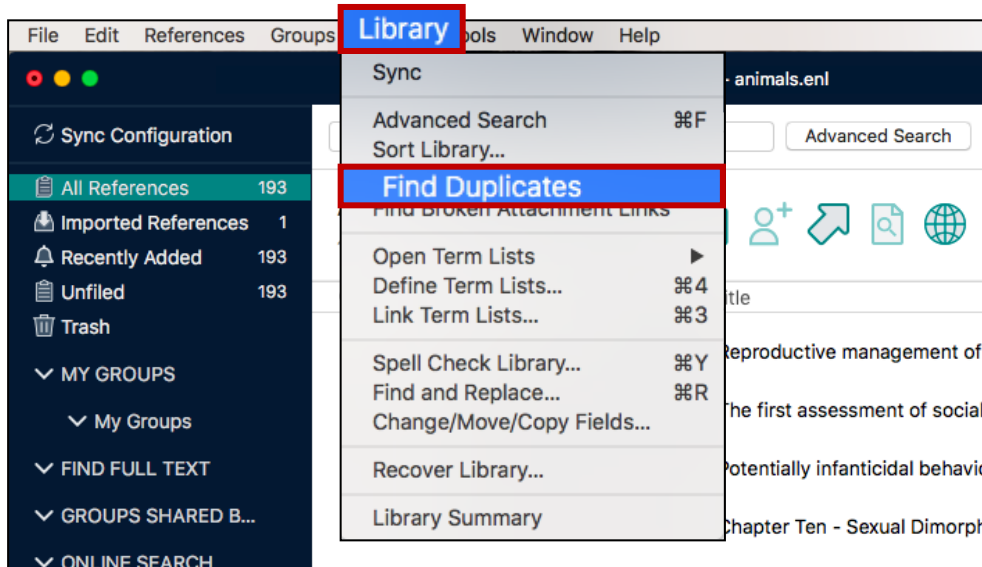
[View It@HKUL](#)

[View It@HKUL](#)



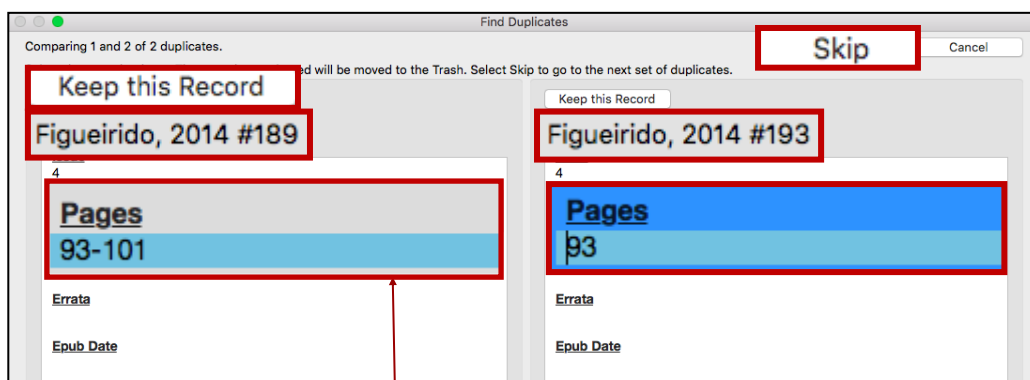
Remove Duplicates

- 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**.

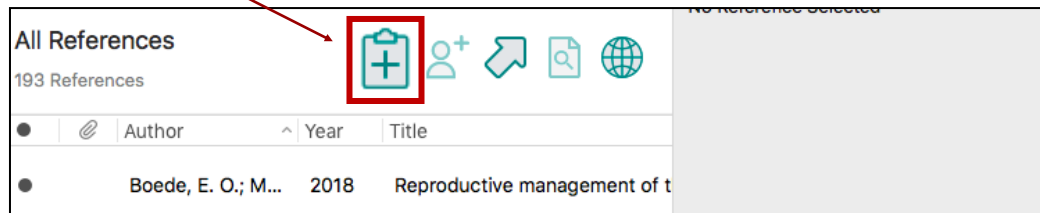
(Note: If you are citing the same reference multiple times, select the reference under a unique record number. Otherwise, the cited reference may be treated as two different citations.)



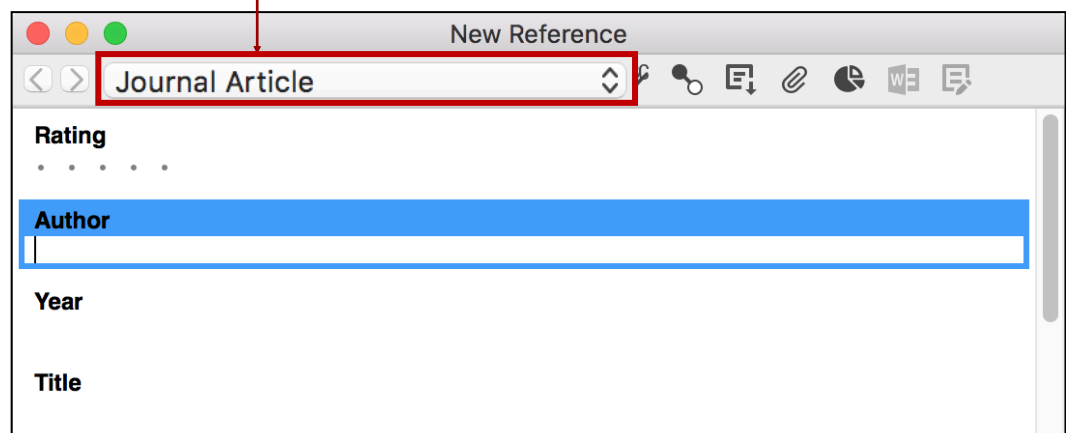
- 3 Different data of the records is **highlighted** for comparison. Select the record you would like to **keep**. To keep both records, click on **Skip**.
(Note: Make sure the deleted record has not been cited in any of your papers.)

4. Manual Input

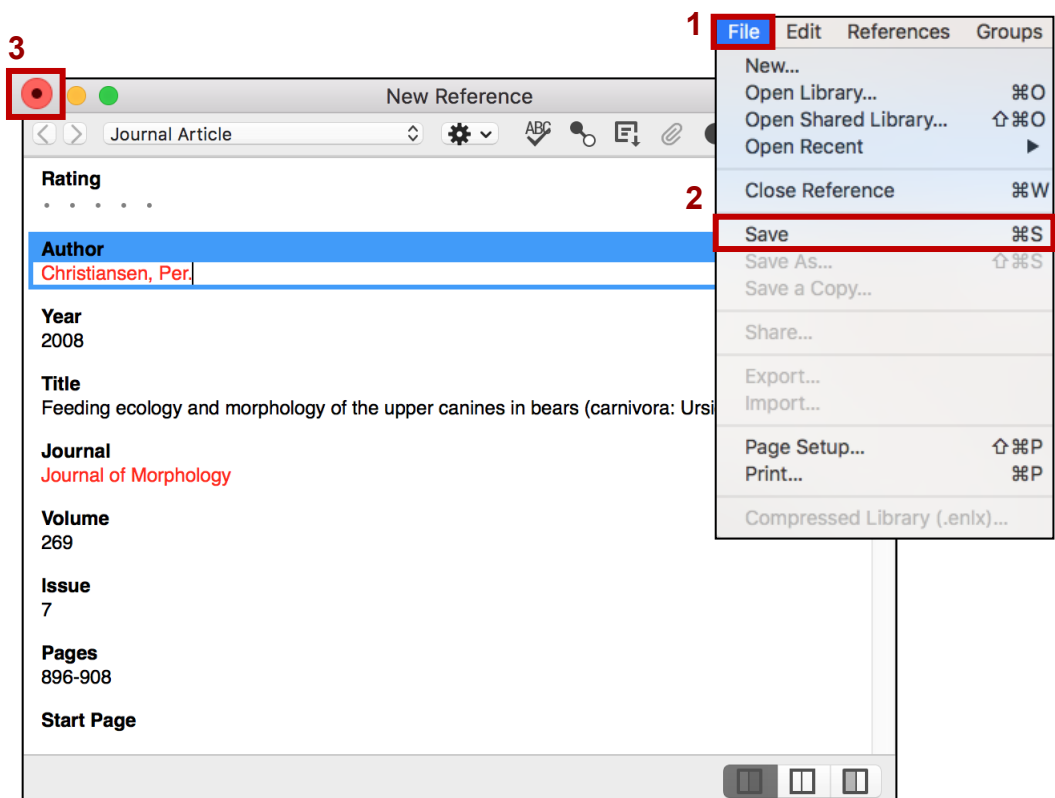
- 1 Click on the **New Reference** icon from the EndNote top icon bar.



- 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

	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	
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	

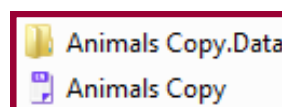
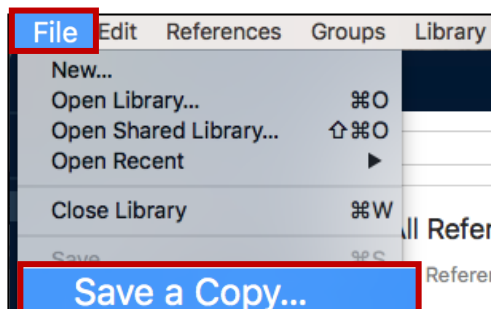


Back up your EndNote Library!

Method 1: Save a Copy

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

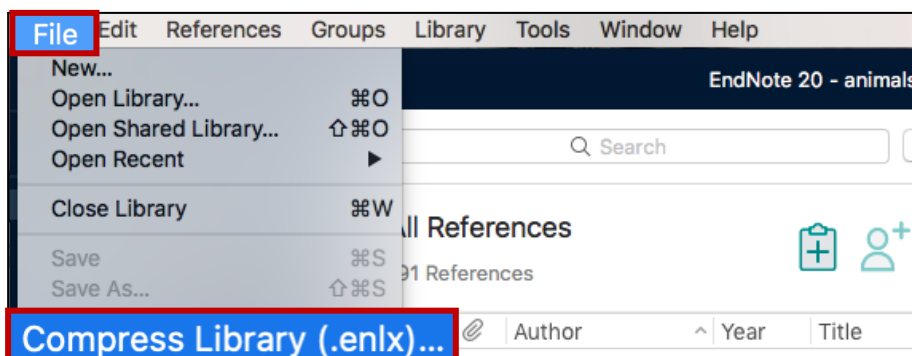
Select **File > Save a Copy**



Method 2: Compressed Library

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

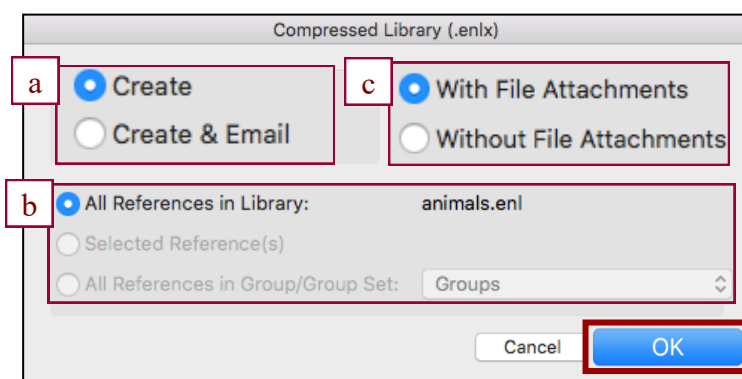
1 Select **File > Compress Library**



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)⁴

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), 385-393.⁴

Christiansen, P. (2008). Feeding ecology and morphology of the upper canines in bears (carnivora : Ursidae). *Journal of Morphology*, 269(7), 896-908.⁴

Wildt, D. E. (Ed.). (2006). *Giant pandas: Biology, veterinary medicine, and management*. Cambridge: Cambridge University Press.⁴

- Insert **figures and charts**

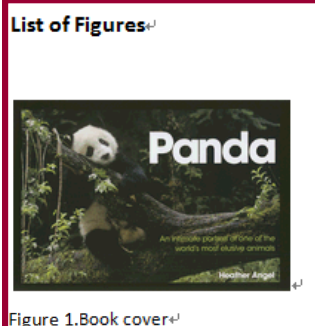
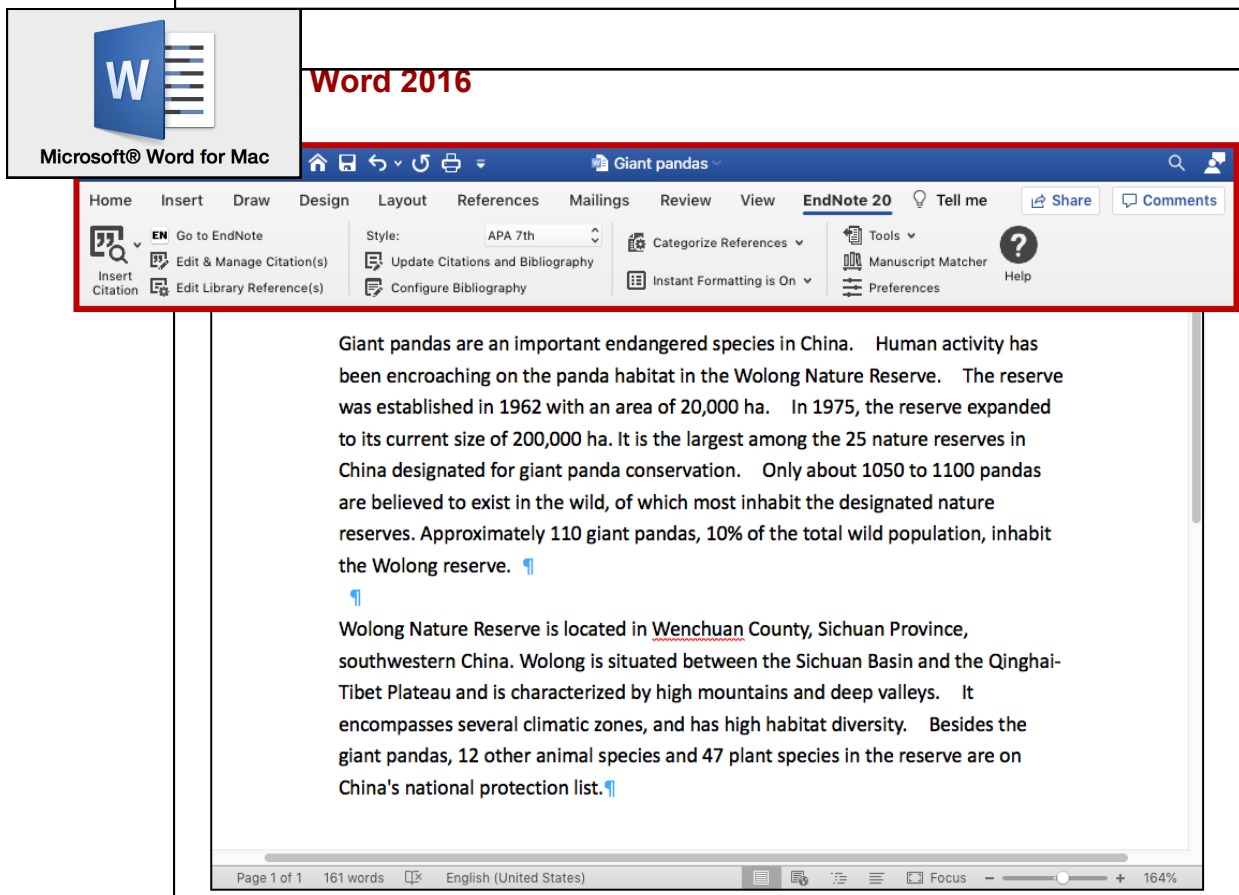
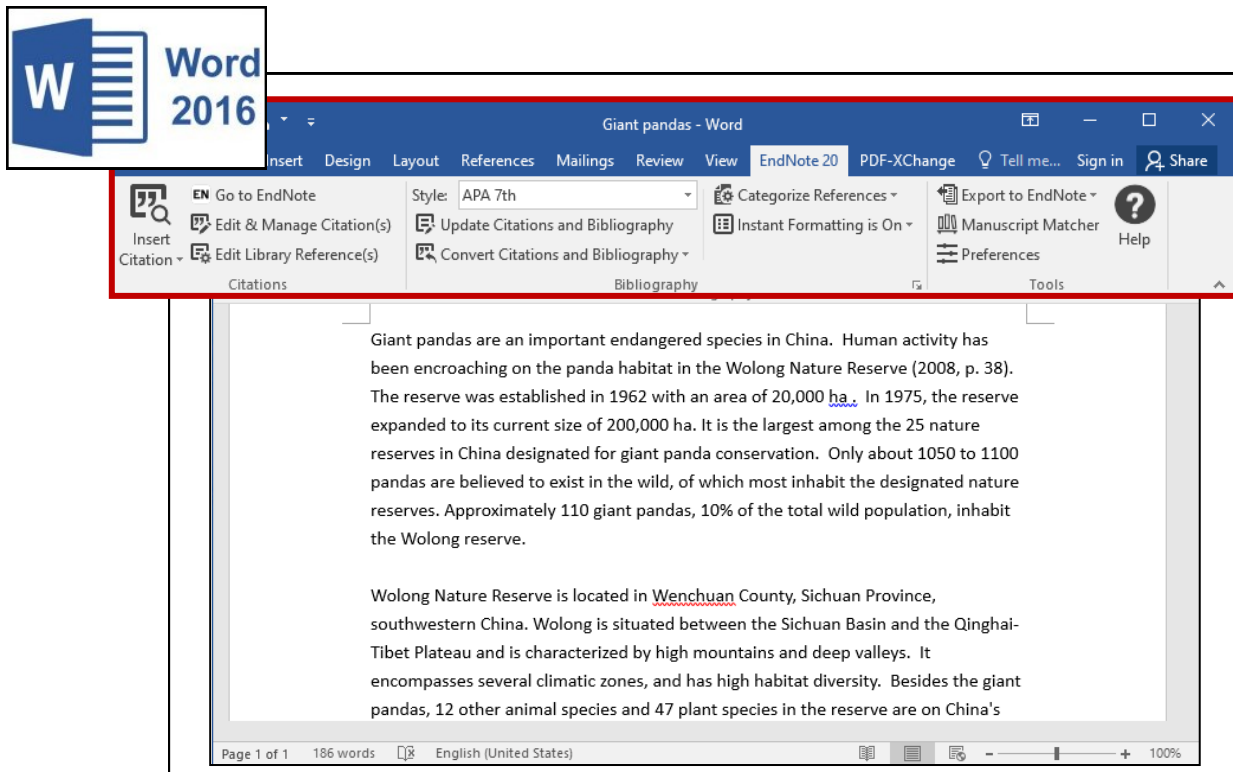


Figure 1. Book cover⁴

- 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.

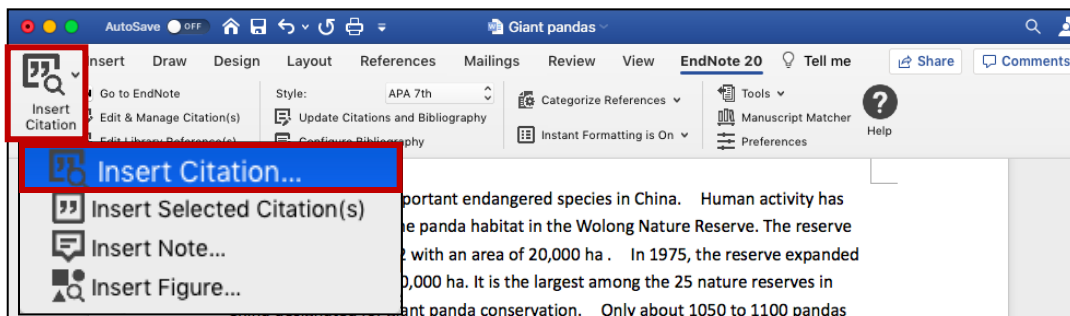


3. How to use CWYW?

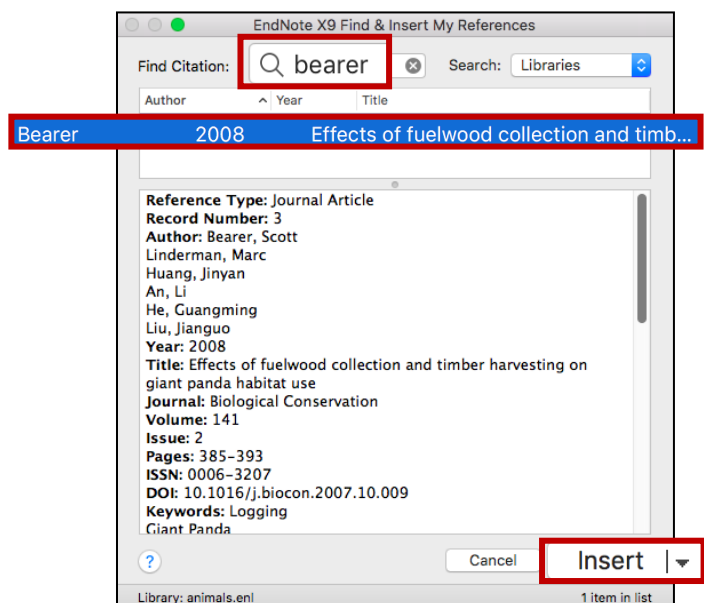
Step 1 Insert a citation

Method A Insert Citation

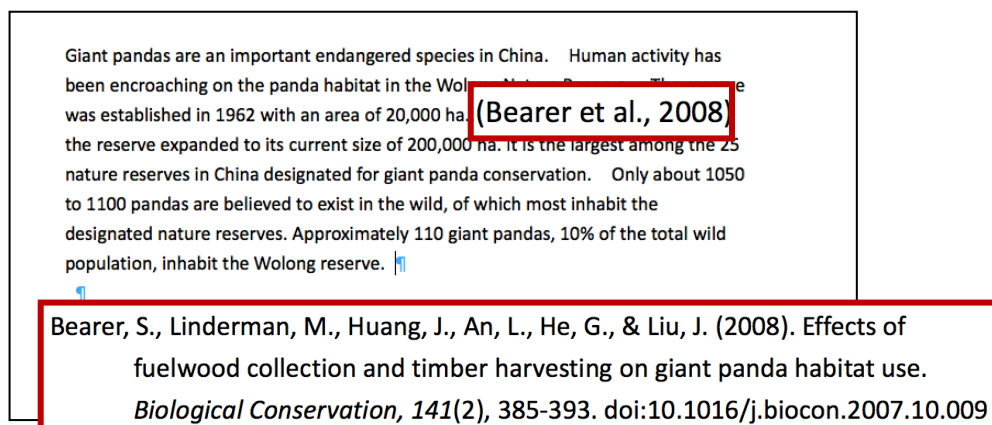
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**



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



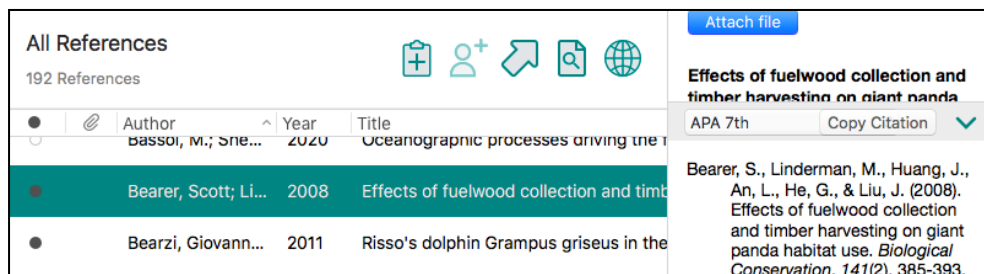
- 3 The **in-text citation** and the **reference** will be inserted into your document.



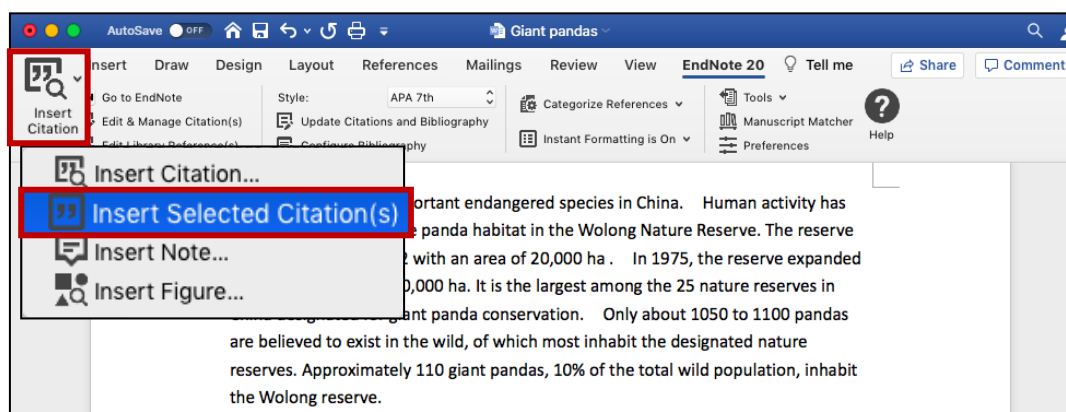
Step 1 Insert a citation

Method B Insert Selected Citation

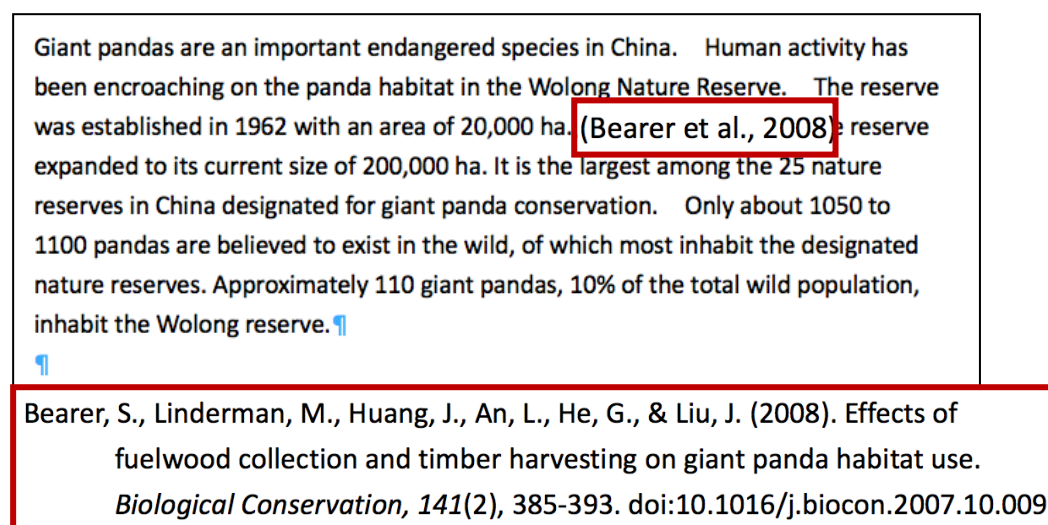
- 1 In **EndNote**, highlight the **desired citation**.



- 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.

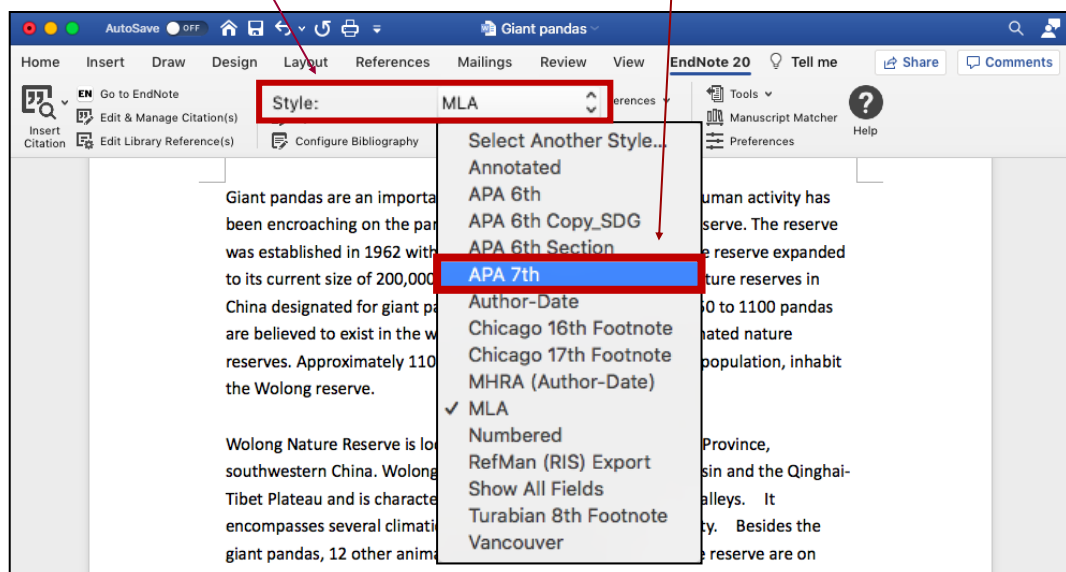




Change the citation style

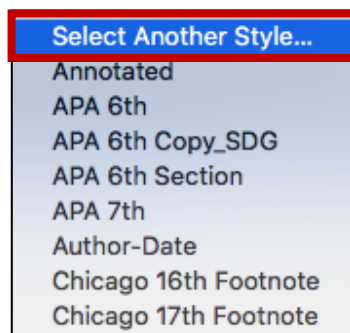
1 In the **Bibliography** tab section, open the **Style** pull-down menu.

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!

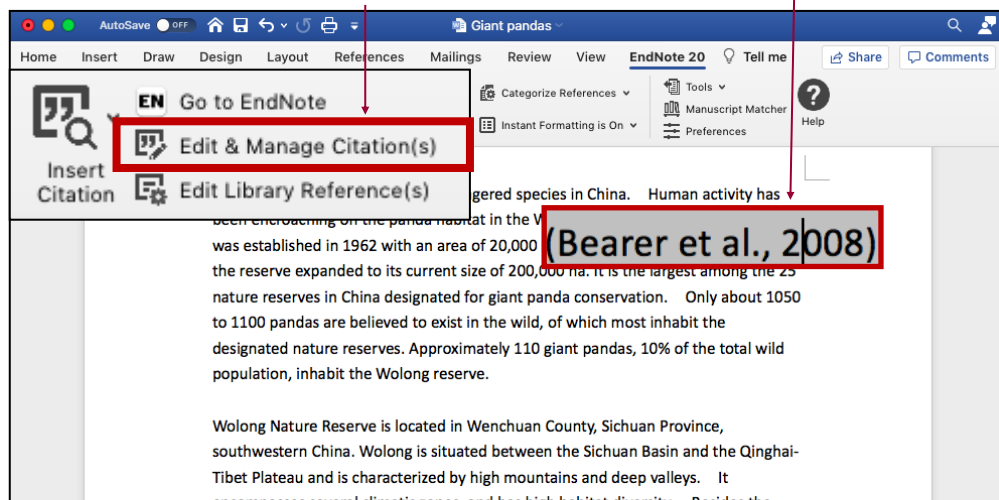
Step 2 Edit & Manage Citation(s)

1

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

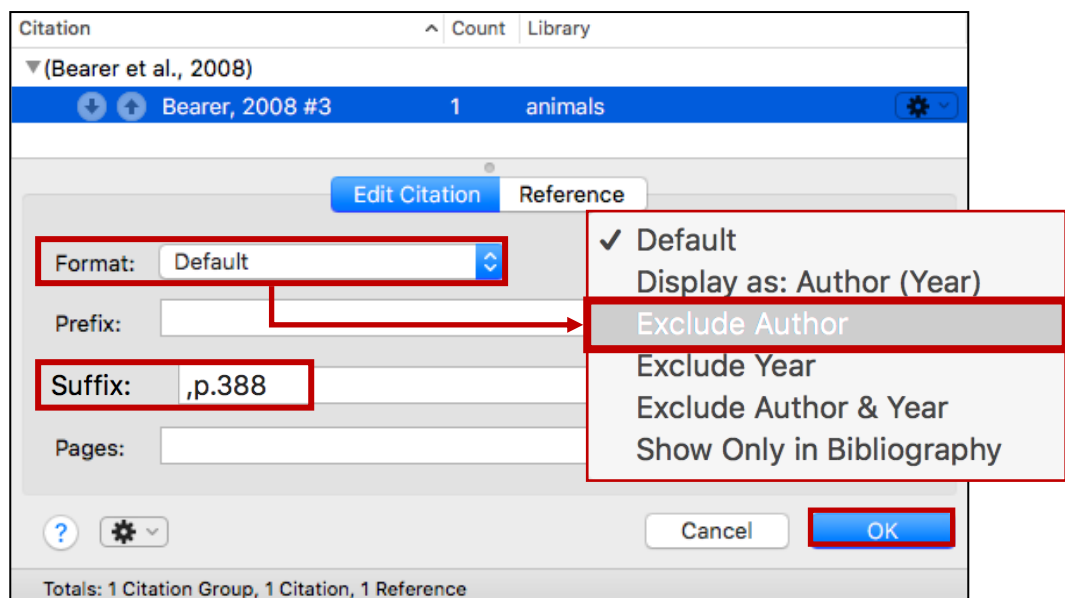
2

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.

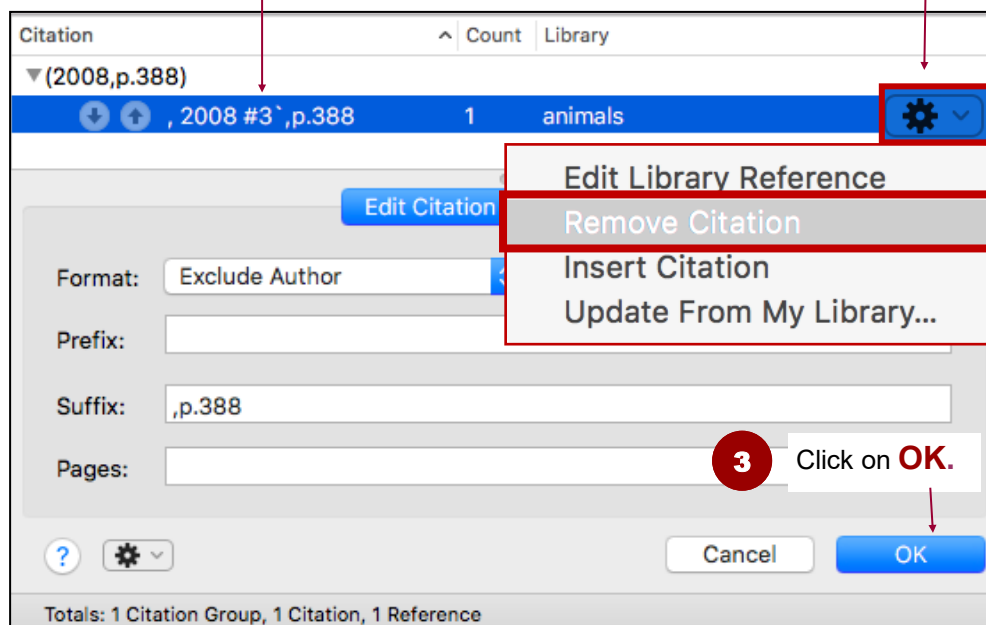
Giant pandas are an important endangered species in China. Human activity has
 was established in 1962 with an area of 20,000 ha. According to Bearer, in 1975,
 the reserve expanded to its current size of 200,000 ha (2008, p.388). It is the largest
 expanded to its current size of 200,000 ha. It is the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

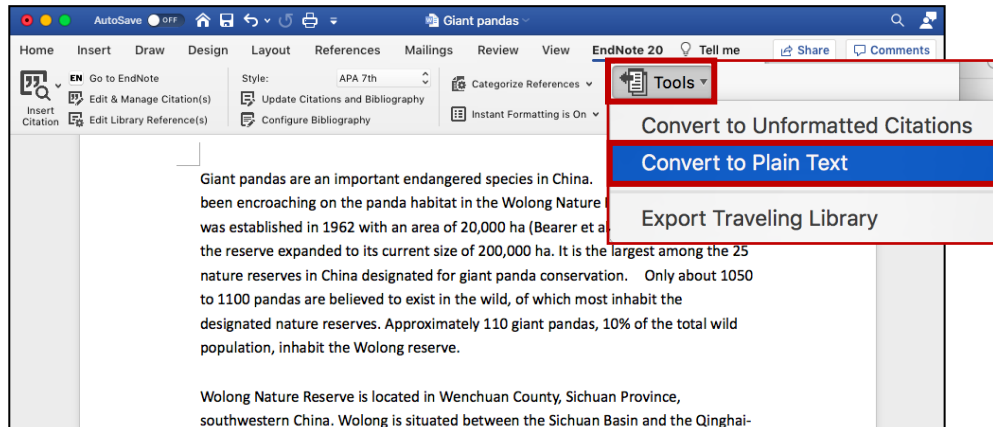
- 1 From the **Edit & Manage Citation(s)** menu, highlight the **desired citation**.
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



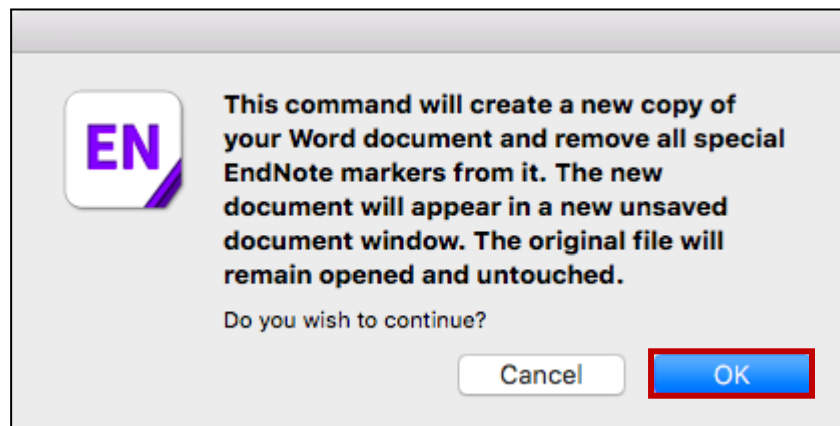
Step 3 Remove Field Codes

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

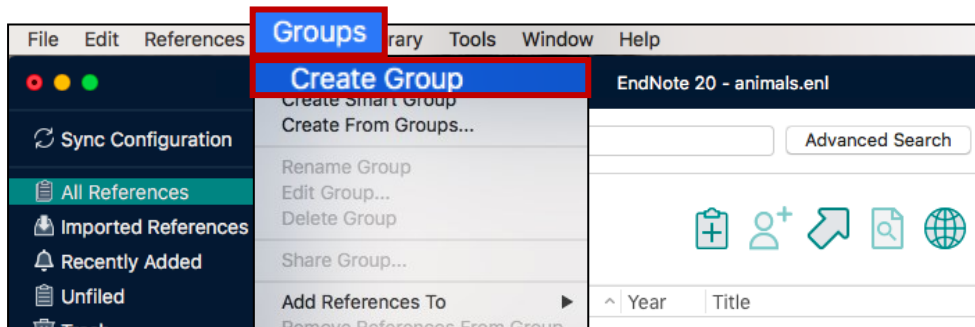
	Custom Groups	Smart Groups
Create the group	Manually add references to a group.	Specify criteria - references meeting the criteria will automatically be added to the group.
Updates	Done manually <ul style="list-style-type: none"> The group will not be updated unless you manually add or remove references. 	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

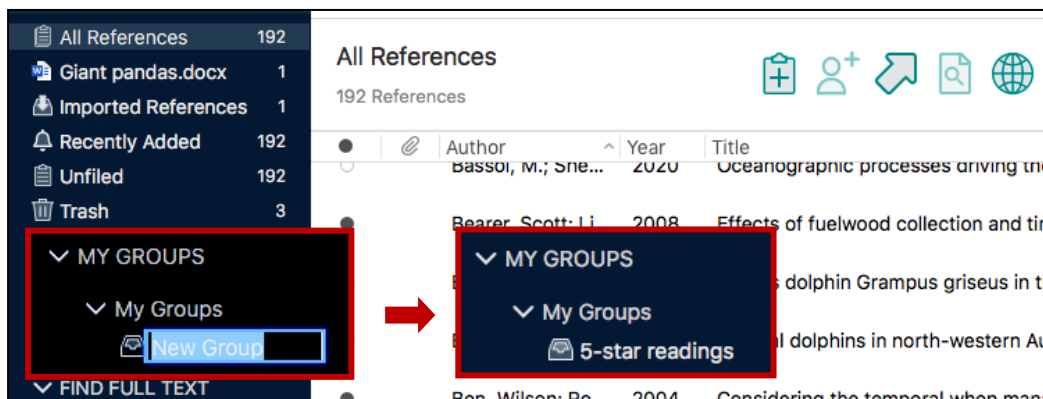


- (a) **Create a custom group** by the name “5-star readings”
- (b) **Add** 3 references to this custom group

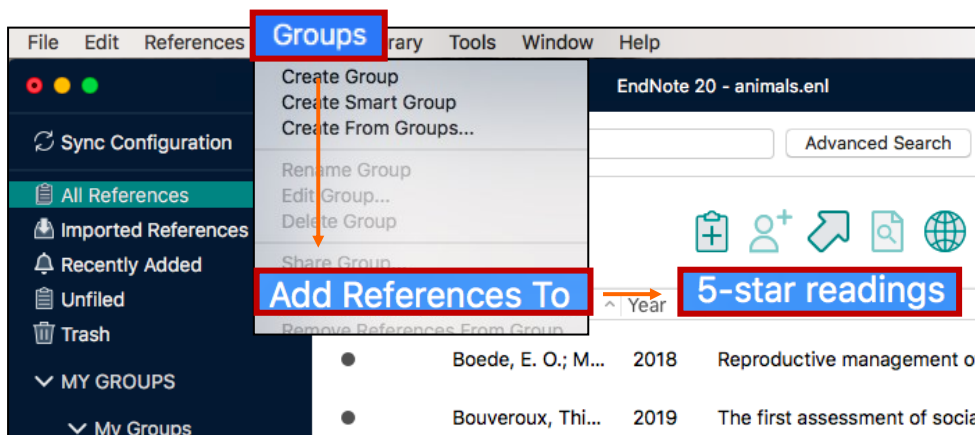
- 1 From top bar menu, select **Groups > Create Group**



- 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)

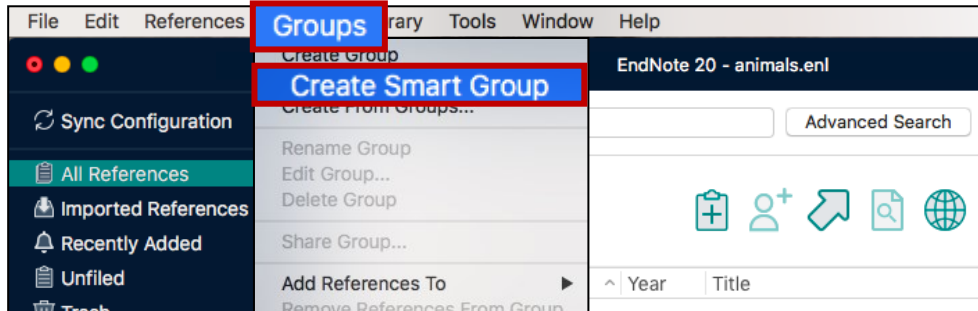


3. Create a Smart Group

Create two smart groups:

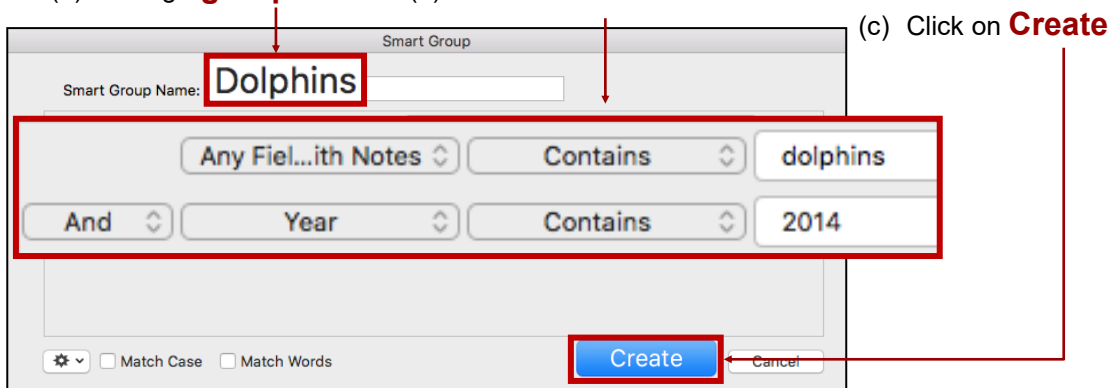
- (a) Dolphins
- (b) Pandas

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

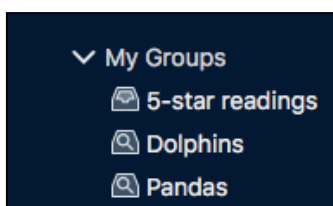
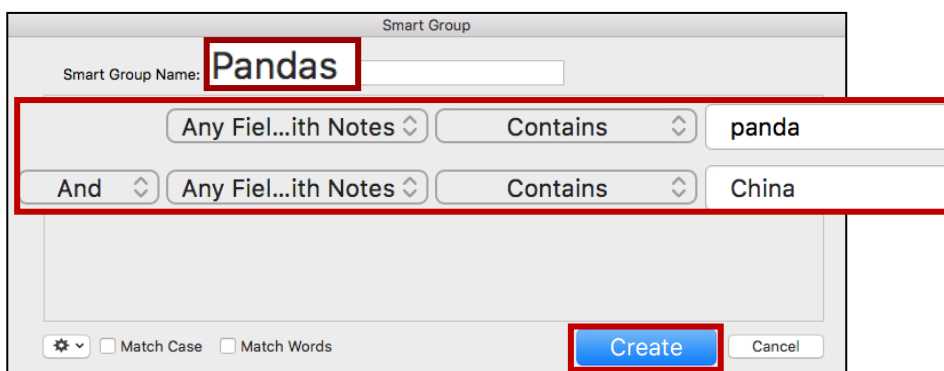


2 Create the smart group for **Dolphins**

- (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!