

# 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 shows a table of 'All References' (82 References) with columns for Author, Year, and Title. The first few entries are: Carolin; W... (2017) 'Why is the giant panda black and whit...', Choudhury, ... (2019) 'The endangered Ganges river dolphin ...', Christiansen, ... (2008) 'Feeding ecology and morphology of t...', and Condet, Man... (2016) 'Habitat selection of two island-associ...'. Below the references, a Word document titled 'Giant pandas - Word' is open. The document contains two paragraphs. The first paragraph discusses the Wolong Nature Reserve and includes an in-text citation: '(Anthes, 2013, p. 78)'. The second paragraph describes the location of the Wolong Nature Reserve. At the bottom of the 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?

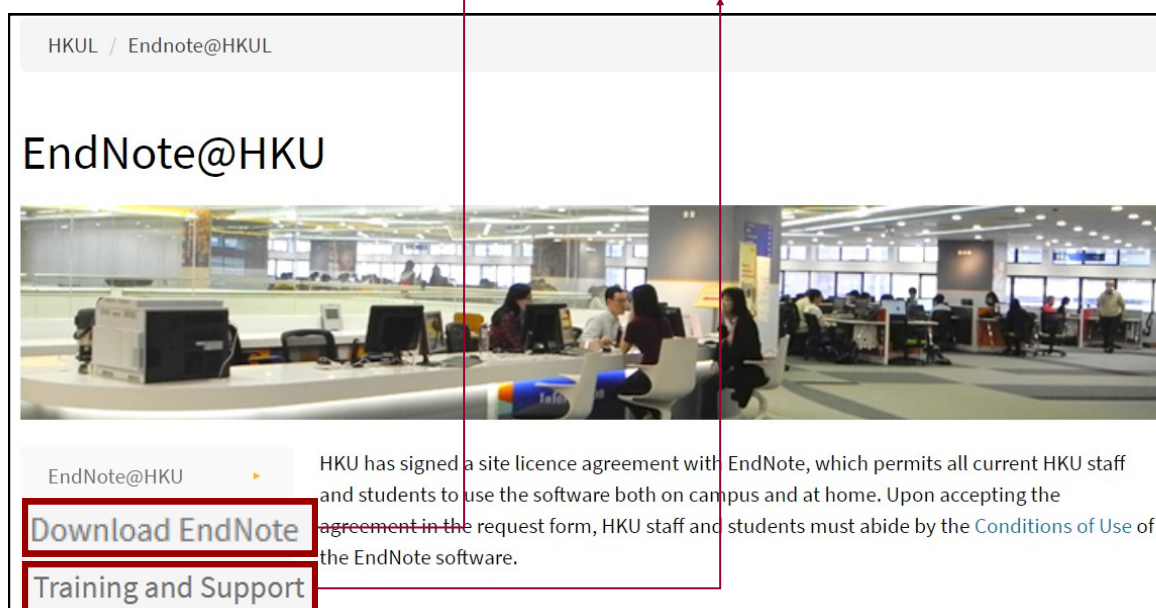
HKU has taken out an **EndNote site license** which permits **current HKU staff and students** to use EndNote both on campus and on their personal PC.

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

**URL:** <https://lib.hku.hk/endnote/>

**Download** a copy  
of EndNote

**Learn** how to  
use EndNote



## 4. How to download and install EndNote?

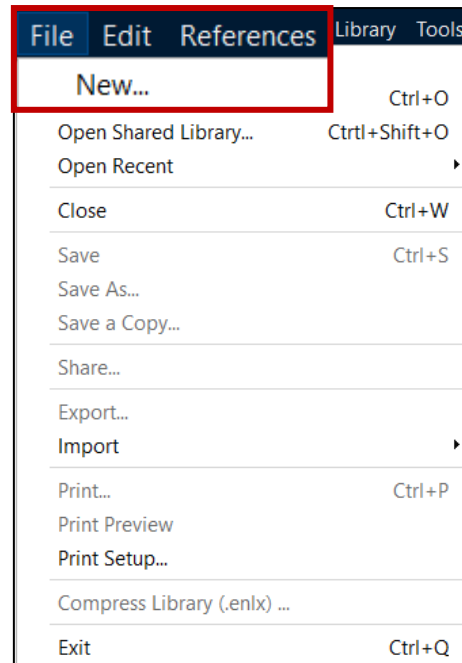
Refer to the **Downloading and Installation Guide** :  
EndNote@HKU > Download EndNote > Installation Guide for Windows

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

## 5. Create an EndNote Library

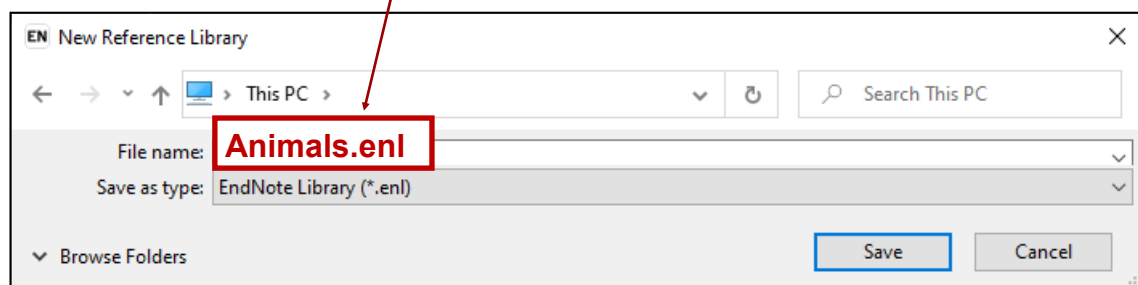
1

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

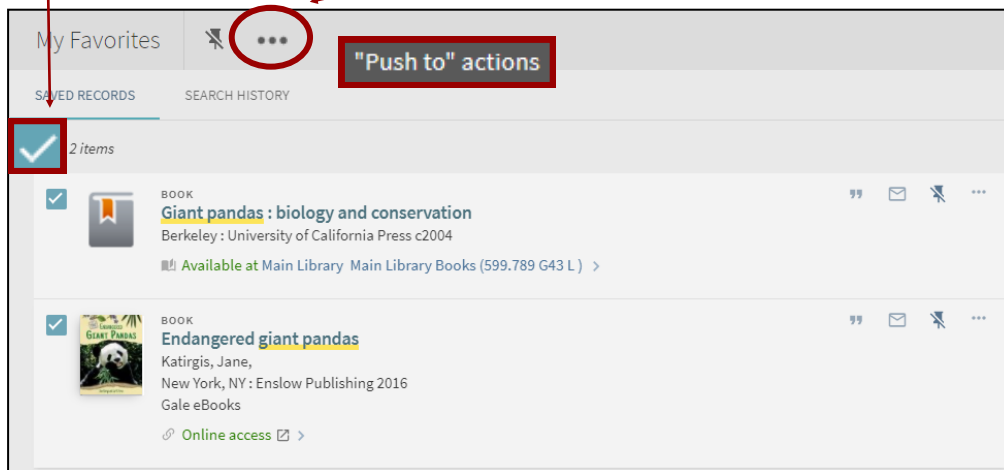
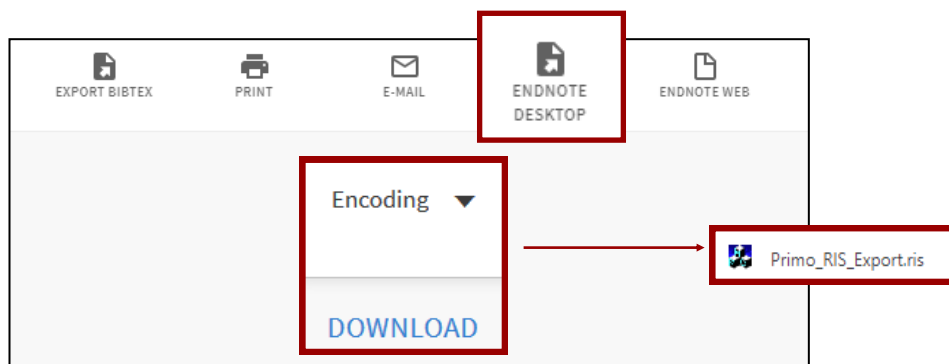
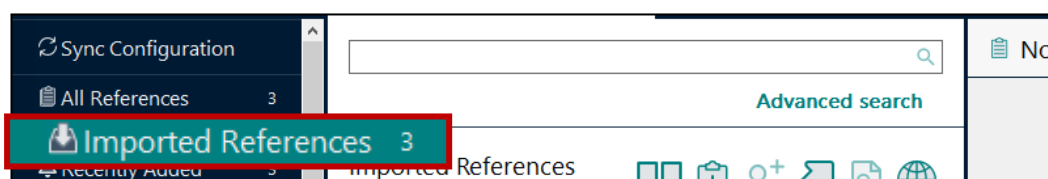
The screenshot shows the Find@HKUL search results page for the query "Giant panda". Three numbered instructions are overlaid on the page:

- 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

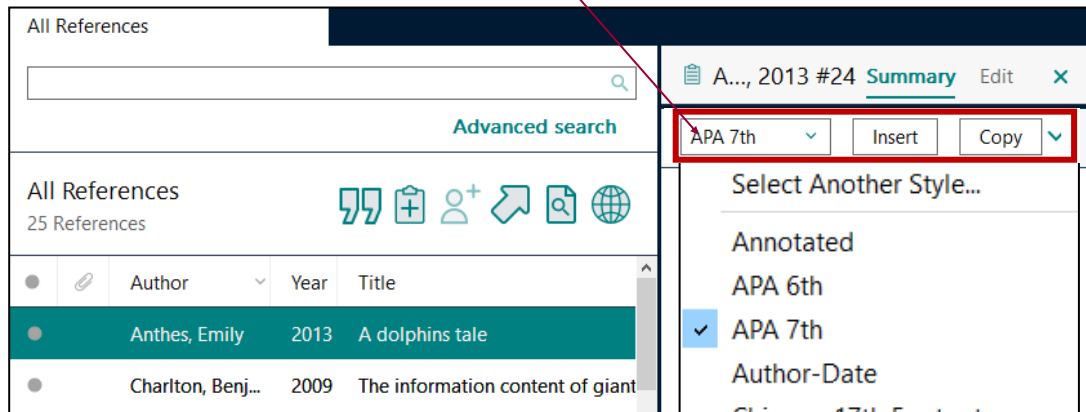
The right sidebar shows refinement options: "Refine results", "Expand My Results", "Sort by Relevance", "Show Only", "Full Text Online (29,574)", "Peer-reviewed Journals (6,968)", "Available in the Library (62)", "Open Access", "Resource Type", and "Articles (14,635)".

**Step 2 Export records to EndNote****1** Select the records**2** Open “Push to” actions**3** Select **ENDNOTE DESKTOP** and click on **DOWNLOAD****4** Click to open the downloaded file. The results will be **imported** into your EndNote library

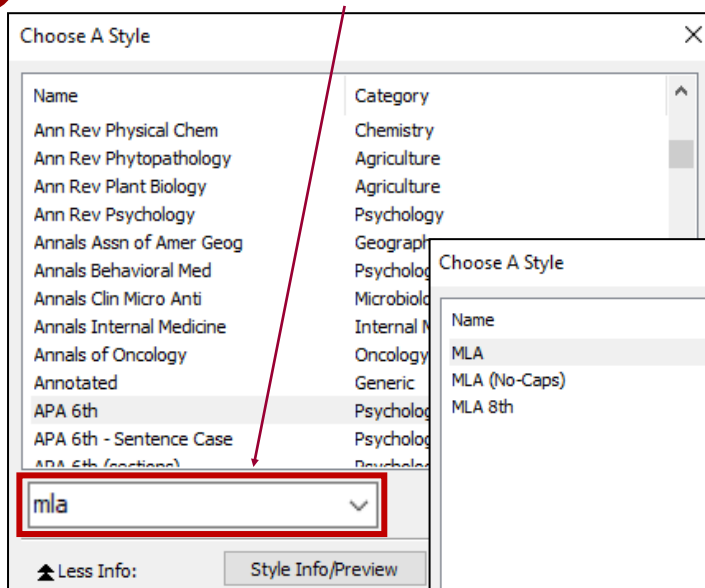


## Change citation styles

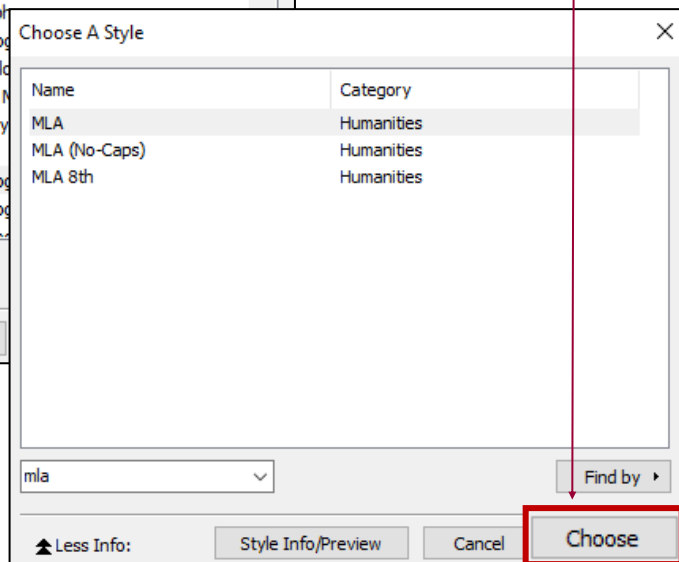
- 1 Highlight a reference. Open the **pull-down menu** for Output Style. Choose **Select Another Style**.



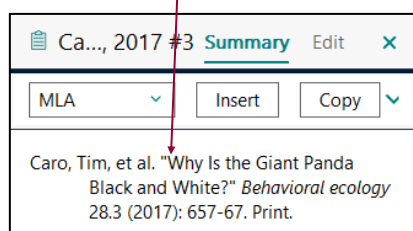
- 2 Enter name of your citation style and then press **Enter**.



- 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 "Zoo & wild animal medicine: current therapy". In the Preview panel below, **circle the problem area(s)**:

<input type="text"/> <input type="button" value="Advanced search"/>		Fowler, 1999 #2 <u>Summary</u> Edit <input type="button" value="X"/>	
All References 1 Reference		<input type="button" value="+ Attach file"/>	
APA 7th <input type="button" value="Insert"/> <input type="button" value="Copy"/> <input type="button" value="v"/>		<b>Zoo &amp; wild animal medicine : current therapy</b>	
Author Year Title		Fowler, M. E., & Miller, R. E. (1999). <i>Zoo &amp; wild animal medicine : current therapy</i> (4[th ed.]. ed.). W.B. Saunders.	

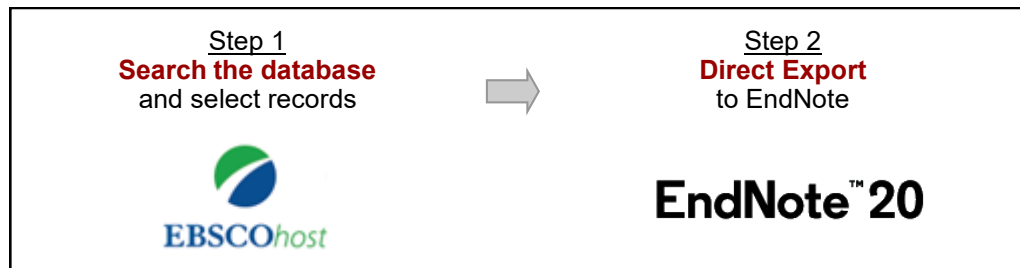
- 2 This is an example of APA 7th Citation Style for Editions other than the First:  
Harris, L. A. (2001). *Canadian copyright law* (3rd ed.). McGraw Hill Ryerson.

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

<input type="text"/> <input type="button" value="Advanced search"/>		Fowler, 1999 #2 Summary <b>Edit</b> <input type="button" value="X"/>	
All References 1 Reference		B I U X <sup>1</sup> X <sub>1</sub> <input type="button" value="Save"/>	
Author Year Title		Place Published Philadelphia, Pa.	
Fowler, Murray E.; Mi... 1999 Zoo & wild animal medicine : curren		Publisher W.B. Saunders	
		Volume	
		Number of Volumes	
		Series Volume	
		Number of Pages	
		Pages	
		Editor	
		Edition 4th	



## 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

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 a Guiana dolphin (*Sotalia guianensis*), Brazil.

Academic Journal

Asfixia por deslocamento laríngeo associado a consumo de presa de g...  
(*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

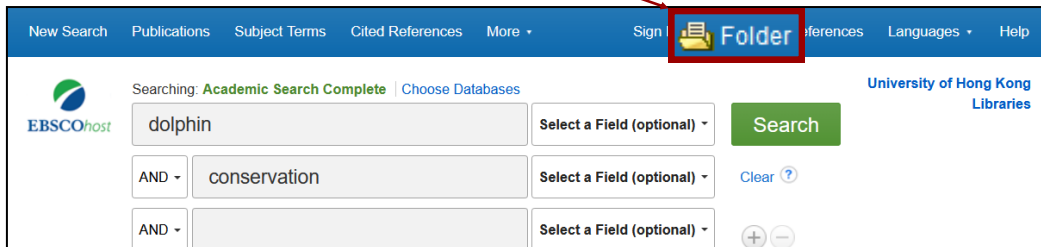
PDF Full Text (4.7MB)

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.

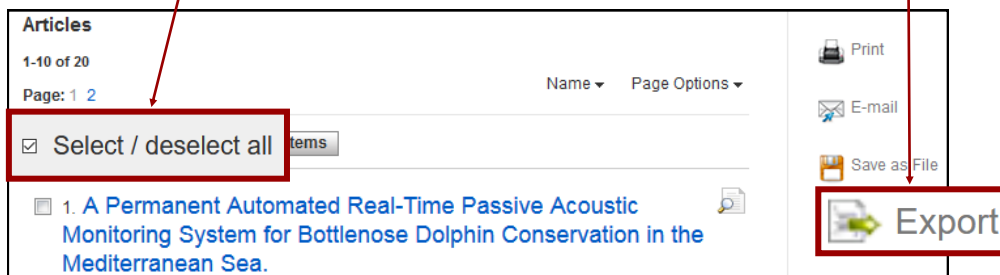
## Step 2 Direct Export to EndNote

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

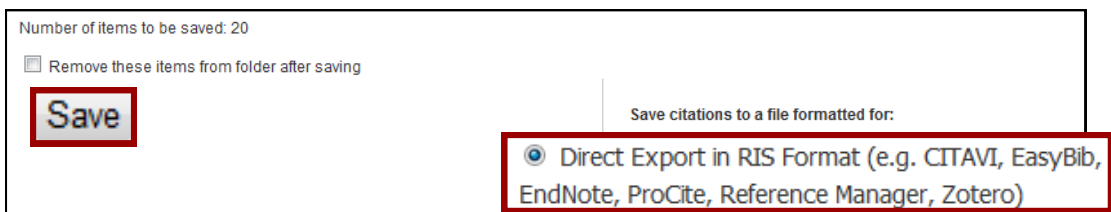


- 2 Tick the checkbox to select all records

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



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



- 5 Click to open the downloaded file. The records will be **imported** into your EndNote library.



## Open Link: Locate and attach PDF

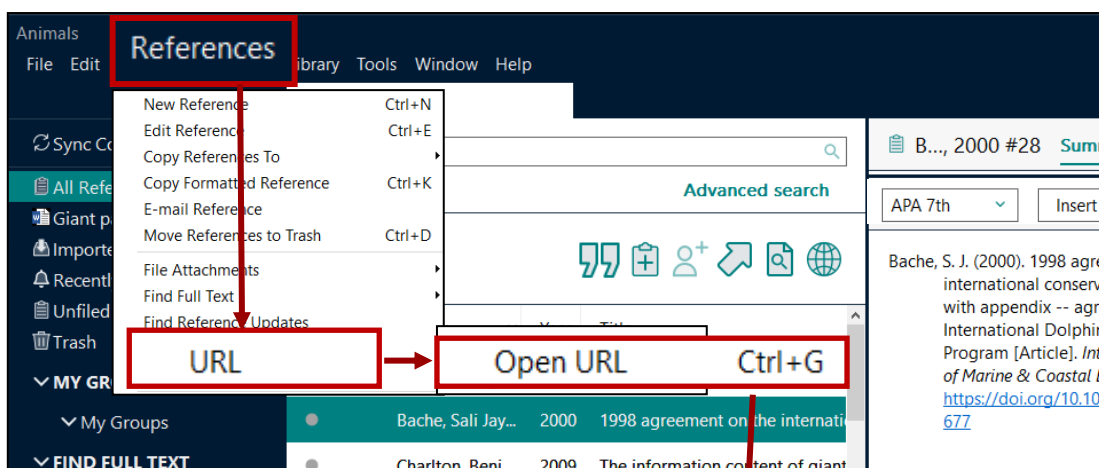
Point directly to the article website and get full text, if available and attach PDF to your library

### Step 1: Locate PDF full text

1

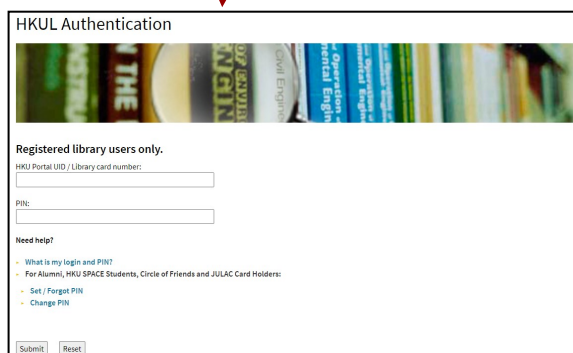
**Highlight** the reference.

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



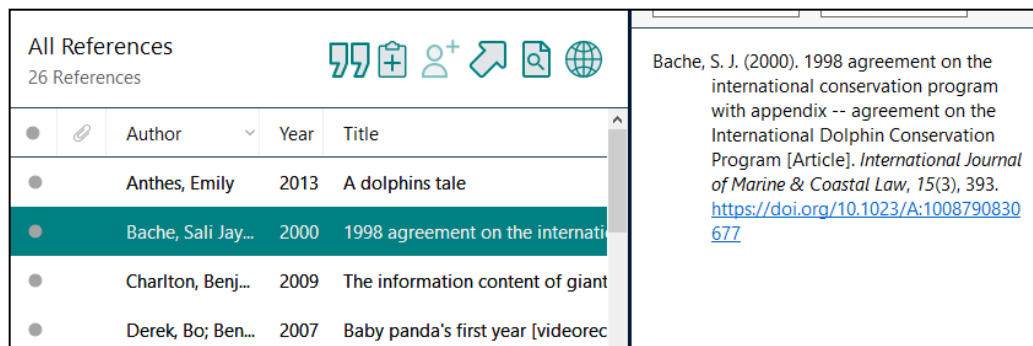
3

Save the PDF from the database

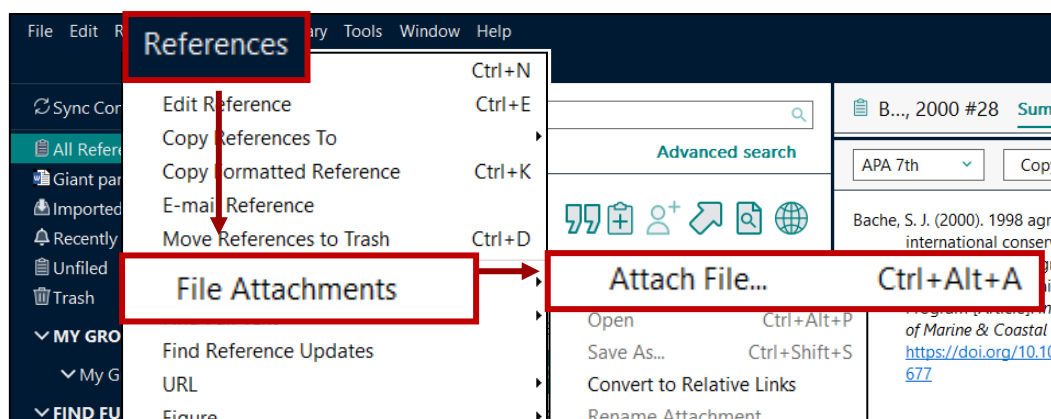


## Step 2: Link to PDF full text

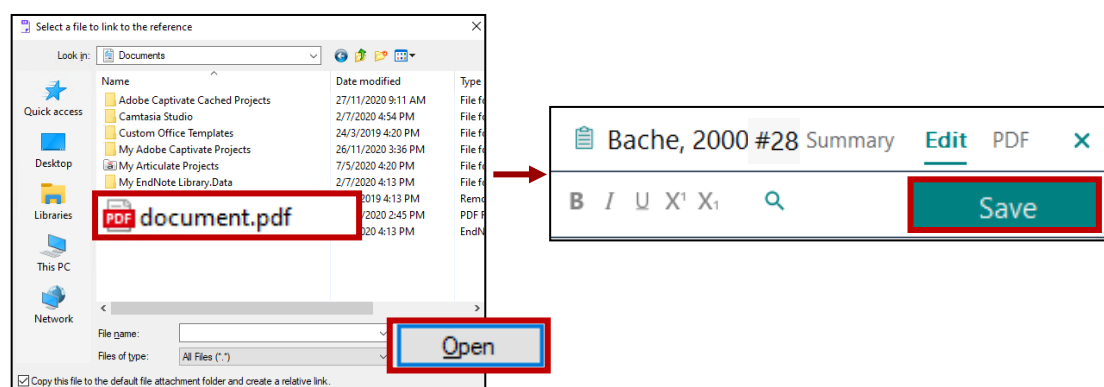
- 1 Highlight the reference in your library.



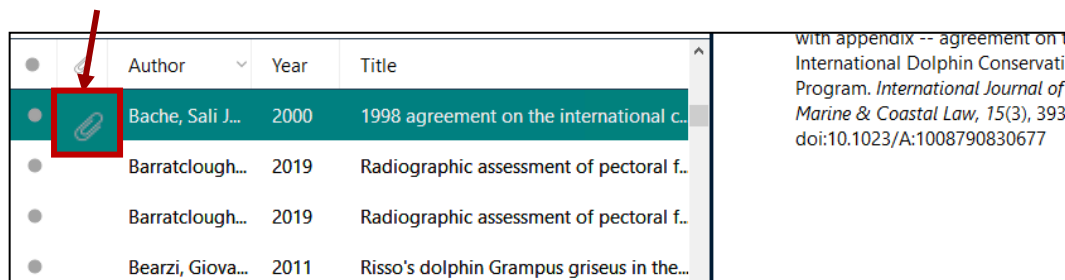
- 2 From top bar menu, select **References > File Attachments > Attach File**.



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



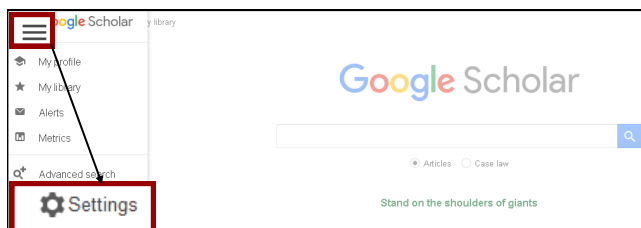
- 4 A **paper clip icon** will be displayed against the reference.



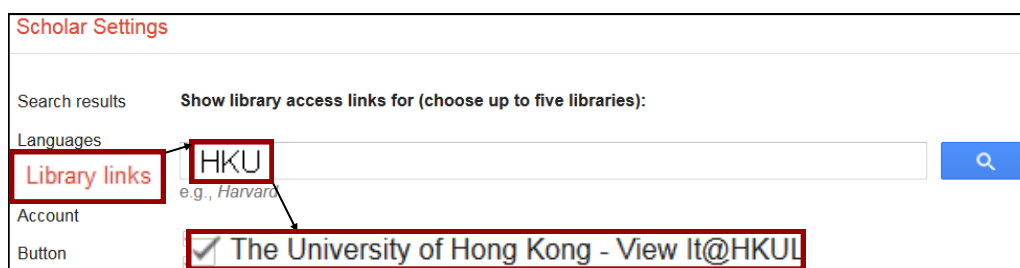
### 3. Direct Export - Google Scholar

#### Step 0 Set up Scholar preferences

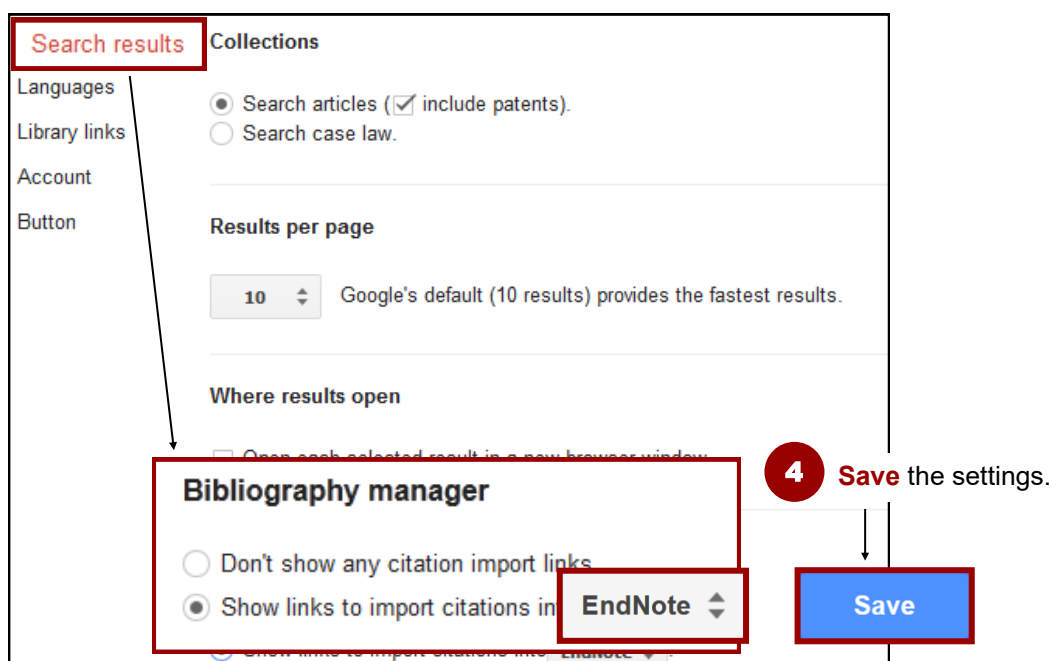
- 1** Go to <http://scholar.google.com> and click on **Settings**

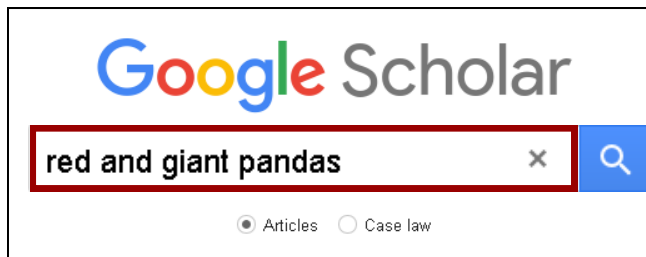


- 2** Under **Library links**
1. Search for **HKU**
  2. Select **The University of Hong Kong - View it @HKUL**

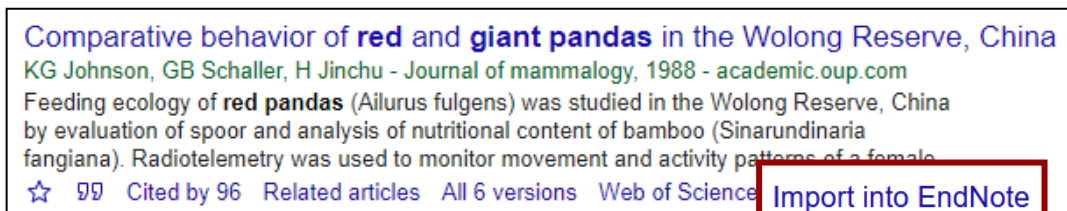


- 3** Under **Search results > Bibliography manager**
1. Select **Show links to import citations into**
  2. Choose **EndNote** from the pull-down menu.



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

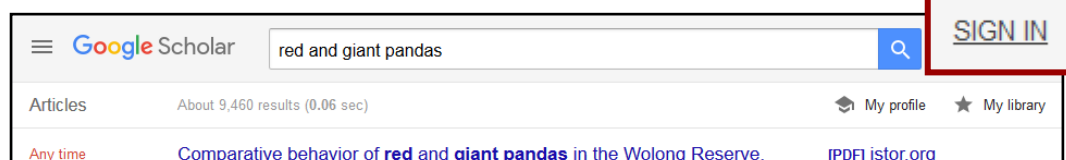
- 1 Click on **Import into EndNote**.



- 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, click on **Export all**.

**5** Choose **EndNote**.

Export all

BibTeX articles in your library  
EndNote for red and giant pandas  
CSV

ion by giant pandas and red pandas in Xiangling Mountains  
W Fuwen, F Zuojian, W Zuwang - Dong wu xue bao.[Acta Zoologica ..., 1999 - europepmc.org  
Giant pandas preferred to select the habitat with the gentle slope facing to the south with dense forest canopy. On the other hand, Red pandas showed strong habitat preference for ...  
 Cite Label Delete

Geometric morphometrics shows differences and similarities in skull shape between the red and giant pandas  
B Figueirido, FJ Serrano-Alarcón... - Journal of ..., 2012 - Wiley Online Library  
A morphometric analysis of the skull of the red or lesser panda, *Ailuropus fulgens* (*Ailuridae*), and the giant panda, *Ailuropoda melanoleuca* (*Ursidae*), was performed for evaluating the ...  
 Cite Label Delete

Three-dimensional computer simulations of feeding behaviour in red and giant pandas relate skull biomechanics with dietary niche partitioning  
B Figueirido, ZJ Tseng... - Biology ..., 2014 - royalsocietypublishing.org  
The red (*Ailurus fulgens*) and giant (*Ailuropoda melanoleuca*) pandas are mammalian carnivores convergently adapted to a bamboo feeding diet. However, whereas *Ailurus* ...  
 Cite Label Delete

**6** Click to open the downloaded file. The records will be **imported** into your EndNote library.



**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](http://www.jstor.org)

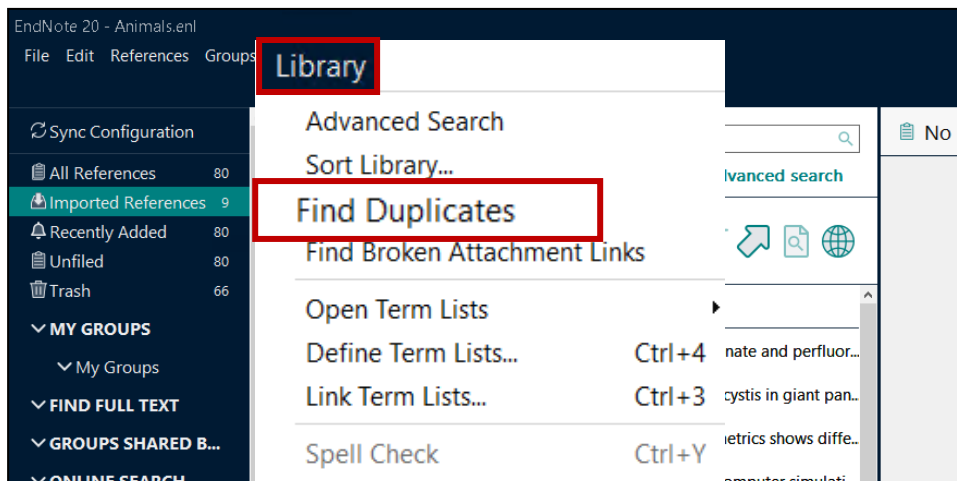
View It@HKUL



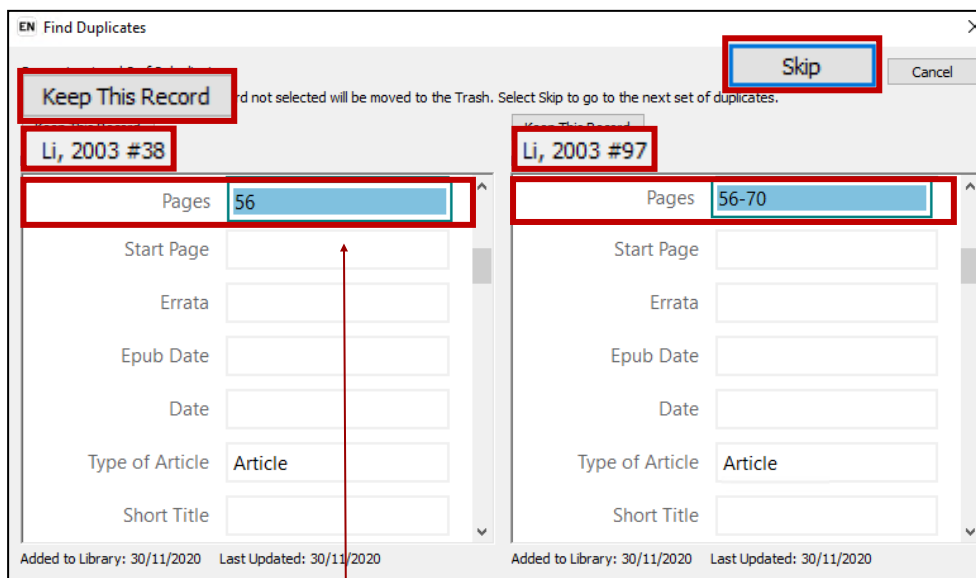


## Remove Duplicates

- 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.)

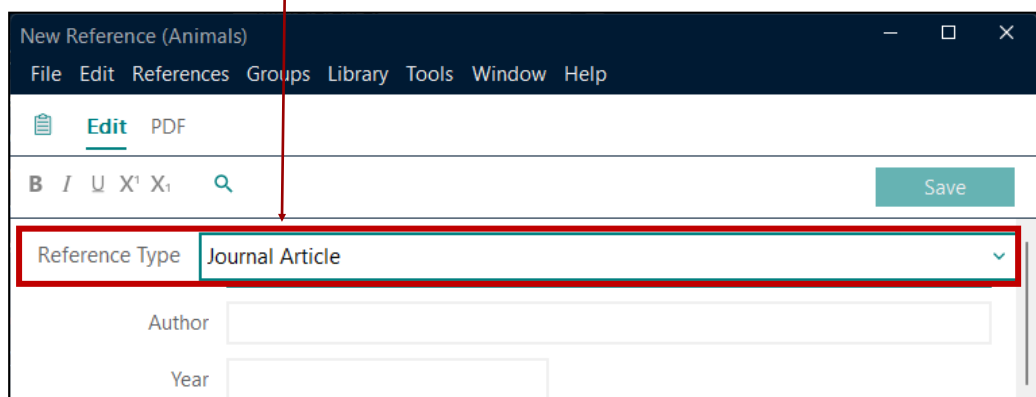


## 4. Manual Input

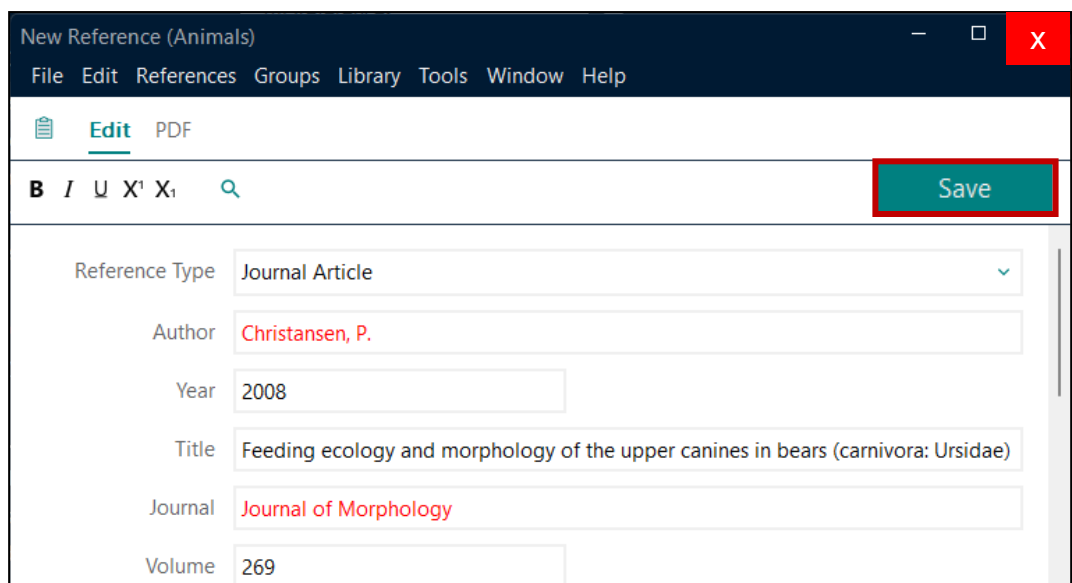
- 1 Click on the **New Reference** icon from the EndNote top icon bar.



- 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**

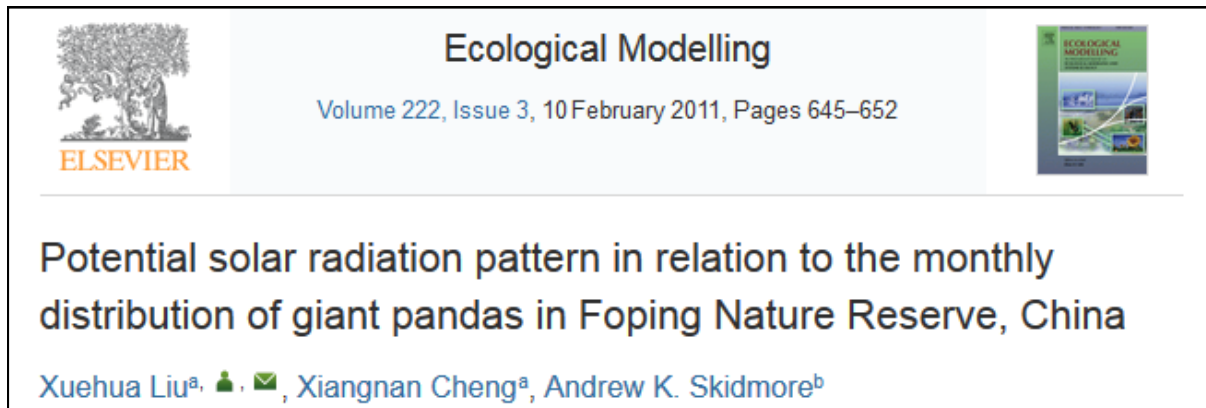
Pages 1331



Pages 1,331



## Manual Input: A journal article



File Edit References Groups Library Tools Window Help

Edit PDF

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

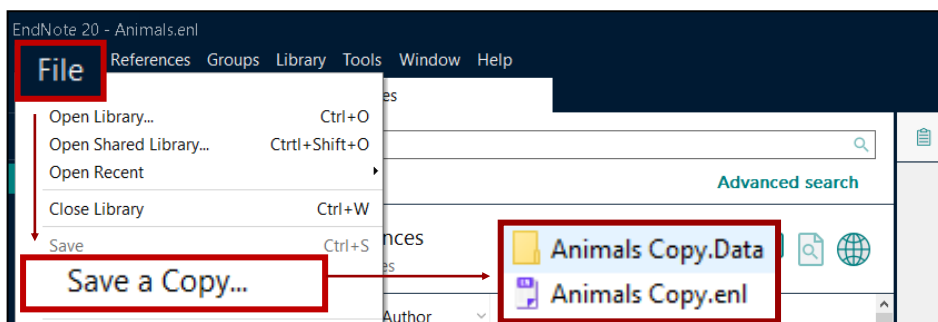


## Back up your EndNote Library!

### Method 1: Save a Copy

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

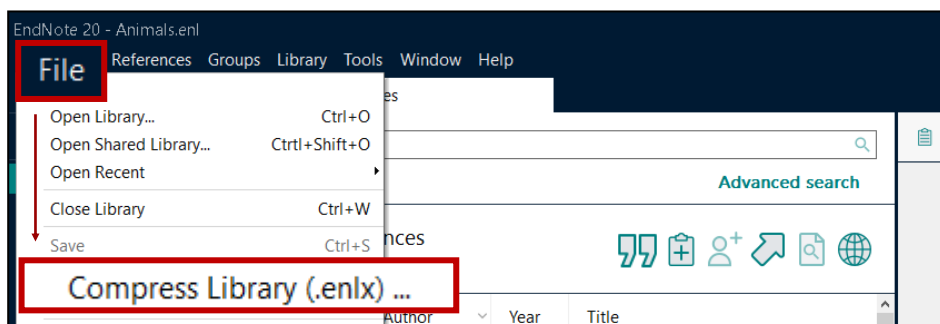
Select **File > Save a Copy**



### Method 2: Compressed Library

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

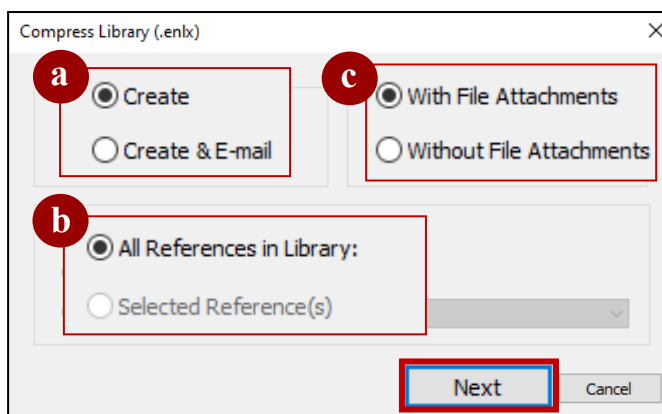
#### 1 Select **File > Compress Library**



#### 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**

### List of Figures<sup>47</sup>

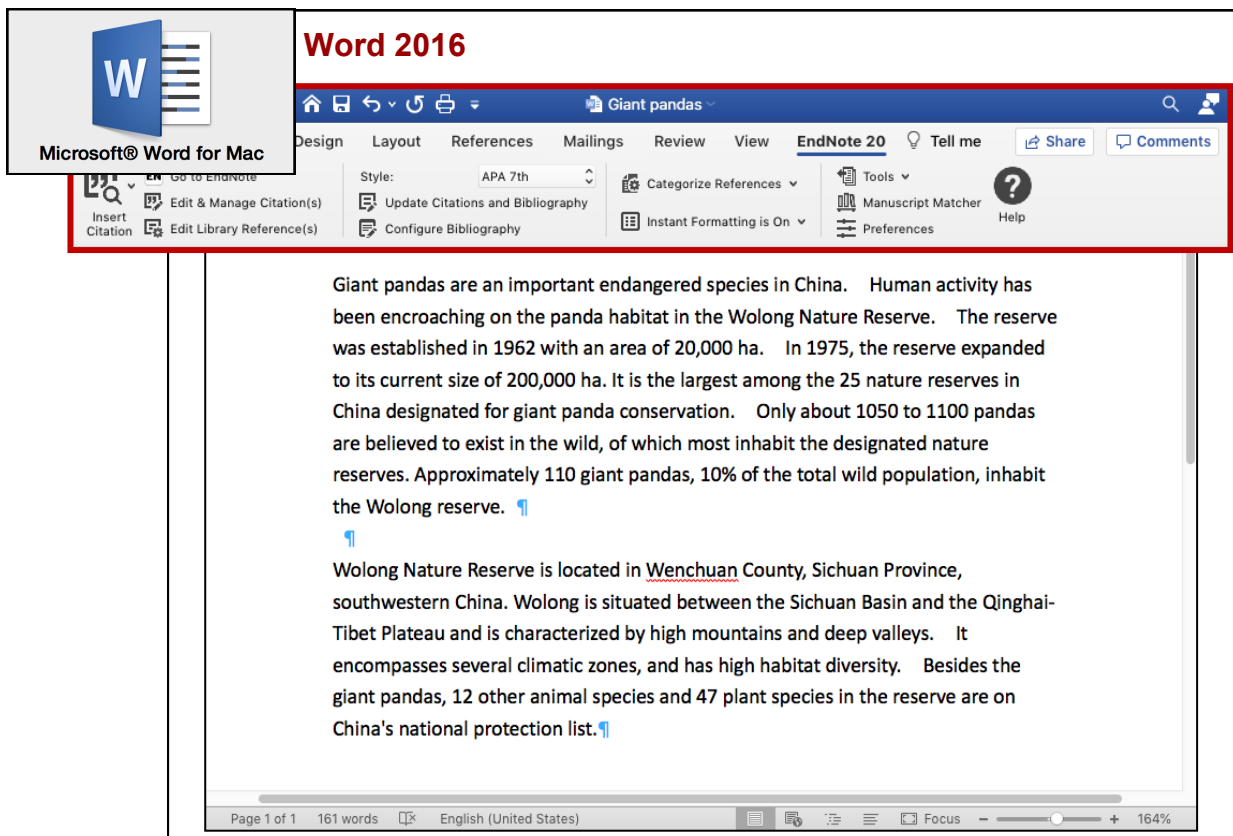
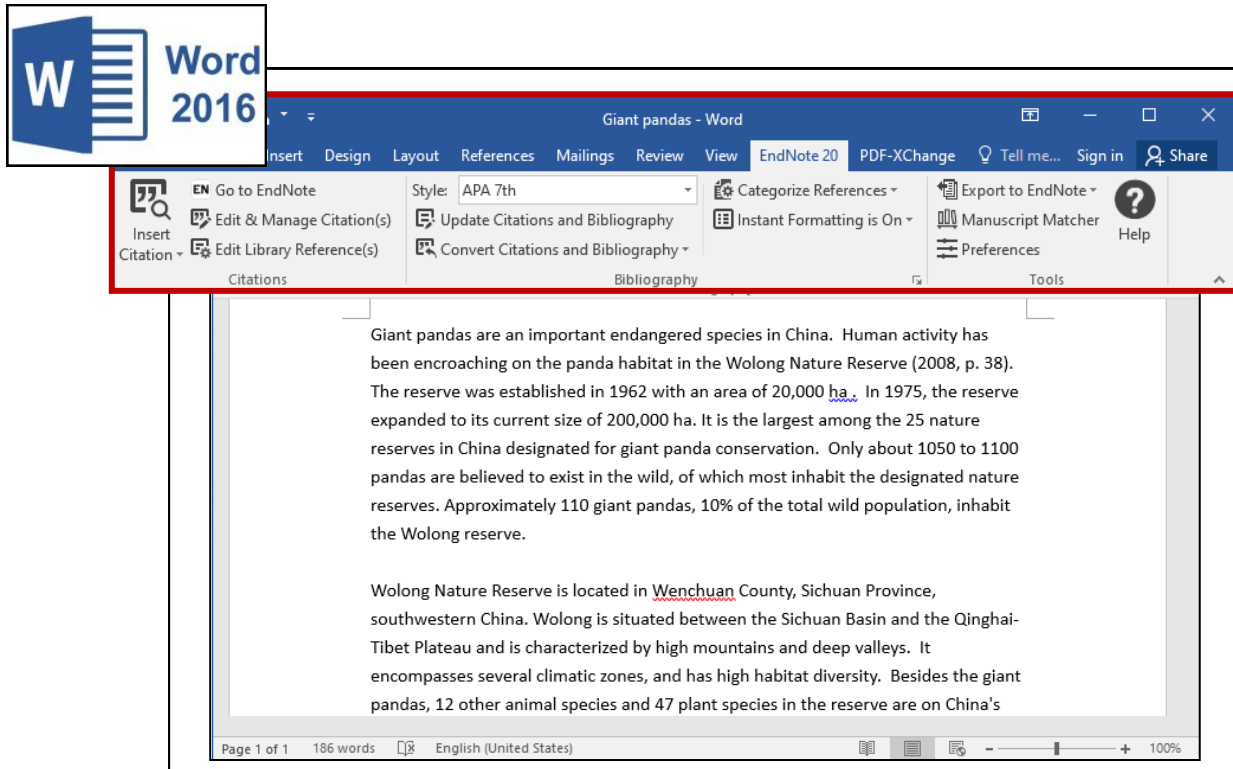


Figure 1. Book cover<sup>48</sup>

- 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?

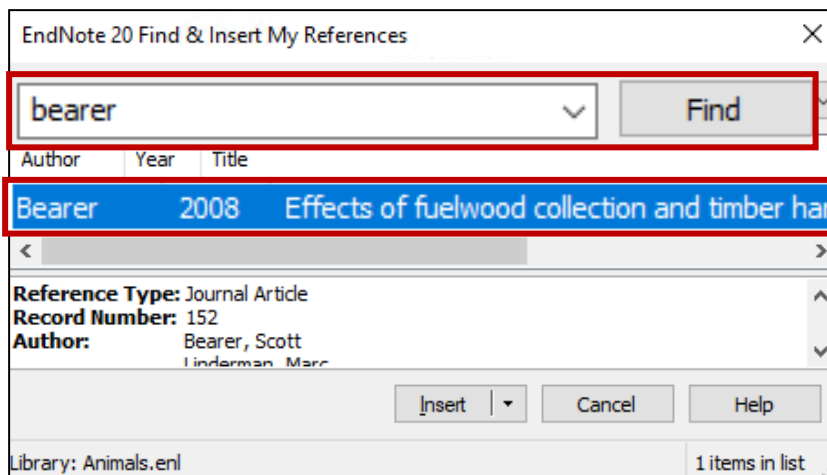
#### Step 1 Insert a citation

Method A Insert Citation

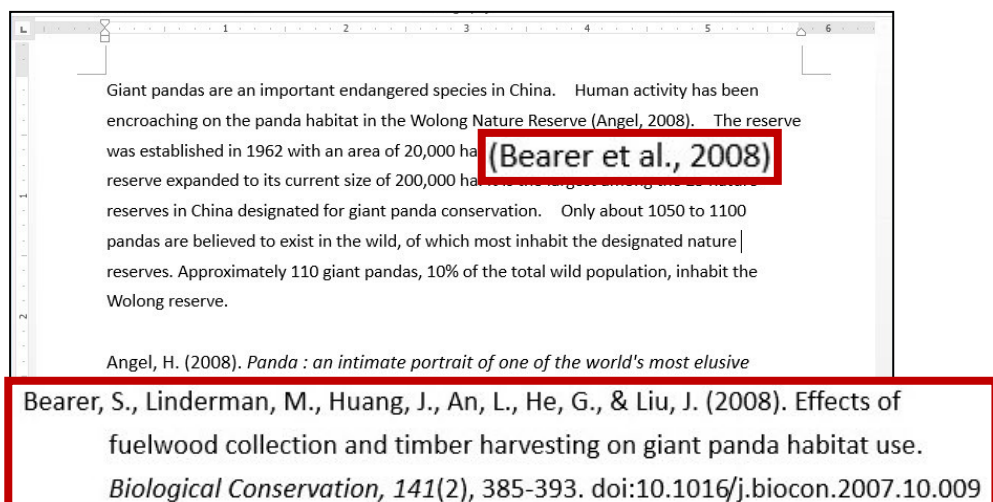
- 1 In Word, **place the cursor** where you would like to insert your in-text citation. Select **Insert Citation > Insert Citation**



- 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.

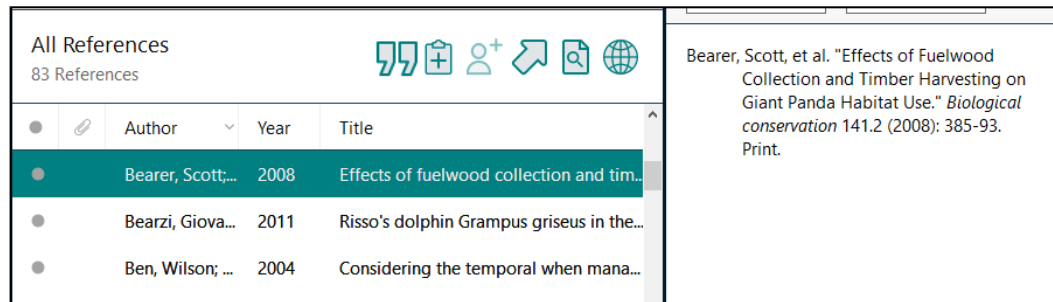




## Step 1 Insert a citation

Method B Insert Selected Citation

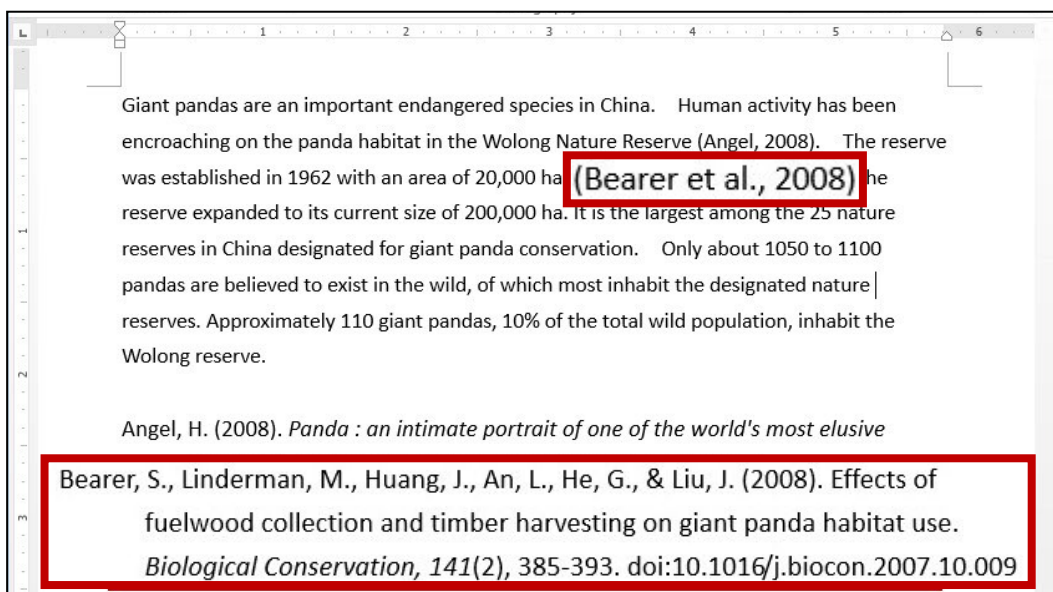
- 1 In **EndNote**, highlight the **desired citation**.



- 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.

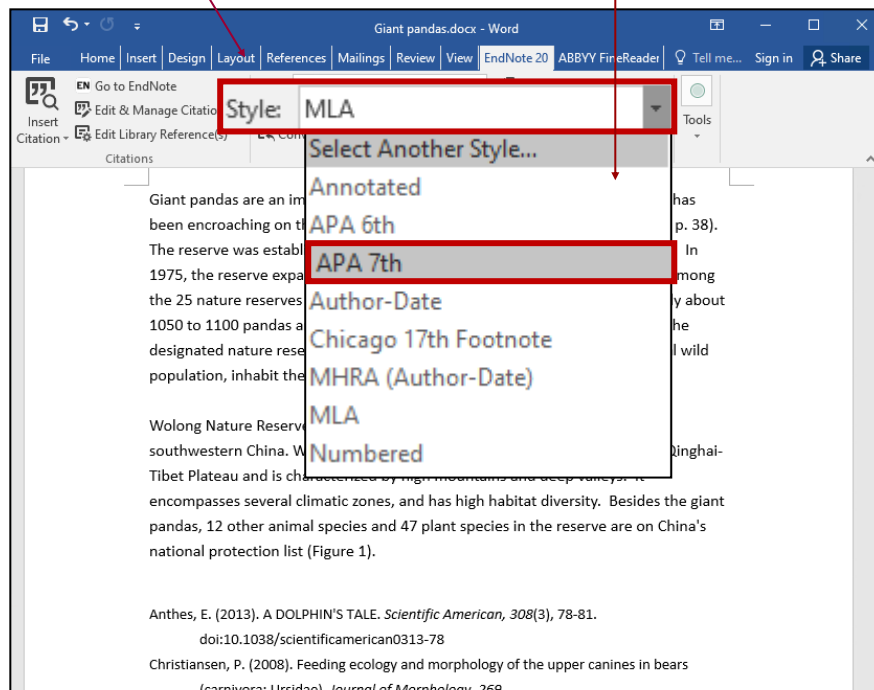




## Change the citation style

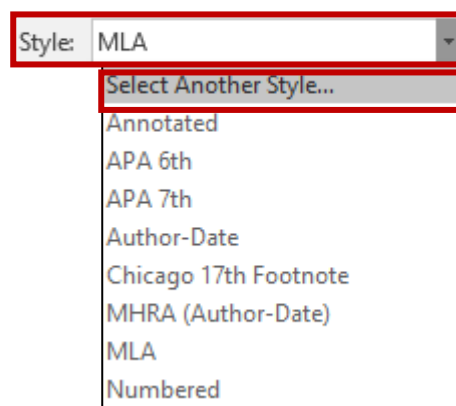
**1** In the **Bibliography** tab section, open the **Style** pull-down menu.

**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.

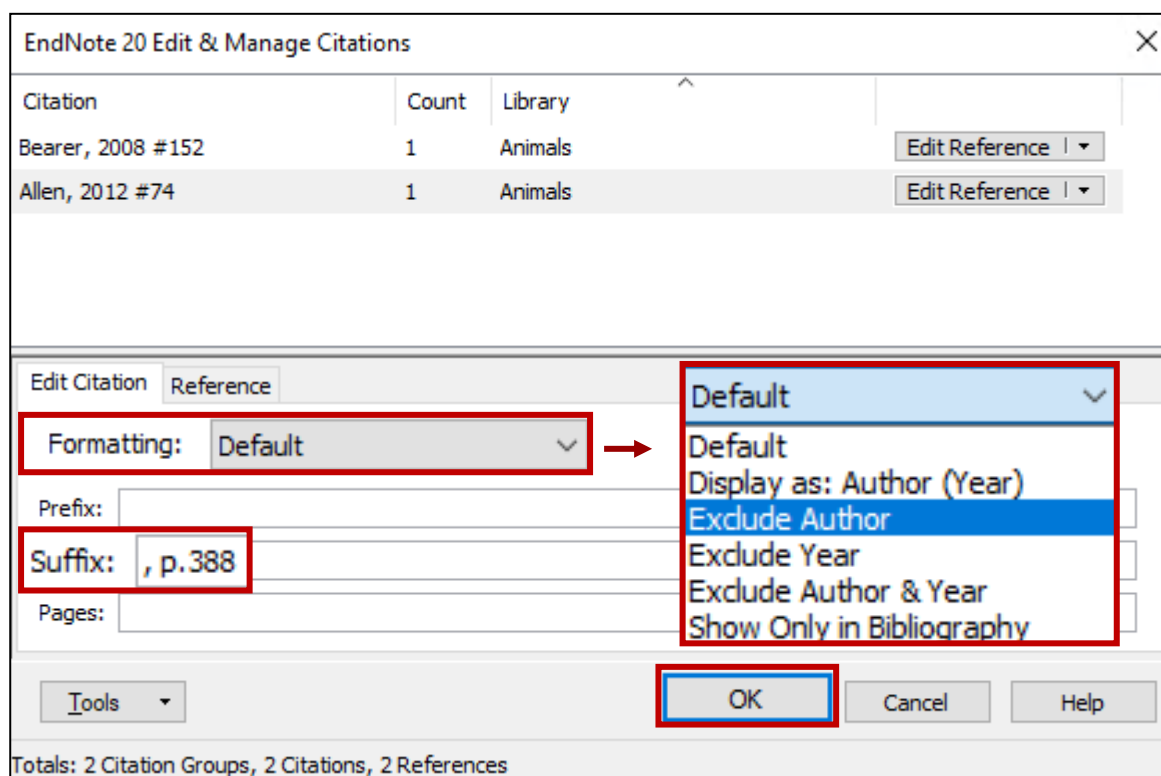
2

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

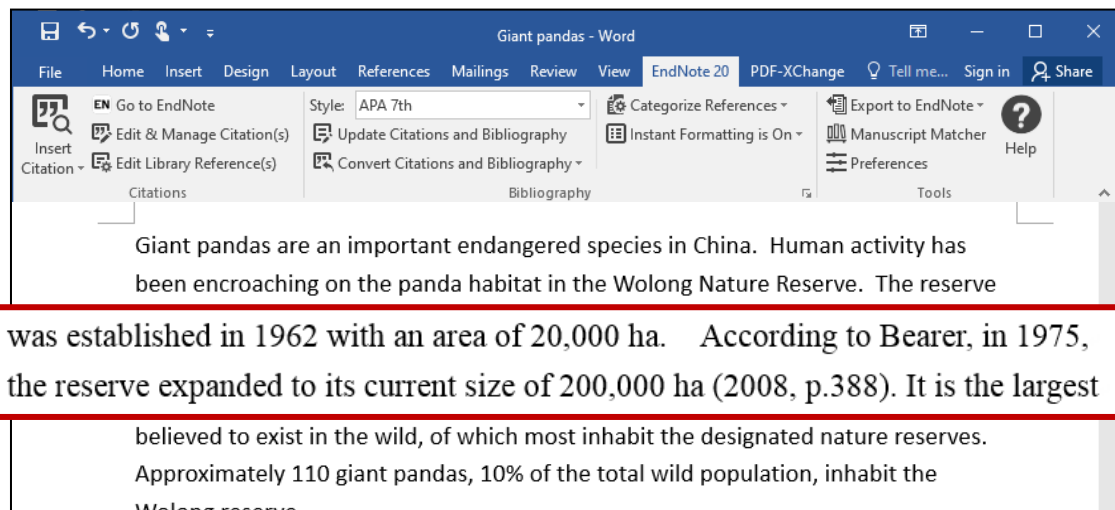


3

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.

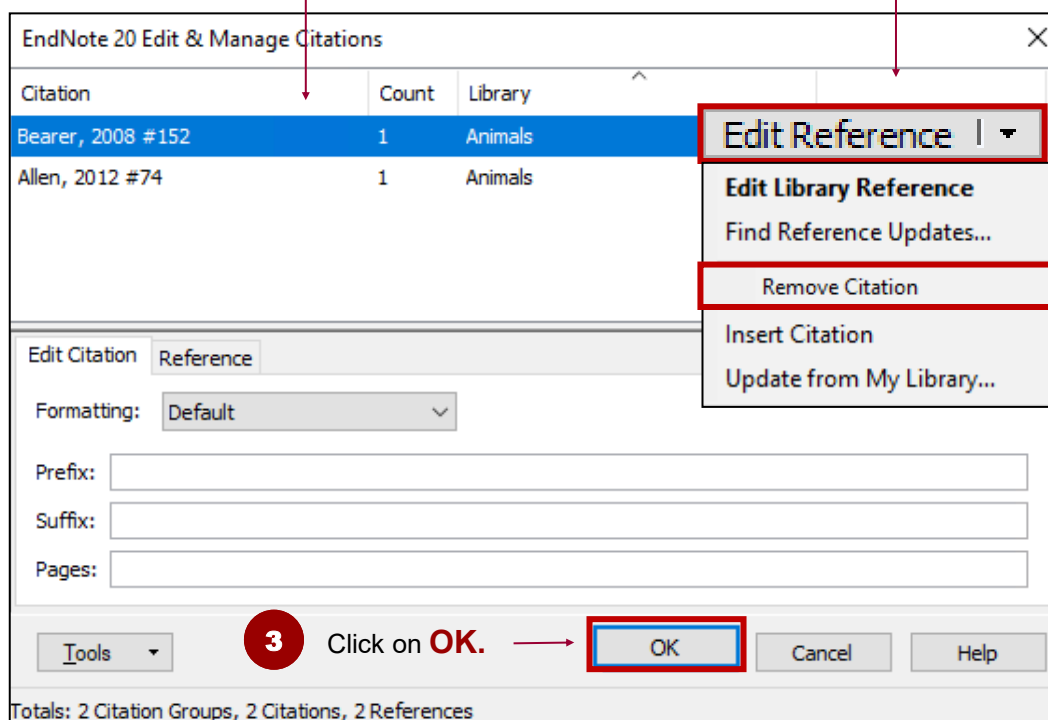


### Removing a Citation

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**.

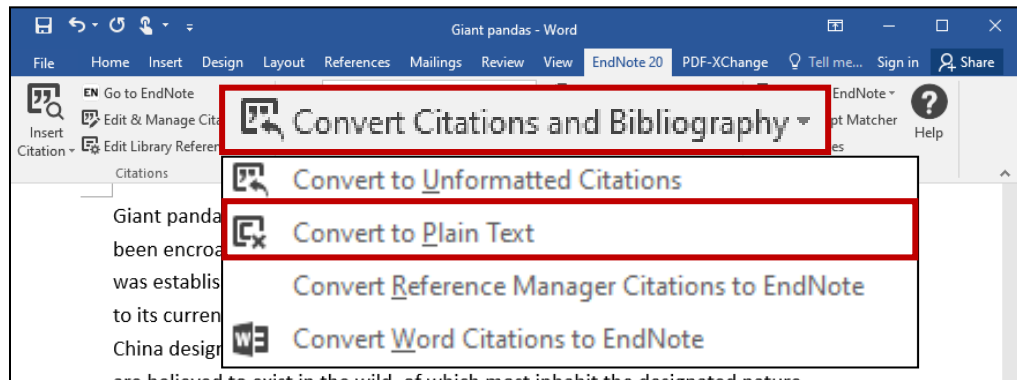
- 2 Open the pull down menu for **Edit Reference**, and then select **Remove Citation**.



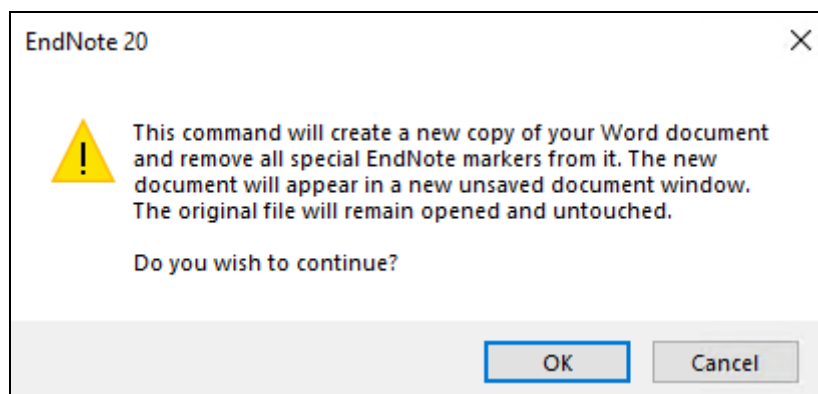
### Step 3 Remove Field Codes

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)	

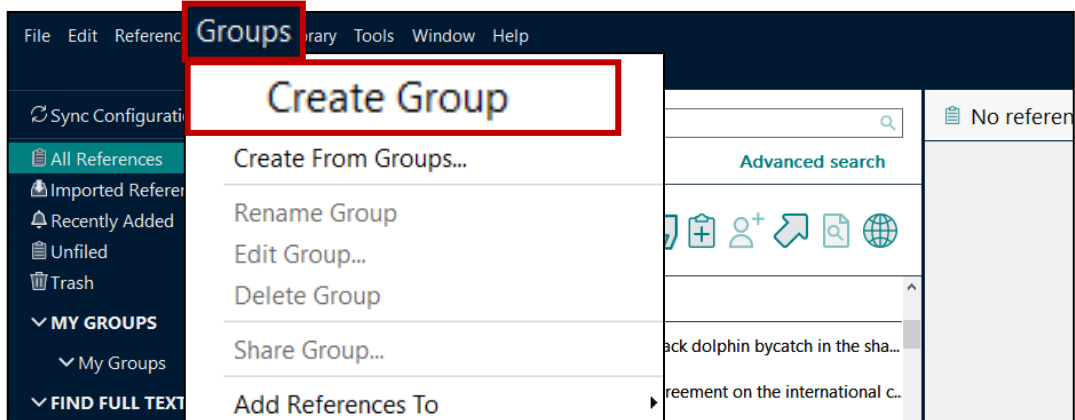
## 2. Create a Custom Group



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

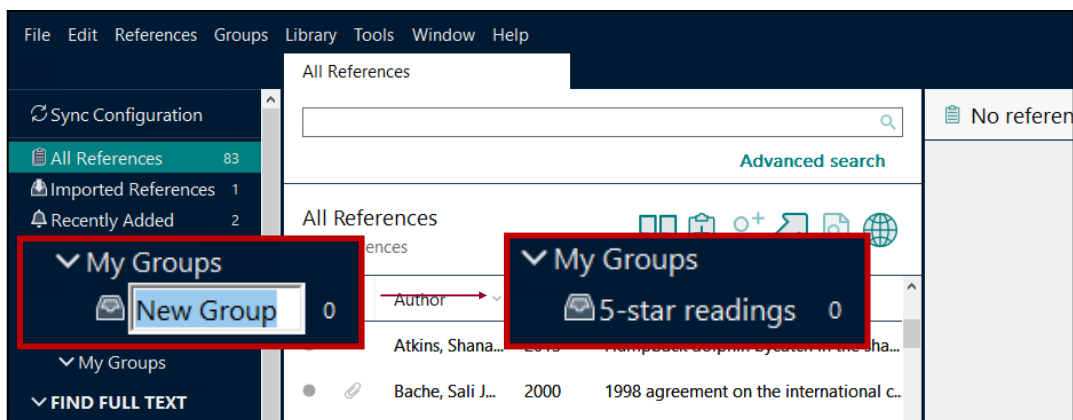
1

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



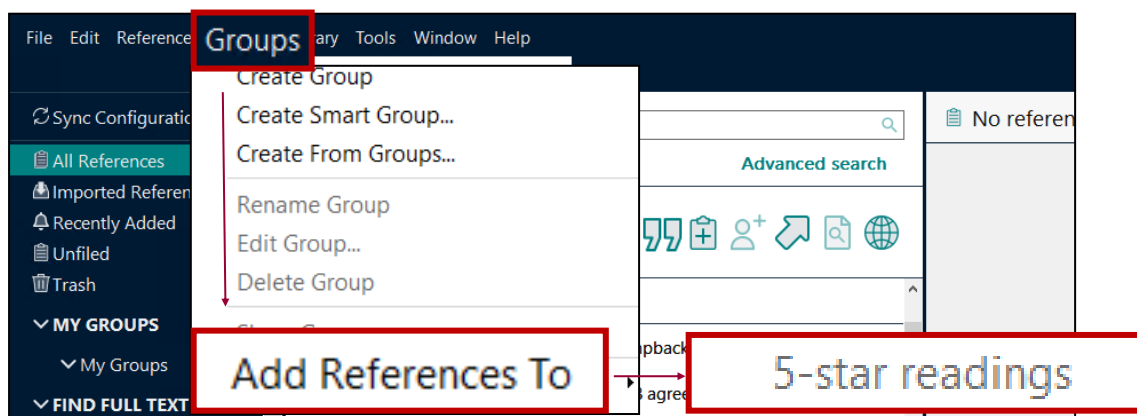
2

**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)

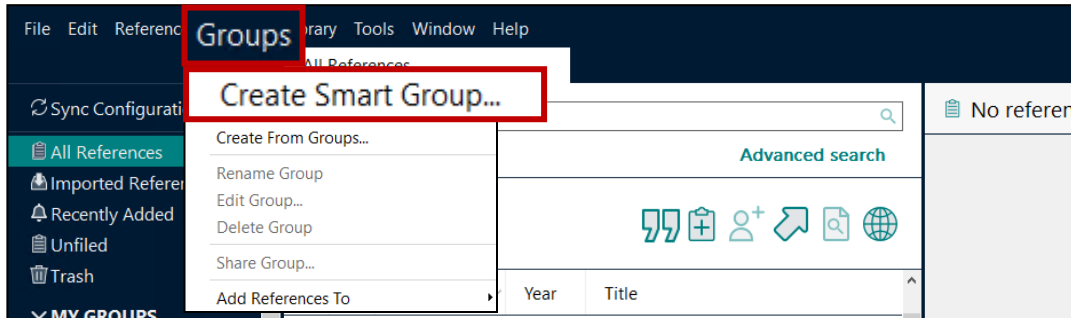


### 3. Create a Smart Group

**Create two smart groups:**

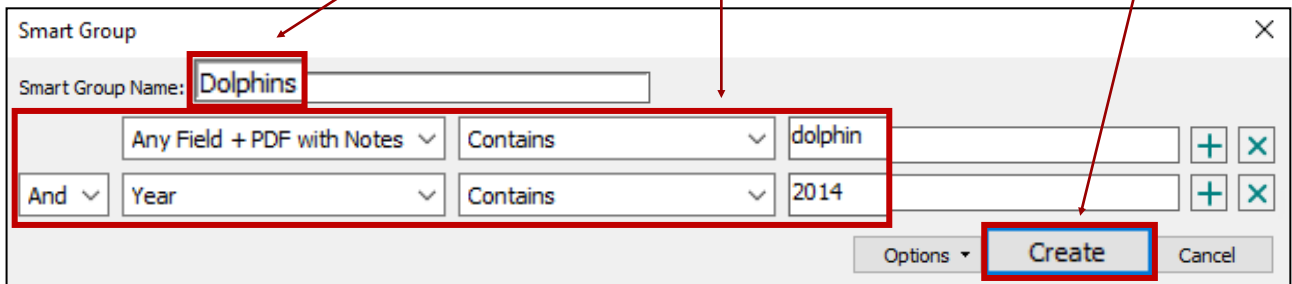
- (a) Dolphins
- (b) Pandas

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

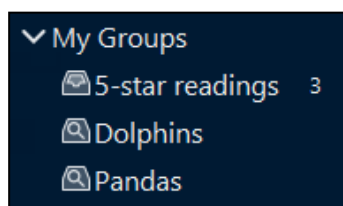
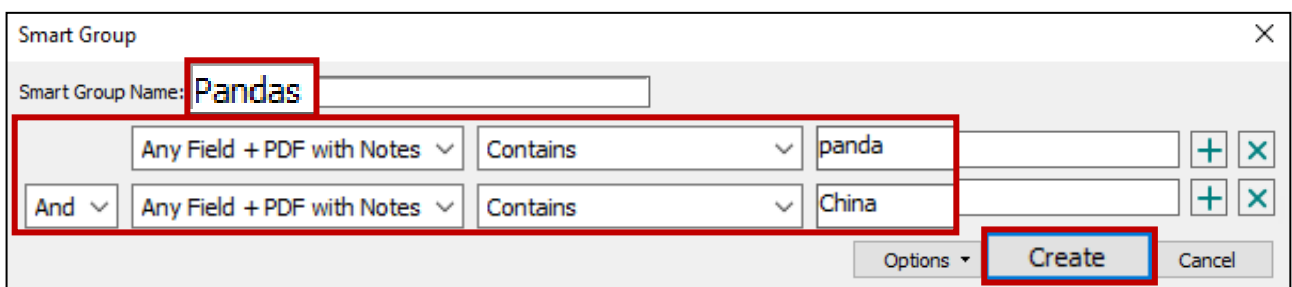


**2** Create the smart group for **Dolphins**

- (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:** Services Counter, 2/F, Main Library  
**Telephone:** 3917-2202  
**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!