**Libraries and Cultural Resources**

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https://library.ucalgary.ca/guides/hsl/citationmanagementtools

# ADVANCED FEATURES of ENDNOTE 20

Session: **Advanced.** A good understanding of EndNote desktop features and workflow is needed.

Duration: 45 minutes

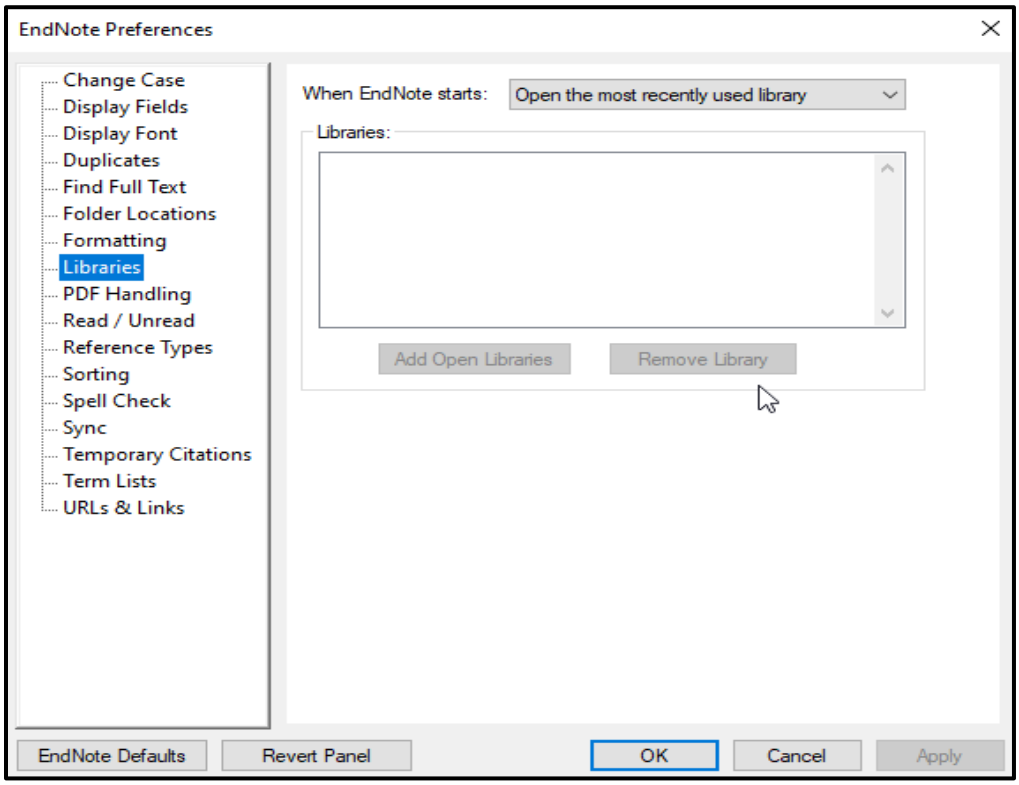
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## AGENDA:

- Set customized preferences within an EndNote library: display fields, fonts, find full text, pdf handling, duplicates
- Organize your projects and automatically sorts references into smart groups
- Share your library, groups or references with collaborators
- Edit and manage citations in MSWord when using EndNote
- Create a categorized bibliography
- Download and add a new output style to your EndNote desktop Style Manager

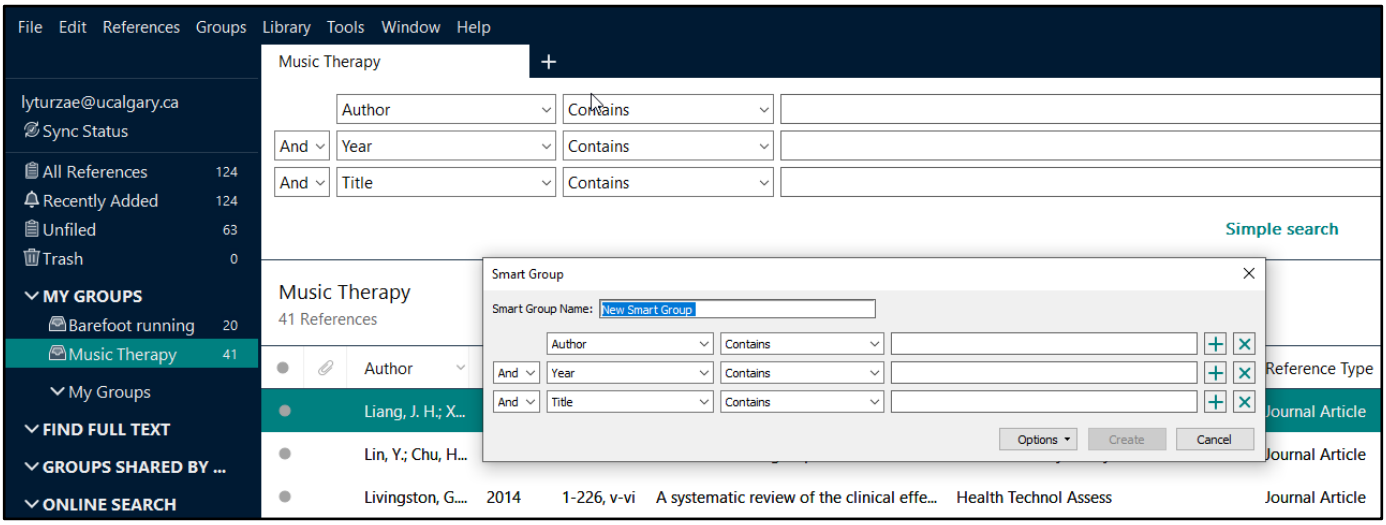
## EndNote Preferences:

Set your preferred preferences within EndNote by going to the tab-by-tab window of the **customizable preferences** available within the program. Under the **Edit menu** > go to **Preferences.**



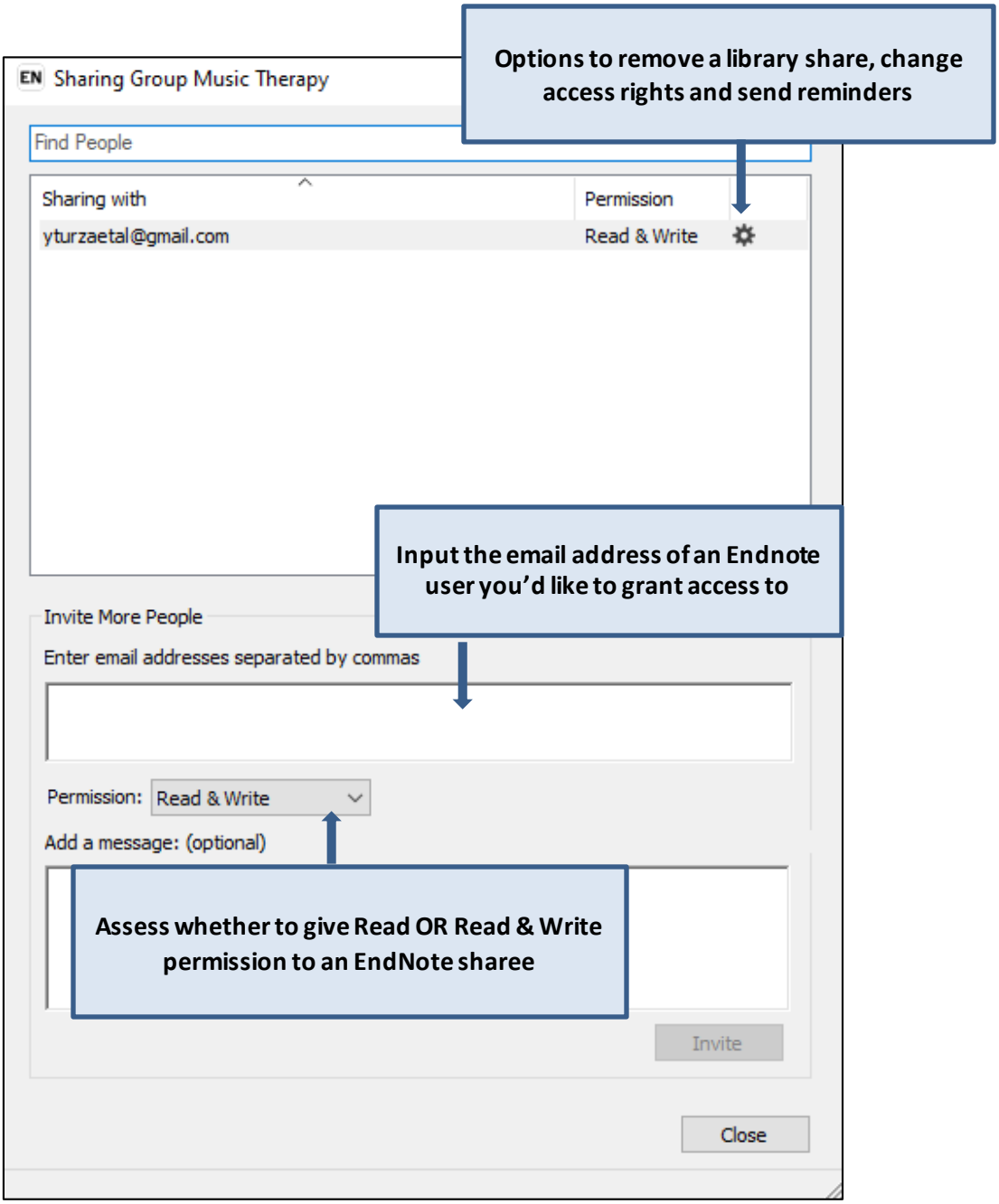

## Organize Using Smart Groups:

Create smart groups based on a search query within your EndNote references. Create a new smart group by going to the **Groups menu > Create Smart Group**.



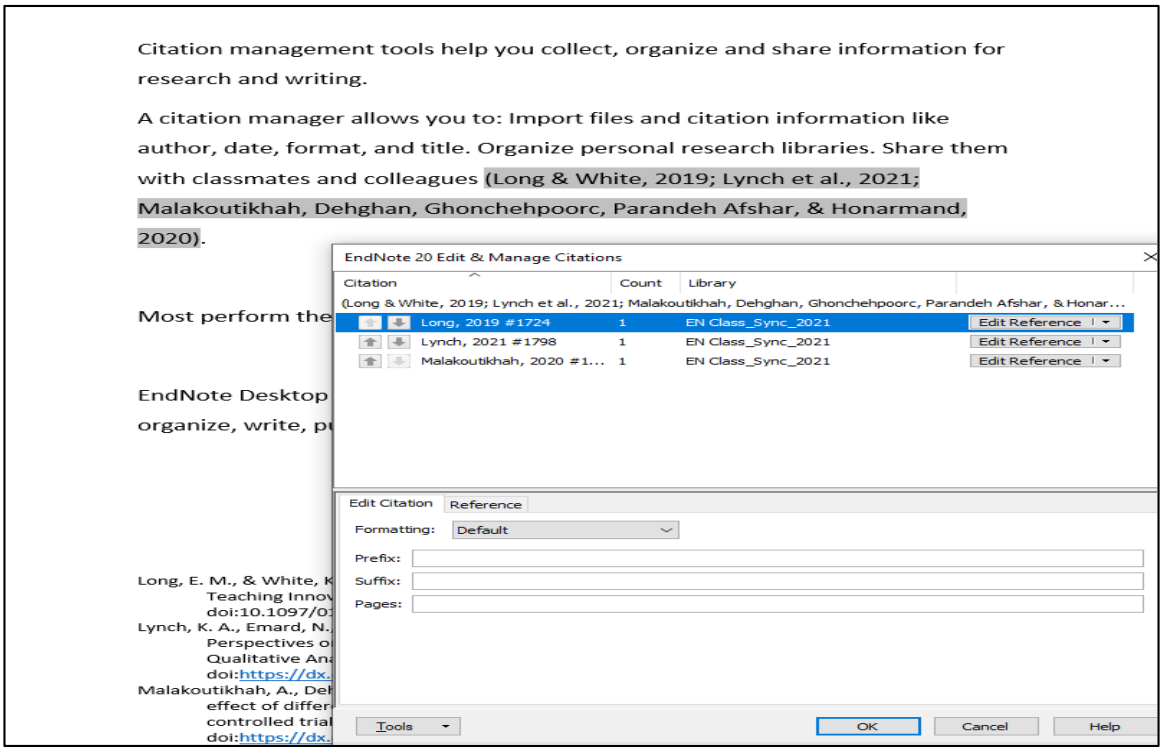
## Sharing options in EndNote:

The Library Sharing in EndNote 20 allows you to **share designated EndNote libraries, groups or references** to up to **200** other EndNote desktop users.



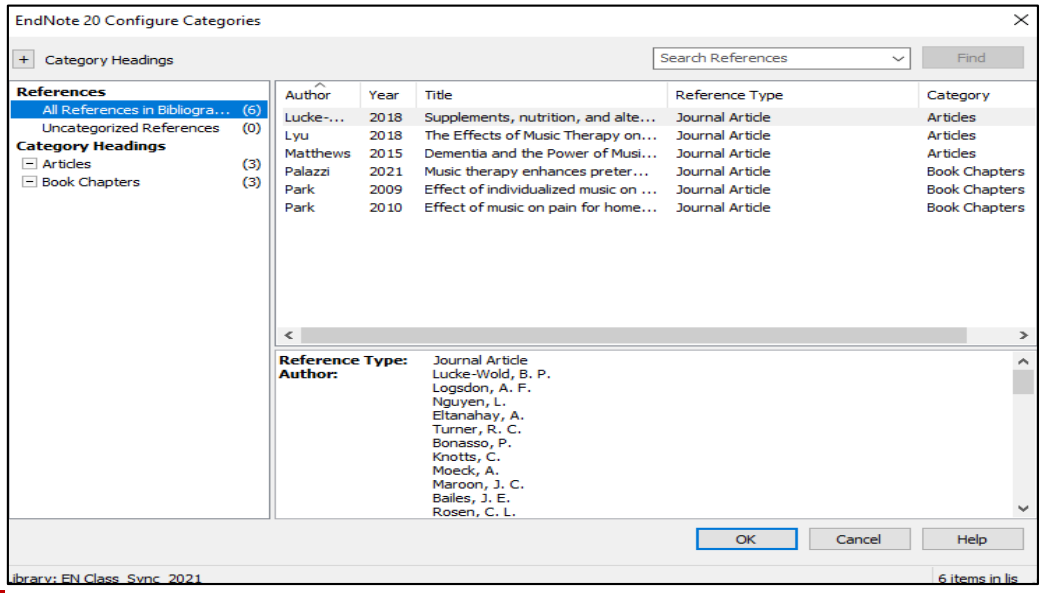
## Use the Edit & Manage Citations to modify appearance(s) of in-text citations:

Highlight the formatted in-text citations that you'd like to modify and then use the **Edit and Manage Citation(s)** feature found on the EndNote 20 tab in Word. Add information under the **Prefix, Suffix** and **Cited Pages** fields to let your reader know where data included within the source of work is found.



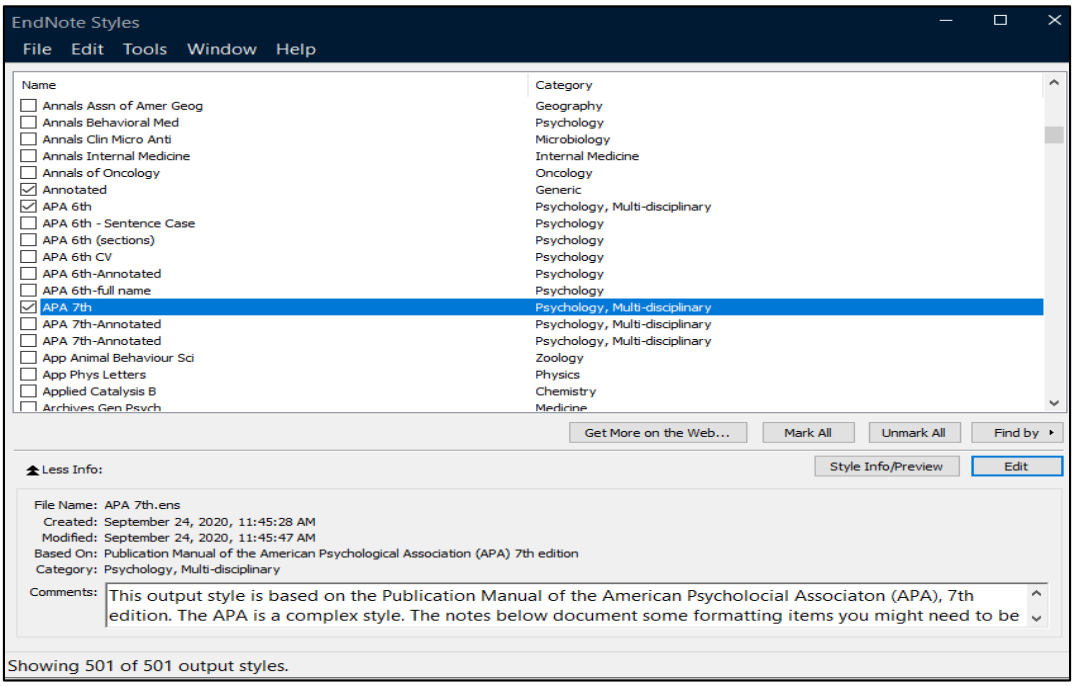

## Categorized Bibliography:

EndNote creates a bibliography and inserts the selected references under the appropriate categories based on the reference type. Under the **EndNote 20 tab in Word** >go to **Categorize References** > select **Configure References**



## Style Manager:

To search for an output style go to the **Tools menu** > select **Output Styles** > select **Open Style Manager**




## EndNote Software Support and Training:

For in-depth support, contact EndNote Technical Support at: https://endnote.com/contact/

Produced by EndNote, the User's LibGuide contains instructional information with links to resources

Find answers to common questions on the Endnote Knowledge Base portal

Consult the Citing and Writing in the Health Sciences guide for customized resources produced by the Health Sciences Library.

Feel free to connect with me personally for specific EndNote questions - Lourdes Yturzaeta