

EndNote Training & Certification Program July 2023

Session 2: Be an Expert in EndNote Desktop- A guided tour of EndNote 20

Duration: 90 mins

Session goal: Attendees should be able to demonstrate expert knowledge and skills required to use EndNote Desktop (EndNote 20) for importing, organizing and citing references.

Agenda

1. Access EndNote

2. Library Creation

- Create an EndNote library (enl file and Data folder)
- Compress your library for backup purposes
- Store your library in cloud

3. Referencing

- Import References from search databases (Pubmed/Google Scholar/ScienceDirect)
- Create new references manually
- Full Text Searching using Endnote Click

4. PDF Handling

- Organize references by placing them into custom groups and group sets
- Manually add a file attachment to an EndNote library record
- Import a folder of PDFs stored locally into your EndNote library
- Configure PDF Auto Import preferences to import PDFs from a folder automatically
- Annotate a PDF by using the highlight tool and add a searchable sticky note
- Standardize PDF file names through PDF Handling preferences

5. Library Organization

- Create Groups
- Search groups and the whole library
- Find and remove duplicate references from your EndNote library

- Modify spellings or instances of words throughout your library with the Find and Replace tool
- Automatically organize your projects and sort your references with smart groups
- Compare or contrast the contents of two or more groups with combination groups
- Share your library (or custom groups) with collaborators

6. Bibliography Creation

- Download and Use Journal Styles
- Edit existing Journal Styles
- Create a new style and save it
- Create a categorized bibliography or reference list with the EndNote
- Configure Categories feature Review tools to prevent interruption of your writing flow in large documents
- Switch your EndNote output style to meet journal requirements
- Use Journal Term Lists

7. Cite While You Write™

- Demonstrate Cite While You Write™ functions: insert, remove, and modify in-text citations
- Turn Instant Formatting OFF
- Remove the EndNote field codes from your Word project when requested with Convert to Plain-Text Improve reference metadata quality with Find Reference Updates