

EndNote Creating Groups & Smart Groups

Last Update: 12/21/2017



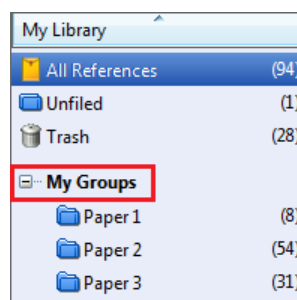
Objective: This guide will show you how to create groups within your EndNote Library.

About: Groups can help you organize your citations into categories. The Groups feature allows you to organize your references by different topics to help you better keep track of your references. With groups, your citations will appear in your main library, as well as within the group folder you assign them to. There are two types of groups; a regular **Group** and a **Smart Group**.

Creating a Regular Group

About: Groups allow you to select any reference and store within the group file. The references selected can be on any topic, any keyword, etc.

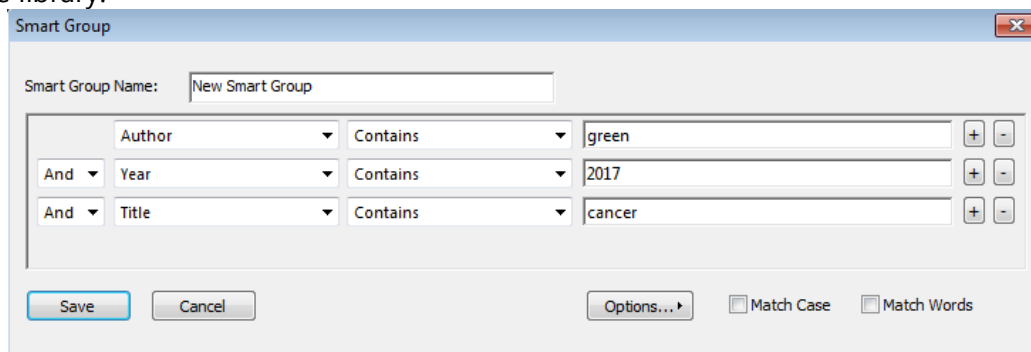
1. Right click on My Groups and select "Create Group."
2. Name the Group
3. You can assign citations to a group by the following methods:
 - a. Right click the citation and click **Add references to...**
 - b. **Drag and drop** the citation into the selected file.



Creating a Smart Group

About: Smart Groups are keyword specific groupings of citations. The Smart Group section will only display references which match the criteria you specified.

1. Right click on My Groups and select to create smart group.
2. In the new window that opens, select the fields you which to have the Smart Group use as a screening tool. For instance, if you wish to group all citations by a specific author – choose Author and then enter the name of the author you wish to group citations by.
 - a. A smart group will update groups as existing references are edited and new references are added to the library.



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