Using Groups and Group Sets to manage your library

You can use groups and groups sets to organise your references by categories of your choosing. Groups can be added, deleted and changed without affecting the All References area of your library. References can belong to multiple groups. All references belong to the All References group as well as whichever groups you assign them to. Group Sets act like a subject heading to place your groups under.

Create a Group:
From the Menu bar:
1. Click on Groups in the top menu bar
2. Select Create Group from the drop-down menu
3. Type a name for the group / group set in the box that opens in the Groups Pane on the left

From the Group Pane on the left:
1. Right click on My Groups
2. Select Create Group from the menu
3. Type a name for the group in the box that opens in the Groups Pane on the left

Create a Group Set:
From the Menu bar:
1. Click on Groups in the top menu bar
2. Select Create Group Set from the drop-down menu.
3. Type a name for the group / group set in the box that opens in the Groups Pane on the left

From the Group Pane on the left:
1. Right click on My Groups
2. Select Create Group Set from the menu.
3. Type a name for the group/group set in the box that opens in the Groups Pane on the left

Add a new Group to a Group Set:
1. Click on the name of the Group Set in the Groups Pane.
2. Follow the steps for creating a group. The new Group box will appear under the Group Set name.
Add existing groups to a group set:
Highlight/select a Group, then drag and drop it into the Group Set.

It is now also possible to combine groups through the Create From Groups option

Add references to a Group
1. Highlight/select the reference/s in the library window
2. Drag and drop selected references into the group

OR
1. Highlight/select the reference/s in the library window
2. Click on Add References To from the Groups drop-down menu
3. Select the name of the group from the list available

OR
1. Highlight/select the reference/s in the library window
2. Right-click on the reference and go to Add References to
3. Select the group from the sub-menu

Smart Groups/Create from Groups
Smart Groups are groups that have an inbuilt search query. EndNote automatically checks your new references against this query, and adds them to the smart group if they match.

1. Right click on My Groups.
2. Select Create Smart Group from the menu.
3. Type a name into the Smart Group Name box.

4. Use the search boxes to create the search query that EndNote uses to automatically populate this group.
5. Click Create.
6. You will see that this new group has appeared in the Groups pane, and EndNote has added all of your references that meet the search criteria. Click on the Smart Group Name to open the group and view the references added to