

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

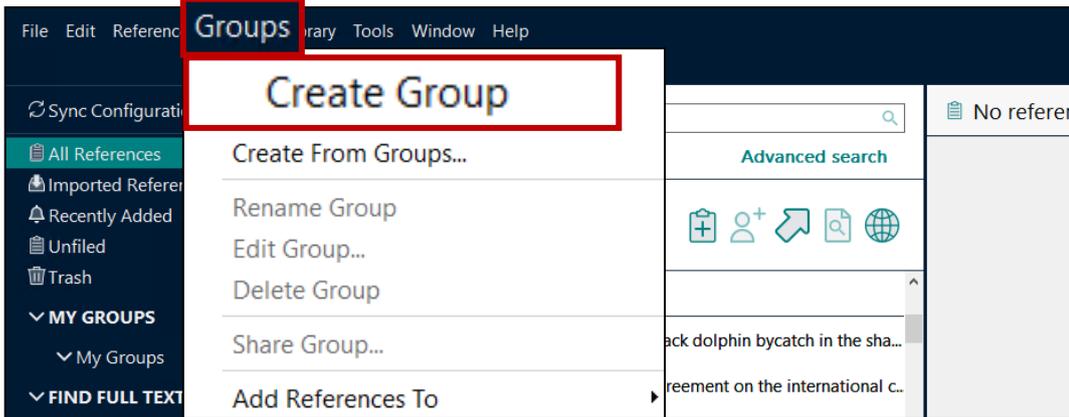
	Custom Groups	Smart Groups
Create the group	Manually add references to a group.	Specify criteria - references meeting the criteria will automatically be added to the group.
Updates	Done manually <ul style="list-style-type: none"> The group will not be updated unless you manually add or remove references. 	Updates automatically <ul style="list-style-type: none"> Dynamically update the group as new references are added to the library.
Applications (Some examples)	<ul style="list-style-type: none"> Keep a list of good readings Remind yourself that this list requires special attention. 	<ul style="list-style-type: none"> Group references matching certain keywords Group references by publication period.
Number of groups	Maximum 5,000 groups (custom and smart groups combined)	

2. Create a Custom Group

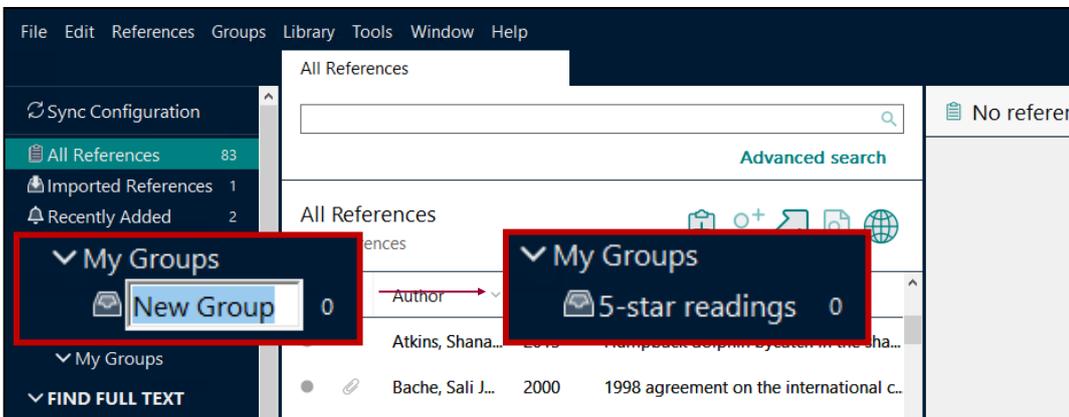


- (a) **Create a custom group** by the name “5-star readings”
- (b) **Add** 3 references to this custom group

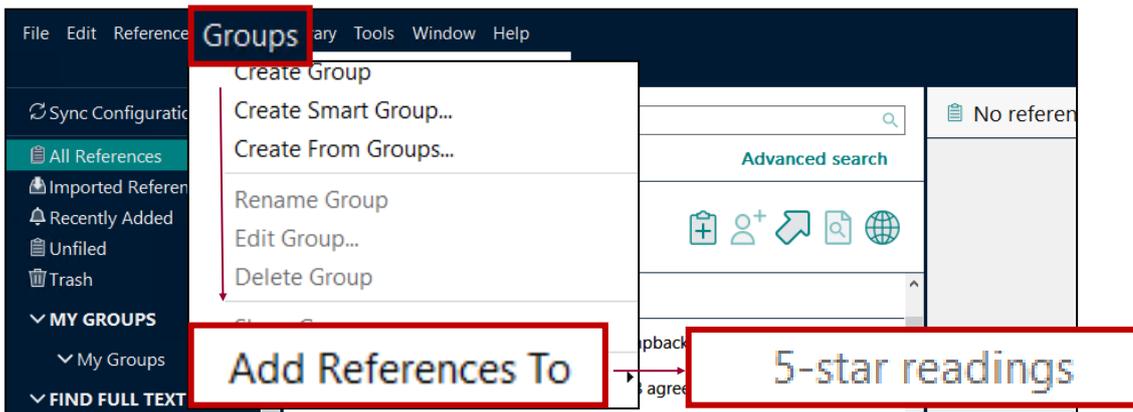
1 From top bar menu, select **Groups > Create Group**



2 Enter name of the group.



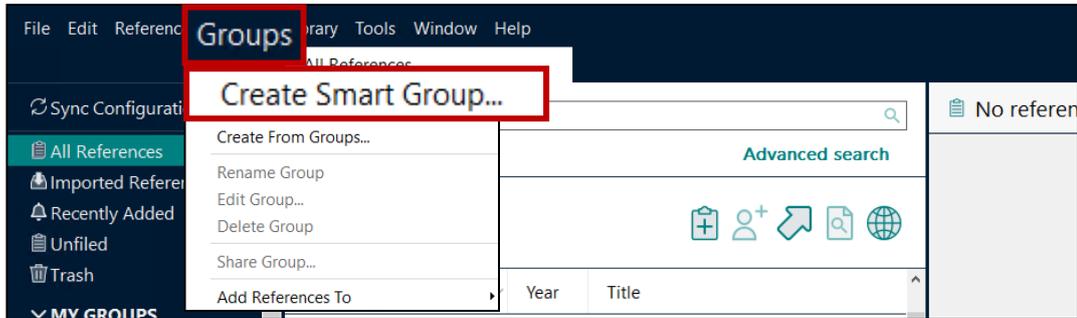
3 Find the references and then add them to this group by selecting **Groups > Add References To > A custom group** (Note: Or, you can **Drag and drop** it to the group)



3. Create a Smart Group

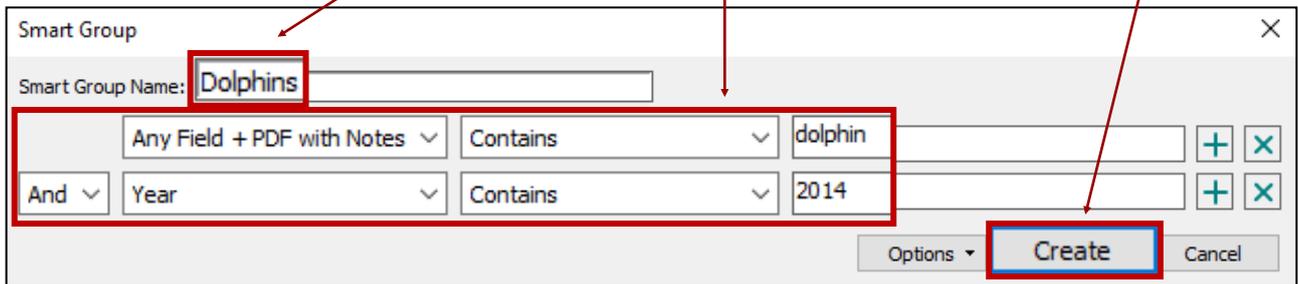
Create two smart groups:
 (a) Dolphins
 (b) Pandas

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

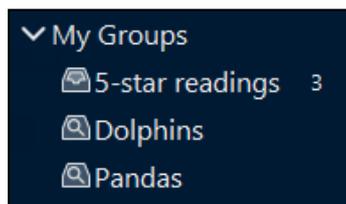
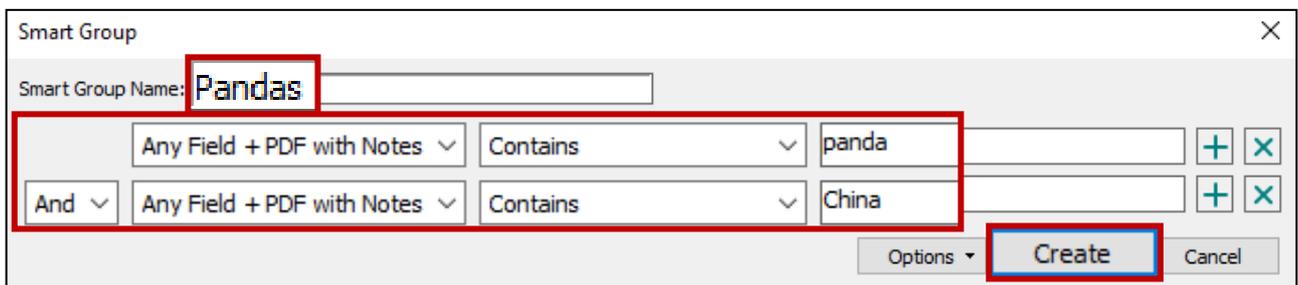


2 Create the smart group for **Dolphins**

(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.