EndNote X3 - Grouping References

Once you have entered a significant number of references into your library, you may find it helpful to group them by subject. This is a much better option than setting up separate libraries for each topic.

To set up a group, click on Groups on the top menu bar, and select Create Group from the drop-down menu. This will open a box in the Groups Pane on the left-hand side of the library window, where you can type a name for the group.

Creating a New Group

To add a reference to a group, highlight the reference in the library window. Click on Groups on the top menu bar, click on Add References To from the drop-down menu, and then select the name of the group.
Adding a Reference to a Group

More on groups

- You can also add references to groups by right-clicking on the reference and selecting the group, or you can drag-and-drop the reference onto the group name in the group pane.

- You can have up to 500 groups in your library.

- You can set up smart groups. These groups have an inbuilt search query. When a new reference is added to your library, it is checked against the search query. If it matches, it is automatically added to the smart group.

- For more sophisticated grouping, you can organise your groups into group sets.