

Part 4 : Organising Your References

Using groups

Groups make it easy for you to organise your references without having to make multiple EndNote libraries.

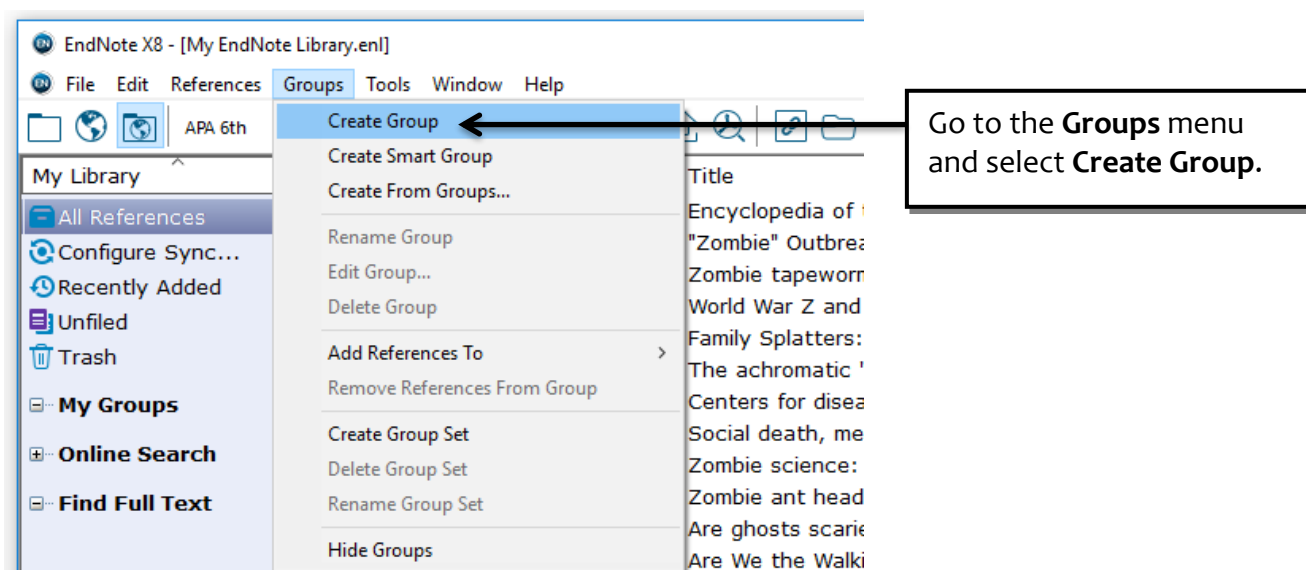
There are several types of groups to help you organise your references in EndNote. Some of these groups are automatically generated and some are ones that you can create yourself. You can further organise your references by storing multiple groups in custom Group Sets.

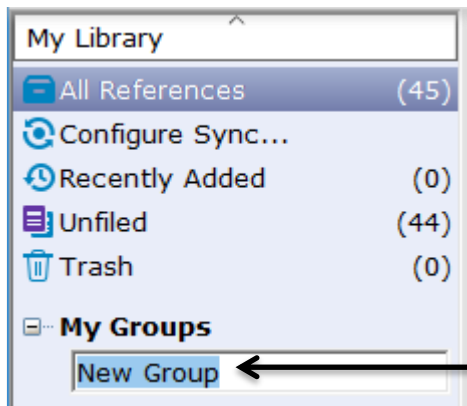
Some things to note about using groups:

- You can create a maximum of 500 Custom Groups and Smart Groups (combined) in a single library.
- A single reference will never appear more than once in a particular group. However, you can add that reference to any number of groups.
- Removing a reference from a *Custom Group* does not delete it from the *library*. It removes the reference from the group subset, but the reference still exists in the library.
- Deleting a reference from the *All References group* also deletes it from all *groups* in that library. The deleted reference will be moved to the Trash group.
- If you delete a reference from Trash it no longer exists.

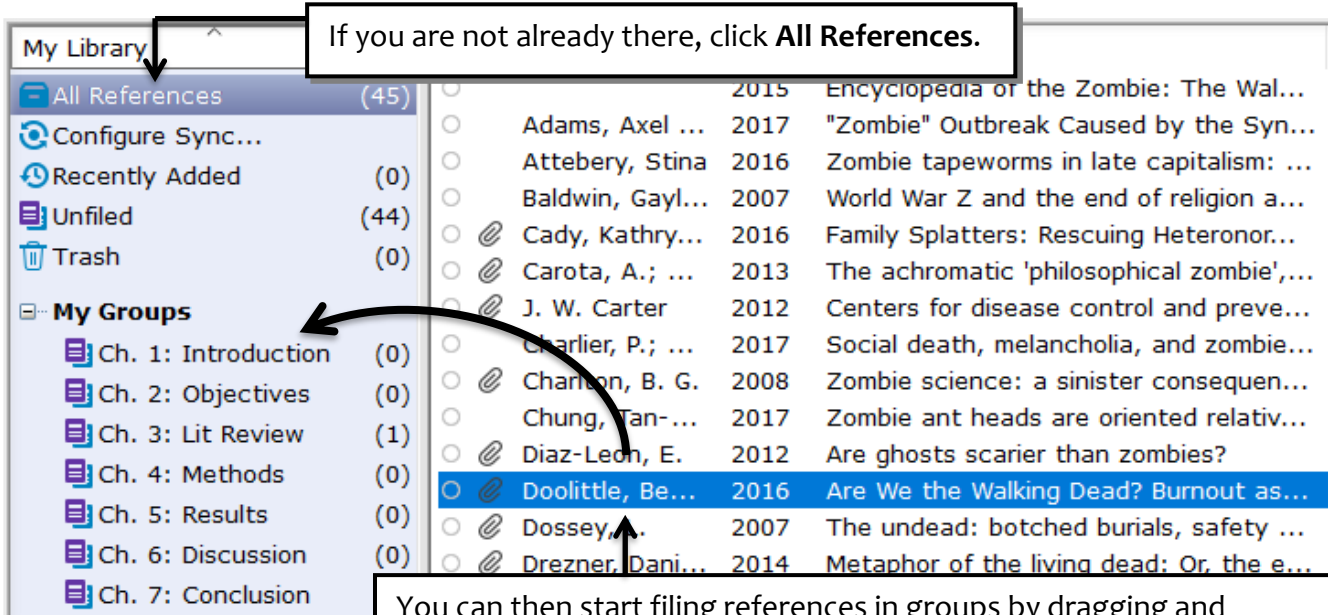
Creating a custom group

You can create custom groups as you wish, in order to organise your references. You might wish to make groups for each chapter of your thesis, or for different papers you are working on.



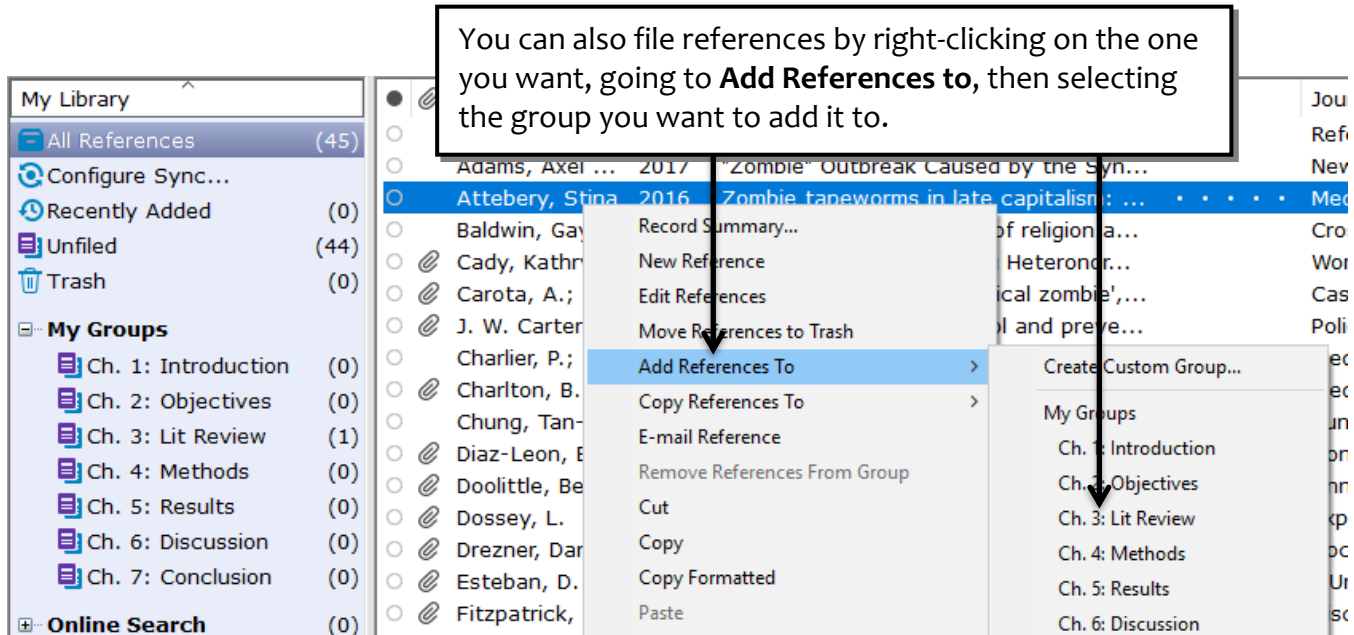


A box will appear in the *Groups* pane.
Type in a descriptive name for the group you have just made, then click the <Enter> key.



If you are not already there, click **All References**.

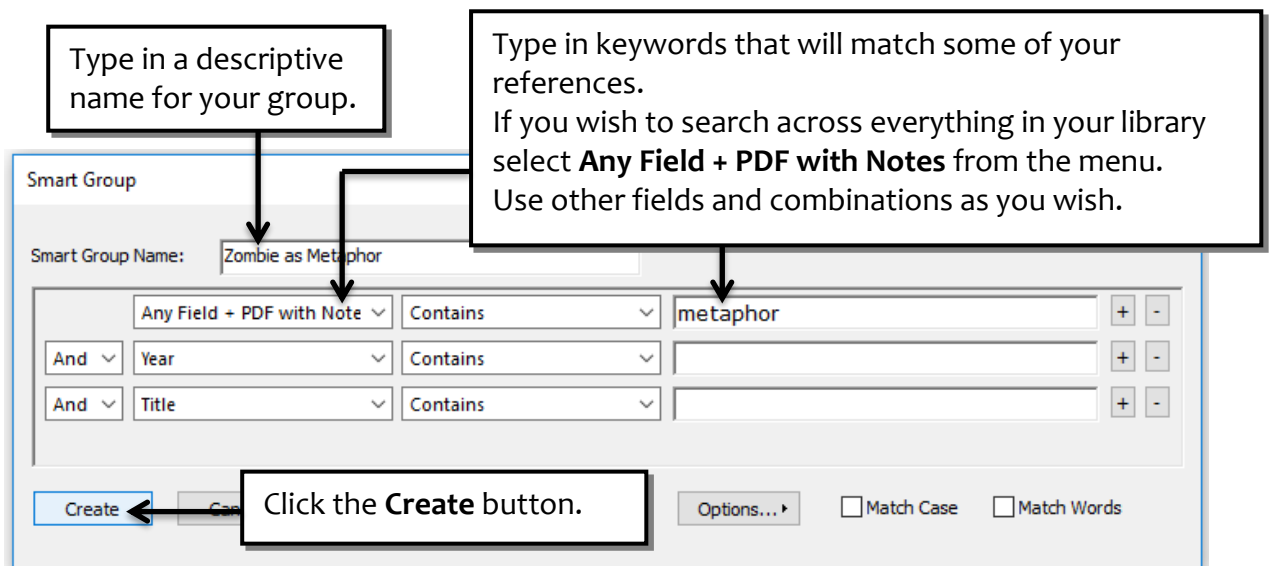
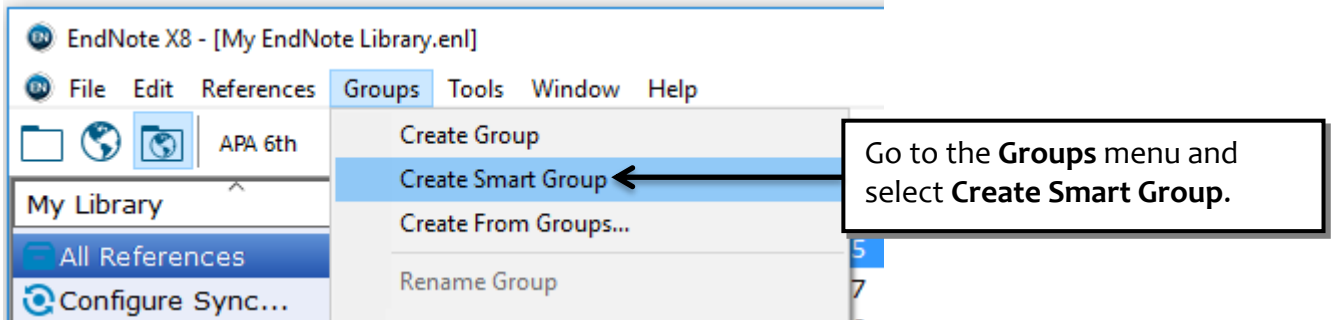
You can then start filing references in groups by dragging and dropping them from the Reference List pane onto the group name.



You can also file references by right-clicking on the one you want, going to **Add References to**, then selecting the group you want to add it to.

Creating a smart group

Smart groups are built with search strategies, for example, works by a particular author or matching some subject keywords. Smart groups are dynamically updated as you add references to and edit references in the library.

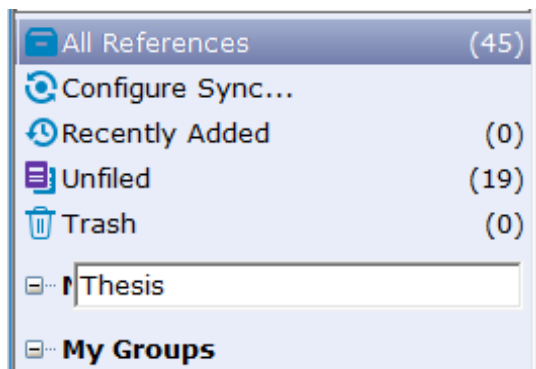
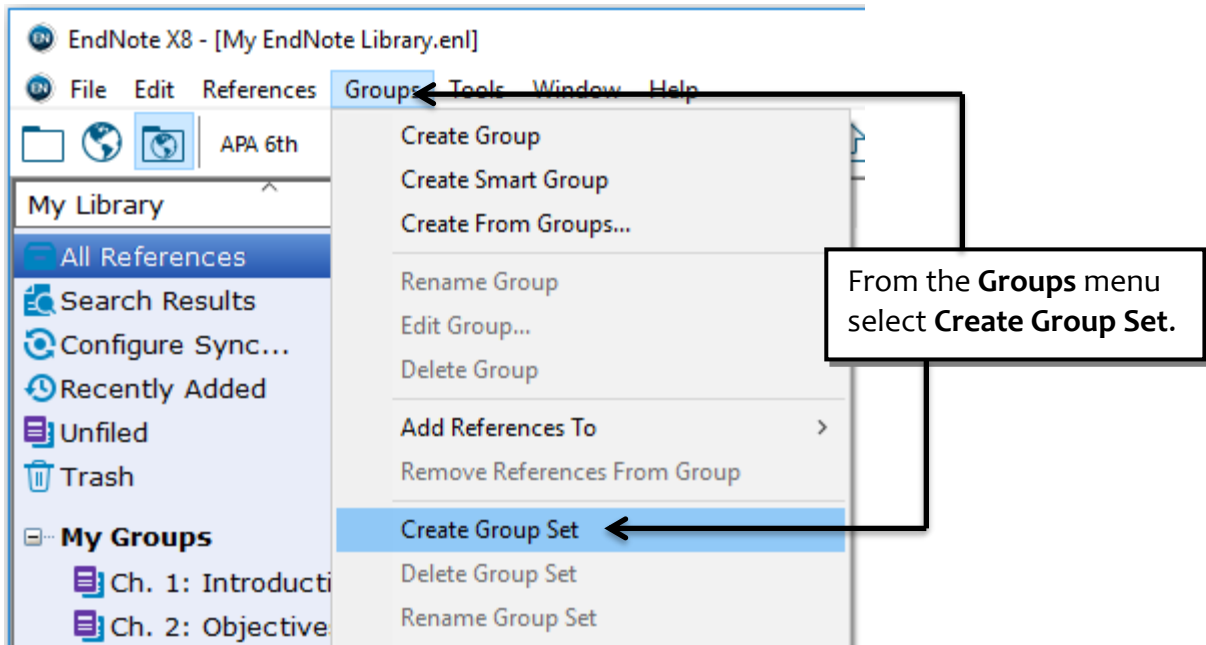


My Groups	
Ch. 1: Introduction	(6)
Ch. 2: Objectives	(8)
Ch. 3: Lit Review	(21)
Ch. 4: Methods	(6)
Ch. 5: Results	(9)
Ch. 6: Discussion	(12)
Ch. 7: Conclusion	(5)
Zombie as Metaphor	(9)

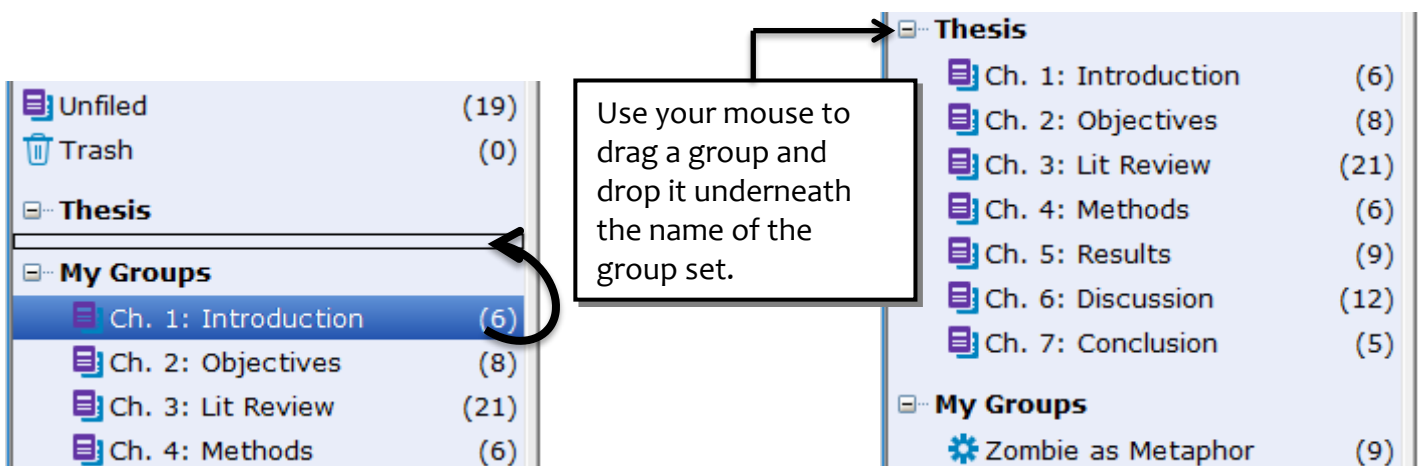
Any references you have in your EndNote library which match the search criteria for your Smart Group will automatically be filed in the Group, as will any future references you add.

Creating a group set

If you make custom groups and/or smart groups to help you organise your references, before long you might end up with a large number of groups. To help you organise your groups you can create *group sets*.



Give your group set a name.



Duplicate records

As you add more and more references to your EndNote Library, from a variety of databases, it is likely that you will get duplicate records for the same item.

To avoid anomalies in your citations and references once you start adding them to your Word document, you need to ensure that you only have one record for each item. (This is another reason to only use one EndNote Library).

- Go to the **References** menu and click **Find Duplicates**.
- Any duplicate records will be displayed, with the areas of differing text highlighted. This will help you decide which record you wish to keep.
- Generally, you should keep the older record, as this is likely to be the one you have edited, added attachments to, and most importantly, already used for citations in your document.

You can tell which is the older record by looking at its record number (preceded by #).

Comparing 1 and 2 of 2 duplicates.
Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

Keep This Record Skip Cancel

Keep This Record

Morgan, 2015 #17
Ref Type: Journal Article

Date
4//

Type of Article

Short Title

Alternate Journal

ISSN
1474-4422

DOI

Morgan, 2015 #48
Ref Type: Journal Article

Date
2015/04/01/

Type of Article

Short Title

Alternate Journal

ISSN
1474-4422

DOI
10.1016/S1474-4422(14)70320-5

Original Publication

Added to Library: 17/07/2017 Last Updated: 17/07/2017

If necessary, you can copy & paste information from your 'reject' record into the one you want to keep – for example, the more recent record may have a DOI.

When you have finished any editing, click the **Keep This Record** button for the one you want to keep.
The other record(s) will be sent to Trash.

Note that the criteria used by EndNote to identify duplicate records won't always catch all of them. You will still need to look through your Library and delete any records you don't want. It is probably easiest to do this if you sort your Library by 'Author' or 'Title'. Click on the column header to do this.