EndNote Desktop: Create a Smart Group

A Smart Group gathers references from the EndNote Desktop library by matching search criteria or keywords in the record. A Smart Group is identifiable in the left pane by a cog wheel icon.

To create a Smart Group, click on the “Groups” menu, and then on “Create Smart Group.” A dialog window will open.

Enter a name in the “New Smart Group” box. Enter your search criteria (e.g., any field, keywords) and click the “Create” button.

Whenever new references are added to the EndNote library that have matching criteria, they are automatically added to the Smart Group.