Intro to Endnote: Creating Groups & Collaborating

This information can be found in video format at

Groups are how you organize your references. Creating groups makes it really easy to create a bibliography or keep track of references if you’re using endnote for several different classes/projects.

You can create a new group when you import a citation as an RIS file by selecting new group. When you hit Import, you will be asked to name your new group.

You can also create a new group by hovering over the Organize link and then selecting Manage my Groups
Intro to Endnote: Creating Groups & Collaborating
Here you can create groups and eventually add collaborators! Click **New Group** to get started.

You'll see a pop-up where you will name this group.

Hey look, there it is!

If you are working on this project with someone else, you'll want to click **Manage Sharing**

Once you’re on the sharing page, you’ll want to select **Start sharing this group**
Add E-mail Addresses to 'History 201 Lit Review'

Enter e-mail addresses. Use the Enter or Return key to separate addresses.

groupmember1@wclive.westminster.edu,
groupmember2@wclive.westminster.edu,
professor@westminster.edu

- OR -

Select a text file with e-mail addresses separated by commas.

Browse… No file selected.

☐ Read only ☐ Read & Write

Note: Attachments are not shared, regardless of access privileges.

Apply

Close window.

You’ll be taken to a pop-up where you can enter the names of everyone that will need access to this page. Be sure to select Read & Write access, or else your collaborators won’t be able to add citations to the group.

Manage Sharing for 'History 201 Lit Review'

1 E-mail Address

<table>
<thead>
<tr>
<th>E-mail Address</th>
<th>Read only</th>
<th>Read &amp; Write</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:kohlerjp@westminster.edu">kohlerjp@westminster.edu</a></td>
<td>☐</td>
<td>☑</td>
</tr>
</tbody>
</table>

Note: Attachments are not shared, regardless of access privileges.

Add More

Delete All

Once you add your collaborators, you should see them each under the Manage Sharing screen.
Intro to Endnote: Creating Groups & Collaborating

To add a citation to a group (unless you added it when you imported it), go to the home screen and select the citation.

Then use the “Add to group...” drop down menu to put it where you’d like it!
Your groups and groups that have been shared with you will show up on the sidebar. You can easily see how many citations are in that group, the number of citations are within the parentheses next to the group name.

To delete a group, you can go to Manage My Groups and select “Delete” next to the group name.