Setting up EndNote sync for collaboration

Windows Sync Icon		Mac Sync Icon	

Sync to a new EndNote basic account (Windows)

EndNote X9 gives you the ability to sync your Endnote library across two or more computers via EndNote basic http://www.myendnoteweb.com/. Once you have a group in EndNote basic, you can share it with fellow researchers.

- You can sync one library with up to 50,000 references, 5,000 groups and unlimited attachments.
- **You can only link one library to an EndNote basic account.**

1. Open your library in EndNote X9.

2. Click the **Sync icon on the toolbar**.

3. Enter your existing EndNote basic login details and press **OK**, or click **Sign Up**.

4. Enter your email address twice - you do not have to use your RMIT email account. This email address will become your login.

5. Click **Submit**.

6. Fill in all of the required fields that have a red *

7. Click **I agree**.

8. Your registration is complete. Click **Done**.

9. The Sync system will authorise your new account and add the details to EndNote X9. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Sync screen if required.

10. Click **OK** again to close the **Preferences** screen.

11. A new **Sync Status group** is listed in the **Groups** pane.

12. Click the **Sync** symbol to carry out the first sync exchange (Windows) or (Mac)

13. If you have references in the library, you will be asked to make a compressed backup. Follow the instructions to do so.

14. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.

15. EndNote X9 and EndNote basic will now sync automatically. Please remember to regularly back up your Word documents.

16. Want to check how much space you have left on EndNote basic? Click **Sync Status** in EndNote X9.

Sync to an existing EndNote basic account

1. Open your library in EndNote X9.

2. Click the **Sync** button in the toolbar.

3. Type your existing EndNote basic login and password into the **EndNote Account Credentials** fields.

4. Click **OK**.

5. You may be asked to register the computer for your EndNote basic account. Fill in all of the required fields that have a red *

6. Click I agree.

7. Your registration is complete. Click **Done**.

8. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the **Preferences** > **Sync** screen if required.
   (**Edit** > **Preferences** > **Sync for Windows or EndNote** > **Preferences** > **Sync for Mac**)

9. Click OK to save the settings.

10. Want to check how much space you have left on EndNote Web? Click **Sync Status**.


Sync an existing account to a second computer (Mac or Windows)

1. These instructions assume you have already created and synced a library on the first machine. Make a note of the name of the library.

2. Open EndNote X9 on the second computer (Mac or Windows).

3. Click **File** > **New**.

4. Create a new library with the same name as the original synced library.

5. Click the **Sync** button in the toolbar.

6. Type your existing EndNote basic login and password into the **EndNote Account Credentials** fields.

7. Click **OK**.

8. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the **Preferences** > **Sync** screen below if required.
   (**Edit** > **Preferences** > **Sync for Windows or EndNote** > **Preferences** > **Sync for Mac**)

9. Click **OK** to close the **Preferences** screen.

10. Click the **Sync** symbol to carry out the first sync exchange.

11. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.

12. The synced library's references, attachments and groups will be added to the library on your second machine.

13. Your computers will now sync to EndNote basic and update automatically. Please remember to regularly back up your Word documents.
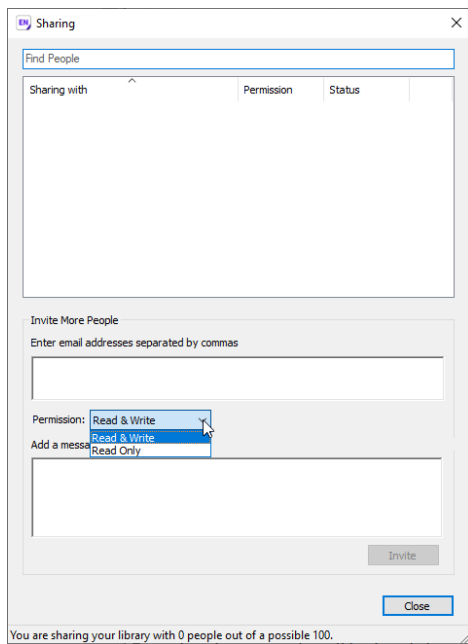
Sharing a library via EndNote X9

It's very easy to share an EndNote library with up to 100 colleagues. The full record, including attached full text or images, will be shared.

1. Sync your library.

2. Click the **Share Library** icon next to the **Sync** icon on your toolbar.
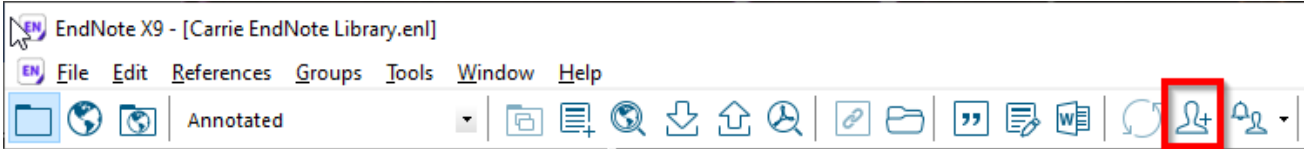
3. A **Sharing** screen will appear. Enter each email address, separated by commas.

4. Click **Invite**.

5. Your colleagues will receive an email asking them to accept your invitation. They will only be able to do so if they are using X7.2 or newer (e.g. X9). Older versions of EndNote are not capable of sharing libraries.

6. Once they click **Accept** they will be taken to a web browser. They will need to log in to their EndNote basic account and click another **Accept** button.

Managing Shared Groups

When you sync an existing EndNote basic account with EndNote X9, you may duplicate group names or references or introduce new groups to the X9 library.

Any new EndNote basic group is listed under **Unfiled Groups**. It is recommended moving these groups into your **My Groups** section.
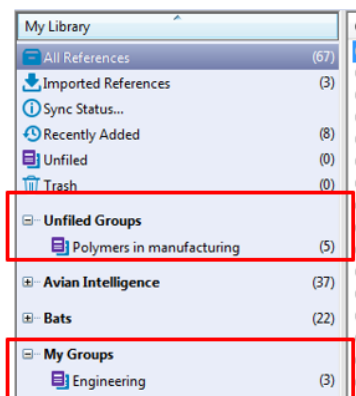
To clear these unfiled groups, I would:

1. Click and drag the new **Unfiled Group** "*Polymers in manufacturing*" into the **My Groups** section. The previously unfiled **Polymers in manufacturing** group has now become part of **My Groups**.

2. Within **My Groups** > **Engineering**, click one reference and then **Control-A** (Windows) or **Command-A** (Mac) to select them all.

3. **Edit** > **Copy** the references. (**Edit** > **Cut** will delete the references. Not recommended.)

4. Click the **My Groups** > **Polymers in manufacturing** group to select it.

5. **Edit** > **Paste** the references. This copies all of my **Engineering** desktop group references to the **Polymers in manufacturing** shared EndNote online group.

6. Now I can right-click the **My Groups** > **Engineering** group and delete it.

7. Click **References** > **Find Duplicates** to identify and remove any doubled references.

8. Click the **Sync** symbol to update the synced library. You should also refresh your EndNote basic library to reflect the new changes.

Delete group -- references already copied to **Polymers in manufacturing** group
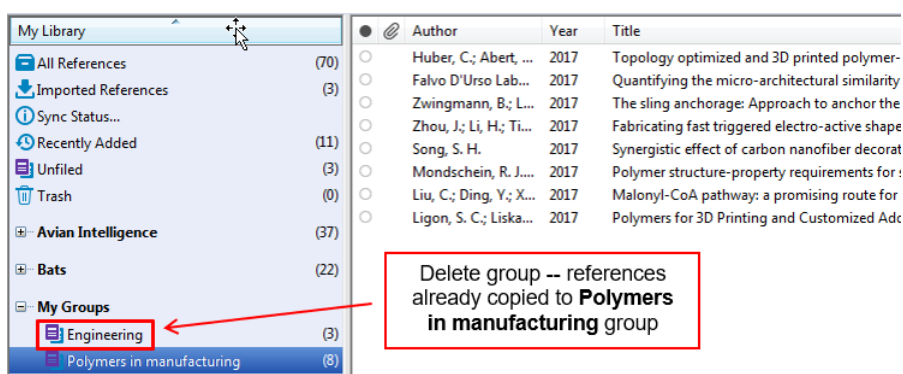
9. Please remember to regularly back up your Word document, *and also* your Endnote Library by using the File > Compressed Library (.enlx) option.