DESKTOP ENDNOTE
GUIDE 9

Synchronising Desktop EndNote and EndNote Online
For Version X8

This guide will take you through the process of linking an EndNote library with an EndNote Online account, and synchronising the bibliographic data stored on the two.

If you do not have an EndNote Online account, first refer to the Library’s Guide on Getting Started with EndNote Online to set up an account.

Background information about EndNote is available on the Library website at:
www.reading.ac.uk/library/endnote

WHAT IS SYNCHRONISING (“SYNC”)?

The Sync function compares the contents of a Desktop EndNote library to your EndNote Online account, with any changes you have made to the references and groups on one automatically changed in the other to produce and maintain matching datasets.

Why Sync?

By synchronising a Desktop EndNote library with your EndNote Online account, you ensure:

- individual references do not get lost between your accounts
- time is saved by not exporting/importing reference files manually between the two
- you can work with all your references online, even if away from your own computer
- EndNote Online serves as a current backup for your desktop EndNote library

LINKING AN ENDNOTE LIBRARY TO YOUR ENDNOTE ONLINE ACCOUNT

In order to be able to Sync accounts, you first need to link them through EndNote.

1. Open EndNote and open the library you want to be synchronised with your EndNote Online account (only one library can be synchronised with EndNote Online at any one time).
2. From the Edit menu select Preferences...
3. You should now see the EndNote Preferences box. In the left-hand column, select Sync.
4. In the **EndNote Account Credentials** section, enter your EndNote Online login details into the **E-mail address** and **Password** boxes. Click **Apply** to store these details.

5. Click the **Enable Sync** button at the top of the box.

6. An **EndNote Login** box appears, with your EndNote Online access details already entered.

7. Click the **OK** button in the **EndNote Login Box**.

8. At this stage, you may be prompted to enter **further personal details** to **register** your account. If so, enter the personal details requested and click **I agree**.

9. Once done, your account login details will be checked and the direct link between desktop EndNote and your EndNote Online account authorized.
SYNCHRONISING A LIBRARY AND ENDNOTE ONLINE MANUALLY

1. From the Tools menu click Sync, or click the icon.

2. If this is the first time you have used the Sync function for the library you have open you will prompted to create a compressed library backup. If so, click Yes and Save the file.

3. EndNote will now synchronise the references stored in your library and EndNote Online account, updating the two databases accordingly. This may take some time, depending on the number of your references and attached files, so be patient.

4. To check for any duplicate records created in EndNote by syncing, from the References menu click Find Duplicates. The Find Duplicates box will open for any duplicates found, giving you the choice to Skip the references or to use the Keep This Record button to only keep one.

5. Occasionally the synchronisation process may be unable to match records in EndNote and EndNote Online. Where this is the case, a Sync Conflict Group will be created in EndNote. Select the Sync Conflict group to open the Resolve Sync Conflicts box and remove the conflicting reference.

SYNCHRONISING AUTOMATICALLY

Rather than synchronising manually, you can opt to have your chosen library automatically synchronised by desktop EndNote with your EndNote Online account every 15 minutes.

1. From the Edit menu select Preferences…

2. You should now see the EndNote Preferences box. In the left-hand column, select Sync.

3. In the Sync this EndNote Library section, tick the Sync Automatically box and then click Apply.

4. As well as synchronising automatically, when closing your EndNote library you will now also be prompted to sync any changes that have yet to be processed. Click Yes to sync any changes before exiting, or No to delay them until you next open the library.
CHECKING SYNCHRONISATION STATUS

1. With your EndNote library displayed, select Sync Status from the left-hand column.

![Sync Status](image)

2. A Sync Status box will open, showing details of the references stored in your EndNote library and EndNote Online account, and whether there are changes to be synchronised.

![Sync Status Details](image)

3. Click the Close button to exit Sync Status.

FURTHER INFORMATION AND HELP

- Consult the EndNote pages on the Library website at [https://www.reading.ac.uk/library/endnote](https://www.reading.ac.uk/library/endnote)
- Contact your Liaison Librarian – find yours at [https://www.reading.ac.uk/library/liaison](https://www.reading.ac.uk/library/liaison)
- Use the Help button within EndNote
- Visit the EndNote website at [www.endnote.com/support](http://www.endnote.com/support) for technical support, updates to filters and styles, FAQs and tip sheets