Desktop EndNote guide 9
Synchronising Desktop EndNote and EndNote Web
For EndNote version X7
This guide will take you through the process of linking an EndNote library with an EndNote Web account, and synchronising the bibliographic data stored on the two.

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

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

**What is synchronising (“Sync”)?**

The Sync function compares the contents of a Desktop EndNote library to your EndNote Web 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 Web 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 Web serves as a current backup for your desktop EndNote library

**Linking an EndNote library to your EndNote Web 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 Web account (only one library can be synchronised with EndNote Web at any one time). For instructions on how to open an EndNote library see *Desktop EndNote Guide 1*.
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 Web 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 Web 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 Web account authorized.

**Synchronising a library and EndNote Web manually**

1. Open **EndNote** and **open** the **library** you want to synchronise with your EndNote Web account.
2. From the **Tools** menu click **Sync**, or click the ✉ icon.
3. 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.

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

5. 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.

6. Occasionally the synchronisation process may be unable to match records in EndNote and EndNote Web. 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 a library and EndNote Web automatically**

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

1. Open **EndNote** and **open** the **library** you want to synchronise with your EndNote Web account.

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

5. 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 current synchronisation status

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

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

3. Click the **Close** button to exit Sync Status.
Further information and help

- Consult the EndNote information on the Library website at: www.reading.ac.uk/library/endnote
- Use the Help button within EndNote
- Visit the EndNote website - provides technical support; updates to filter, connection and output style files; FAQs and tip sheets. www.endnote.com/support

Guide written by:

Ross Connell
The Library
University of Reading
Whiteknights
PO Box 223
Reading, RG6 6AE

r.connell@reading.ac.uk
Tel 0118 378 7142

www.reading.ac.uk/library