

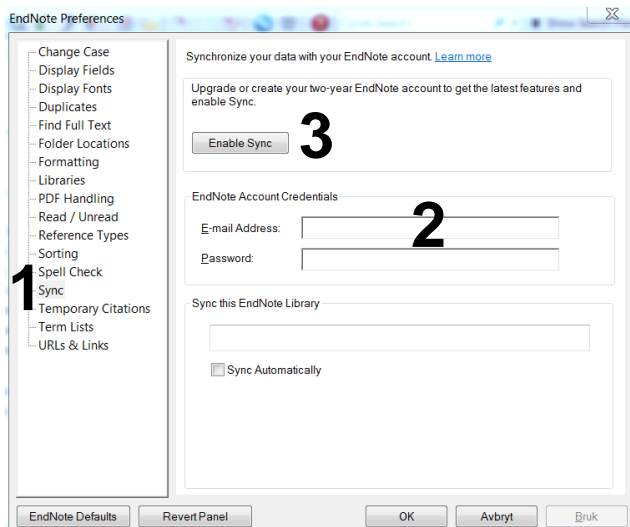
How to share and use a joint EndNote-library in research cooperation

! Make a back up of your EndNote library before doing major changes or imports to EndNote!

"Library sharing" is only available in EndNote X7.2 and later versions. You can share a library with maximum 14 (X7.2) or 100 (X8) users. All users involved must have X7.2 or later versions and an active EndNote Online account. **You can only sync (and share) one EndNote library. If you using the sync option for your personal library, you can't sync and share another joint library.**

Creating a shared library

You start by creating a new library for sharing. You can use your personal library, but risk that others may do unwanted changes. If this is a problem, we recommend that you make a new library that can be shared.

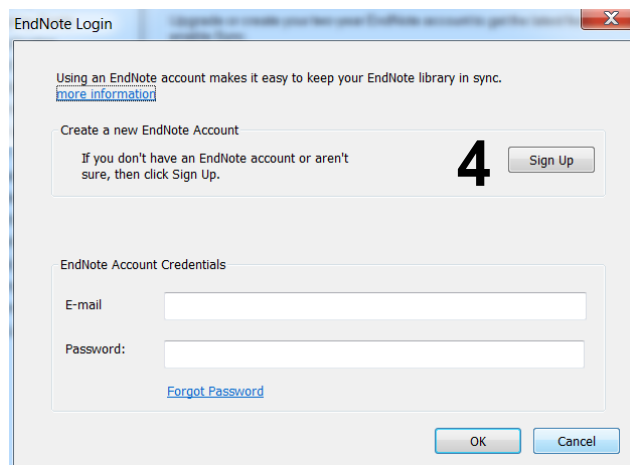


Open the library to be used for sharing.

Edit → Preferences → Sync (1)

If you have an active EndNote Online account, log on **(2)** and click **"Enable Sync" (3)**. Finish with **"OK"**.

If you don't have an active EndNote Online account, click **"Enable Sync" (3)**.



Then choose **"Sign Up" (4)**.

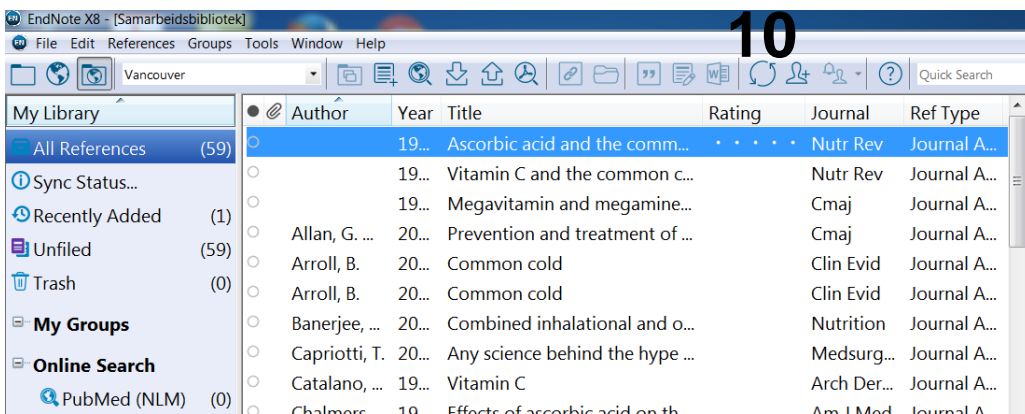
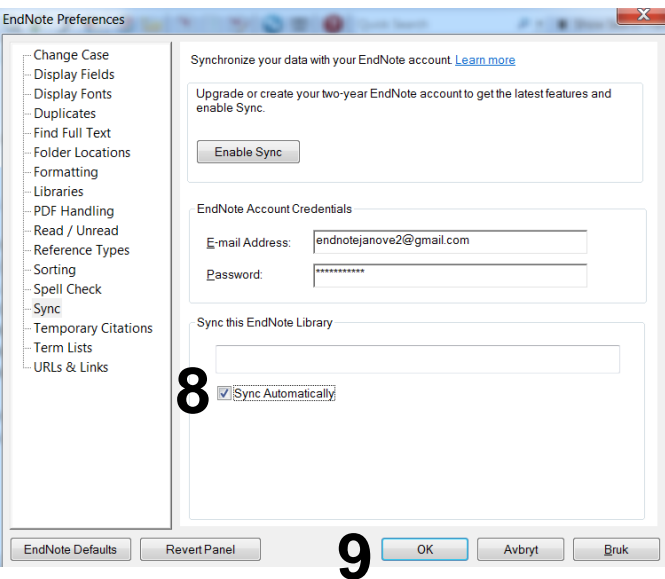
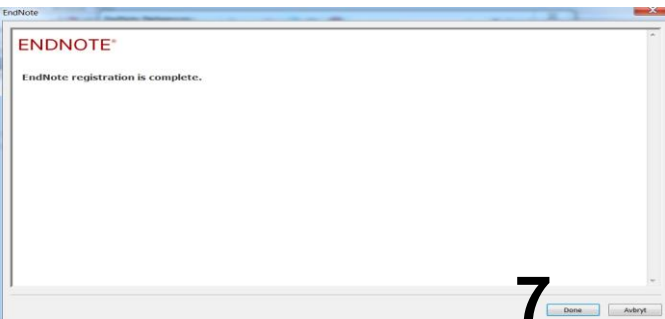
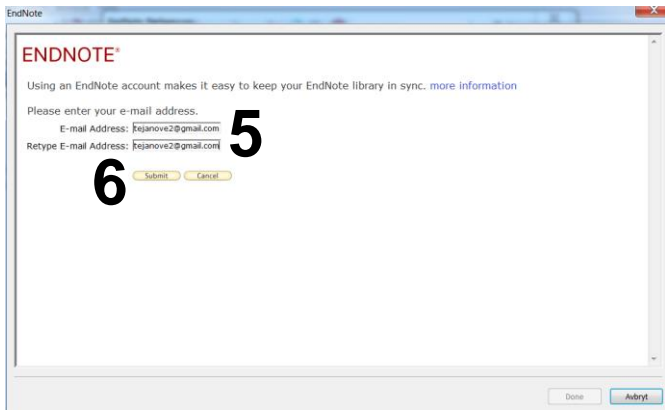
Insert the email you want to use for the EndNote Online account **(5)**. Finish with **"Submit" (6)**.

In the following window add the required information. Finish by accepting the terms.

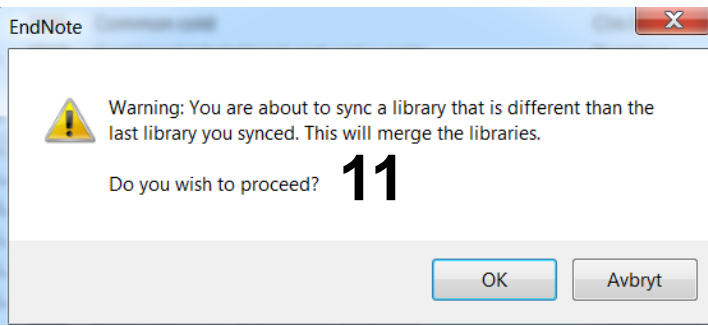
Click **"Done" (7)** to end the registration.

Click **"Sync Automatically" (8)** and **"OK" (9)**.

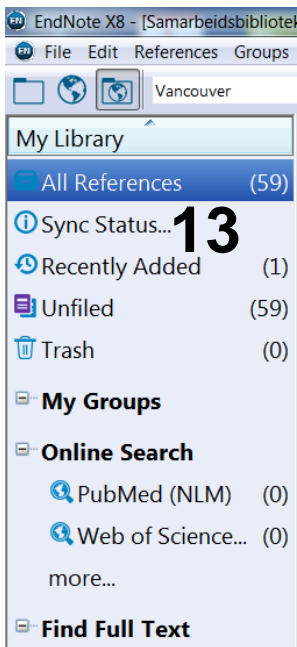
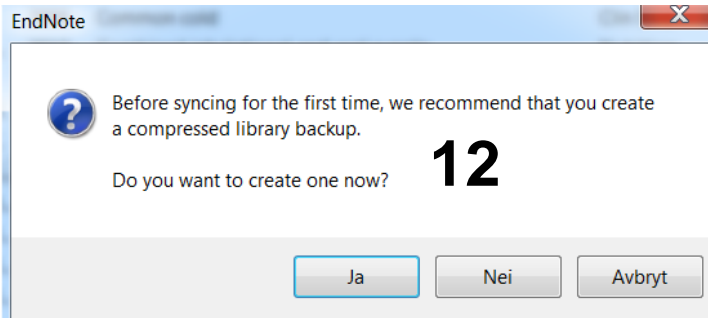
Click the **"Sync" button (10)** to initiate the first synchronization.



Click OK if you get this message (11).



You are now being offered the option of making a back up of the shared library. Click "yes" if you want to do this (12).



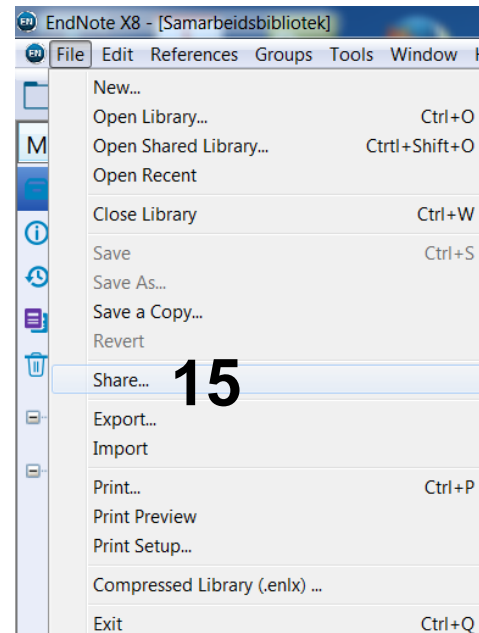
Click "Sync Status" (13) in the left panel to get information about the shared library and the synchronization (14).



Sharing the joint library with other users

Choose

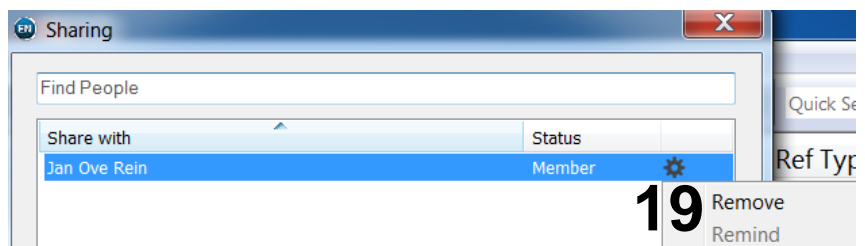
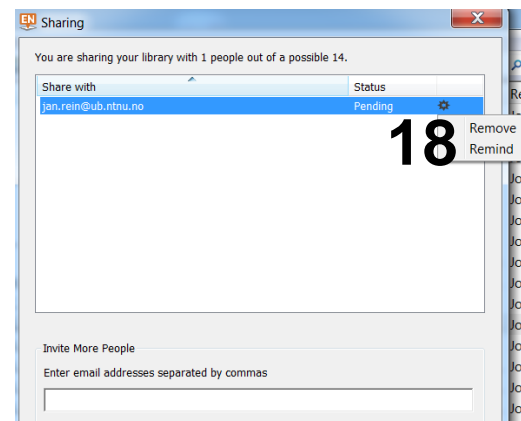
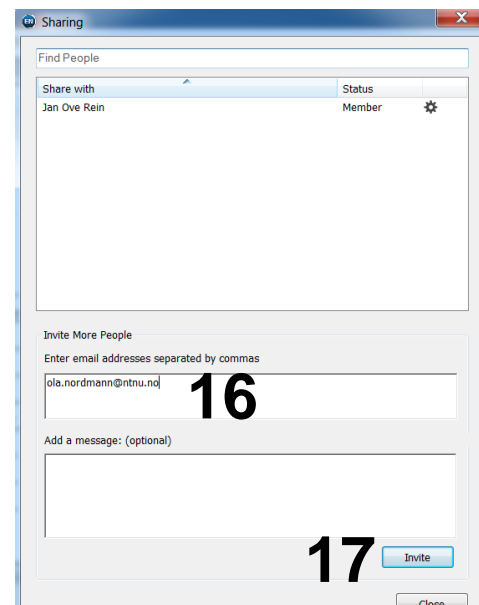
File → Share (15)



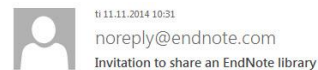
Insert the email address to the users you want to share the library with (16). You can add several email addresses by separating the with a comma. Finish with "Invite" (17).

You can check the status of invited users and send a reminder if necessary (18).

Users that have accepted your invitation will get a "Member" status. You can remove invited users later (19).



Opening a shared library



Til: Jan Ove Rein

ⓘ Hvis det er problemer med hvordan denne meldingen vises, kan du klikke her for å vise den i en nettleier.

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Jan Rein (endenotejanove2@gmail.com) would like to share an EndNote library with you. By accepting this invitation, you will be able to access all of the references, PDFs, file attachments, and notes in this shared library from your own EndNote X7 desktop application. To accept this invitation and access Jan Rein's library, you **must** have the latest version of EndNote X7 (**EndNote X7.2**) installed.



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Don't have EndNote X7 yet? [Get it now](#) to access shared libraries.

[Learn more](#) about sharing your research with EndNote.

If you do not wish to accept this invitation, please notify Jan Rein directly.

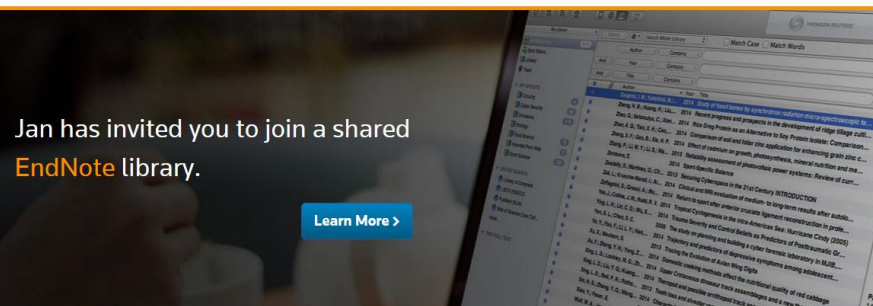
Invited users will receive an email from EndNote **(20)**. Click "**Accept**" **(21)** and a registration page will open **(22)**. Log on to EndNote Online or create an account if you do not have an EndNote Online user.

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Support

Jan has invited you to join a shared
EndNote library.

[Learn More >](#)



To accept this invitation, sign in using the same credentials you use when accessing EndNote online or syncing your desktop library, or create a new account. To access this shared library, you must have EndNote X7.2 installed.

Sign In

Email

Password

Accept

[Forgot your EndNote password?](#)

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Create an Account ?

First Name *

Last Name *

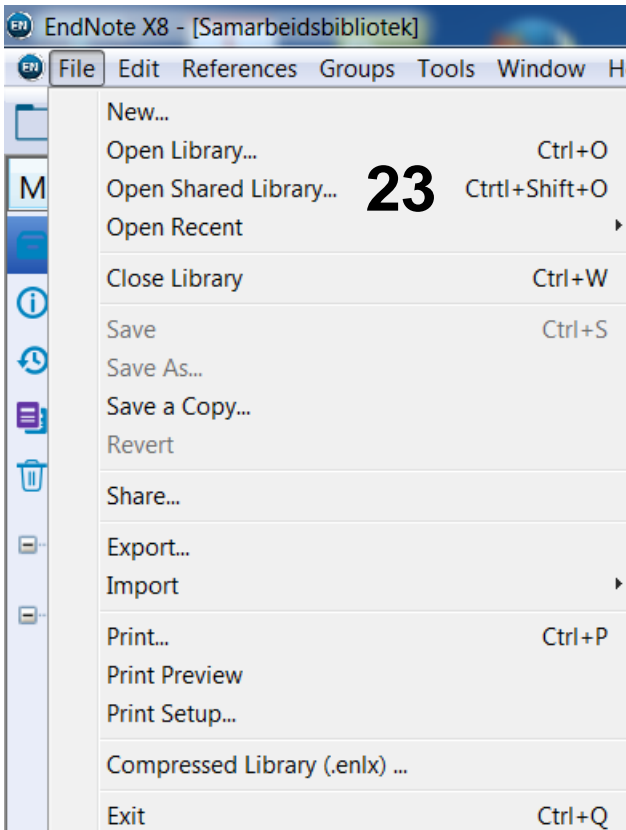
Email *

OR

When you are logged on you will receive a receipt telling you that you are allowed to use the shared library. You will also get some information about how to use shared libraries. You can now go to EndNote and open the shared library.

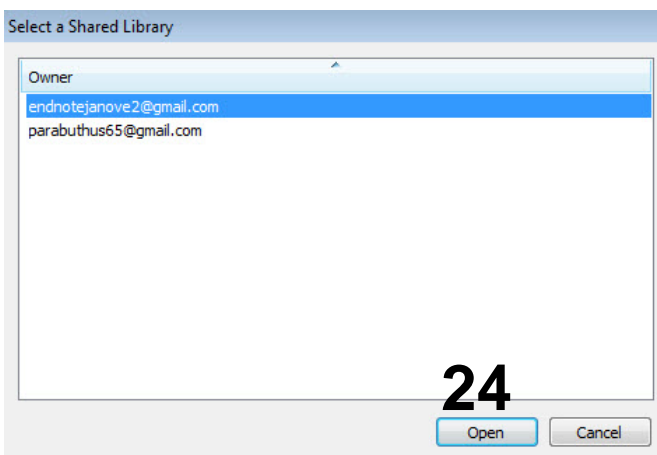
Close other libraries in EndNote.

File → Open Shared Library (23)



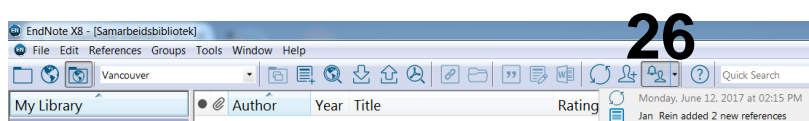
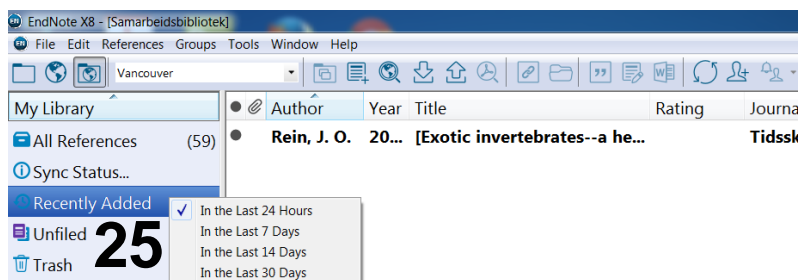
Choose the shared library you want to open (you choose the email of the user who has shared the library with your, as the library name is not available here) and click "**Open**" (24).

The shared library will open in EndNote.



EndNote X8 provides the option of listing recently added references in the library (25). You can right-click to adjust the time period for this function.

X8 also provide an activity log showing the activity of all users of the shared library (26).



Cooperating with a shared library and manuscript

The screenshot displays the EndNote X8 interface. The main window shows the 'Sync Status' for a shared library named 'Samarbeidsbibliotek'. The 'Sync Details' section indicates the last sync run on Monday, June 12, 2017, at 14:15:16 PM +0200, with all changes sent and no errors. The 'Local Sync Library' section shows 61 references, 0 groups, 1 group set, and 0 attachments. The 'Online Sync Library' section shows the username 'endnotejanove2@gmail.com', serial number '3091898173 (Premium until June 12, 2019)', 61 references, 0 groups, 1 group set, and 0 attachments. The 'Sync Limits' section shows a maximum of 1,000,000 references, 5,000 groups, 5,000 group sets, and unlimited attachment storage.

A confirmation dialog box is overlaid on the right side of the screen, asking: "You have made changes that have not been synced. Do you want to sync them now? If you do not sync the changes now, they will be sent the next time you open this library." The dialog has two buttons: "Ja" (Yes) and "Nei" (No). The number 26 is overlaid on the dialog box.

The number 25 is overlaid on the 'Sync Status' window, and the number 26 is overlaid on the confirmation dialog box.

When you open a shared library, it will automatically be synchronized with EndNote Online. Changes made by the participants of the shared library will be included. Click on "**Sync Status**" to check the status of the shared library (25). When you close the library, EndNote will ask you if it should be synchronized (26). Answer "**Yes**".

14 (X7.2) or 100 (X8) users can share the same library and use it simultaneously. All changes are shared with local versions of the library through the synchronization. This also applied for attached pdf-files. Users can use both PC and Mac.

A shared manuscript with EndNote references can be sent/shared between the users without any problems **as long as the references are inserted from the shared library**. Users can use both Word for Windows or Word for Mac when working on the shared library.

We generally recommend that you regularly make a backup copy of the shared library and manuscript as a precaution, as EndNote's Library Sharing is a new function with the potential of some glitches.