Advanced EndNote: Sharing & Collaboration
Research ReachOut @ the Library

Contents

Introduction

This workbook has been designed to accompany the 'Advanced EndNote: Sharing & Collaboration' webinar in the Research ReachOut program run by Murdoch University Library.

This document works in conjunction with the EndNote (EN) Guide, an online resource maintained by the Library. Relevant sections of the Guide are linked throughout this workbook and can be referred to for more information.

Please note, this topic is for advanced users of EndNote only, and assumes the user has EndNote 20. Introductory users can refer to the Murdoch University EndNote Training Guide for further assistance.

Syncing, sharing and collaborating with EndNote

EndNote can be a great tool for sharing references with colleagues, research groups and for national and international collaboration. This workbook will cover some of the different options for syncing, sharing and collaborating using EndNote.

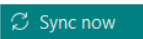| Syncing	Using the cloud to transport information between EndNote Desktop and EndNote Online
Sharing	Allowing others to access and copy your references, but not to edit them
Collaborating	Allowing others to access, use, edit and remove references

Using EndNote Online

EndNote Online is the online counterpart to EndNote desktop. It's free to use and is the preferred way to have a backup of your library saved online or in the cloud. While EndNote Online is not a replacement for EndNote desktop, there are some functions that can only be completed in EndNote Online.

EndNote Online allows you to:

- Sync your library across multiple devices for your personal use
- Access and manage your references anywhere with an internet connection
- Share and collaborate with other EndNote users
- Back up your library online (though this shouldn't be the only backup!)

EndNote Online Setup
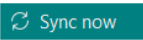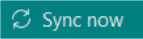
To set up EndNote Online:

- Go to www.myendnoteweb.com
- Click "Register"
- Enter your details, then click "Register"
- Go to your email to confirm your registration
- Open EndNote Desktop
- Click on 'Sync Configuration' or 'Sync Status' at the top of the left hand side menu
- Click the 'Sync now' button ⟳ Sync now
- You will be prompted to enter your EndNote Online account details

If you already have an EndNote Online account with a different online library to your desktop library, please visit our EndNote Guide (EN Online) for further instructions.

Syncing with EndNote Online

Once you've set up EndNote Online, you can use it to access your EndNote library on multiple computers e.g. using your work desktop and your home laptop.

To access your working library on two computers using Endnote online:

1. Back up your working library: EndNote Guide (Managing Your Library)
2. Under Sync Status, select "Sync now" ⟳ Sync now
3. Open EndNote Desktop on your second computer
4. In the Sync menu (Edit > Preferences > Sync) enter your EndNote online account credentials. You should now have the same EndNote Online account linked to both your computers.
5. Under Sync Status, select "Sync now" ⟳ Sync now
6. Make syncing and backing up your library the last thing you do before you exit EndNote for the day
7. When opening EndNote Desktop on your first computer, make syncing the first thing you do to ensure your library remains updated.

Sharing: EndNote Groups

You can use the EndNote Groups function to share a particular group of references with up to 100 people. Each of those people will need to have their own EndNote Online account.

To create a group:

- Working in EndNote Desktop, right click on 'My Groups' in the left-hand side menu
- Click on 'Create group', then enter a name for the group
- Once your group has been created, it should appear under My Groups. You can then drag and drop as many records as you like into that group

To share a group:

- In EndNote Desktop, click on the group you wish to share.

- Click the 'Share this group' button 🧑‍💼⁺
- Add email addresses for those with whom you want to share the group. These email addresses must be linked to their EndNote Online accounts.
- Change the permission to 'Read Only'
- Click 'Invite' and close the window
- The invited users will see the shared groups under 'Groups shared by others' (in EndNote Desktop) and Organize > Others' Groups (EndNote Online). Clicking on the group name will open the group in EndNote Online.
- Once this is done, you can edit, add or remove emails, or adjust access privileges, by going back into the 'Share this group' window 🧑‍💼⁺

Please note that this function does not share PDFs for copyright reasons.

While the EndNote Desktop interface is more user-friendly, you can also share groups directly from EndNote Online. This alternate method allows you to bulk upload email addresses if necessary. Please see the [EndNote Guide (Sharing & Collaboration)](#) for further instruction.

Collaborating: EndNote Groups

This is the same process as sharing using EndNote Groups, except that you will need to choose the 'Read & Write' option when adding in your collaborators' email addresses.

Reflection

- What are the circumstances in which you would want to share only?
- When would you allow editing?

Sharing: Whole Library

With EndNote X9 and EndNote 20, you can also easily share a Read Only copy of your entire EndNote library. You can share your library this way with up to 99 other people and their shared versions of your library will update as you update your library.

Unlike sharing groups, sharing libraries does not require the other users to have EndNote Online.

Note that this method will share all attached PDFs, which may put you in breach of copyright. For more about copyright, please see the [Copyright Advice guide](#) on the library website.

Process:

- In Endnote Desktop click on 'File', then 'Share'.
- Enter the email addresses of the people with whom you will be sharing, separated by commas
- Next to permission select 'Read Only'

- Click Invite then close

To open a library that's been shared with you:

- File
- Open Shared Library
- Click on the appropriate library
- The shared library will open in a new EndNote window

Note: The READ ONLY permission for sharing libraries in this way is only available with Endnote X9 and later. It is not available with EndNote X8 or earlier; sharing libraries with those versions of EndNote will grant all shared users Read & Write permission.

Collaborating: Whole Library

As with sharing, you can also collaborate using your whole library. This will give all users read and write permissions.

This is the same process as sharing your whole library, except that you will need to choose the 'Read & Write' option when adding in your collaborators' email addresses.

Some things to be aware of before collaborating with your whole library:

- Once set up, all group members can add, edit, and delete any references or groups, including permanently deleting references and groups from your desktop library. Because of this you should back up the library frequently (to USB, external hard drive etc.). The only change group members can't make is renaming the library
- PDFs are automatically shared, so be aware of copyright and licensing restrictions:
- Only the person who shared the library should back up the shared library
- Once this is done, you can edit, add or remove emails, or adjust access privileges, by clicking on 'File' then 'Share' again.

Once others have started working with your library, you can see the last 500 changes made to it by clicking on 'Sync Status' and then the 'Activity Feed' symbol.

Reflection

- When would you share a group?
- When would you share the whole library?

EndNote Online Method: Pros & Cons

Pros	Cons
• Avoids duplicating libraries • Groups allow multiple projects to be managed easily • Changes are updated immediately • Lower administrative burden	• Requires an internet connection • Read & write access could lead to data being deleted for everyone • Still requires regular offline backups

Compressed Library

Transporting a Library

If you're unable to use the Sync option to transport your library between two computers, you can manually transfer the library using a USB, or by email (if the file size allows).

To compress your library:

- Back up your library to your hard drive
- Click File > Compress Library
- Choose 'Create' if you wish to download the file to a USB, or 'Create & Email' if you wish to try emailing it
- Select whether you'd like to save attached PDFs
- Ensure 'All References in Library' is selected
- Click 'Next', and save the file to your USB, or to your computer's hard drive if you'd like to email it

To open your compressed library on another computer:

- Download the compressed file to your hard drive
- Double click the downloaded .enlx file or .enl file, or you can use File > Import > File, then select your compressed file.

After making any changes, you will need to back up the library to your hard drive then repeat the process by creating a new compressed version of the library, with a new file name, to transfer back to the first computer. Do NOT overwrite the previous version.

Some things to be aware of if you choose to transport your library using a compressed library:

- Libraries that exceed 4 GB in size and/or 65,535 files cannot be compressed by EndNote. It is possible to transport a large library by saving a copy and then

compressing using WinZip or similar. Please see our [EndNote Guide (Sharing & Collaboration)](#) for further instructions.

- There is always the potential for file corruption when transporting a library using this method. Syncing using EndNote Online is an easier and safer option if possible. Whichever you choose, always back up your library first.
- If you're using Cite While You Write on any current documents, be aware that this process may cause mismatched references.

You can also use the compressed library function to transport a select set of references, or a Group. This is the same process as compressing a whole library, except that you will need to select the group or select your references on the Compressed Library screen.

Sharing: Compressed Library

You can also use the compressed library function to share your entire library, or a select set of references or Group/s.

Follow the method for transporting your library but enter the recipient's email during the collaboration process or provide them with the compressed library via email.

Please note that the person you're sharing with won't have access to any new references or updates unless you continually share copies of your compressed library with them.

Collaborating: Compressed Library

Collaborating using a compressed library works the same way as sharing a compressed library. However, collaborators who have made any changes to the library will need to follow the process of backing up and compressing the updated library, then sending it back to you via email or USB before you can work with it.

Compressed Library: Pros & Cons

Pros
- No internet connection required
- Better if travelling (no opportunity to return to original device)
- Copied/compressed libraries double as backups

Cons
- May result in multiple libraries on the same device
- Each team member must update the changes themselves
- Higher administrative burden

Reflection

- When would a compressed library be more appropriate than EndNote Online?

Travelling Library

Travelling Libraries

The final, and least preferred, option for transporting and sharing a select set of EndNote references is by using the Travelling Library function.

The Travelling Library function allows you to import references into EndNote from a Word document. For this to work, the references must be formatted – this means they have been inserted into the document using the Cite While You Write plug-in, and the accompanying formatting has not been removed.

To share a travelling library is quite easy – just send a copy of your formatted document to the recipient. Anyone with Word 2007 and EndNote 7 or later will be able to create a library from this document.

The recipient will then need to:

- With the document open in Word, click on the EndNote tab
- Select Export to EndNote > Export Traveling Library
- Export the travelling library to their existing EndNote library

If you only want to share the references and not the whole document, you can produce the library to give to someone else via email or USB. The process is the same, but you'll need to export the file to a new library rather than an existing one.

If you want to send the document but not the travelling library, you'll need to share an unformatted or plain-text version.

Always back up both your document and your library before using a travelling library

Travelling Libraries: Pros & Cons

Pros	Cons
• Access to original EndNote library not required	• Rebuild the library from scratch • Formatted document has limited data (compared to a well-maintained EndNote library) • Higher workload

Reflection

- Why do you think the travelling library is our least preferred method?

Further assistance

- Please refer to the EndNote (EN) Guide (https://libguides.murdoch.edu.au/endnote) for more information about EndNote in general.

If you require further assistance in using EndNote, please contact the Library in the first instance. Our librarians are can assist you via a walk-in service, one-to-one appointments or online: https://www.murdoch.edu.au/library/help-support/ask-our-librarians.