DESKTOP ENDNOTE GUIDE 2

Using Online Search to download book details from a catalogue
For Version X8

This guide will take you through using EndNote’s Online Search to connect directly from EndNote to our library catalogue and then download the results of your search to EndNote.

WHAT IS ONLINE SEARCH?

You can use EndNote’s Online Search to connect directly from EndNote to library catalogues and other resources.

However, we only recommend the use of the Online Search for retrieving references from catalogues not databases. This is because the Online Search offers a quite basic search, not the full functionality you have when searching a database directly, for instance you cannot search for authors using initials. If you perform a search that is too general you might retrieve thousands of useless records.

To get references from databases, we strongly recommend that you use search the database and then use a Direct Export (see Desktop EndNote guide 1) or Filters (see Desktop EndNote guide 3) to import the results into your EndNote library.

Note that the Online Search will list databases which are not available to Reading users.

USING THE INTEGRATED LIBRARY & ONLINE SEARCH MODE

This mode will automatically add the references you find on the catalogue to your EndNote library.

Connecting

1. Open your EndNote library.
2. Click on the Integrated Library and Online Search Mode icon.
3. From the Online Search option in the left hand window click on 'More'.
4. You will now see the list of databases to which EndNote can connect directly.

5. To access the catalogue, select U Reading from the alphabetical list.

6. Click on the Choose button.

**Searching**

7. A search template will appear. You are given options to search by Author, Title, Keyword, but you can change these to select different fields to search.

8. Type in an author's name and one or two words from the title of a book they have written in the appropriate boxes. Your search screen should look like this:

   ![Search Screen](image)

9. Click on the Search button to view the results.

**Search tips:**

The And/Or/Not pick-list to the left of the field names, allows you to select different ways to combine your search words. You can use **and**, **or**, and **not** - using **and** will find only records that contain both words; using **or** will find records containing either word; using **not** will find records contain the first word but not the second. The default is set to **and**.

You can add extra fields to the search screen by clicking on the +button to the right of an existing field. This will add another search box. Use the pick-list to choose the appropriate field to search.

**Results**

10. A Confirm Online Search window will open displaying the number of results found.

11. Click OK and they will appear on screen for you to view.
12. At this stage, you can edit the references if you wish - double click on a highlighted reference to see the full record.

13. Select a reference and right-click on it to bring up a menu of options - this includes Move references to trash so that you can delete the titles you don’t want to keep.

14. These references are now in your Library. You can now do a new search, but note that if you click on All References in the window on the left you will close the connection U Reading now appears in the Online Search list. Click this link to go back to searching the catalogue.

15. If you carry on searching you can choose whether to clear previous searches by clicking the checkbox in the Confirm Online Search screen above.

**USING THE ONLINE SEARCH MODE**

If you think your search might result in a large number of records, which you don’t want automatically added to your library, use the Online Search Mode.

Once you have done your search in the same way outlined above, you will have to select records and copy them into your library.

**Saving references in the Online Search Mode**

1. Highlight the references you want to keep.

2. Click the Copy to Local Library icon on the toolbar.
   This will copy the references to the currently open library.

**FURTHER INFORMATION AND HELP**

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