EndNote Desktop – Online Search

This document explains how to use the Online Search mode in EndNote Desktop.

First, click the globe icon in the upper left of the screen to open the Online Mode window. Depending on which EndNote Desktop Connections you added and configured, several database or library catalog choices may be available for searching. (See the Overview page of the EndNote Desktop library guide to learn more about Connections.)

Click on a database name to select it and open the Online Search panel. The Online search panel can be opened or closed by toggling the Show/Hide Search Panel button in the menu bar. The Online Search panel can be resized by dragging the separating frame below it, which is just above the area where search results will appear.

Choose fields to search and the appropriate operators from the available dropdown menus, and enter your search terms in the blank boxes. Rows can be added or deleted using the plus or minus buttons on the right of each row. Click the Search button in the upper left of the Online Search panel when done.
A window will pop up for you to confirm that you want to add the references from the search results to the EndNote Desktop results window. The citation information and abstract (if available) can only be viewed after being added to the results window. If there are a large number of results, you can change the number of results to import (such as only records 1 to 10) for examination.

Click the ‘OK’ button, and the results will appear. Click on a reference in the results panel to view the details in the reference record panel on the right.

The displayed results are in a temporary holding area. To add references from the results to your library, highlight the references you want, and click the “Copy to Local Library” icon on the menu bar. To select more than one record at a time, hold down the Ctrl key.
Click the Local Library Mode (books) icon in the upper left to change views. The selected references will have been copied into another temporary location, in a folder titled “Copied References.” The number to the right of the folder name indicates how many references were copied into the folder. Click on the folder name to see the reference list in the center panel.

To save the references, highlight them and drag them into a Group. (See EndNote Desktop X8 library guide instructions on how to create groups for more information.) Click on the Group name to see that the selected references have been added.

The contents of the “Copied References” folder will be overwritten each time a new set of references is copied from an Online Search. The “Copied References” folder will disappear upon exiting EndNote Desktop, only to reappear when a new set of references is copied to the local library.