

# EndNote<sup>®</sup> X Tips

## Searching Online Resources

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This tip sheet will help you learn how to do the following:

- Connect to and search a remote database.
- Retrieve and save references from a remote database.

If EndNote is not already running, start it and open the sample Paleo library (PALEO.ENL).

### What EndNote's Searching Offers

EndNote's search interface provides a simple way to do basic searches of local EndNote libraries and remote databases. The same Search window is used for both purposes, removing the need to learn a separate set of controls to search online databases. This search interface is not intended to replace the advanced search options offered by your information provider's interface. There may be times when you want to use the information provider's search interface (for example, when doing a very detailed subject search such as a literature review) and then import the references into EndNote. This is an option using EndNote's Import command, and you can find more information on it in the tip sheet on importing references into EndNote.

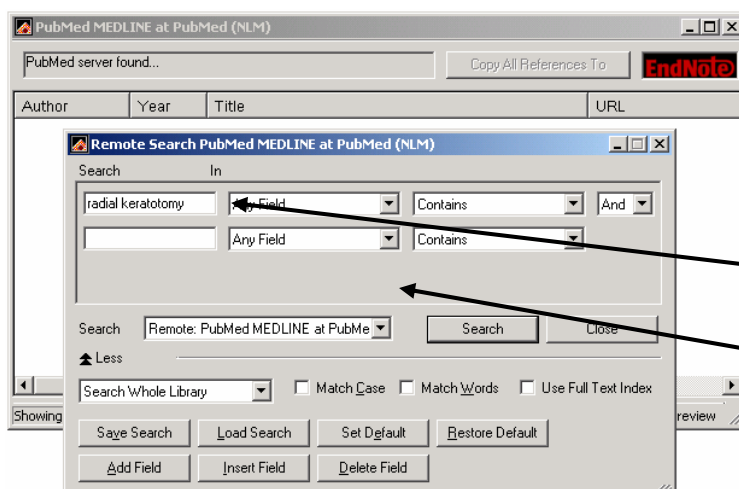
### Connect to a Remote Database

The first step in searching a remote database is connecting to it, so we begin this example by connecting to the PubMed database. Note that EndNote offers a variety of connection files to remote databases. Some of these databases are by paid subscription only (password and account information necessary), and some are public access (no restrictions for general use). Library catalogs, the Library of Congress book catalog, and the National Library of Medicine's PubMed are examples of public-access databases.

With EndNote running, choose *Connect* from the *Tools* menu and then select *Connect* again. The *Connect* menu presents a "favorites" list of internet databases to which you have successfully connected previously. You may also customize this list using the Connection Manager. (See the EndNote manual for details.)

Select the *PubMed* connection file (start typing the file name to quickly jump to it in the list), and click on the *Connect* button to direct EndNote to connect to the PubMed database at the National Library of Medicine.

When the connection has been successfully established, EndNote opens a window showing "PubMed MEDLINE at PubMed (NLM)," which will be populated with retrieved references after searching. This is the Retrieved References window. In front of this window you will see the Search window. Note that the "Search Remote: PubMed MEDLINE at PubMed (NLM)" option is automatically selected. EndNote is ready to search the remote database.



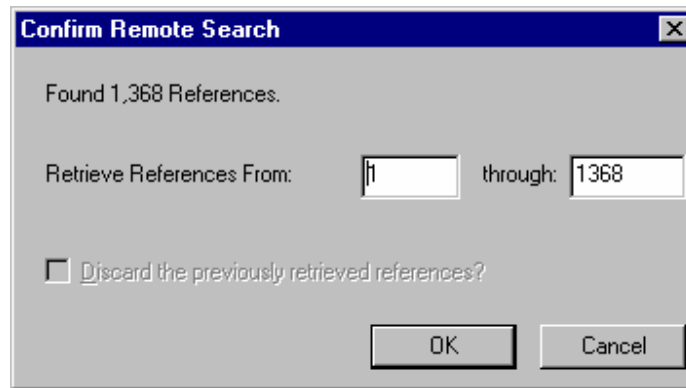
Retrieved References window

Enter the search term(s) to find the references you need. Searching a remote database is very similar to searching an EndNote library.

Enter the term "radial keratotomy" in the search window and click the *Search* button.

"Search Remote" is automatically selected when you connect to a remote database.

EndNote sends the search request off to the remote database (PubMed, for this example), and a summary of the search results is displayed.

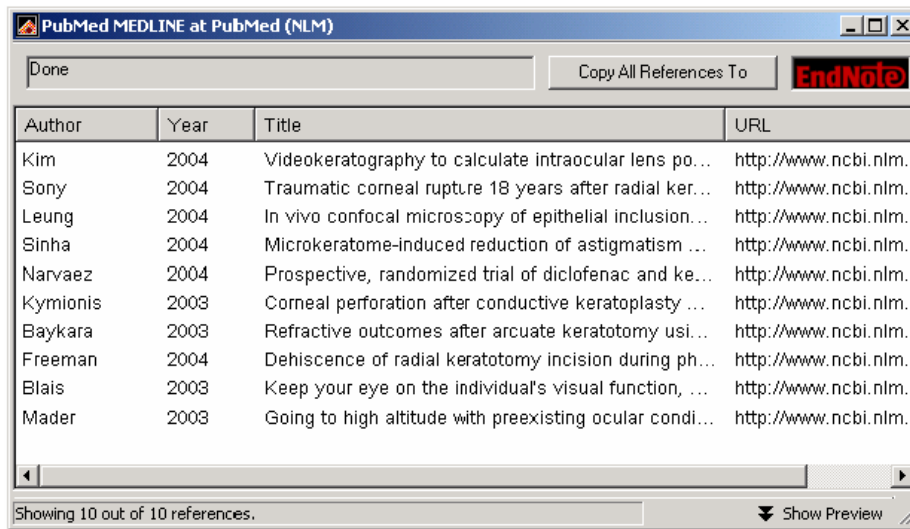


The dialog displays the number of references found that match your search request, and gives you the option to retrieve them. If the result set seems too large, you can refine the search. (To do so, click "Cancel," return to the EndNote search window, and enter additional search criteria.)

Change the number in the second box in the window to "10" and click *OK*.

The first ten references are downloaded and appear in the Retrieved References window.

NOTE : You can cancel a retrieval in progress by clicking the *Pause*.

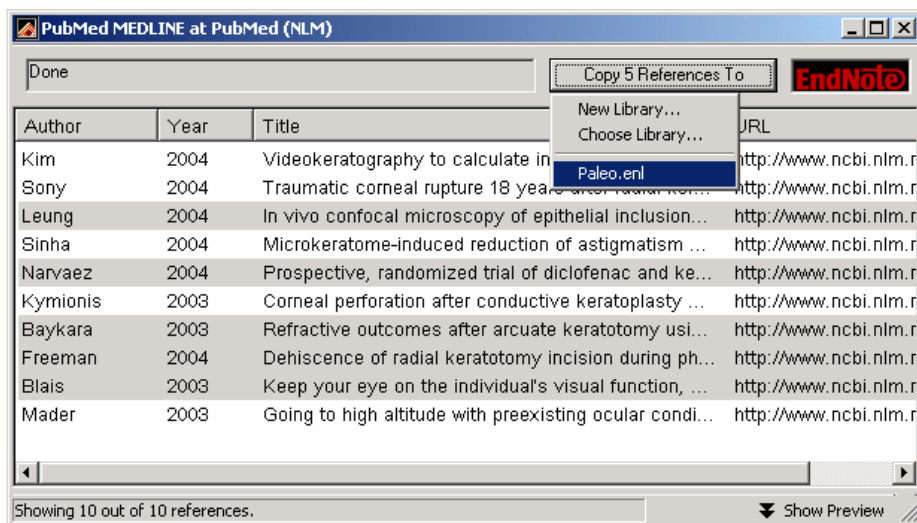


### Save the References

At this point you can peruse the retrieved references to see which ones you would like to keep, then save the references you want by transferring them into one of your own EndNote libraries.

The selected references can be copied to an open library using drag-and-drop or the copy and paste commands. You can also copy references directly to a library that is open, to a library that is closed, or to a new library using the Copy References To button, as described below.

For this example, we'll save a few of the retrieved references to the EndNote example library called "Paleo.enl."



Select a subset of the references displayed by holding down the *Ctrl* key (*Command* key on the Macintosh) and clicking on the individual references. (*Shift-click* to select a range of references).

Choose the option *Copy # References To* (where "#" stands for the number of references) and select the listed Paleo library.

Notice that the open libraries appear below the New Library and Choose Library choices. Paleo is listed because you opened it at the beginning of this exercise.

When you close the Retrieved References window for PubMed, EndNote alerts you that the references in the Retrieved References window will be discarded. Because you have already saved what you needed, you may click *OK* (Windows) or *Discard* (Macintosh) and close the window.

### Selecting and Adding a Connection File

The connection files are located in the Connections folder in your EndNote directory. If a connection file is not available for the database that you want to search, you may be able to create one. Contact your librarian or information provider to see if the database is available on a Z39.50 server. If it is, you can request the information required to establish a Z39.50 client for that database. See the EndNote user manual for more information on creating connection files.

### Access-Restricted Databases

EndNote comes with preconfigured connection files to free reference databases and library catalogs as well as databases that require payment and/or a password for access. Most of the databases offered by the commercial information providers (OCLC FirstSearch, DIMDI, SilverPlatter, etc.) require an account for access. When you attempt to connect to a restricted database, EndNote may prompt you to enter your user ID and/or password. Enter the necessary information, and click *OK* to log on. (Depending on the database you are accessing, the passwords and IDs may be case-sensitive). Additional factors, such as if the database requires IP authentication (a process whereby the data provider can check to see that you are logging in from a site that is allowed access to the database) may influence whether or not you will be able to access subscription databases, and if you will be able to access them only from limited locales, such as your school's physical campus.

For certain connections, EndNote might prompt you for more information, for example, a Group ID or User ID along with a password. You may leave blank the items that do not pertain to you.

To gain access to a restricted database, contact the information provider directly to set up an account. Alternatively, your institution may provide access; contact your library for further details. Thomson ResearchSoft does not control access to any online databases.

### Free Databases

Two major databases that do not require passwords are the MEDLINE database from the National Library of Medicine (PubMed) and the Library of Congress. Many of the general library catalogs are also unrestricted.

## **EndNote Connection Files and Firewalls/Proxy Servers**

EndNote connection files using the z39.50 protocol (all except the PubMed and ISI Web of Science connection files) may not work through a firewall. This includes so-called "invisible" firewalls. If you are unable to connect to a database that you believe you should have access to, check with your network administrator and ask if your institution has a firewall. The PubMed and ISI Web of Science connection files are able to connect through most (non-authenticating) proxy servers if the proxy settings are set up in the computer's Internet Options. (Note that an authenticating proxy server is one where you must enter a password to access the internet). See your operating system's Help files for information on setting up proxy server settings in Internet Options or contact your network administrator.

**For more information see the EndNote manual chapter entitled *Searching Remote Databases with EndNote*.  
(Note that the manual is available in your EndNote folder as a PDF file.)**