

Chapter 6: Importing Reference Data into EndNote

Online searching, described in the previous section, is the easiest way to retrieve references from online databases, but not all information providers offer that option.

If you have access to an online bibliographic database or university catalog, you can probably use EndNote's import filters to import text files saved or downloaded from these sources. EndNote filters are configurable, so they give you the flexibility to import the reference data you need and eliminate data you do not need.

In this part of the guided tour you will learn about:

- ◆ Downloading data in a tagged output format.
- ◆ Selecting an import filter and importing data into EndNote.

Open the Sample Library

If EndNote is not already running, start it and open the sample library (Sample_Library.enl), as shown under "Start EndNote" on page 25.

Search the Database and Save the References

Often when you search a database, the matching references are displayed as text, with no clear indicator between each piece of bibliographic information. The PubMed reference below, saved in a Citation format, is an example. There is no clear indicator for EndNote to be able to differentiate a title from an address or an abstract.

```
Am J Med Genet A. 2005 Mar 9; [Epub ahead of print]
```

```
Reconstructing the behaviors of extinct species: An excursion into comparative paleoneurology.
```

```
Rogers SW.
```

```
Salt Lake City VA-Geriatrics Research, Education and Clinical Center and Department of Neurobiology and Anatomy, University of Utah School of Medicine, Salt Lake City, Utah.
```

```
How can the behavior of an extinct species be reconstructed-say a dinosaur such as Allosaurus? Despite the relatively abundant
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fossilized remains of this and other dinosaurs, the incompleteness of the fossil record has permitted room for considerable speculation, mythology, and perhaps a bit of unsettling reflection on what factors contributed to the eventual fate of these remarkably successful animals. (continued)
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PMID: 15759265 [PubMed - as supplied by publisher]

To use this information effectively, each piece of bibliographic information must be consistently tagged so it can be directed to the correct EndNote field.

Database providers typically offer several different download formats. Regardless of which system you are searching, you need to save the references in a tagged format to a text file.

For this tour, we will use a text file of PubMed references that were previously downloaded in the tagged MEDLINE format. The file Pubmed-dinosaur.txt is provided in the EndNote Examples folder. A single reference in the file appears like this:

```
PMID - 15759265
OWN - NLM
STAT - Publisher
DA - 20050310
PUBM - Print-Electronic
IS - 1552-4825
DP - 2005 Mar 9
TI - Reconstructing the behaviors of extinct species: An excursion into comparative paleoneurology.
AB - How can the behavior of an extinct species be reconstructed-say a dinosaur such as Allosaurus? Despite the relatively abundant fossilized remains of this and other dinosaurs, the incompleteness of the fossil record has permitted room for considerable speculation, mythology, and perhaps a bit of unsettling reflection on what factors contributed to the eventual fate of these remarkably successful animals. (continued) (c) 2005 Wiley-Liss, Inc.
```

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AD - Salt Lake City VA-Geriatrics Research,
    Education and Clinical Center and
    Department of Neurobiology and Anatomy,
    University of Utah School of Medicine,
    Salt Lake City, Utah.
AU - Rogers SW
LA - ENG
PT - JOURNAL ARTICLE
DEP - 20050309
TA - Am J Med Genet A
JID - 101235741
EDAT - 2005/03/11 09:00
MHDA - 2005/03/11 09:00
AID - 10.1002/ajmg.a.30538 [doi]
PST - aheadofprint
SO - Am J Med Genet A 2005 Mar 9;.

```

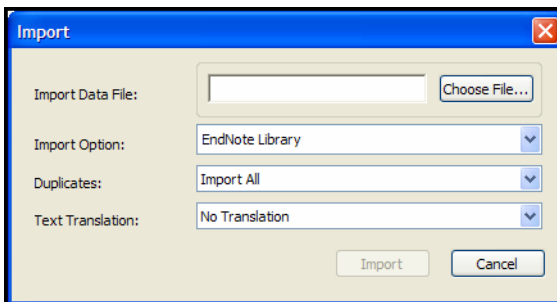
Each tag can be mapped to a corresponding EndNote field. If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately.

Choose the Correct Import Filter and Import into EndNote

Once you have captured and saved your data file in a tagged format, you need to identify the proper EndNote filter to import the data. There are hundreds of filters included with EndNote; each one is designed to read a specific tagged format from a specific information provider.

To import the sample PubMed text file into the sample library:

1. View the Library window in EndNote.
2. From the *File* menu, choose *Import*.

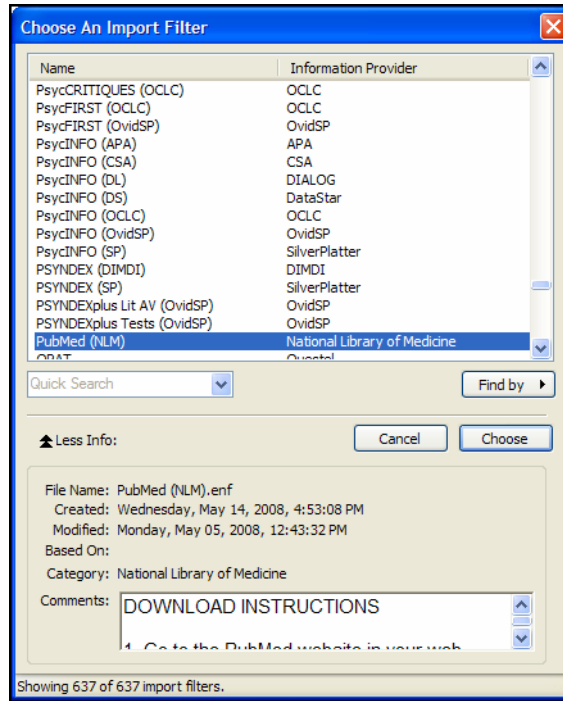


3. Click the *Choose File* button to display a file dialog.
4. Browse to the EndNote X2\Examples folder and then highlight and *Open* the Pubmed-dinosaur.txt file.

- From the *Import Option* list, select *Other Filters* to display the list of filters supplied in the EndNote Filters folder. (You may experience a delay before EndNote displays the full list of filters.)

You may want to peruse the list, to get an idea of what filters are supplied. You can create new filters or copy and edit existing filters.

- Begin typing “PubMed” to jump to that filter in the list.



If the *More Info* button is available, click it and notice that the Comments section at the bottom of the window gives tips for downloading references from the selected source.

- With the *PubMed (NLM)* filter highlighted, click *Choose*.
- Leave the other two options at their default settings:

Duplicates: Import All

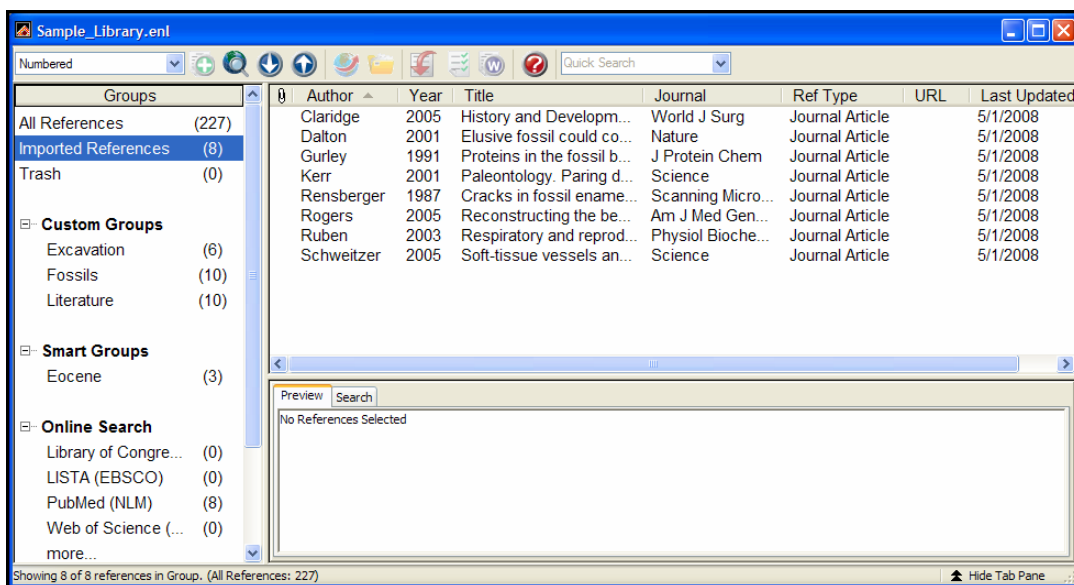
By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under EndNote Preferences. We will import all references regardless of duplicates.

Text Translation: No Translation

This option allows you to specify the text character encoding of the file you import. This is important when you import references in languages that include extended characters. You would typically contact your database provider for the appropriate setting.

9. Click *Import* to import the file.

When the process is complete, only newly imported references display in the reference list. This is a good time to peruse the new references to make sure they imported as expected. You can display the Preview tab to view the formatted references, you can open individual references to make sure all information transferred to the correct fields, and you can easily edit or delete the new references.



Notice that the focus in the Groups pane has switched from the All References group to a new Imported References group.

The Imported References group is a temporary group. It is replaced each time you import a new set of references, and it is removed when you close the library. The references themselves remain in the library unless you specifically delete them.

10. To return *all* of your references to the library display (including the newly imported references), choose *Show All References* from the *References* menu or click on the All References group.

Summary of Output Formats and Corresponding Import Options

A subset of supported information providers are listed here with their recommended output formats. Check this list for guidance in order to download in the appropriate tagged format and select the appropriate import filter. This information was accurate at the time of publication, but you may need to contact your information provider if changes occur. You can also check our website at <http://www.endnote.com> for updated information and import filters.

NOTE: Some of the services listed in this table, such as EBSCO and WilsonWeb, have an alternate, easier way of transferring references into an EndNote library. See “Direct Export from Web Pages” on page 67.

Copyright Issues and Fair Use of Downloaded Data

EndNote gives you the capability to import references downloaded from online databases into its libraries. Some producers of online reference databases expressly prohibit such use and storage of their data; others charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases may have varying restrictions, even from the same information provider (such as DIALOG or Ovid).

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
AARP AgeLine (http://research.aarp.org/ageline/home.html)	There is no method for downloading data from this database. Instead, save the results screen as a plain text file with your web browser's <i>Save</i> command. The resulting text file contains tags which are preceded by 18 spaces.	Ageline (AARP) filter
ACM Digital Library (Association for Computing Machinery)	Users with subscription access to this website can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format. Non-subscribers can download one record at a time: <ol style="list-style-type: none">1. Create a search.2. Click on an article.3. Scroll half-way down the page and select DISPLAY EndNote. Limitations: Since only plain text files can be imported into EndNote, you cannot import images, graphics, etc. Before importing, you may need to edit the file to insert a comma after corporate author names. Otherwise, EndNote will not be able to distinguish corporate authors from personal authors.	EndNote Import
CAS SciFinder	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
CSA (formerly Cambridge Scientific Abstracts)	From the CSA search results screen, click <i>Save/Print/Email</i> . On the "Save/Print/Email" screen, select: Record Format: Full Record Save File Format: PC Click <i>Save</i> . Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*.txt) file.	Various filters for CSA databases are provided in the EndNote Filters folder.
DIALOG	Set your communication software's option to capture text. Use Dialog's Format 5 with "tag" appended to the TYPE command -- type "s1/5/1-20 tag". You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.	Various DIALOG filters are provided in the EndNote Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
EBSCOhost	<p>After adding selected references to your folder, click “View Folder” or “Folder has items” to see its contents.</p> <p>On the Folder Content page, click <i>Export</i>. On the Export Manager page, select “Generic bibliographic management software” to save a file to disk. Click <i>Save</i>.</p>	<p>Various EBSCO filters are provided in the EndNote Filters folder.</p>
EDINA	<p>Use the “Name” format, where data is tagged with words such as “Author” rather than “AU.”</p> <p>Because there are so many different formats used for source data, you may need to manually edit source data after importing.</p> <p>EndNote cannot parse author names that are not clearly delimited, such as “S Hughes B Reynolds S A Bell & C Gardner.” You will need to manually edit author names.</p>	<p>Various EDINA filters are available in the EndNote Filters folder.</p>
Emerald	<p>Display the marked list, click “display for download (ASCII),” and then save as a plain text file.</p> <p>The filter provided works for these Emerald databases:</p> <p>Emerald Management Reviews at http://www.emeraldinsight.com/revs/</p> <p>Computer Abstracts International Database at http://www.emeraldinsight.com/caid</p> <p>International Civil Engineering Abstracts at http://www.emeraldinsight.com/icea/</p> <p>Computer & Communications Security Abstracts at http://www.emeraldinsight.com/ccsa/</p> <p>Current Awareness Abstracts at http://www.emeraldinsight.com/caa/</p> <p>Limitations:</p> <p>Page numbers are separated by a hyphen with spaces on either side of it. You will need to manually remove the spaces after importing.</p>	<p>Emerald filter</p>
InfoTrac (Gale)	<p>From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to “citation;” do not choose “full article.”</p> <p>Limitations:</p> <p>Records often have extraneous information in the title field, which must be removed manually after importing.</p>	<p>InfoTrac (GALE) filter</p>

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
INIST	<ol style="list-style-type: none"> 1. Click the <i>Enregistrer</i> button. 2. Select the records you wish to download. 3. Under “Quels champs?” choose “Tous les champs.” 4. Under “Incluez” choose “Numéro de notice et nom de la base de données” and “Libellés abrégés.” 5. Click the <i>Sauvegarde de notices</i> button. 	Various INIST filters are provided in the EndNote Filters folder.
INNOPAC	Save references in the “EndNote” format.	EndNote Import
Knowledge Finder	Place document in the Save file, and select the document. Choose <i>Export Selected Documents</i> from the <i>File</i> menu.	Various Knowledge Finder filters are provided in the EndNote Filters folder.
Medscape	After selecting the desired records and adding them to your clipboard, click the <i>Save or Email Clipboard</i> link. Save or email your clipboard in PC or Mac MEDLARS format as a plain text (*.txt) file.	MEDLINE (Medscape) filter
NERAC	Save your file as plain text (*.txt).	NERAC
OCLC FirstSearch	<ol style="list-style-type: none"> 1. Mark the records you wish to download. 2. In the navigation pane, click <i>Export</i>. 3. Click the radio button next to “The marked records” or “A range of records.” 4. Click the radio button next to “EndNote.” 5. Click <i>Export</i> and save to a Text file. 	Various OCLC filters are provided in the EndNote Filters folder.
Ovid	<ol style="list-style-type: none"> 1. After selecting the references you wish to download, click <i>Results Manager</i>. 2. Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) 3. Click the <i>Email</i> or <i>Save</i> button. 4. Save the file as plain text (*.txt). 	The appropriate Ovid filter will be selected automatically when using the <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
ProQuest	<ol style="list-style-type: none"> 1. Select the desired references and then click the “My Research Summary” tab. 2. Click the “Documents and Bibliography” tab. 3. Choose “Export,” then either “Export directly to ProCite, EndNote or Reference Manager,” or “Download in a format compatible with ProCite, EndNote, Reference Manager and RefWorks.” If you choose the former, make sure your data is displayed in a tagged format before saving as a text file. 	ProQuest filter
PsycINFO http://www.apa.org/psycinfo	After marking the records you wish to download, choose <i>Full PsycINFO Record</i> then click the <i>Display Marked Records</i> button. Select the text, then copy and paste it into a text editor, saving the file as plain text (*.txt).	Use the PsycINFO (APA) filter.
PubMed	<ol style="list-style-type: none"> 1. From the drop-down menu next to the <i>Display</i> button, choose <i>MEDLINE</i>. 2. From the “Send to” menu, choose <i>File</i> and save the file as a plain text file (*.txt). <p>Note that the PMID will transfer to the Accession Number field in EndNote.</p>	PubMed (NLM) filter
SilverPlatter WebSPIRS	<ol style="list-style-type: none"> 1. Once you've obtained your search results, click <i>Save</i>. 2. Select the following “Save Records” options: Which fields?: All fields Include: Record number and database name Field labels: Short labels. 3. Click the <i>Save Records</i> button. 4. Use your Web browser to save the page as “Text Only” (do not save in HTML format). 	Various SilverPlatter filters are provided in the EndNote Filters folder.
STN	Set your communication software’s options to capture text to a file. Type the command “Display All”.	Various STN filters are provided in the EndNote Filters folder.
UnCover (Ingenta)	Using your email software, save references emailed to you as a “Plain Text” or “Text Only” file.	UnCover (INGENTA)
VHL (Virtual Health Library)	<ol style="list-style-type: none"> 1. After selecting the desired references, scroll to the bottom of the page and click “Your collection” (or “Su selección”). 2. Cancel the print dialog, and then save the screen as a plain text file. 	Various VHL filters are provided in the EndNote Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
Web of Knowledge Web of Science	Display your marked references. Then, look under Output Records and select the option to output <i>Full Records</i> . Next, click <i>Export to Reference Software</i> to have the references exported directly to EndNote. You may also choose <i>Save to File</i> to save the references to a text file and import them into EndNote.	ISI-CE filter
Wilson	<ol style="list-style-type: none"> 1. Click <i>Print Email Save</i>. 2. Click <i>Export to Bibliographic Software</i>. 3. Choose <i>The EndNote Filter</i> and click <i>Export</i>. 4. Save to a text file. 	WilsonWeb filter
WorldCat (OCLC FirstSearch)	<ol style="list-style-type: none"> 1. Mark those references to be saved and click <i>Export</i>. 2. Choose Text File. 3. Click <i>Export</i>. 	WorldCat (OCLC) filter

Direct Export from Web Pages

Certain websites contain a download button that will send your search results directly to EndNote, pick the correct import filter, and start the import process automatically. Start by opening the EndNote library into which the data should be imported. This “direct export” or “direct download” method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter.

The systems listed below provide a direct export of references into EndNote. A detailed table of instructions can be found in Appendix D of the full EndNote manual. The list keeps growing, so contact your information provider to find out whether they participate!

ALEPH	Los Alamos National Laboratory
American Psychological Association, PsycInfo Online	MicroPatent
Bibliotech.dk	Nature
BioMedCentral	Nerac
BioOne	NISC
Blackwell Synergy	OCLC
BMJ	OhioLink
Buffalo University	OVID

CABI-Direct	Oxford Press Journals
Canadian Journal of Communication	Pacific Northwest Labs
CCLR	Patent Cafe
Delphion	PILOTS
EBSCO	PNAS Online
EI Engineering	ProQuest
Elsevier	RLG
EMBASE	Science Magazine
ERIC	Scopus
ESDS Government	St. John of God, Ireland
Google Scholar	Stanford University's Highwire Press
HAPI	Telemed
IEEE	Thieme
JAMA	Web of Science
JISC	WebFeat
JSTOR	WilsonWeb
Karger Publishing	

This concludes the tutorial for using EndNote's *Import* command.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

- ◆ See Chapter 7, "Importing Reference Data into EndNote," for details about import options and about importing references from other bibliographic software programs.
- ◆ Read Chapter 17, "Filters," to learn how to create or modify filters that map downloaded references to corresponding fields in EndNote. You can enter tags and map them to specific EndNote fields.
- ◆ See Appendix D, "Direct Export Formats and Import Formats" for detailed tables of instruction for importing reference data from various online systems.