

# EndNote<sup>®</sup> X1 Tips

## Importing Reference Data

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

- Download references from remote databases in an EndNote-friendly format.
- Import downloaded references into the EndNote library.

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

### Introduction to Importing Reference Data

If you have access to an online bibliographic database, a university catalog, or a bibliographic database on CD-ROM, you can probably use EndNote's filters to import text files saved or downloaded from these sources. EndNote filters are customizable so they give you the flexibility to import only the reference data you need.

To transfer references from an online bibliographic database into EndNote, you will need to save a text file with information in an EndNote-friendly format. How you do this will vary from one data provider to another. In the EndNote manual's chapter *Importing Reference Data into EndNote* you will find one of the most useful parts of the entire manual—a table containing instructions for saving your data for each of the data providers for which EndNote has preconfigured filters. Consulting this table so that you know the best download format before you do your database search can often save you having to repeat the search later. (Note that the manual is available in your EndNote folder as a PDF file.) Another location for this information is in the "About this filter" portion of the EndNote filter. You can view this information by opening the filter for editing in the EndNote filter manager. To open a filter for editing, select *Open Filter Manager* from the *Edit>Import Filters* submenu.

For text to be imported with an EndNote filter, the data must be consistently "tagged," with each tag starting on a new line. Here are two examples of such an output:

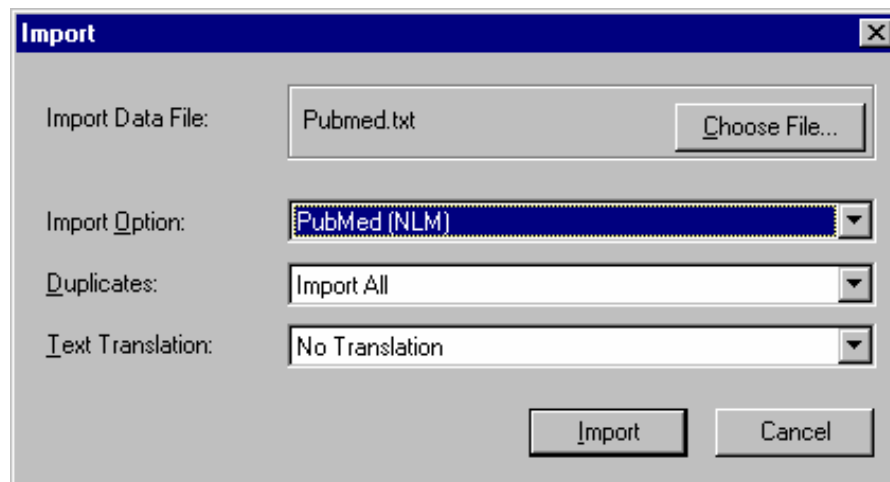
```
AU- CRAMER, -Z.O.  
TI- AQUATIC MACROPHYTES AND LAKE ACIDIFICATION  
PY- 1993  
SO- ENVIRONMENTAL-POLLUTION. VOL. 5, NO. 2, PG.54-79  
  
Author: Cramer, ZO  
Title: Aquatic macrophytes and lake acidification  
Year: 1993  
Source: Environmental Air Pollution. Vol. 5, (2) pp.54-79
```

### Import Instructions

In this example, you will download a PubMed search and import its results into EndNote.

- To begin, access the PubMed web site at [www.PubMed.gov](http://www.PubMed.gov) using your internet browser.
- In the line that begins "Search PubMed for:" type the phrase "sushi and health."
- Click on the *Go* button to conduct the search. You should see the page change to show your search results, but the results are not in a tagged format that EndNote can use.
- Click on the pull-down menu where you see the word "Summary" by the *Display* option to see the list of available formats. This list controls the format in which the data will be saved. Change it from "Summary" to "Medline." You will see the data on the screen change to the tagged Medline format.
- On the pull-down menu "Send to" menu, select *File* to save the file to your computer. You can give the file any name you want and save it to your hard drive, a floppy disk, or a network drive, but it is very important that you remember where you saved the file. EndNote will not "remember" for you when you import the file. Note that EndNote can only import plain text files, so the data must be saved in plain text. EndNote cannot import rich text format, Word, WordPerfect, or any other word-processing format, only plain text. However, it can import text files in a variety of encoding options, such as Unicode UTF-8, ASCII, etc.
- In EndNote, open the library into which you want to import the data.
- Select *Import* from the *File* menu.

- Click the *Choose File* button, then locate and open the text file you saved from PubMed containing the records you want to import. Make sure “Files of Type” is set to “All Files” to view text files.
- Click on the *Import Option* pull-down menu to select the filter you will use. The Import Options include a number of default options, including EndNote Library, Refer/BibTex, and Tab-Delimited (very useful for transferring data from spreadsheets and database programs like Access). It also includes recently-used filters and any filters you have selected as “favorites” in the Filter Manager (see Help or the EndNote manual for information on setting favorite filters). Note that most of the filters include a database name, followed by an abbreviated name of the data provider in parentheses. For example, the PubMed filter will appear as “PubMed (NLM)” to show that the database name is PubMed and the data provider is the National Library of Medicine. Different data providers may provide the same database, but it will be formatted according to their own standards. So you will need to be careful that you are using a filter with a name, and hence format, that matches both the database **and** the data provider you are using.
- Select the *PubMed (NLM)* filter from the list. If you do not see it in the list, select *Other Filters* to open the Filter Manager, showing a complete list of the available EndNote filters, then select *PubMed (NLM)* from the Filter Manager list. “PubMed (NLM)” should now appear in the Import Option line. Once you select a filter to import a file, EndNote retains that setting until you change it. You do not need to go through these steps again unless you want to import from a different database and thus choose another import filter.
- Select your preferred option from the *Duplicates pull-down menu*. (By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. These criteria may be changed in the EndNote preferences. See the EndNote manual for details on changing preference settings.)
- Select the text-encoding method from the text translation options if the default settings do not work. Note that you may need to refer to documentation on the database’s encoding method from your database provider. For PubMed use the default.
- Click the *Import* button to begin the import process.



When the import is complete, only newly imported references are displayed in the library window. To view all of the references in your library, select *Show All References* from the *References* menu.

**For additional information see the EndNote manual chapter *Importing Reference Data into EndNote*.  
(Note that the manual is available in your EndNote folder as a PDF file.)**