

Importing Information from EndNote

To make this process as smooth as possible, make sure that **all your references that need to be imported into NVivo AND the EndNote reference library are on the same computer/drive as the NVivo Project**. This is important so that:

- NVivo can access them for importing,
- NVivo can access them when you want to work on references that are imported as “External” files.

External files are stored as **file paths to the original document** stored on your computer/drive. They are not actually imported into the Project, which means they do not automatically travel with the Project if you work on multiple computers. NVivo does this to ensure the Project file doesn't get unnecessarily large and take up more file space and computing power. **For the file link to work, it needs to stay in its original location on import, otherwise the link will be broken**. You can choose to import the file into the Project later if you wish, but it's not always necessary or desirable to do so.

If you have already imported some of your reference files beforehand, **NVivo will check for duplicates and not import them a second time**. It matches based on EndNote ID, but if this isn't available, by title (default), or author and year. If the file contains attachments etc., these won't be imported again so your existing file is preserved. If you are working on a **Mac**, you will have to update the file information for those existing Files. If you are working on a **PC**, **NVivo can link the reference information to the already imported**, but you will need to verify the information is correct for each existing file. If you select **Advanced → Matched Files → Select Existing →** then select the file to be matched to the reference and click **OK**.

If you have a **large reference library**, consider “**chunking**” your import: multiple smaller groups of references at any one time.

Procedure:

- In **EndNote**, export your references as an XML file.
File → Export → Save As Type: XML (*.xml). Make sure the “Export Selected References” box is ticked.
- In **NVivo 14**, click on the **Import** tab at the top of the screen, then the **Bibliography** icon, and select “**EndNote**”. Select your **EndNote XML** file, then click **Open**.
- Choose how you want to **name the sources** (e.g., by Title or Author).
- Choose if you want your references in **one classification table or separate classification tables** for each type of reference (e.g., one for books, one for journals etc.). One single table is usually easiest to manage.
- Select “**Import source content from file attachments, URLs, or figures where available**”. Only one file per reference will be imported. If there are multiple by default, the first file attachment is imported. If you want to import a different file, click the **Advanced** button (on the import dialog box) and select the file you want to import for that particular reference. The path and file name for all file attachments, URLs or figures are recorded in the file attribute values.

- Select **“Create memos from abstract, keywords and notes”**. This is particularly important if you have **Abstracts that are greater than 512 characters in length**. Only the first 512 characters are automatically imported into NVivo, so this ensures the entire Abstract will be accessible as a Memo in NVivo.
- Select **“Assign attribute values to memos”**.


Where the information from EndNote is stored in **NVivo 14**:

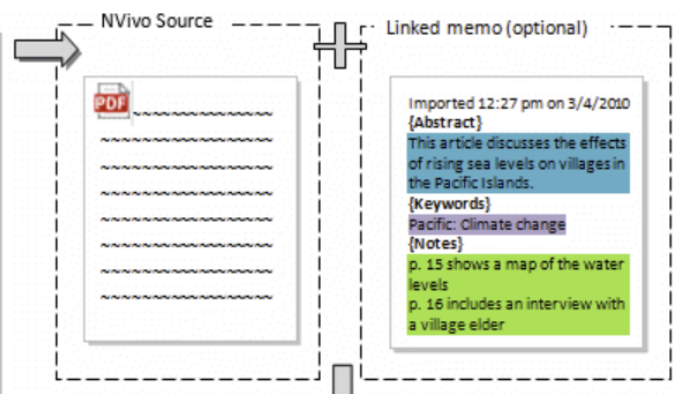
- References will be classified as **“Reference”** in the **File Classification** area (unless you choose to have separate **File Classifications** for each type of reference (e.g., book, journal etc.). The latter is not recommended, for simplicity.
- Your reference files that have attachments, will be stored within the Project along with their attachments in the **Files** folder of your **Data** area.
- Your reference files that do not have attachments will be **stored as file links** in the **Externals** folder. You just need to click on the link for easy access to the reference file.
- The referencing details will be stored in the **File Classifications** folder in the **Data** area.
- Any keywords, abstracts and notes will be stored in **Memos** folder of the **Notes** area.

Type: Journal Article
Author: Smith, Andrew
Year: 2008
Title: Rising seas in the Pacific
Journal: Ecology Times
Keywords: Pacific; Climate change

Abstract
 This article discusses the effects of rising sea levels on villages in the Pacific Islands.

Notes
 p. 15 shows a map of the water levels
 p. 16 includes an interview with a village elder

File attachment




Properties of source and linked memo

General tab
 Name: Rising seas in the Pacific
 Description: This article discusses the effects of rising sea levels on villages in the Pacific Islands.

Attribute Values tab
 Classification: Reference

Attribute	Value
Reference Type	Journal Article
Author	Smith, Andrew
Year	2008
Title	Rising seas in the Pacific
Secondary Title	Ecology Times
Keywords	Pacific; Climate change
.	.