



Reference Manager Windows Version

# **Import Filter Editor User's Guide**

***April 7, 1999***

**Research Information Systems**

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## Introduction

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Import Filter Editor will help you create and edit the filters for importing references into Reference Manager. The import filters determines how text files, downloaded from a database service, are to be read by Reference Manager. Import Filter Editor creates a single file that you can use on all databases within a given service.

## Technical Support

Technical support is available to registered users Monday through Friday from 8:00 A.M. to 5:00 P.M. Pacific Time. You can call, write, fax, or send electronic mail. When calling RIS Technical Support, please use a phone near to your computer and have your serial number available.

Before calling, you may want to look at technical support's list of frequently asked questions (FAQ's) on our World Wide Web (WWW) site.

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## Chapters in this Book

This book contains the following other nine chapters:

**Chapter 2 Examining a Text File**—provides general information on viewing the text file containing the references to be imported. This is a first step before getting involved with Import Filter Editor.

**Chapter 3 Getting Started with Import Filter Editor**—covers how to start the program, and an introduction to the look and feel of the main screens.

**Chapter 4 Working with the Basics**—covers some basic procedures you will be using as you create and modify import filters.

**Chapter 5 Working with an Import Filter**—provides step-by-step instructions for creating an import filter. Describes how to add or change databases, reference types, or tags.

**Chapter 6 Testing an Import Filter**—covers the process of testing your import filters using Reference Manager. This helps to ensure the import filter is going to work as intended.

**Chapter 7 Printing Import Filter Information**— covers how to print and view information in Import Filter Editor.

You can print only from the Database tab. All information on the selected database prints.

**Chapter 8 Troubleshooting**— covers how to solve some of the common problems you might encounter.

**Index**



# 2

## Examining a Text File

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Before working with Import Filter Editor, let's look at a text file and get familiar with components to which you will need to refer. As you create import filters using the Import Filter Editor, you specify tags, delimiters, and so forth—based on what the text file looks like.

You need to download references in a tagged format to a text file from the database service. You should also download all the fields in the reference.

---

When you view the text file, be careful to note the case (upper case or lower case) of the text. As you create tags in a later chapter, make sure to type text in the same case as it appears in the text file.

---

In this chapter, we will look at:

- ◆ Viewing the Text File
- ◆ Identifying Reference Formats
- ◆ Identifying Database Identifiers
- ◆ Identifying References Type Identifiers
- ◆ Identifying Tag Formats
- ◆ Identifying Replace Text

## ◆ Identifying Text Styles

Specifically, this chapter covers viewing the text file and locating the references and database identifiers. Then, we will locate the fields in each reference and the tags that identify them. Later, we will be specifying these tags and identifiers as we create the import filter. We will also discuss Replace Text—that is text within your downloaded file that you do not want imported into Reference Manager.

## Viewing the Text File

You can view a text file within a word processor. Or, you can print several pages from a text file and work from the paper copy.

```
Record 1 of 2 - MEDLINE (R) 1/98-4/98
TI: Assessing hibernating myocardium: an emerging cost-effectiveness issue -editorial-
AU: Lucignani-G; Schwaiger-M; Melin-J; Fazio-F
SO: Eur-J-Nucl-Med. 1997 Nov; 24(11): 1337-41
ISSN: 0340-6997
PY: 1997
LA: ENGLISH
CP: GERMANY
MESH: Cost-Benefit-Analysis; Myocardial-Stunning-surgery; Preoperative-Care; Thoracic-Surgical-Procedures-econ
MESH: *Myocardial-Stunning-diagnosis; *Myocardial-Stunning-economics
TG: Human
PT: JOURNAL-ARTICLE; REVIEW; REVIEW,-TUTORIAL
AN: 98041930
UD: 9804
-----
Record 2 of 2 - MEDLINE (R) 1/98-4/98
TI: Regional in vivo and in vitro characterization of autonomic innervation in cardiomyopathic human heart.
AU: Ungerer-M; Hartmann-F; Karoglan-M; Chlistalla-A; Ziegler-S; Richardt-G; Overbeck-M; Meisner-H; Schomig-A;
AD: Medizinische Klinik, Technische Universitat Munchen, Munich, Germany. ungerer@med1.med.tu-muenchen.de
SO: Circulation. 1998 Jan 20; 97(2): 174-80
ISSN: 0009-7322
PY: 1998
LA: ENGLISH
CP: UNITED-STATES
AB: BACKGROUND: In contrast to healthy volunteers, regional differences of cardiac autonomic innervation have
rs were closely correlated (r=.65, P=.05). Similarly, uptake1 density or norepinephrine content and HED retentic
MESH: Adult-; Cardiomyopathy,-Congestive-metabolism; Cardiomyopathy,-Congestive-radionuclide-imaging; Middle-Ag
MESH: *Cardiomyopathy,-Congestive-physiopathology; *Heart-innervation
TG: Female; Human; In-Vitro; Male; Support,-Non-U.S.-Gov't
PT: JOURNAL-ARTICLE
RN: 0; 51-41-2
NM: Receptors,-Adrenergic,-beta; Norepinephrine
AN: 98105948
UD: 9804
SB: AIM
-----
Record 1 of 9 - Current Contents (R) all 7 editions
AN: Q6533-13 See Table of Contents
TI: DOPA RESPONSIVE DYSTONIA AND NORMALIZATION OF SOLEUS H REFLEX TEST RESULTS WITH TREATMENT
AU: KOELMAN-JHTM; SPEELMAN-JD; HILGEVOORD-AAJ; BOUR-LJ; DEVISSER-BWO
```

As you look at the text file, notice that it is divided into logical groupings of information. The text file contains a series of references. Each reference is made up of one or more fields. You need to determine how these groupings are set up in the text file, so that you can enter this information into Import Filter Editor. Normally all the references in a text file are from one database. However, a text file might also contain references from more than one database.

As you work in Import Filter Editor, you will be switching back and forth between viewing the text file and viewing Import Filter Editor windows and dialog boxes.

## Identifying Reference Formats

To identify a reference in your text file, look at the file for an indication of what separates one reference from the next. In most instances, it is a blank line. But, you can also use distinct text or a tag that appears either at the beginning or end of the reference.

In the sample, there is a dashed line between the references. Additionally, the references are separated by the record number (Record 1 of 2) that clearly states where the reference starts. This information is specified in the Reference and Tag Format tab in the Service window.

## Identifying Database Identifiers

The first type of identifier we need to find is the database identifier. This is the text in the reference that identifies the database from which this reference came. In most instances, this will be the name of the database.

Notice in the sample above, the first two references' database identifiers are "MEDLINE," while the third reference's database is identified as "Current Contents." Identifiers must be specified exactly as they appear in the file and must be unique to references from that database. This information is specified in the Database tab in the Service window.

## Identifying Reference Type Identifiers

A reference type identifier is the text within a reference that identifies the type of reference. It must be specified exactly as it appears in the file and must be unique to references of that type. In most instances, one of the tagged fields in the reference contains the reference type information which you can use as the identifier.

In the sample, the PT tag contains the identifier "JOURNAL-ARTICLE". This information is specified in the Reference Type tab in the Database window.

## Identifying Tag Format

Tags mark the beginning of each field. The tag format consists of the characters that are common in all the tags. More specifically, you need to identify each character at each position in the tag and determine if they are the same in all the tags. If the character is not the same, then you need to determine if the characters at that position are in one of the predefined character sets.

In the above sample, all the tags occur at the beginning of the line and consist of either two or four uppercase letters followed by a colon and spaces. To identify what these

tags have in common, you notice that all tags are at the beginning of the line and are followed by at least two upper case letters. Therefore the tag format is “¶\u\u”. ¶ represents a new line or end of a line and \u represents the uppercase letters character set. This information is specified in the Reference and Tag Format tab in the Service window.

Tag formats can include special characters, character sets, and literal characters such as spaces, dashes, colons, and text characters. You must identify these correctly in order for any information to be transferred into Reference Manager.

## Identifying Replace Text

Replace text is any text in a field that you do not want imported or that you want replaced with other text before importing into Reference Manager—such as those sometimes found at the end of a line or field. Once you determine the undesired text, you can specify this in the Replace Text tab of the Edit Tag dialog for the field where this text appears. Then Reference Manager, as it imports the text file, performs the Replace text in the order specified.

## Identifying Text Styles

Some database services download style attributes such as bold, italic, and underline in the text file. They appear as symbolic characters beginning or surrounding the styled text, e.g. “\bBolded word\b”.

As you import text, you can control whether or not these style attributes are retained as the text comes into the database. If you want to retain the style attributes, specify the surrounding symbolic characters in the Text Styles tab in the Service window. If you do not want to import a word with a text style, you can remove the symbolic characters by specifying them as replace text.

## Getting Started with Import Filter Editor

---

This chapter is designed to help you get started using Import Filter Editor. Use this chapter to learn how to launch Import Filter Editor and to gain an understanding of the user interface.

This chapter covers:

- ◆ Launching Import Filter Editor
- ◆ Understanding the Menus
- ◆ Understanding the Windows and Dialog Boxes

### Launching Import Filter Editor

There are four ways to access Import Filter Editor—from Windows or from Reference Manager. These methods are:

#### To launch Import Filter Editor:

- From Windows, go to the **Start** menu, select **Programs**, then **Reference Manager**, and then **Import Filter Editor**.
- From Reference Manager for Windows, from the **Tools** menu, select **Import Filter Editor**.

- From Reference Manager for Windows, click the button marked IFE on the Toolbar.
- From Reference Manager's Import Text File dialog, click the **Edit Filter** button after specifying a filter, then click on the **Advanced** button.

## Understanding the Menus

There are five menus in the Import Filter Editor program, accessible from the menu bar at the top of the screen. Three are visible initially and two additional ones are visible when you open an import filter. These menus provide access to Import Filter Editor commands and functions.

The main function of each is described below.

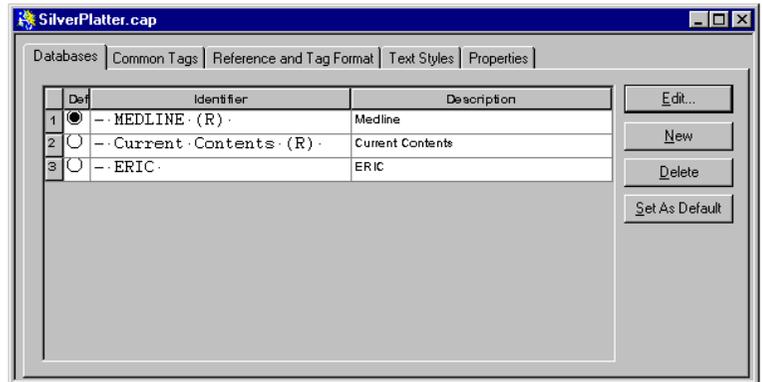
- The **File** menu provides options that let you work with an import filter file. These options include creating, opening, closing, or saving import filters. You can also print the current database's specifications from this menu. The bottom portion of the menu keeps track of the last four files opened.
- The **Edit** menu provides options that allow you to cut, copy, and paste text.
- The **View** menu lets you view or hide the toolbar and status bar.
- The **Window** menu lets you arrange windows for viewing on your desktop and lists the currently open windows.
- The **Help** menu provides access to online help and information about the Import Filter Editor.

# Understanding Windows and Dialog Boxes

Two windows provide access to information in Import Filter Editor. These windows have a similar look and feel, but are used to enter different levels of information. In addition, the Edit Tag dialog box, used for specifying tag information, acts as a third level in which to add information.

## The Service Window

The top-level window, the Service window, shows information at the highest level—that is information about the database service in general.



## Tags in the Service Window

There are five tabs in the Service window. They are:

The **Databases tab**, shown above, shows all defined databases for this database service. Each has a unique identifier and descriptive name.

The **Common Tags** tab contains tags that are common to all databases and reference types.

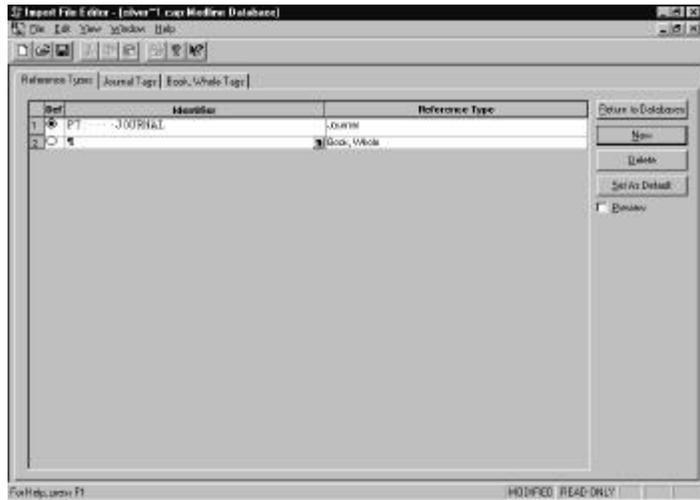
The **Reference and Tag Format** tab is used to define the formats of references and tags for this database service. The information in this tab determines how Reference Manager parses a reference and a tag in the downloaded text file.

The **Text Styles** tab lets you define the text style attributes, if any, in your text file. Any text in the text file surrounded with the specified start and stop sequences will import into Reference Manager with that style.

The **Properties** tab contains general information about the database service and the import filter file. The Service's name is listed here.

## The Database Window

When you click the Edit button from within the Databases tab, the Database window appears for the database where your cursor was. The Database window, accessed from the Service window, provides the second level of information in Import Filter Editor. It displays Reference Types and their specific tags for a specific database.



Notice that the title bar shows the name of the database.

---

You can go back to the Databases tab in the Service window at anytime by clicking on **Return to Databases**.

---

### Tabs in the Database Window

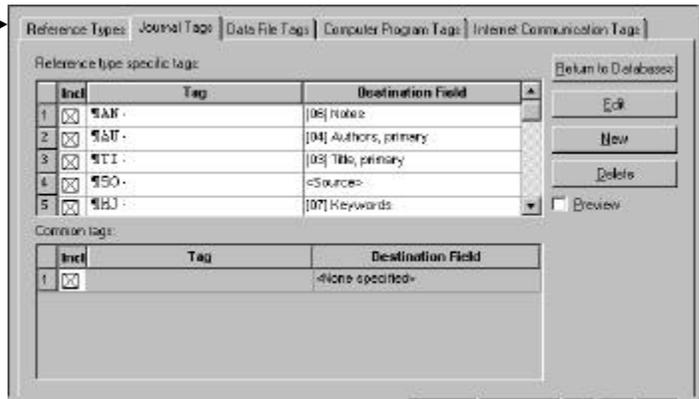
This window shows the following tabs:

The **Reference Types** tab lets you specify the reference types that you want imported from the database.

As you add a reference type (e.g., Journal), a tab for the reference type's tag appears. This new tab lets you specify the tags imported for this reference type.

Here, more tabs are shown. There is one tags tab for each different reference type defined.

The additional tabs

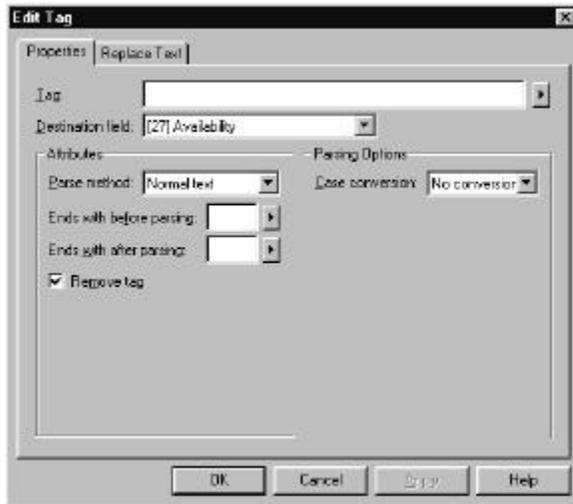


When there are more tabs than will fit across the screen, you can scroll to locate the other tabs.

## The Edit Tag Dialog Box

The Edit Tag dialog box lets you define field tag specific information. You can access the Edit Tag dialog box from two windows:

- Under the Common Tags tab of the Service window, insert the cursor on the line of the tag to edit and click the Edit button. This dialog box pops up automatically when you create a new tag.
- Under the tags tabs of a specific reference type of the Database window, insert the cursor on the line of the tag to edit and click the Edit button. This dialog box pops up automatically when you create a new tag.



The options in this dialog box vary depending on the Destination field and Parse method selected. The Parsing Options that appear, in particular, are dependent on the Parse method.



## Working with the Basics

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Once you have launched the program and gotten familiar with the interface, you are ready to begin working with some of the basic functions in Import Filter Editor.

These basic functions include:

- ◆ Using Special Characters and Character Sets
- ◆ Saving Files in Import Filter Editor
- ◆ Working with Tags

### Using Special Characters and Character Sets

As you specify identifiers and formats in Import Filter Editor, you may want to enter special characters and character sets. Special characters are mostly hidden characters, such as an end of line or a tab character. If you are using a word processor to look at the text file, you can view these special characters by showing hidden text in your word processor.

A character set is a group of characters that you can use when you cannot specify a specific character in a format or identifier. Import Filter Editor comes with predefined

character sets, or you can create your own custom character sets. For example, a tag format that consists of an end of line character followed by two uppercase letters looks like this “¶\u\u”. ¶ is a special character and \u is the predefined character set containing all uppercase letters.

Fields that allow special characters or character sets have an arrow button to the right of them. You can enter special characters and character sets by clicking this arrow button and selecting an item from the pop-up menu or typing them in the field. Depending on the field, you see a different pop-up menu.

### To enter a special character or predefined character set:

1. Place the cursor in a field, such as the Separator format, where you need to enter a special character or character set.



Special characters or character sets can be used in this field.

2. Click the arrow, and the special character menu appears.

End of Line	Ctrl+L	← These are the Special Characters
Tab	Ctrl+T	
Null Character (ASCII 0)	\0	
\	\\	
Any Upper Case Letter	\u	← These are Character Sets
Any Lower Case Letter	\l	
Any Number	\n	
Any Letter	\a	
Any Letter or Number	\b	
Any Letter or Space	\c	
Any Letter, Number or Space	\d	
Any Character	\*	
Custom Character Set...		

Use the Custom Character Set if you want to manually type the character set, rather than choose a predefined one.

---

The other characters are as follows:

Any uppercase letter: A-Z

Any lowercase letter: a-z

Any number: 0-9

Any letter: a-z and A-Z

Any letter or number: a-z, A-Z, and 0-9

Any letter or space: a-z, A-Z, and space character

Any letter, number, or space: a-z, A-Z, 0-9, and space character

Any character: any and all characters

---

3. Select an item from the menu by clicking it.

The symbol for the special character or character set appears in the field.

4. Repeat the process to enter additional special characters or character sets.

### To build a custom character set:

1. Select **Custom Character Set** from the special character drop down menu.



2. Type all the characters you want to use in this custom character set. Or click the arrow to select from the special character menu.
3. When you are done, click **OK**.

The custom character set appears in the field.

## Saving Files in Import Filter Editor

This section describes how to save import filters. It is recommended you save the file intermittently as you work in it.

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Import filters created by RIS cannot be modified. For these filters, the Save command is disabled on the File menu and the status bar displays an RIS indicator.

---

When saving an import filter, the default file extension is **CAP**. This extension is necessary for Reference Manager to recognize the file as an import filter. It is recommended that you save filters in the Import folder located in your Reference Manager program folder. Use the Save command from the File menu to save new or modified import filters.

## Using the Save As Feature

You can make a copy of an import filter by using the Save As command, making changes to this copied file, while retaining the original. You can create as many altered copies of these files as you need.

The Save As feature is useful for copying RIS created filters so you can modify them.

## Working with Tags

As you work in Import Filter Editor, you need to view the text file and determine which tags to import and the type. This section provides some hints on how to make the selection.

Import Filter Editor classifies tags into three types:

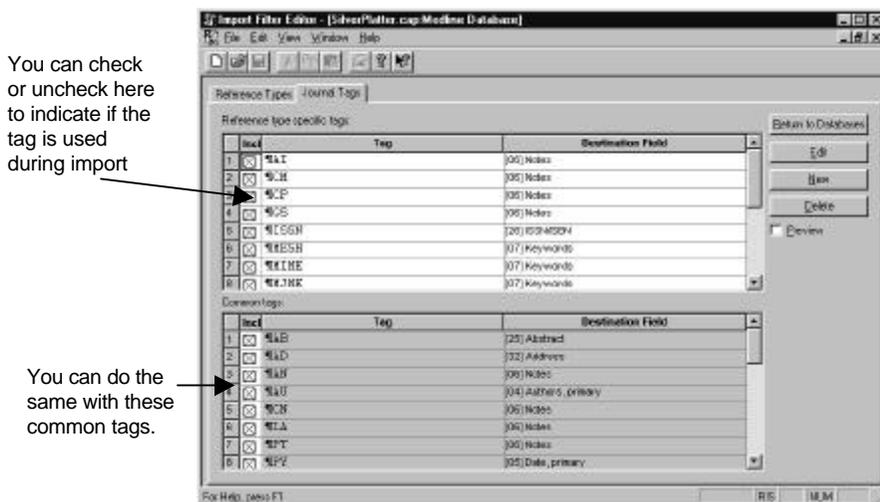
- ◆ Common Tags
- ◆ Reference Type Specific Tags
- ◆ Source Tags

## Understanding Common Tags

Common tags are those tags that are the same for more than one database or reference type within a database service. Common tags are the easiest to use as you define them once. They can be used in all reference types defined. If you do not want to import a common tag for a specific reference type, you can exclude it.

## Understanding Reference Type Specific Tags

Reference Type specific tags are tags that are parsed differently for more than one reference type and must be defined individually for each reference type. You define reference type specific tags in the Database window in its reference type tags tab.



You can use both reference type specific and common tags to define all tags to be imported for a reference type. To have Reference Manager import the tag, select the checkbox in the Incl column. To have Reference Manager not import the tag, clear the checkbox.

When Reference Manager imports a tag, it searches the reference type specific tags first. Then, if there is no match, it searches the common tags. If there is still no match, then the tag is not imported.

## Understanding Source Tags

Source tags are used when there is more than one piece of data in a tagged field that imports to more than one Reference Manager field. You use a Source tag to indicate how and where each piece of data should be parsed by Reference Manager during the import.

Normally a tagged field imports into one Reference Manager field. For example, the TI tag imports into Reference Manager's Title field. However, some tagged fields import into more than one Reference Manager field. As the following example shows, the SO tag for this journal reference imports into the Periodical, Volume, Issue, Pages, and Publication year because it contains multiple types of information.

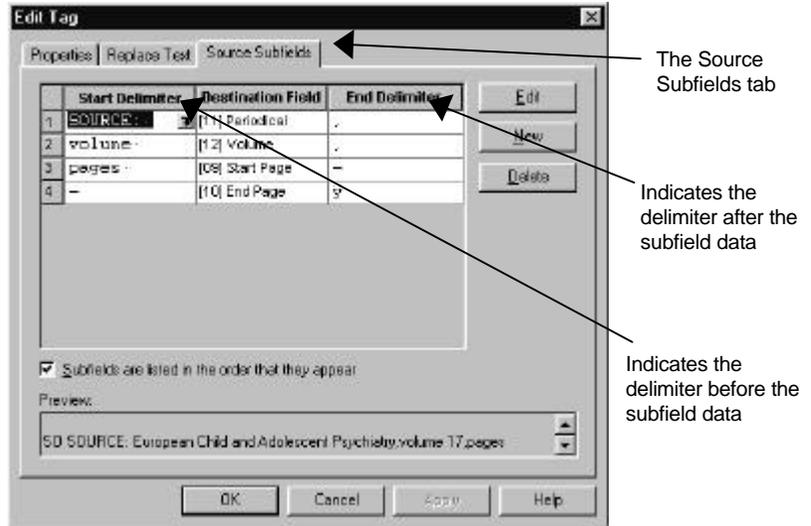
SO: Journal of Allergy and Clinical Immunology. 92(6):802-811, 1993 Dec.

You can create Source tags by setting the Destination Field to <Source> in either the common or reference type specific tags tab. Each piece of data in the source tag is specified in the Source Subfield tab in the Edit Tag dialog box.

### **To make the Source Subfields tab visible, do the following:**

1. In either the Common or reference type specific tags tab, put your cursor on the line of the tag that you want to be a source tag.
2. Click the **Edit** button.
3. Select the **Properties** tab.

4. In the **Destination** field, select **<Source>**.  
A confirmation message appears.
5. Click **Yes**.
6. Click the **Source Subfields** tab to view this window.



## Mapping Tags to Reference Manager Fields

Mapping is the process of matching the field of one reference type to the corresponding field in another reference type. Since field names are customizable in Reference Manager (except for the Generic reference type) each field can be named differently in each reference type.

Import Filter Editor uses the generic reference type's field names in the Destination field's drop-down list since it is not customizable. So, when you select the destination field

for the tag in Import Filter Editor, make sure it maps correctly to the field for the reference type in your database.

Field numbers next to the field name also help you when you are trying to figure out what fields in your database map to what fields in the generic reference type. Another helpful tool is the Field and Type Editor in Reference Manager.

# 5

## Working with an Import Filter

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Included with Reference Manager are some common import filters for the more popular database services. These will help you get started. You may want to create import filters for other database services from which you import data into Reference Manager.

This chapter covers creating new definitions and opening and editing existing definitions. It includes these sections:

- ◆ Creating a New Import Filter
- ◆ Working with an Import Filter
- ◆ Working with a Database
- ◆ Editing Tags or Subfields

### Creating a New Import Filter

For each database service you subscribe to, you create a separate import filter in Import Filter Editor. If there are distinguishable differences in the format of the references or tags between databases within a service, you may want to create a separate filter per database. However, if the formats are identical, then within an import filter you can create as many databases as you need.

There are two ways to create an import filter:

- ◆ Using the New Import Filter Wizard
- ◆ Manually

---

The New Import Filter Wizard takes you through some initial steps for setting up a definition. However, there are other options not covered in the wizard that must be specified before the filter will work, such as creating databases, reference types, and tags. You might want to review the sections in Working with an Import Filter on page 34, for additional information.

---

### To create a new import filter using the Wizard:

1. From the **File** menu, select **New**.

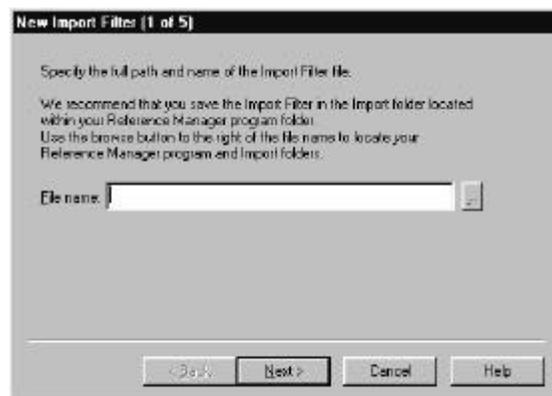
You are asked if you want to use the New Import Filter Wizard.

2. Click **Yes**.

---

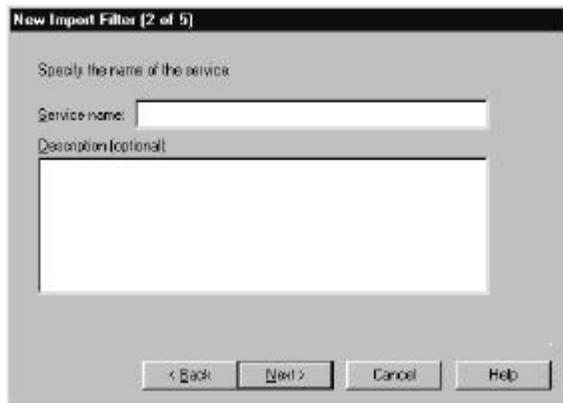
If you select No, you can create an import filter manually. See the following section for instructions.

---

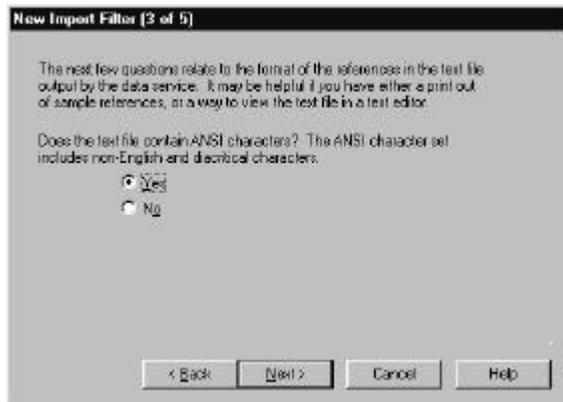


3. Specify the file name and folder of the import filter, or browse to specify the file name and folder. Then click **Next**.

It is recommended you use a descriptive file name that pertains to the database service. Save the file in the Import folder of your Reference Manager program folder. End the file name with the extension .CAP.



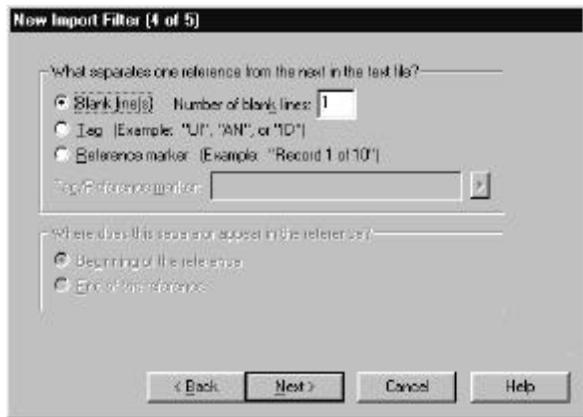
4. Type the name of the service and an optional description, and click **Next**.



5. Select **Yes** or **No**, and click **Next**.

If the text file does not use ANSI characters, for example if it came from a DOS-based system, click **No**. Otherwise, click **Yes**.

The ANSI character set contains diacritical characters that are mostly used in foreign languages. Examples of diacritical characters are ñ or ü.



6. View your text file to determine the distinct separator between references. Then select the separator that divides one reference from the next.
7. Do one of the following:
  - If you chose **Blank line(s)**, in the **Number of blank lines** field, type the number of blank lines that appear between references.
  - If you chose **Reference marker**, which is any text marking either the beginning or end of a reference or **Tag**, do the following:
    - a. In the **Tag/Reference marker** field, enter the specific reference marker or tag that separates the references.

- b. In the **Where does this separator appear in the reference** section, indicate if the marker or tag appears at the start or end of each reference.
- When you are done, click **Next**.

**New Import Filter (5 of 5)**

Are the fields in the reference tagged? Tags can consist of two to three letters and/or numbers followed by punctuation, or of a complete word preceded by a carriage return. Use the selection list button to select the appropriate codes for your data services.

Yes  
 No

Tag format:  ▶

Example of a structured tag format:  
"LI -" will be defined as "LIU-"

Example of a free form with variable length tag format:  
"Author" will be defined as "A#A#A"

8. Select **Yes** or **No** to indicate if the fields in the references are preceded with tags.

If the references are not in a tagged format, such as a comma delimited format, select **No**. Otherwise, select **Yes**.

9. If you selected **Yes** above, in the **Tag format** field, enter in the tag format.

For instructions on how to do this, see Identifying Tag Format on page 14.

10. Then, click **Finish**.

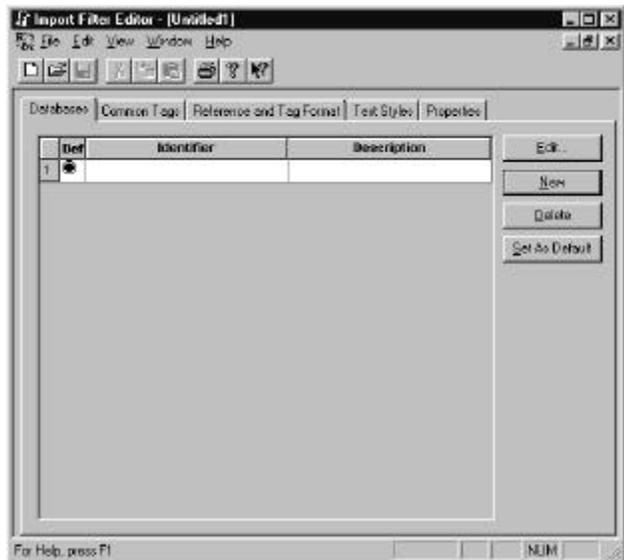
The new import filter is created. The Databases tab appears on your screen. You will still need to define at least one database, a reference type, and tags in order for this filter to work properly. To define a database, go to Defining Databases on page 40.

## To create an import filter manually:

1. From the **File** menu, select **New**.

You are asked if you want to use the New Import Filter Wizard.

2. Click **No**.



---

See, Working with an Import Filter, below, for a complete description of how to fill in information in the tabs.

---

## Working with an Import Filter

When working with an import filter, you can:

- ◆ Open an Existing Import Filter
- ◆ Define Databases

- ◆ Define Common Tags
- ◆ Change Reference and Tag Formats
- ◆ Change the Text Styles
- ◆ Change Properties

## Opening an Existing Import Filter

This section describes how to open an existing import filter.

### Opening an existing import filter:

1. From the **File** menu, select **Open**.
2. Locate the import filter to open and click **Open**.

---

To make changes to a RIS import filter (one created by RIS), you need to make a copy of the import filter and then make changes to the copy. You do this using the Save As command. This renames the file—as the RIS created filters cannot be modified. Therefore, you always retain the original version of the RIS import filters. You can create as many altered copies of these files as you need. These are located in the Import folder.

---

## Defining Databases

You will need to define a database for each database in the service that you want to import into Reference Manager. You can also edit and delete database information for databases in the service.

For each filter in Import Filter Editor, there is one database that is the *default*. If Reference Manager cannot identify the database from which the reference came, then the default database is used.

### To work with information in the Database tab:

**To access this tab:** From the Service window, click on the **Databases** tab.



**Def column**—click here to make this database the default.

The default database is the database reference manager will use if it can't find any of the defined database identifiers.

**Identifier column**—enter the identifier for this database. The identifier is the text in the reference that identifies the database from which this reference came. In most instances, this will be the name of the database.

The Identifier consists of text characters, special characters, and character sets that Reference Manager uses to identify the database or reference type of a reference in the text file. To enter special characters or character sets, click on the arrow button and use the special character menu.

The Identifier must be in the reference and must be unique to the reference. Enter the Identifier exactly as it appears in the text file (case sensitive).

**Description column**—type the name for the database.

**Edit button**—put your cursor on the database you want to edit and click this button. The database window is opened allowing you to add or modify reference types and tags imported for this database.

**New button**—click here to add a blank line from which you can add a new database.

**Delete button**—put your cursor on the database line you want to delete and click this button.

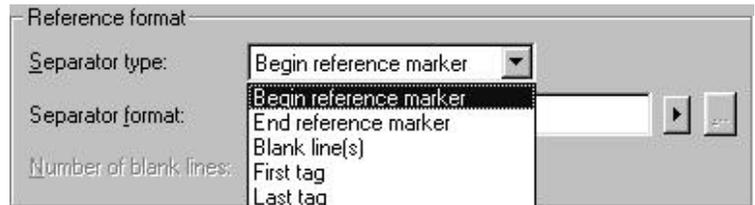
**Set as default button**—put your cursor on the database line you want to be the default database and click this button. The default database is the database Reference Manager will use if it can't find any of the defined database identifiers.

## Defining Common Tags

For information on defining common tags, see Working with Common Tags, on page 49.

## Changing Reference and Tag Formats

The options from which you can select in the Reference and Tag Format tab include:



**Separator type**—this identifies what separates references in the text file. The options include:

- **Begin reference marker**—text that is consistently at the beginning of a reference that is not in a tagged field.
- **End reference marker**—text that is consistently at the end of a reference that is not in a tagged field.
- **Blank line**—one or more blank lines are between each reference in the text file.
- **First tag**—a tag that is always the first tag of each reference in the text file.
- **Last tag**—a tag that is always the last tag of each reference in the text file.

**Separator format**—this is only enabled when separator type is not Blank Line. Enter either the format of the reference marker or the tag that is the separator between references.

**Arrow button**—pops up the insert special character menu for inserting into the Separator format field.

**Browse button**—this is only enabled when separator type is First Tag or Last Tag. This displays a list of defined tags to choose from.

**Number of blank lines**—only available when separator type is Blank Line. This specifies how many blank lines are between references in the text file.

**Tag format**—can include special characters, character sets, and literal characters such as spaces, dashes, colons, and text characters. You must identify these correctly in order for any information to be transferred into Reference Manager.

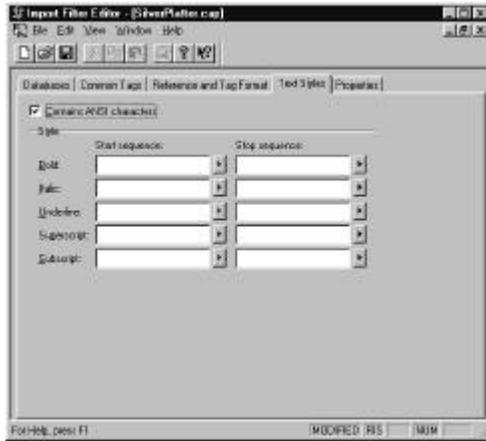
## Changing Text Styles

If the original text file contains text style markers, such as “\b” for bold, you can retain these attributes in the Reference Manager database by defining them in the Text Styles tab.

If the original text field does not contain text style attributes, then you don’t need to set these text options.

### To change text styles:

1. Click the **Text Styles** tab.



2. If the text file contains ANSI characters, select the **Contains ANSI characters** check box.

When this option is selected, ANSI characters are imported correctly from the text file. The ANSI character set contains diacritical characters that are mostly used in foreign languages. Examples of diacritical characters are ñ or ü. Refer to the Windows Character Map for a list of ANSI characters and their keyboard equivalents.

3. In the text file, determine the text style format (such as \u for underline) that begins or surrounds the styled text. In the **Start sequence** column, type the characters before the styled text.

---

Hint: You can also use the arrow to the right to enter a special character. This also applies to the Stop Sequence field.

---

4. In the **Stop sequence** field, type the characters after the styled text if any.

If there is no stop sequence, then the style is applied to the whole word following the start sequence.

5. Enter all other text styles, if any, using the same method.
6. When you are done, select **Save** from the **File** menu.

## Changing the Properties

From the Properties tab, you can change the Service name and Description.

### To change the Properties information:

1. Select the **Properties** tab.



2. In the **Service name** and **Description** fields, make any changes as desired.

3. When you are done, from the **File** menu, select **Save**.

## Working with a Database

Once you have created or opened an import filter, you are ready to work with the databases in it. You can add or modify the database's reference types and tags, and you can specify what data in the tagged field is imported into Reference Manager.

### Defining Reference Types

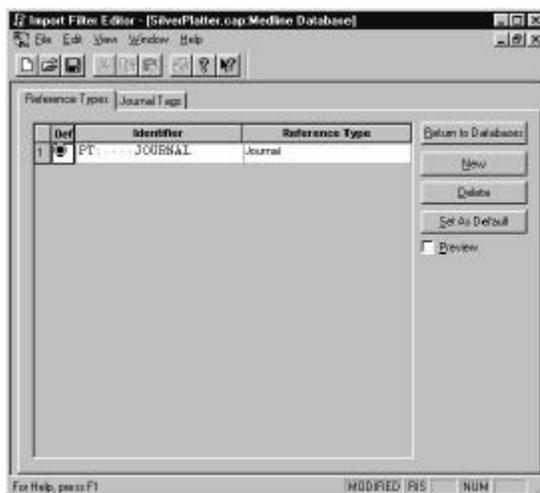
For each database defined, you need to add reference types. You add them for each different type of reference from that database that you want to import into your Reference Manager database. Reference types include books and articles.

You can also delete defined reference types, or you can set a particular reference type as the default.

For each database in Import Filter Editor, there is one reference type that is the *default*. Any unidentified reference types from the database in the text file are imported as the default reference type.

**To work with information in the Reference Types tab:**

**To access this tab:** In the Databases tab, put your cursor on the line of the database that you want to edit and click **Edit**.



**Def column**—click here to make this reference type the default.

**Identifier column**—specify a unique identifier.

A reference identifier is the text within a reference to identify the type of reference. It must be unique to references of that type. In most instances, one of the tagged fields contains the reference type information.

The Identifier consists of text characters, special characters, and character sets that Reference Manager uses to identify the reference type. To enter special characters or character sets, click on the arrow button and use the special character menu. Enter the Identifier exactly as it appears in the text file (case sensitive).

**Reference Type column**—select a type from the drop-down list. The drop down list displays the reference type labels from a standard Reference Manager database. If you have customized the reference type labels in your

Reference Manager database, you have to use Reference Manager's Field and Type Editor (under the Tools menu in Reference Manager) to see what standard reference type label to specify.

**Return to Databases button**—click here to return to the Databases tab in the Services window.

**New button**—use this to add a reference type if one hasn't been already added.

**Delete button**—put your cursor on the reference type line you want to delete and click this button.

**Set as default button**—put your cursor on the reference type you want to be the default and click this button.

The default reference type is used by Reference Manager when it can't find any of the reference type identifiers for this database.

**Preview checkbox**—check here to display a preview of the tag, based on the settings chosen in the dialog.

## Defining Tags

There are three types of tags you can define in the database: common tags, specific reference type tags, and source tags. These tags are explained in chapter 4. This section shows you how to add and define them as well as other functions you can perform.

If many of the tags are the same in more than one database or reference type, it may be easier to define these tags in the Common tags tab. Then, you can make any specialized tags in the reference type specific tags

tabs. You may want to use this approach to save work and time.

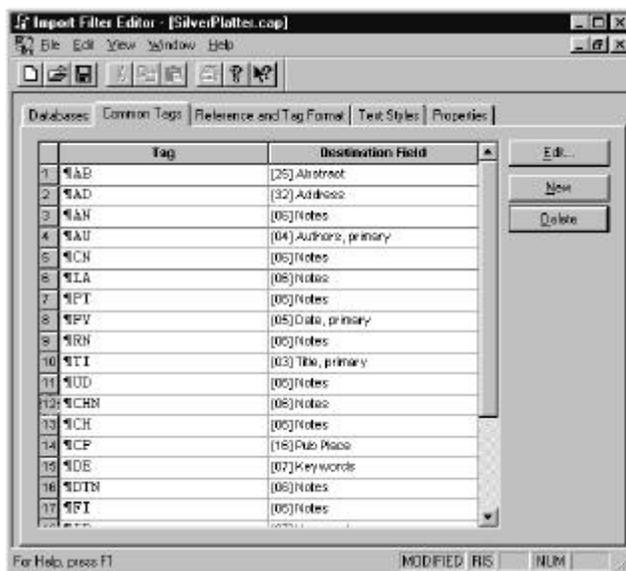
### **Working with Common Tags**

Each reference type contains several tags. The tags indicate the fields, such as Title, Author, and Date. So, for a reference type such as Journal, you might have ten or more tags.

Common tags are those tags that more than one reference type has in common. Title, Author, Keywords and Date are examples of tags that are the same in most reference types in a database service. You define all the common tags that you want to use for all reference types in the Common Tags tab. Then, they are automatically included in every reference type defined. You can also exclude a common tag in the reference type if you so desire.

#### **To work with information in the Common Tags tab:**

**To access this tab:** From the Services window, click on the **Common Tags** tab.



**Tag column**—type a tag label. Type the tag label exactly as it appears in the text file (case sensitive). Click the arrow to insert special characters using the special character menu, if needed.

**Destination Field column**—specify the Reference Manager field into which this tag will import.

For more information, see Mapping Tags to Reference Manager Fields on page 32.

**Edit button**—brings up the edit tag dialog box for the selected tag.

**New button**—use this to add a tag.

**Delete button**—deletes the selected tag from the list.

## Working with Reference Type Specific Tags

You can define specific tags for a given reference type.

### To access reference type specific tags:

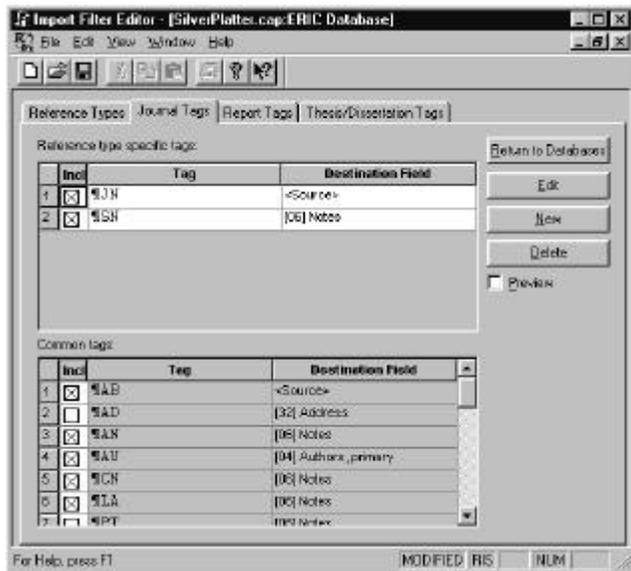
1. In the **Databases** tab, insert the cursor in the line of the database which you are defining reference types.

2. Click **Edit**.

The Database window appears with the Reference Types tab showing the Reference Types listed for this database. Notice for each reference type you have created, there is also a corresponding reference type specific tags tab.

3. Select the Reference Manager tags tab for the reference type for which you want to define tags.

For example, to define tags for the Journal Reference Type, you would select the Journal Tags tab.



Notice the Common tags are shown at the bottom of the window. They are automatically included in each reference type. You can exclude them from a reference type by clearing the check box in the Incl column.

### To define reference type specific tags:

To access reference type specific tags, see the preceding procedure.

**Incl column**—clear the checkbox for those tags you do not want to import (whether Reference type specific tags or Common tags).

**Tag column**—type a tag label. Type the tab label exactly as it appears in the text file (case sensitive). Click the arrow to insert special characters using the special character menu, if needed.

**Destination Field column**—specify the Reference Manager field into which this tag will import. For more information, see Mapping Tags to Reference Manager Fields on page 32.

**Return to Database button**—click this button to return to the Databases tab in the Service window.

**Edit button**—click this button to edit the selected tag.

**New button**—use this to add a new tag. A blank line appears in the Tag column, letting you add the new tag. You can use the drop down arrow to access special characters. Type the tag label exactly as it appears in the text file (case sensitive).

**Delete button**—click this button to delete the tag from the list.

**Preview checkbox**—check here to display a preview of the tag, based on the settings chosen in the dialog.

### **Working with Source Tags**

Source tags are used where there is more than one piece of information in a tagged field that imports into more than one Reference Manager field. Most fields include just one piece of information—such as a title. Source tags include multiple pieces of information—such as a journal name, date, and page numbers.

A source tag can be defined as a common tag. In most cases, however, the data in a source tag is specific to a reference type. To define a source tag, follow the steps above for defining either a common tag or a reference

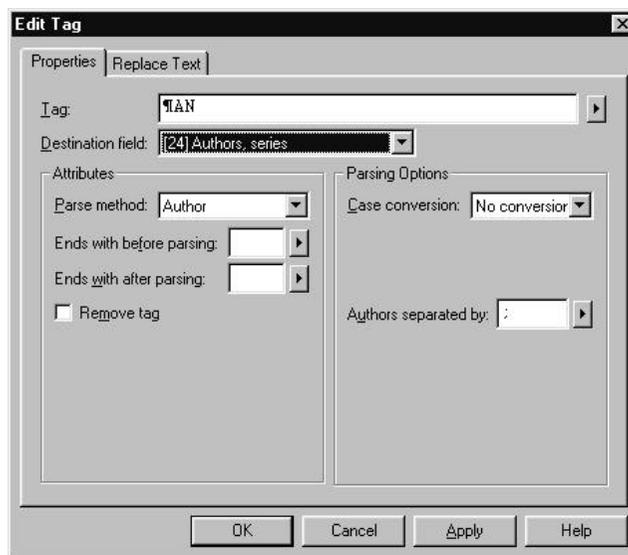
type specific tag and then set the Destination field to <Source>.

## Editing Tags or Subfields

### Defining Properties

In this tab you will instruct Reference Manager in how to parse the data in the tag field before importing.

**To specify options in the Edit Tag or Edit Subfield dialog:**



**To access this tab:** You can do so either from the Common Tags tab or a reference type specific tags tag. Put your cursor on the tag or subfield you want to edit and click Edit.

**Tag field**—is already filled in. You can edit this field.

**Destination field**—is already filled in. You can edit this field.

**Parse method field**—contains the most appropriate choice for the Destination Field you chose. You can change the parse method, but it is recommended you use the default option.

**Ends with before replace field**—lets you specify characters that determine the end delimiter of the data to import.

**Ends with after replace field**—lets you specify characters that determine the end delimiter of the data to import.

The Ends with before parsing is the end delimiter before doing the Replace text. The Ends with after replace is the end delimiter after doing the Replace text.

The End with after replace is the same as the End Delimiter of the subfield if you are in an Edit Subfield dialog box. If you do not specify either end delimiters, all the data in the field is imported.

**Remove tag/start delimiter box**—if you do not want the tags/start delimiter (such as AU for author) to be imported into Reference Manager with the data, check this box.

**Parsing Options box**—on the right side of the dialog box, fill in the fields. These fields vary depending on the Parse method.

For detailed information, see Parsing Methods, below.

## Parsing Methods

The parse method and options effect how the data is imported in Reference Manager. The following parsing methods and their associated options are described below:

### Normal

Case conversion Specify how to change the case of data if needed:

Other Parsing:

- Replaces any carriage return-line feeds and removes any extra spaces in the data.

### Multi key

Keys separated by Delimiter between keywords, if there is more than one.

Space character Delimiter between words in a keyword. This delimiter is converted to a space when imported.

Case conversion Specify how to change the case of data if needed.

Other Parsing:

- Replaces any carriage-return-line feeds and removes any extra spaces in the data.

### Author

Authors separated by Delimiter between authors, if there is more than one.

Case conversion Specify how to change the case of data if needed.

Other Parsing:

- Reference Manager uses smart parsing to parse the last, first, middle, and title name parts from the author name. If “=” precedes the author name, smart parsing is suppressed and the name imports as is. The “=” is used mainly for importing corporate author names.

## Periodical

Case conversion	Specify how to change the case of data if needed.
Synonym type	Specify the synonym type of the periodical: Full, Abbreviated, User 1, or User 2.
Period character	Delimiter after abbreviated words. This delimiter is converted to a period when imported.
Space character	Delimiter after non-abbreviated words. This delimiter is converted to space when imported.

## Other Parsing:

- Replaces any carriage return-line feeds and removes any extra spaces.
- If the Period character and the Space character are the same, each word in the data is looked up in Periodical Term Dictionary to determine if it is abbreviated or not. If the word is not in the dictionary, then it is an abbreviation and is followed by a period. Otherwise, it is not an abbreviation and is followed by a space.
- If the Period character and the Space character are different, the words preceding the Space character are added to the Periodical Term Dictionary.

## Reprint

Reprint data	Specify whether the data contains the reprint status, reprint request date, or both.
“Not in File” ID	Identifier if status is Not in File.
“In File” ID	Identifier if the status is In File.
“On Request” ID	Identifier if the status is On Request.
Request date begins with	Delimiter before the request date.
Request date ends with	Delimiter after the request date.

#### Other Parsing:

- Reference Manager uses smart parsing to parse the year, month, day, and other parts of the request date.

#### Source

A Source Subfield appears where you can specify the subfields.

See the section, Defining Source Subfields, on page 54.

#### Pages

##### Other Parsing:

- Reference Manager uses smart parsing to parse the start and end page.

#### Date

##### Other Parsing:

- Reference Manager uses smart parsing to parse the year, month, day, and other parts of the date.

---

In Reference Manager, smart parsing requires that the captoken.dat file be in your program folder when you perform the import.

---

## Case Conversion

The Case Conversion drop-down list lets you change the case used in the tagged field before importing it into Reference Manager. You have these choices:

**No conversion**—leaves the case of the data as is.

**Upper case**—converts all letters to uppercase.

**Lower case**—converts all letters to lower case.

**Sentence case**—if the data is not already in mixed case, this option uppercases the first letter of each sentence. Leave all other letters in lower case.

**Title case**—if the data is not already in mixed case, this option upper cases the first letter of each word. Leaves all other letters in lower case.

**Author case**—if the name is not already in mixed case, this option uppercases the first letter of each name and initials. Leaves all other letters in lower case.

---

When using Sentence case, Title case, and Author case conversions, words that are in the Reference Manager's Casing Term dictionary are imported using the term from the dictionary.

---

## Defining Replace Text

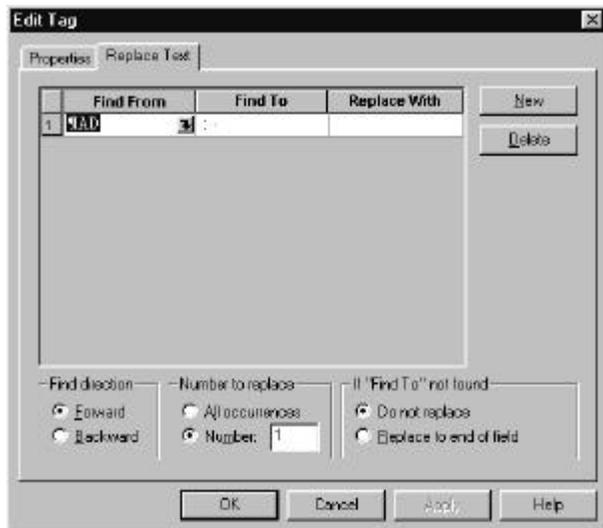
One of the functions you can use in Import Filter Editor is to delete or replace specific text with different text in a tagged field. For example, if there are tab characters in the data that you do not want to import, you can replace them with a space.

### To specify text to delete or replace in a tag:

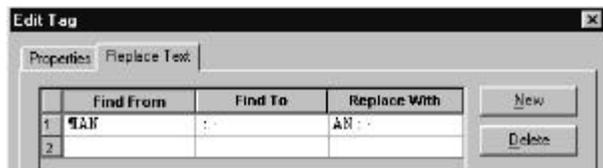
1. Select the tag containing the text to delete or replace by clicking anywhere on the tag's line.

You must be in either the Common Tags tab (Service window) or the reference type specific tags tab (Database window).

2. Click **Edit** to open the Edit Tag dialog box.
3. Click on the **Replace Text** tab.



4. Click **New**.



A blank row appears for you to add text.

5. Do one of the following:
  - To find a certain text string, type the text in the **Find From** column. Leave the **Find To** column blank.
  - To find a range of text, in the **Find From** column type the first character(s) of the text. Then in the **Find To** column, type the last character(s) of the text.

For example, if you wanted to replace text within parentheses, you can enter (“ **in Find From and**”) in Find To.

6. In the **Replace With** column, type the replacement text.

---

If you are using this function to remove text, and not to replace text, leave the **Replace With** field blank.

---

7. In the **Find direction** box, select the direction in which you want Reference Manager to perform the search.

If you chose Backward, for example, it searches the tagged field from the end of the field.

8. In the **Number to replace** box, select how many times you want this replacement to occur.

If you select All occurrences, then all instances of this text are replaced or deleted. If you just want to make a limited number of replacements, click the radio button next to Number, and type the number of replacements to make.

9. In the **If “Find To” not found/empty** box, choose what you want Reference Manager to do if the text in the Find to column is not found or if there is no text in this column.

If the Find To field contains text that is not found, Reference Manager can either skip the text replacement, or it can replace all text from the Find From text to the end of the field.

If the Find To field contains no text, it can replace text in the Find From, or it can replace the text from the Find From to the end of the field.

10. Add any additional lines by clicking **New** and repeating the process.
11. When you are done, click **Apply** or **OK**.

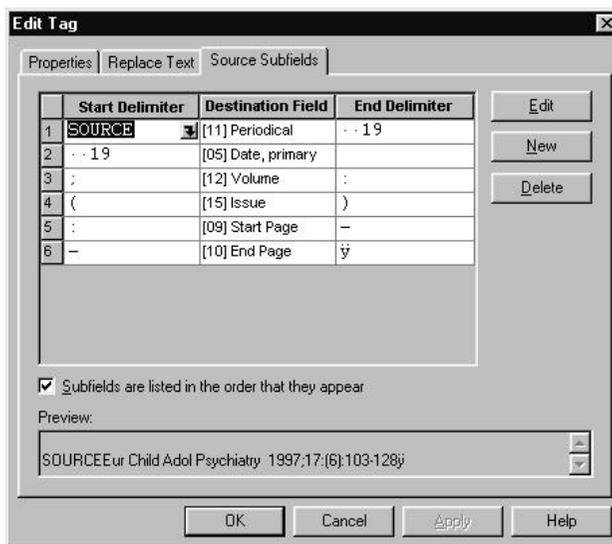
## Defining Source Subfields

When you select <Source> as the Destination field of a tag, you need to complete the Source Subfields tab in the tag's Edit Tag dialog box. You need to define for Reference Manager the Start and End Delimiters for each subfield.

To define Start and End Delimiters for subfields, you must find distinct characters that consistently surround the subfield data, such as a comma or semi-colon.

### To access Source Subfields:

1. Start from either the Common Tags tab in the Service window or a reference type specific tags tab in the Database window.
2. Place the cursor on the line of the source tag (the tag where the Destination field is set to <Source>) and click **Edit**.
3. Click on the **Source Subfields** tab.



### To define Source Subfields:

To access the Source Subfields tab, use the preceding procedure.

**Start Delimiter column**—type the character(s) for the starting delimiter for the subfield. If the start delimiter is not found, then this subfield is not imported. Then Reference Manager will look for the next subfield’s start delimiter.

**Destination field column**—select the corresponding Reference Manager field into which this tag imports. The Edit Tag or Edit Subfield dialog box may appear if this is the first time the Destination field is specified.

If this dialog box appears, fill it out as needed. For more information, see Editing Tags or Subfields on page 55.

**End Delimiter column**—type the ending delimiter for the subfield.

**Subfields are listed in the order that they appear checkbox**—check here if the subfields are listed in the order that they appear in the source tag. If they are not listed in this order, then clear this check box.

The same order means that Reference Manager searches for the start delimiter of a subfield starting from the beginning of the previous subfield.

If they are not in the same order, then Reference Manager searches for the start delimiter of each subfield from the beginning of the tagged field.

**Edit button**—use this button to edit the selected subfield. This function brings up the Edit Subfields dialog box for the subfield.

**New button**—use this button to add a new subfield.

**Delete button**—use this button to delete the selected subfield from the list.

**Preview section**—displays a preview of the subfield, based on the settings chosen in the dialog.

# 6

## Testing an Import Filter

---

After you are finished creating or working with an import filter, you need to test it. Testing the import filter ensures that the databases, tags, and references you have added and defined are working as you intended them to.

Test an import filter using Reference Manager by actually importing a text file downloaded from the database service into a new database

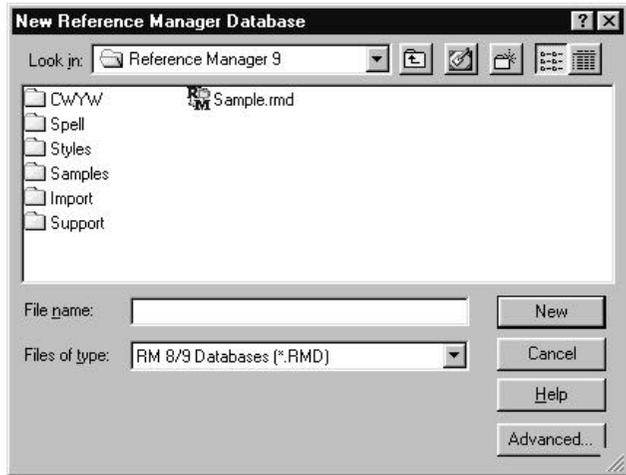
---

**IMPORTANT:** This procedure is done from Reference Manager, not Import Filter Editor.

---

### **To test an import filter:**

1. Open Reference Manager.
2. From the **File** menu, select **New Database**.



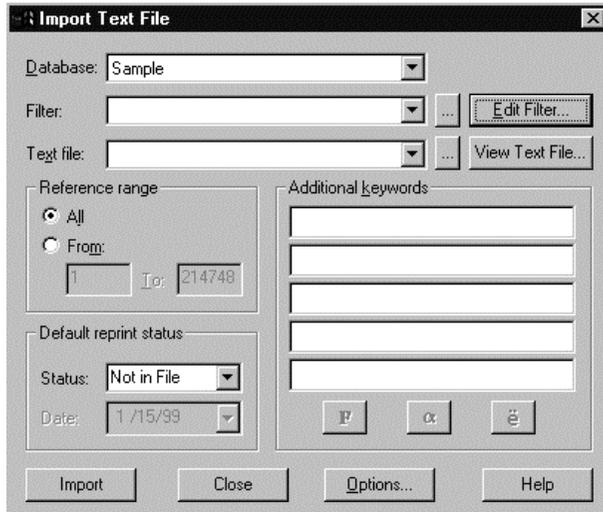
3. In the **File name** field, type **Test** or the name to call the database into which you will be importing.

Note the folder where this database is created in case you want to delete it later.

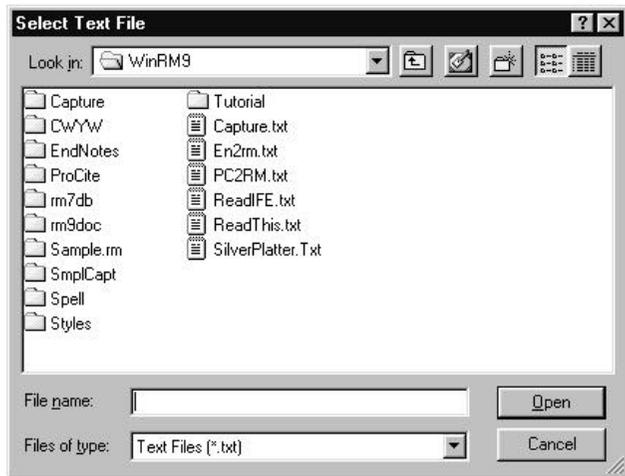
4. Click **New**.

An empty database now appears in Reference Manager.

5. From the **References** menu, select **Import Text File**.



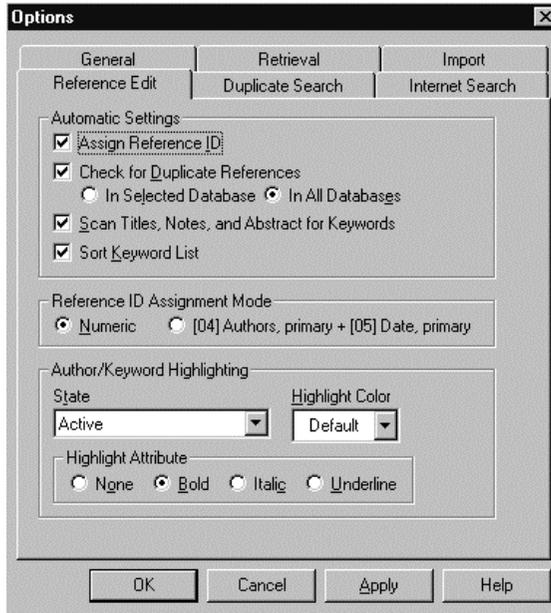
5. In the **Database** field, select the Test database or the database you just created.
6. In the **Filter** field, click the browse button to locate the filter you created or modified using Import Filter Editor.  
  
The File Select dialog appears.
7. Select the filter and click **Select**.
8. In the **Text File** field, click the browse button to select the text file containing the references downloaded from the database service.



9. Locate the text file to import and click **Open**.

If you named the file with a different extension than TXT, change the Files of type to All Files (\*.\*) so that all files appear.

10. In the **Reference range** field, make sure **All** is selected.
11. In the **Additional keywords** fields, make sure all the fields are empty.
12. Click the **Options** button.  
The Options dialog box appears.
13. Click the **Reference Edit** tab.



14. Click to clear the **Check for Duplicate References**, **Scan Titles, Notes, and Abstracts for Keywords** and **Sort Keyword List** check boxes.

Because you are testing to ensure that the import filter imports the data correctly, turn off any settings that could possibly alter the data.

---

Since you are modifying the Reference Manager global settings for testing the import filter, reset it back to the previous setting after the testing is complete.

---

15. Click **OK**.
16. Click **Import**.

---

If there are errors and the test was not successful, a log file will tell you where issues occurred during the

import. Review your references in the database and make sure each field imported correctly. If not, then go back and modify the filter using Import Filter Editor to fix the problem.

---



## Printing Import Filter Information

---

You can use Import Filter Editor's print function to print information about the import filter as well as the selected database.

This chapter includes:

- ◆ Printing Database Information
- ◆ Setting Up the Printer
- ◆ Print Previewing

### Printing Database Information

When you print information in the Import Filter Editor, the printout contains general information about the import filter. It also prints information specific to the selected database, such as tags, reference formats, and parsing options.

---

Print is only available when you are in the Databases tab in the Service window.

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### **To print the specifications of a database in an import filter:**

1. In the Databases tab of the Service window, select the database to print.
2. From the **File** menu, select **Print**.  
The standard Print dialog box for your printer appears.
3. Select your printing options and click **OK**.

## Setting Up the Printer

You can change the printer or the printer setup also, following instruction in this section.

### **To change the printer setup:**

1. From the **File** menu, select **Print Setup**.  
The standard Print Setup dialog appears.
2. Select the setup options and click **OK**.

## Print Previewing

To view a file before you print it, use the Print Preview function. This lets you view the pages that will print ahead of time. From this screen you can also print the document directly.

**To view a file on your screen:**

1. In the Databases tab of the Service window, select the database.
2. From the **File** menu, select **Print Preview**.
3. Preview the file as desired and click **Close**.



## Troubleshooting

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The following sections describe some of the more common problems you might encounter, and their solutions.

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**Hint:** You can locate answers to Frequently Asked Questions (FAQ) on our Web site at <http://www.risinc.com/>.

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### **Cannot locate the Destination Field name in the list box.**

The fields listed in the Destination Field list box are those fields included in the Generic reference type. The field name you are trying to locate is probably specific to a certain reference type. See what field this maps to in the Generic reference type and choose that as the destination field.

Refer to the Appendix containing the Reference Type Chart in your *Reference Manager User's Guide* to see a list of the reference types and the fields to which they map. You can customize this using Field and Type Edit, found in the Tools menu in Reference Manager.

**The tagged field is importing into the wrong Reference Manager field.**

The fields listed in the Destination Field list box are those fields included in the Generic reference type. The field you are trying to import is probably specific to a certain reference type. You can customize this using Field and Type Edit, found in the Tools menu in Reference Manager.

Refer to the Appendix containing the Reference Type Chart for a list of the reference types and the fields to which they map.

**No keywords or notes are imported.**

In the Field and Type Editor dialog box (from within Reference Manager), ensure that you have specified to include the keywords and notes field for the reference type. The boxes (under the column labeled I for Include) should be checked.

In Import Filter Editor, you can make sure these tagged fields are specified in the reference type specific tags or common tags and that their Destination fields are set correctly. If they are already specified and you are using common tags, make sure they are included for this database's reference type specific tags.

**One or more of the tagged fields is not importing.**

See the solution directly above for keywords or notes not importing.

Check the format of the tag(s) that is not importing to see if it follows the tag format specified in Import Filter Editor.

**No references are imported.**

Verify that you have defined the Reference Format. If the Reference Format is defined, check to see if it exists in the text file. Make sure the tag format matches the file.

Make sure the tags in the text file follow the tag format specified.

Make sure tags are defined for the reference types you are importing.

**All author names or keywords are importing as one name or one keyword.**

Ensure that you have specified Keywords/Authors separated by a delimiter. This usually occurs if multiple author names or keywords are listed in a single field.

**The Source fields in my text file are not in a consistent format.**

Try to make the formats consistent using Replace Text. As a last option, you can also use your word processor to edit the text file to make the Source fields consistent.