# CONVERTING FROM REFERENCE MANAGER TO ENDNOTE

Converting a Reference Manager 11 or 12 database to an EndNote library is not difficult and requires no importing or exporting of text files. If you have customized your Reference Manager reference types and fields, you can even customize the mapping of those reference types and fields during the conversion process.

Note that the conversion will make no changes to the original Reference Manager database.
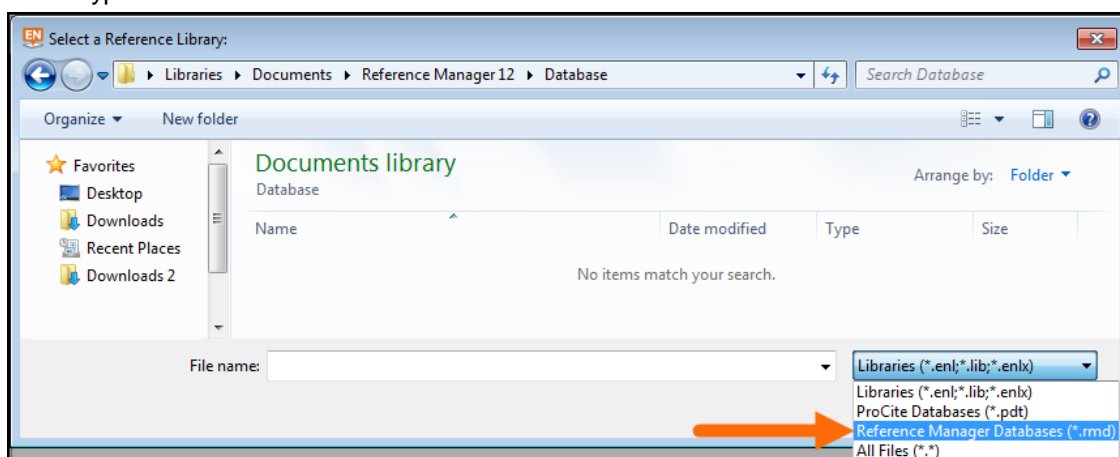
It is important the steps below be followed in the order shown.

## 1   CONVERTING THE REFERENCE MANAGER DATABASE

- In EndNote, select **Open Library** from the **File** menu.
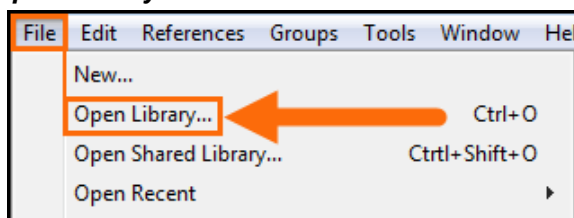
- In the *Select a Reference Library* window, navigate to the folder containing your Reference Manager database and select **Reference Manager Databases (*.rmd)** from the drop-down list of file types.


- You will now see the Reference Manager database in the folder. Select it, then click on the **Open** button.

Reference Manager Conversion 06-05-15.docx
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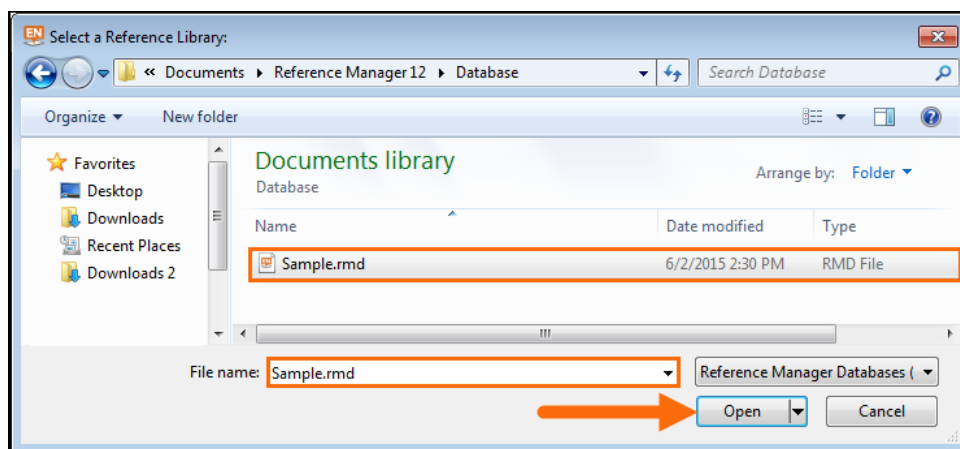
- If you have changed any of your reference types or fields in Reference Manager, click the **_Customize_** button to customize the field mappings. (Click here to continue with the uncustomized conversion instructions.)
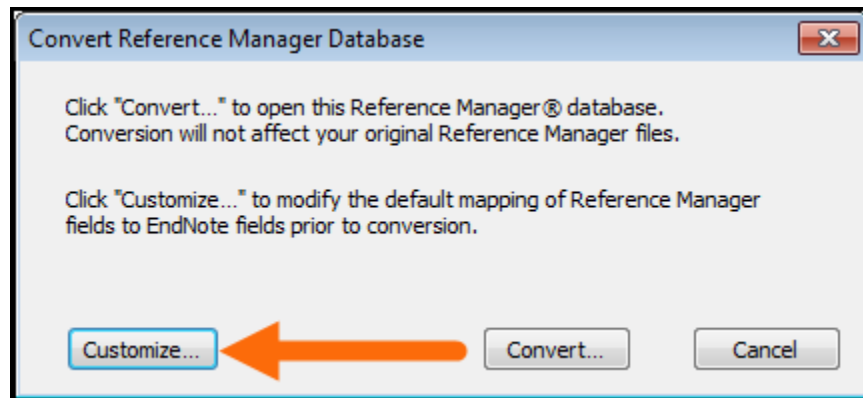

- If you have selected to customize your conversion, in the top half of the reference and field mapping window you can select the EndNote reference type that each Reference Manager reference type will import as. For example, in the screenshot below it shows that any reference that was entered as an abstract in Reference Manager will be imported as a journal article in EndNote. You can change these options if you wish using the drop-down list for each match in the EndNote column.
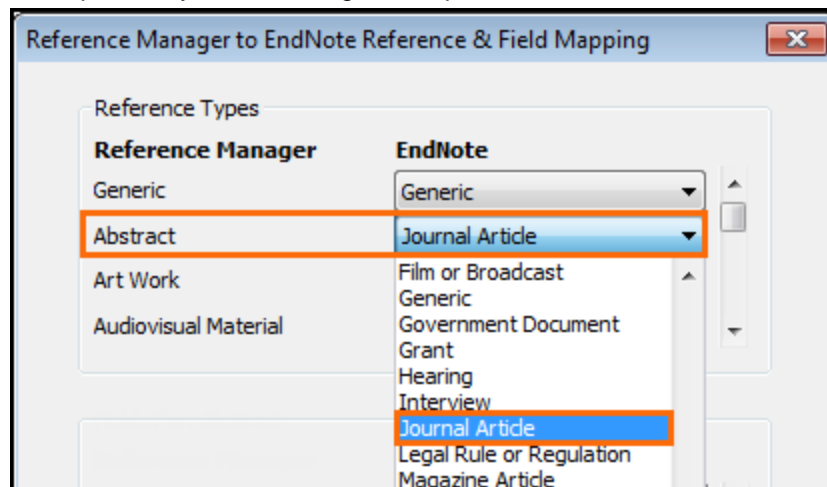

- In the bottom part of this window you can select the specific fields in EndNote that each Reference Manager field will map to for the shown reference type. In the screenshot below, the Pub Date field for the Journal reference type in Reference Manager is being mapped to the Date field in EndNote.
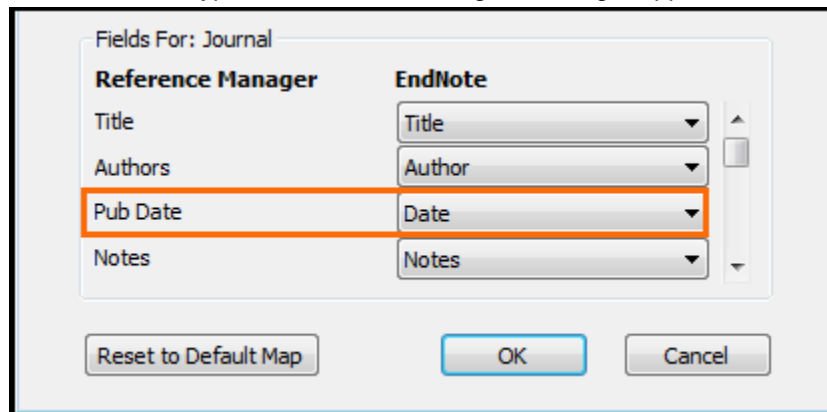
- When all reference types and fields are mapped as you wish, click the **OK** button to finalize the field and reference type customizations. Please note the field mappings will need to be set for each database converted.
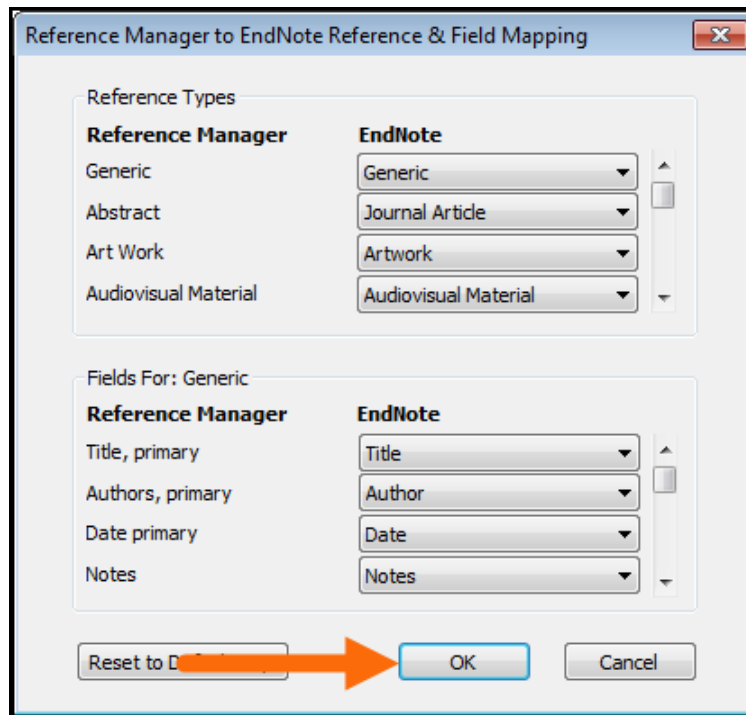
- Click the **Convert** button to convert the database.
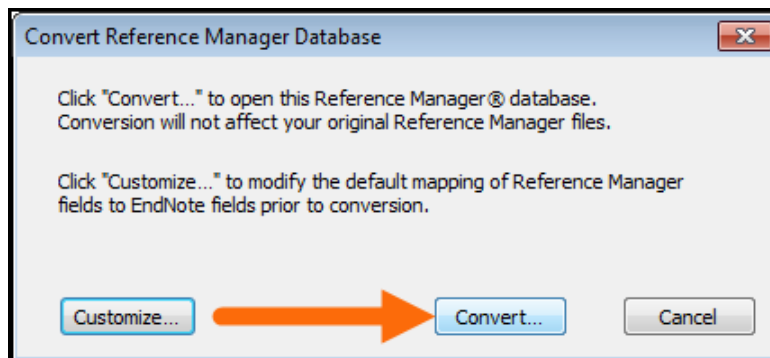
- Give your new EndNote library a name. We suggest saving the new library in your main documents folder. Never save an EndNote library in an online service such as Dropbox, OneDrive, Google Drive, SharePoint, or similar online ("cloud") storage. These services will corrupt an EndNote library. We also suggest you avoid putting a read-write copy of an EndNote library on a network drive. We have seen corruption and performance issues with read-write libraries on network drives. It is best to store your library on your computer's hard drive. Click the **Save** button to save your new EndNote library.
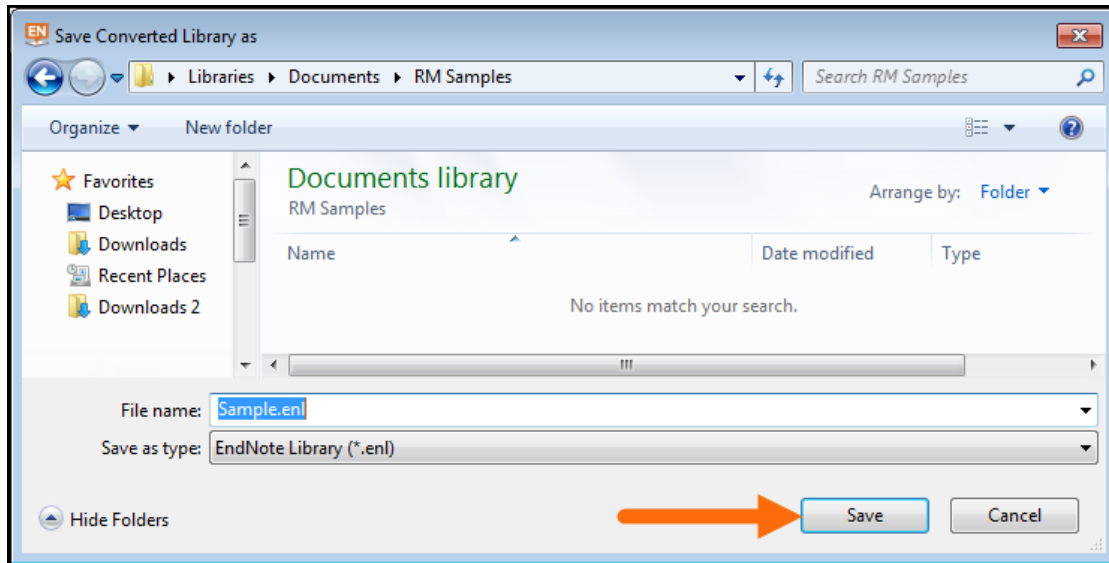

If you plan to share your library with multiple EndNote users, EndNote offers several options for this. See the Collaboration chapter of The Little EndNote How-To Book for more information.

2 CONVERTING ATTACHMENTS

- If there were attachments in your Reference Manager database, EndNote will show the screen below, asking if you would like to convert them to relative links (attachments) in the EndNote library. This will copy the attachment files to the .data folder of the EndNote library and create links between the attachments and the matching records in the library. Click the **Yes** button to convert attachments. If you choose not to convert attachments, links to the original attachments will remain, but if you move your library to a new computer those links may be broken if the same directory structure does not exist on the new computer.
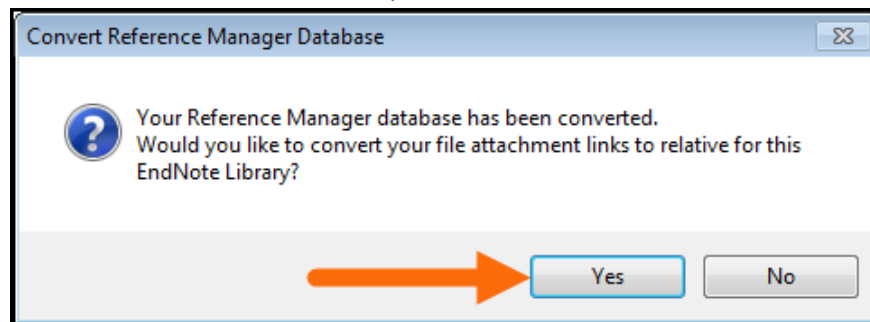
- You will receive a message of how many links have been converted. Click the **OK** button.
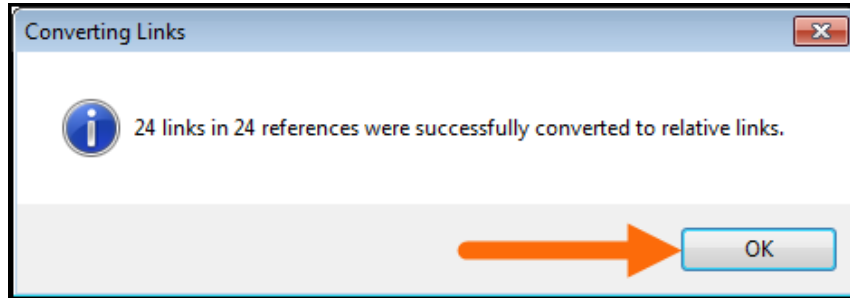

- Your new EndNote library will be displayed. The paperclip icons below show there are files attached to the Brill, 2001 and Connor, 2001 records. Any type of file can be attached to an EndNote record and each record can have up to 45 attachments.
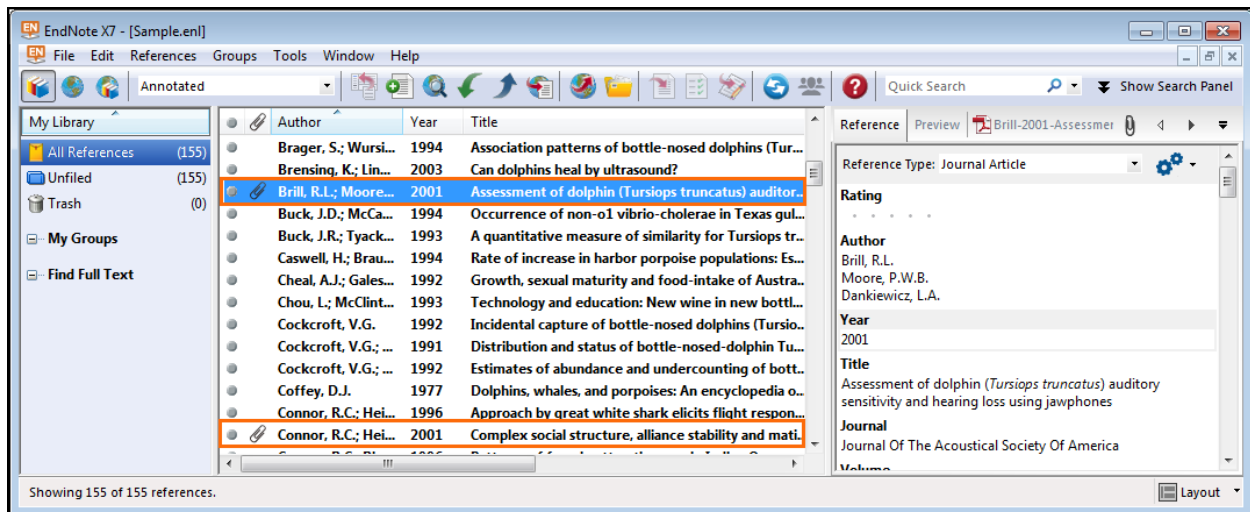
## 3   CONVERTING WORD DOCUMENTS WITH REFERENCE MANAGER CITATIONS

- Although you normally would not see the codes shown here, what you see below is an example of the actual coding that is inserted into your documents when you use Reference Manager's Cite While You Write in Word. The code starts with the text "ADDIN REFMGR.CITE" because this citation came from Reference Manager. These Reference Manager codes need to be converted to EndNote codes if you want to continue working with them using EndNote. (The field codes are shown by using the *Toggle Field Codes* command in Word. You do not need to do this to convert the citations.)
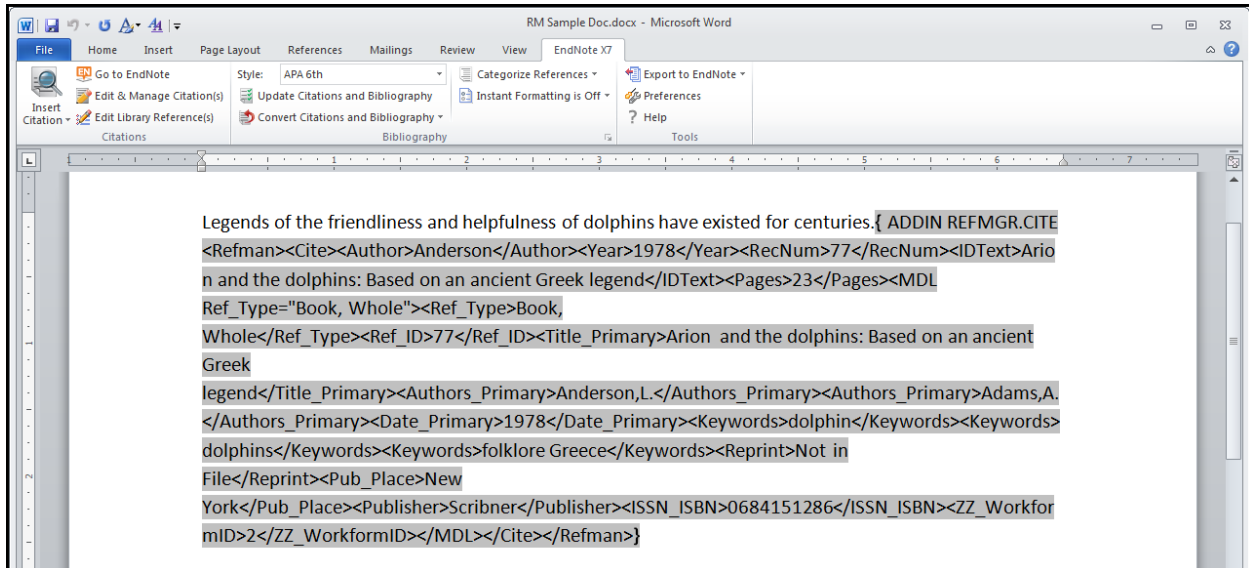

- The screenshot below is what you would normally see with Reference Manager citations in the document. The codes are shown above just to give you an idea of what is really there.
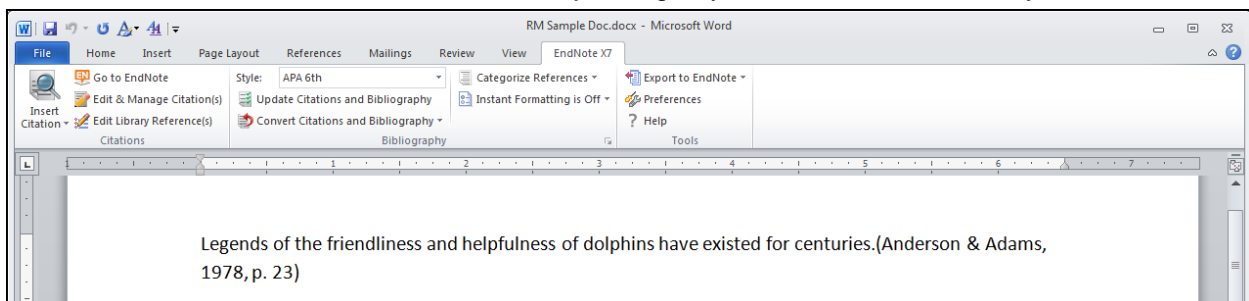
- Select the entire Reference Manager bibliography, as shown below, and delete it. A new EndNote bibliography will be generated at the end of the document when the citations are converted.
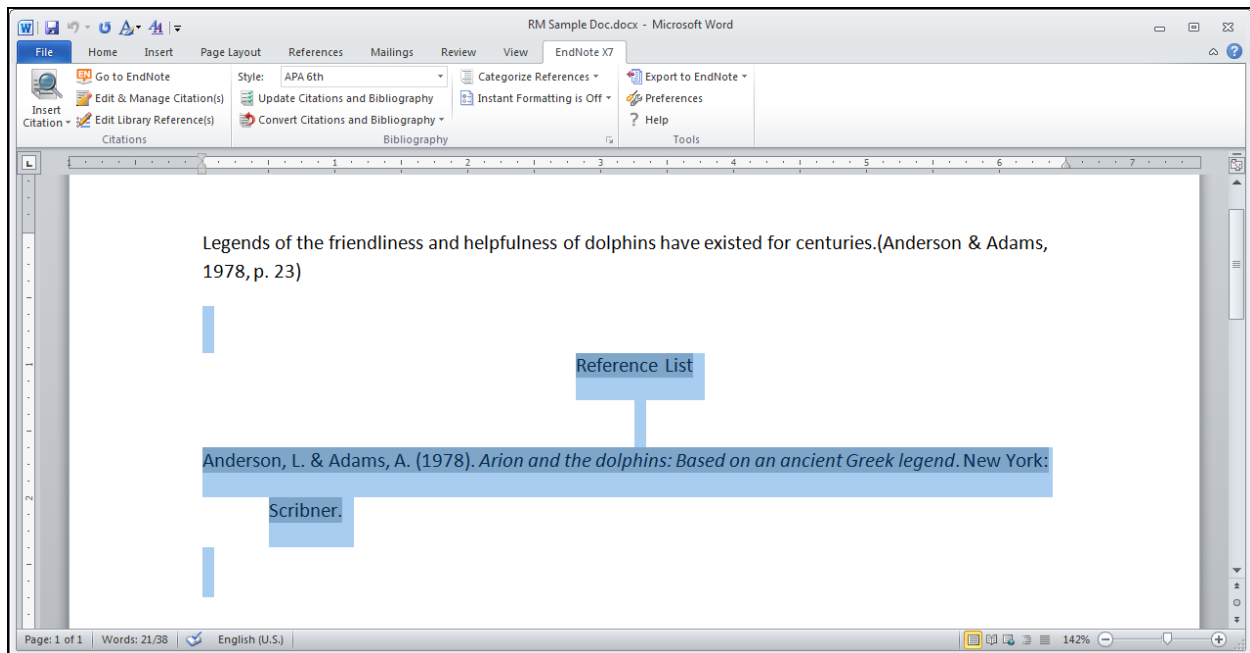
- Select **Convert Reference Manager Citations to EndNote** from the drop-down **Convert Citations and Bibliography** list in the *Bibliography* group.
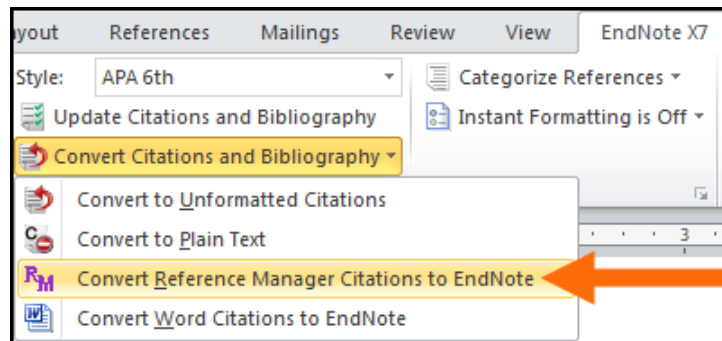
- EndNote will display the screen below, where you can select a style and set layout options much as you can in the *Configure Bibliography* window in EndNote. Set your options, then click the **OK** button.
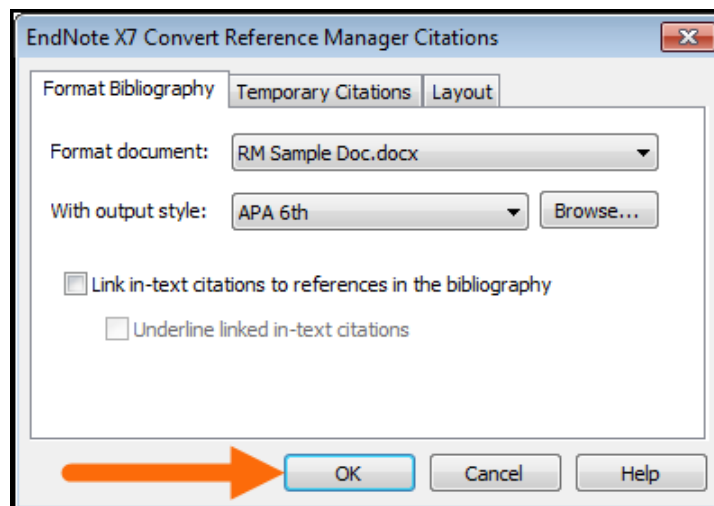
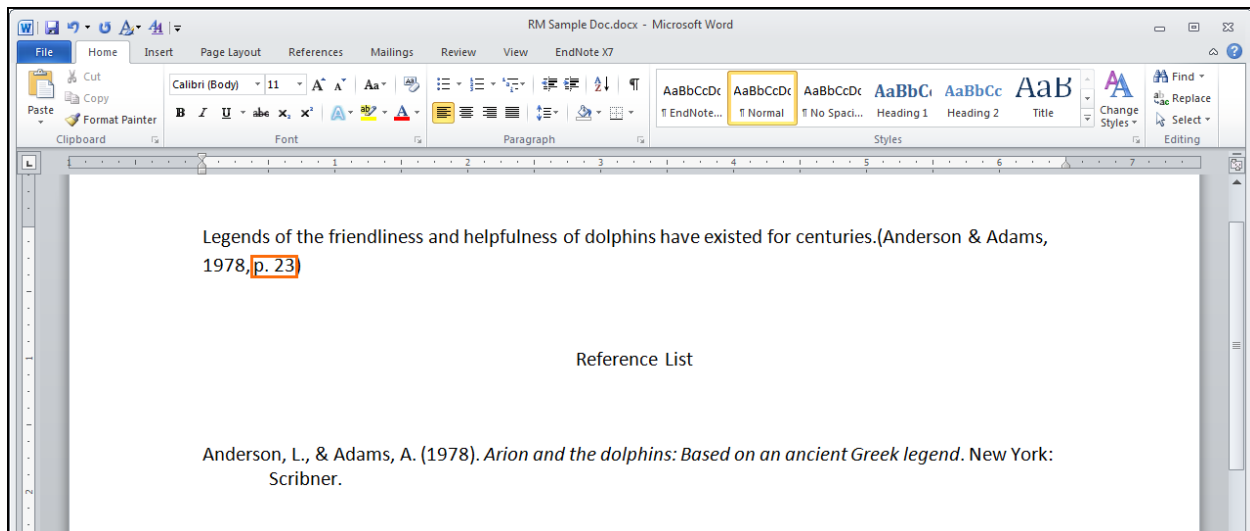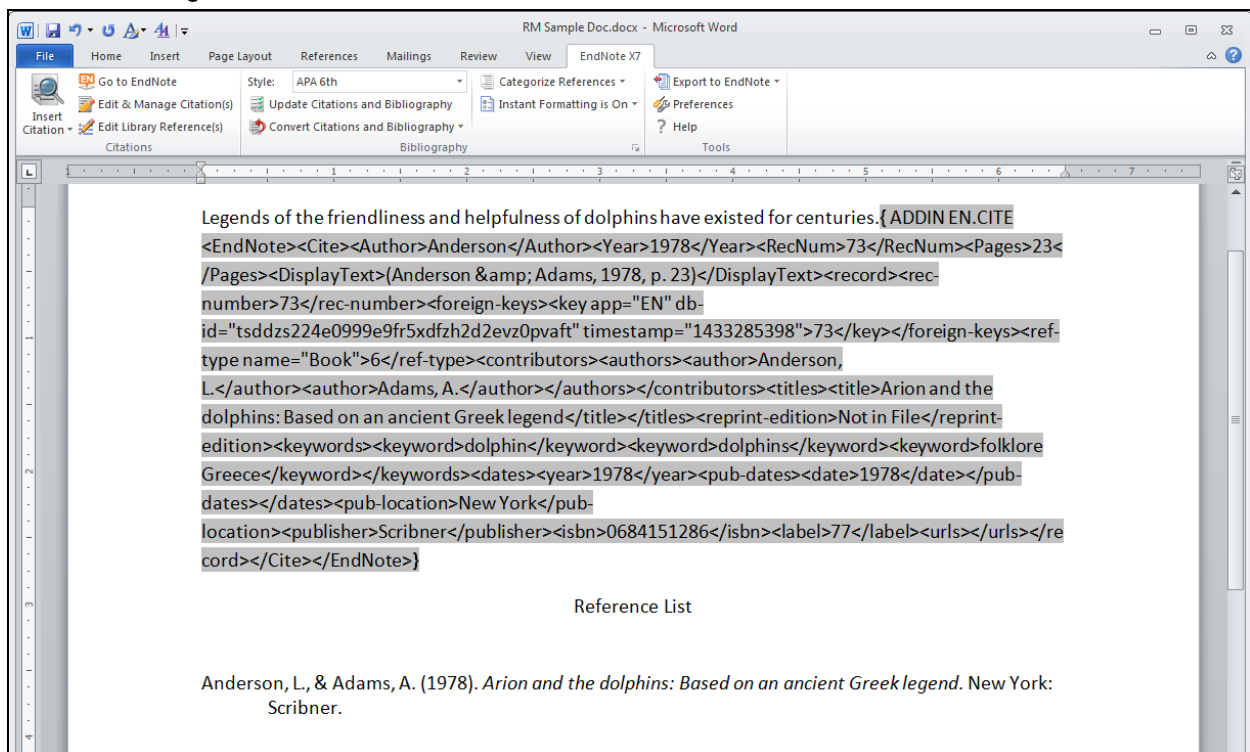- The bibliography and citations look the same at first glance, but they are now EndNote citations and bibliography instead of Reference Manager. Note that in this example even the page number in the citation was converted.

- If you looked at the field codes in Word now, you would see the code begins with "ADDIN EN.CITE," showing that it is now an EndNote citation.

4   REFERENCE MANAGER REFID NUMBERS AND ENDNOTE RECORD NUMBERS

Both the Reference Manager RefID and the EndNote record number are used as internal tracking numbers, or identifiers, for the database. However, there are major differences in how these two identifiers are assigned and behave.

In Reference Manager, a RefID is assigned to a record when it is created. The numbering system used to assign that RefID can be set by the user and that RefID can be edited by the user. If a record is copied or moved from one database to another, Reference Manager will attempt to keep the same RefID in the new database.

In EndNote, the record number is also assigned when the record is created, but how it is assigned and how it is treated after that is very different. In EndNote—

- The record number assigned will always be the next sequential number after the last number assigned by the program. This means if you have 999 records in a library, numbered sequentially from 1 to 999, and delete 900 of them, the next record number assigned will still be 1,000.

- If a record in a library is deleted, the record number for that record will never again be used in that library.

- Record numbers are assigned by EndNote and the user cannot change them.

- If a record is moved or copied from one library to another, it will be assigned a new number in the new library.

- If a record is cut from the library and pasted back into the same library, it will be assigned a new record number.

- If a library is synced between multiple computers using EndNote Sync, new record numbers are assigned on the new computer. So record numbers will be different for the same library data appearing in libraries on multiple computers.

In short, EndNote record numbers are not permanent. They change and should not be used as permanent identifiers. If you must have a permanent identifier for tracking articles within your EndNote libraries, we suggest using the Label field. When Reference Manager databases are converted to EndNote using the method above, the old RefID will automatically be added to the Label field of the EndNote record.

For Cite While You Write in Word documents, you can use the contents of the Label field instead of the record number in temporary citations by changing the *Temporary Citations* setting in the preferences. Select **Preferences** from the **Edit** menu, then **Temporary Citations** to make the change. If you have a group working together, that setting would need to be changed for everybody in the group.

You can also set the library display to show the Label field instead of the record number in the *Display Fields* section of the preferences.