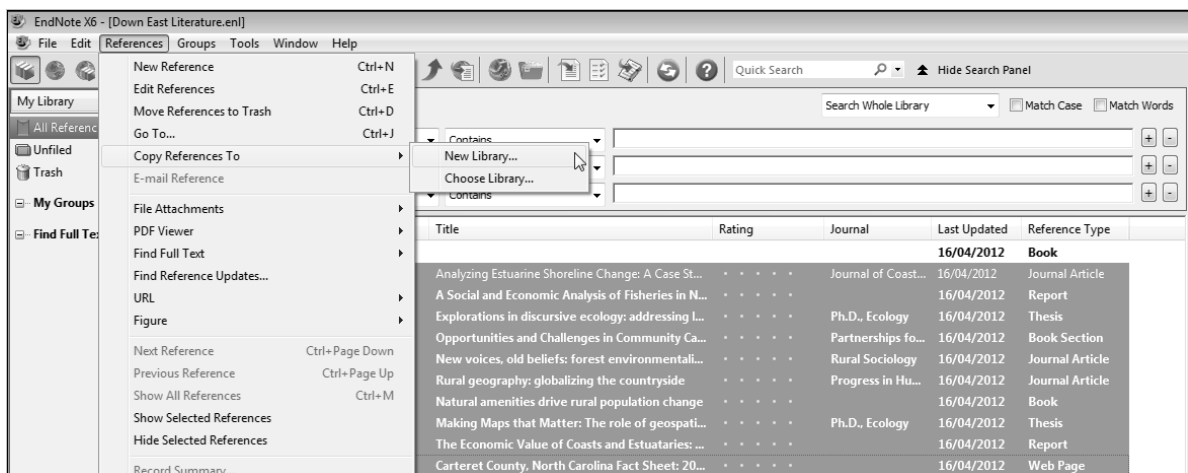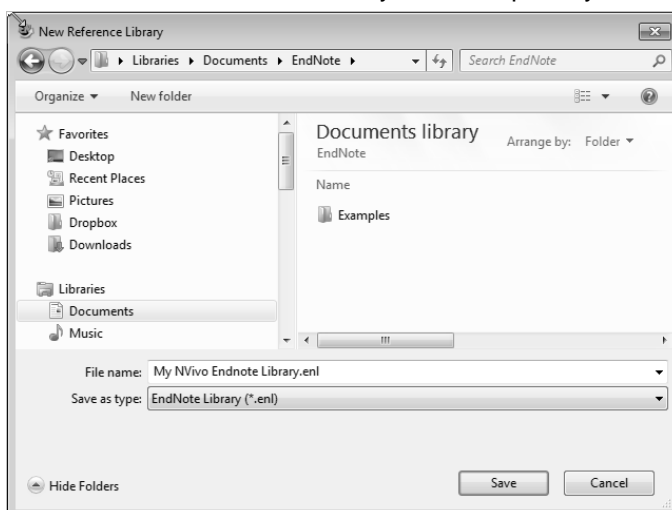# Importing EndNote references in NVivo

These instructions are applicable if your EndNote library and NVivo are installed on different computers. These instructions also apply when NVivo is installed on a virtual Windows environment (e.g. Apple Boot Camp, Parallels, VMware Fusion) on a MAC and EndNote is installed on the MAC side.

How to copy Endnote references for importing into NVivo

1. Open your Endnote library. Select the references you wish to export.

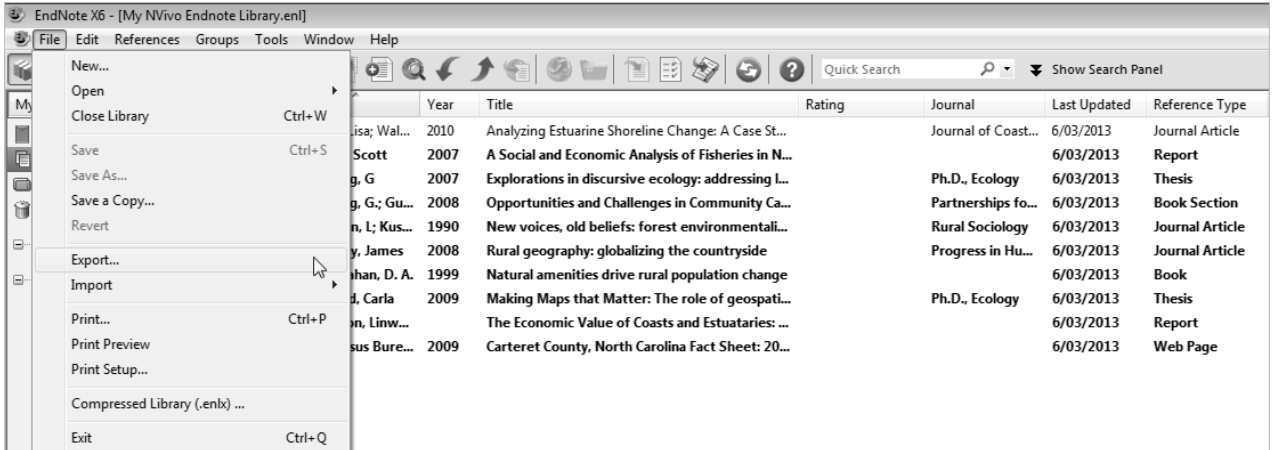2. On the **Reference** menu, choose **Copy References To > New Library…**

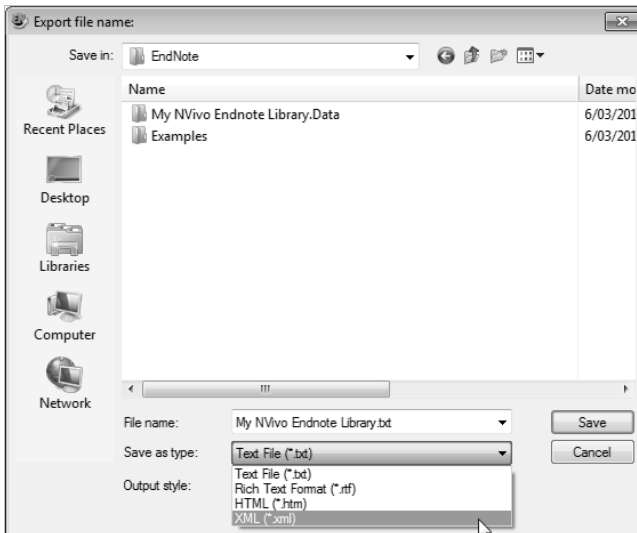3. Save the New Reference Library, for example, My NVivo Endnote library.enl.

The New Library file automatically opens.

4. Export this library. On the **File** menu, choose **Export…**

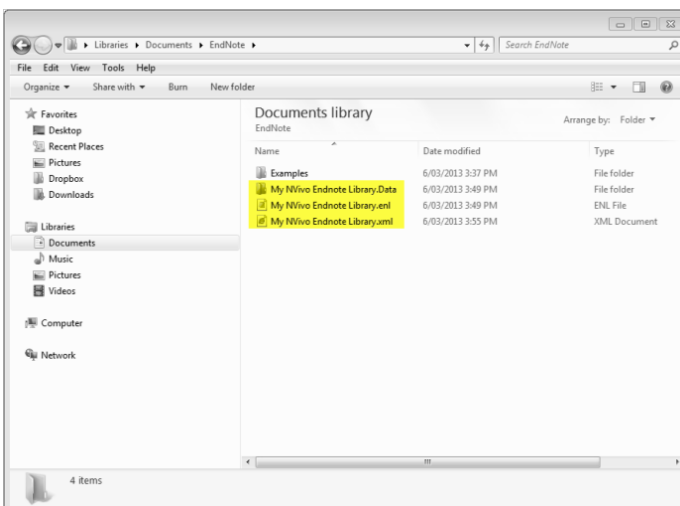5. At the **Export file name** dialog, Save as type: XML (*xml).
   It is recommended that this file is saved to the same location as the library files (Step 3) which will
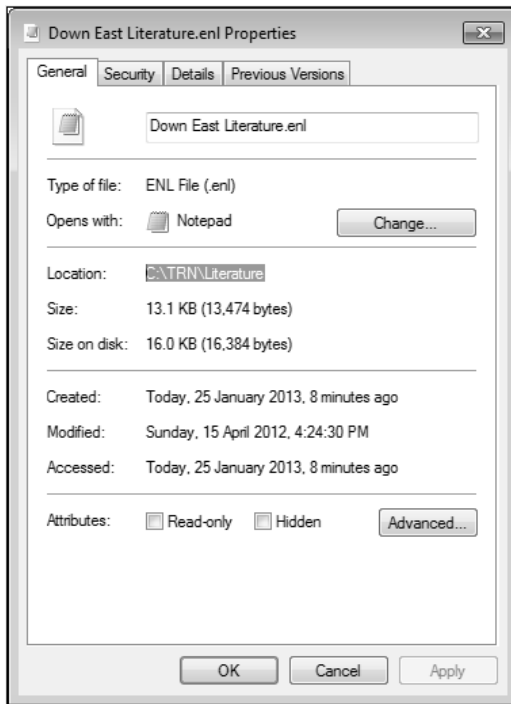   make it easier to locate when copying (Step 6).

6. Locate the ***.xml**, *.**enl** files and the *Data folder from the New Library created in Step 3 above and
   copy to your portable external drive or USB. All these files will be required to bring your Endnote
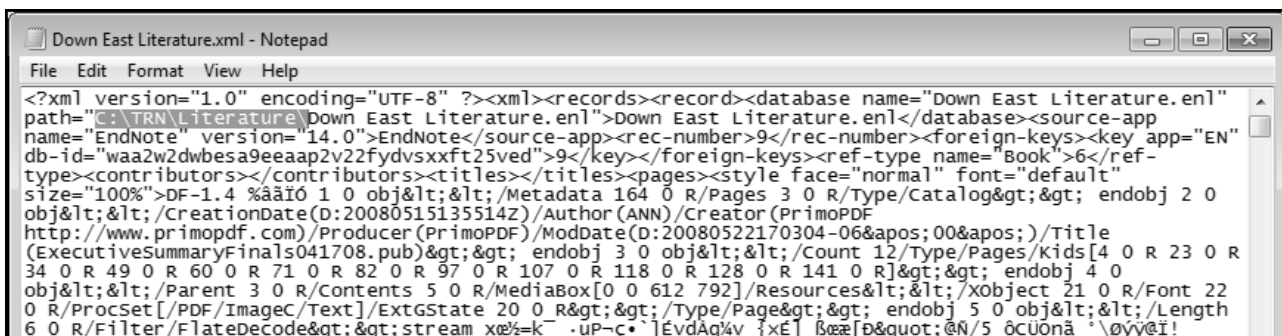   Library with any PDFs into NVivo successfully.

   Note for MAC Users: These files are packaged into a folder with a *.enlp extension. Move the
   whole *.enlp folder and the *.xml file to the Windows side (e.g. Desktop)

7. Right-click on the ***.enl** file and select **Properties**. Copy the Location.

8. Open the ***.xml** file via Notepad.

9. Replace the path as shown in the screen shot below with what you copied in Step 7.

10. Save and close Notepad.

11. **Open** your NVivo project (or create a new one)

12. On the **External Data** tab, in the **Import** group, click the arrow below **From Other Sources**, then choose **From EndNote**.

13. Browse to the location of the *.**xml** file. Click **Open**.

14. The Import from EndNote dialog opens to display options to create sources in your NVivo project from each record in the bibliographical database.

    Note that:
    - In the 'Import Bibliographical Data' dialog box

        o Sources will be named by their **Title** but if you prefer the source to be named by Author and Year, select Name sources by **Author and Year**.

- o Sources will automatically be assigned the new Source Classification Reference. Different classifications based on record type, e.g. Journal or Thesis may be selected if preferred.

- o Imported items may be linked to existing sources in an NVivo project. NVivo will match items by name.

- o Refer to the link below for detailed information on options available on the 'Import Bibliographical Data' dialog box.

  http://help-nv10.qsrinternational.com/desktop/dialogs/import_bibliographical_data.htm

- Abstracts, keywords and notes created in your bibliographical database may be converted to memos in your NVivo project. For more information on how reference information is imported and handled in NVivo, refer to the link below:

  http://help-nv10.qsrinternational.com/desktop/procedures/exchange_data_between_nvivo_and_reference_management_tools.htm

- Bibliographical records that have a PDF attachment will be created as 'Internals'.

- Files cannot be imported when:

  - o The file is password or copy-protected.

  - o The file is not in a supported format.

  - o The file cannot be accessed - for example, the reference library is not on your computer or cannot be accessed across your network.

- Bibliographical records without associated content will be created as 'Externals'.

15. Click **Import**

.