



**SYMPLECTIC**

**Guide to exporting and importing  
publications**

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# Introduction

The MathSciNet name is © American Mathematical Society

The data within Symplectic Elements can be exported in text or spreadsheet formats, or for common reference management programs, so that the data can be used in research papers, CVs and other documents.

The exported data is provided in a range of formats:

- RTF, suitable for MS Word and other text-based programs
- PDF, suitable for print
- CSV, for Excel and databases
- BibTeX format (for *MathSciNet* and other reference management services)
- RIS (Research Information Systems) format, for Reference Manager, *EndNote* and other reference management programs.

BibTeX and RIS are both flexible formats, which can be used by many different programs and online applications.

This guide will take you through the import and export process for two commonly used products:

- Reference Manager\* (version 12)
- *EndNote*\* (version X3)

It will also show how to export data from the online service *MathSciNet*\* for importing into *Symplectic Elements*.

In addition, data from *Symplectic Elements* can also be exported in comma delimited CSV format, which can be opened by a range of database and spreadsheet programs, including MS Excel.

Some types of administrators for *Symplectic Elements* can also export CSV data covering individuals and groups, using the 'reporting' tools.

If you have been given the administrator role 'Statistician' for the system, see the separate document '*Guide to Statistics and Reporting Tools*' for more details.

\* *EndNote* and *Reference Manager* are registered trademarks of Thomson Reuters.

# Exporting publications in Excel, Word or PDF format

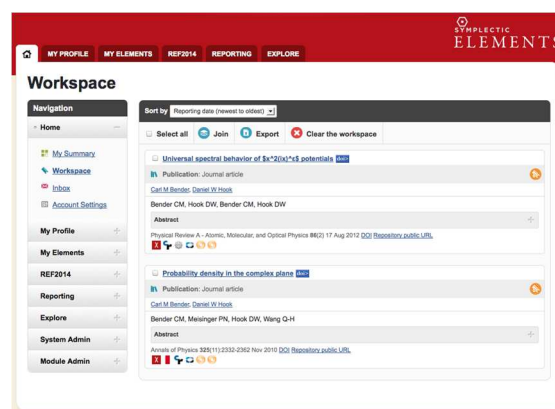
In addition to formats suitable for import into *Reference Manager* and *EndNote*, version 3.7 of *Symplectic Elements* now includes the option to export publications, and other element types, in a range of other formats.

These exports can be useful for printing out, or for inserting into CVs, grant applications and other documents.

Links to export lists of elements in a range of formats are shown on a range of screens around the system:

- Your home screen, where each individual type, or a full set of 'all' types can be chosen.
- Publications lists, where you can choose to export all your publications, or mark a number of publications and export these.
- The workspace, where you can place individual publications by yourself and others, and export a custom list.

On each of these screens, simply click on the relevant icon and the list of elements will be compiled into the chosen format for opening or saving to your computer.



PDF and Word documents will present publications in the APA-6 citation style.

Please see [http://en.wikipedia.org/wiki/APA\\_style](http://en.wikipedia.org/wiki/APA_style) for further information.

Other element types will be shown in a simple list of values, using this format:

- Field name: Field value
- Field2 name: Field2 value

# Reference Manager 12

*Reference Manager* is a desktop program used for managing reference libraries and creating instant bibliographies.

By regularly exporting your publication lists from *Symplectic Elements*, you can keep your *Reference Manager* library up to date without duplicating effort.

In addition, if you have an existing library of your books, chapters and other publications in *Reference Manager*, you can save re-keying these within *Symplectic Elements* by importing them directly into the system.

## Exporting from Symplectic Elements for Reference Manager

Links to export lists of publications in a range of formats are shown on a range of screens around the system:

- Your home screen, where each individual type, or a full set of 'all' types can be chosen.
- Publications lists, where you can choose to export all your publications, or mark a number of publications and export these.
- The workspace, where you can place individual publications by yourself and others, and export a custom list.
- Search results, where the first page of any set of results from searching the database can be exported (change the filter options to increase the number on the page)

On each of these screens, click on the relevant RIS icon and choose to save or open the file.

You can also export files in .RIS format from the Reporting > Basic Reports page under section 4.ii. This allows you to export .RIS files for single users, multiple specified users and groups.

The RIS format is contained within plain text files, which list each reference by type, and label each data field with a suitable tag.

An example RIS file for journals is shown below.

```

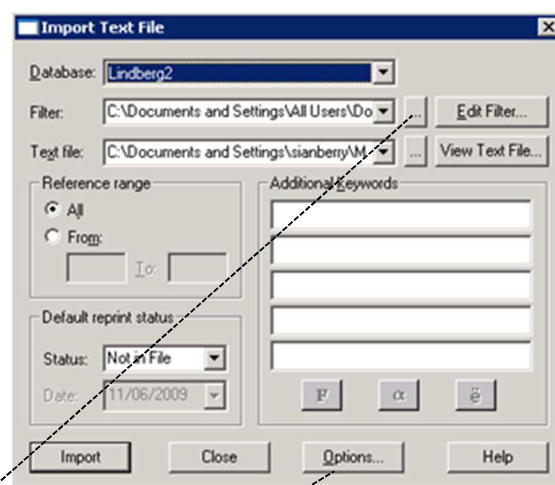
TY  = JOUR
ID  = 1511
A1  = Mckeown, J.O.
A2  = Darwin, C.J.
SN  = 02724987
IS  = 3
JA  = Quarterly Journal of Experimental Psychology Section A: Human
      Experimental Psychology
SP  = 401
EP  = 421
Y1  = 1993///
Y2  =
UR  = http://cd335-www.scopus.com/inward/record.url?partnerID=Hyv43PwWsetdW2-s2.
      0-0024733948&md5=5215045885d36470e1fc326b73082067
TI  = Effects of phase changes in low-numbered harmonics on the internal
      representation of complex sounds.
VL  = 43
UR  =
TY  = JOUR
ID  = 1467
A1  = Darwin, C.J.
A2  = Denis Mckeown, J.
A3  = Kirby, O.
SN  = 01676393
IS  = 3
JA  = Speech Communication
SP  = 221
EP  = 234
Y1  = 1999///
Y2  =
UR  = http://cd335-www.scopus.com/inward/record.url?partnerID=Hyv43PwWsetdW2-s2.
      0-0024733948&md5=584051827705e0b1e61b2b04c84097
TI  = Perceptual compensation for transmission channel and speaker effects
      on vowel quality
VL  = 8
UR  =
TY  = JOUR
ID  = 1468
A1  = Gardner, R.B.
A2  = Gask1171, S.A.
A3  = Darwin, C.J.
SN  = 00014966
IS  = 3
JA  = Journal of the Acoustical Society of America
SP  = 1329
EP  = 1337
Y1  = 1999///
Y2  =
UR  = http://cd335-www.scopus.com/inward/record.url?partnerID=Hyv43PwWsetdW2-s2.
      0-0024503743&md5=4110978f05a3e4f5c6d1b5e702edc76
TI  = Perceptual grouping of formants with static and dynamic differences
      in fundamental frequency
VL  = 85
UR  =
TY  = JOUR
ID  = 1469
A1  = Darwin, C.J.
  
```

## Importing data into Reference Manager

To import your RIS-formatted text files into *Reference Manager*, first create a new database to hold them (or you can use an existing database and simply add the new publications to this).

With the database open, go to the main menu, and select 'file/import text file'.

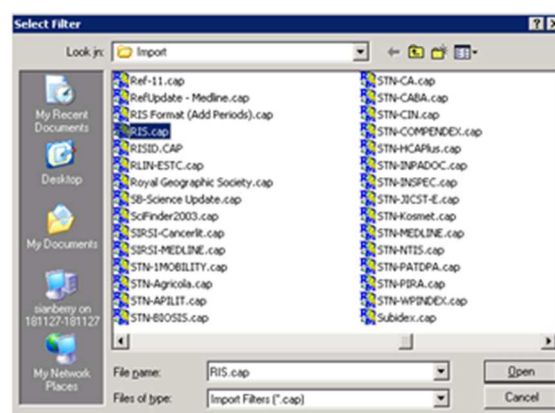
You will see the screen opposite, where you can select the text file to import and the 'import filter' that *Reference Manager* will use to process the file.



Click to choose the import filter

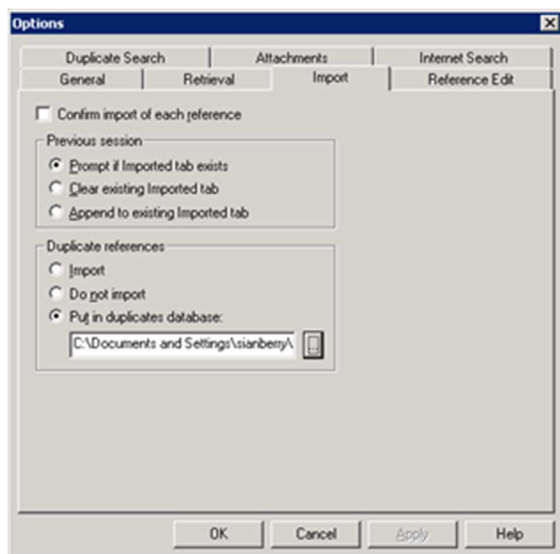
Click to select other options

For all files that have been exported from *Symplectic Elements*, you should choose 'RIS' from the list of available import filters.



Click on 'Options' to change other settings. The most important of these is how the program should deal with 'duplicate' publications that are already listed in your chosen database.

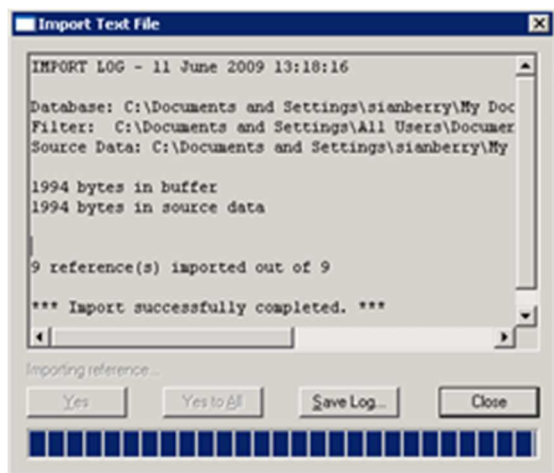
You can select to reject duplicates and not import them, but it is better to choose to have duplicates kept in a separate database. This means that, after importing, you can inspect them and check for any problems.



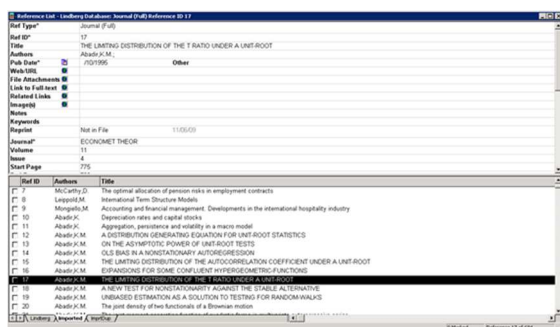
You can import RIS files containing other types of publications into the same database.

*Reference Manager* will automatically recognise the reference types and file them appropriately.

Once the new items have been imported, you can check the import log pop-up window for any errors or problems, and then see the new publications in the database.



**Publications in the *Reference Manager* database after importing:**





## Exporting data from Reference Manager

*Symplectic Elements* is the ideal tool for obtaining information about journal publications from online database sources. However, other types of publication need to be entered manually into the system.

When you first set up your publications data within *Symplectic Elements*, it will save time if you can import an existing list of books, chapters or reports from *Reference Manager*.

In order to do this, you will need to export the data from *Reference Manager* in a suitable format.

### Search for a type of reference

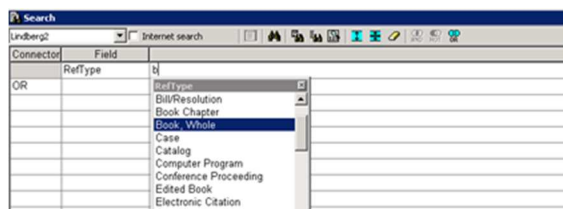
If you want to export just one type of reference (e.g. books) from *Reference Manager*, you first need to run a search.

Click on the search icon (a pair of binoculars) in the main toolbar and the screen below will appear.

Click in the 'field' column and choose the option 'RefType' from the drop-down menu.

Then, in the 'parameter' column, start typing the name of the type of publication you want to export. A drop-down menu will appear and you can choose the correct type from the list.

Click on the search icon in the toolbar within the search window to carry out the search. A new database window will then appear, containing the relevant publications.



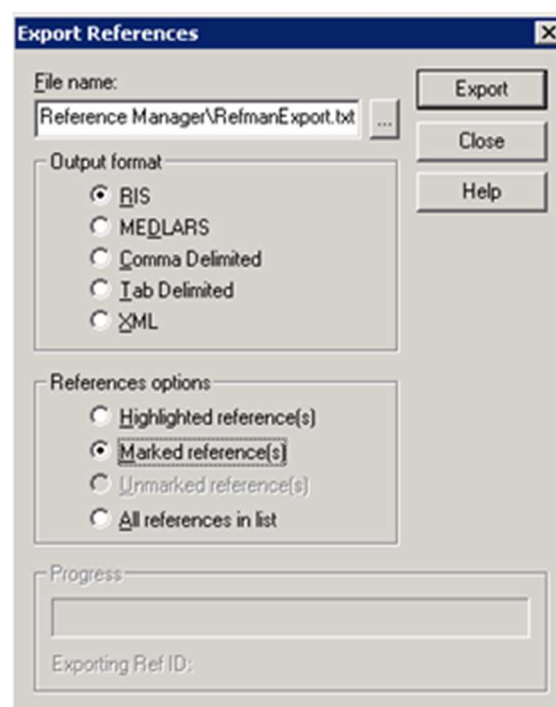
In the database window that contains the search results, you can now mark the entries for export.

Do this by checking the box next to each reference or right-clicking in the list and choosing the option 'mark all'.

To complete the export, click on file/export and the window below will appear.

Choose the 'RIS' output format and choose 'marked references' from the options.

Click on the browse icon to choose a location and file name for your exported references, then click on 'export' and the text file will be created. Make sure you save this as a plain text file, not in a word processing format.



### Check and export references



# Importing files into Symplectic Elements

RIS files that you have exported from *Reference Manager* or *EndNote* can be imported directly into *Symplectic Elements*.

To do this, first make sure you have the appropriate RIS file(s) stored in your computer. Then, choose 'import' from the main 'publications' menu in *Symplectic Elements*. Browse for the file you have saved and then click on 'upload'.

The system will compare the new publications with your current publications list (including any declined publications) and look for it in other users' records as well. It will generate a list showing the new publications and any matches found with existing publications.

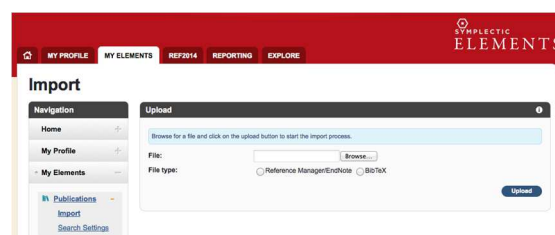
For each publication that matches an existing record, you will be given a range of options.

For records that match an existing publication of yours, which has only online database records, you have three choices:

- **Import as new:** create a new record based on this data, separate to the existing record.
- **Supplement Existing:** add a manual source to the existing publication record and make this the preferred source.
- **Do not import:** skip this record in the import file.

For records that match an existing publication of yours, which does have a manual source, you have three choices:

- **Import as new:** create a new record based on this data, in addition to the existing manual publication.
- **Overwrite existing:** overwrite the existing manual record with the new data.
- **Do not import:** skip this record in the import file.



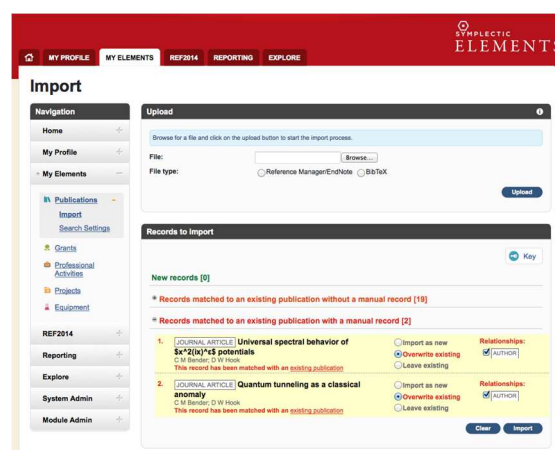
For records that match another user's record with an existing manual source, you have four choices:

- **Import as new:** create a new record separate from the other user's record.
- **Import as link:** create a new record in your list, as a link to the existing record, without changing the details of the existing record.
- **Overwrite existing:** create a new record in your list, with a link to the existing record, and overwrite the data in the existing manual record.
- **Do not import:** skip this record in the import file.

For records that match another user's record with only online sources, you have three choices:

- **Import as new:** create a new record separate from the other user's record.
- **Import as link:** create a new record in your list, as a link to the existing record, and add a manual source to the record.
- **Do not import:** skip this record in the import file.

Choose the option you prefer for each publication then click on 'import' to finish the process.



# EndNote X3

*EndNote* is a similar desktop program to Reference Manager, and is used for managing reference libraries and creating instant bibliographies while writing.

By regularly exporting your publication lists from *Symplectic Elements*, you can keep your *EndNote* library up to date without duplicating effort.

And, if you have an existing library of your books, chapters and other publications in *EndNote*, you can save re-keying these within *Symplectic Elements* by importing them directly into the system.

## Exporting from Symplectic Elements for EndNote

Links to export lists of publications in a range of formats are shown on a range of screens around the system:

- Your home screen, where each individual type, or a full set of 'all' types can be chosen.
- Publications lists, where you can choose to export all your publications, or mark a number of publications and export these.
- The workspace, where you can place individual publications by yourself and others, and export a custom list.

On each of these screens, click on the relevant RIS icon and choose to save or open the file.

The RIS format is contained within plain text files, which list each reference by type, and label each data field with a suitable tag.

An example RIS file for journals is shown below.



```
TY - JOUR
ID - 1513
AU - Mckeown, J.O.
AU - Darwin, C.J.
SN - 02724392
IS - 3
JA - Quarterly Journal of Experimental Psychology Section A: Human Experimental Psychology
SP - 401
EP - 421
Y1 - 1993///
L2 -
http://cdci315-www.scopus.com/inward/record.url?partnerID=wy43FW6&eid=2-s2.0-002473394&uid=54051&pid=77050&doi=10.1080/00331749308404097
T1 - Effects of phase changes in low-numbered harmonics on the internal representation of complex sounds.
VL - 43
ER -

TY - JOUR
ID - 1467
AU - Darwin, C.J.
AU - Denis Mckeown, J.
AU - Kirby, D.
SN - 01676393
IS - 2
JA - Speech Communication
SP - 221
EP - 234
Y1 - 1999///
L2 -
http://cdci315-www.scopus.com/inward/record.url?partnerID=wy43FW6&eid=2-s2.0-002473394&uid=54051&pid=77050&doi=10.1080/00331749308404097
T1 - Perceptual compensation for transmission channel and speaker effects on vowel quality
VL - 8
ER -

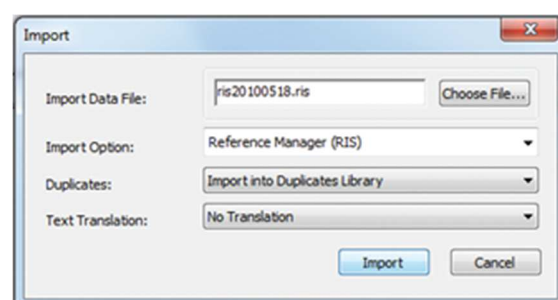
TY - JOUR
ID - 1468
AU - Gardner, R.B.
AU - Gaskill, S.A.
AU - Darwin, C.J.
SN - 00014966
IS - 2
JA - Journal of the Acoustical Society of America
SP - 1329
EP - 1337
Y1 - 1999///
L2 -
http://cdci315-www.scopus.com/inward/record.url?partnerID=wy43FW6&eid=2-s2.0-002473394&uid=54051&pid=77050&doi=10.1080/00331749308404097
T1 - Perceptual grouping of formants with static and dynamic differences in fundamental frequency
VL - 85
ER -

TY - JOUR
ID - 1469
AU - Darwin, C.J.
```

## Importing data into EndNote

To import data from *Symplectic Elements* into *EndNote*, first open the appropriate library, or create a new library to hold your publications.

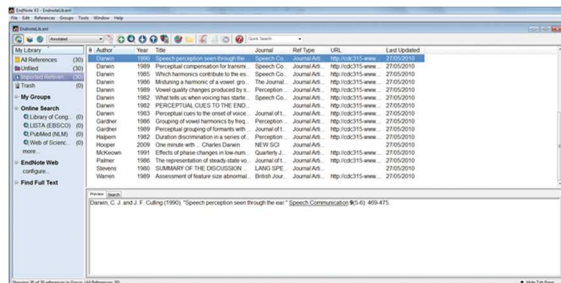
Then, from the main menu, choose file/import and the window below will appear.



Browse to find the correct RIS formatted text file on your computer, choose 'Reference Manager (RIS)' from the list of import options, and choose what you wish to do with duplicate entries that may already be in your library.

## Symplectic Elements v4.17 - Guide to exporting and importing publications

The best option is usually to import them into a separate 'Duplicates Library', where you can inspect them and identify problems after importing.



Click on 'Import' when you have selected the appropriate options and the publications will be inserted into your library.

## Exporting data from EndNote

*Symplectic Elements* is the ideal tool for obtaining publication information about journal publications. However, other types of publication need to be entered manually into the system.

When you first set up your publications data within *Symplectic Elements*, it will save time if you can import an existing list of books, chapters or reports from *EndNote*.

In order to do this, you first need to export these data from *EndNote* in a suitable format.

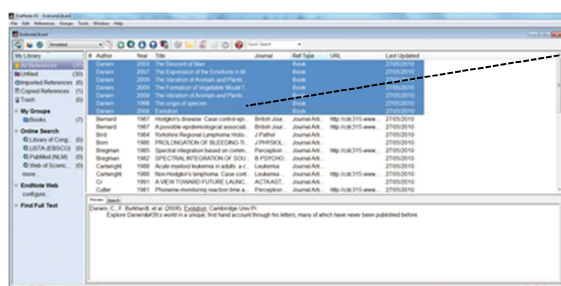
## Selecting publications for export

You can choose to export your whole library for importing into *Symplectic Elements*. If you do this, *Symplectic Elements* will identify duplicates and give you options for dealing with these - see section 2.4).

However, it may be easier and quicker only to export your manual publications, as *Symplectic Elements* will find journal articles automatically.

There are two ways of separating manual publication types from journal publications within *EndNote*:

- By creating a sub-group.
- By highlighting the relevant publications in the main library list.



## Create a group

To create a sub-group within your *EndNote* library, right-click on 'My Groups' in the left hand panel and choose 'create group' from the menu that appears. Name your group appropriately.

Then, you can drag and drop the relevant publications from the main list into the group after sorting them by reference type. The publications will still remain in the list 'All References' as well as in the custom group.

## Highlight references

Alternatively, you can simply sort the 'All References' list by publication type, then temporarily highlight all the references of a certain type before exporting.

## Exporting

To export, highlight either the custom group name or the set of references you want to export and then choose 'file/export' from the main menu.

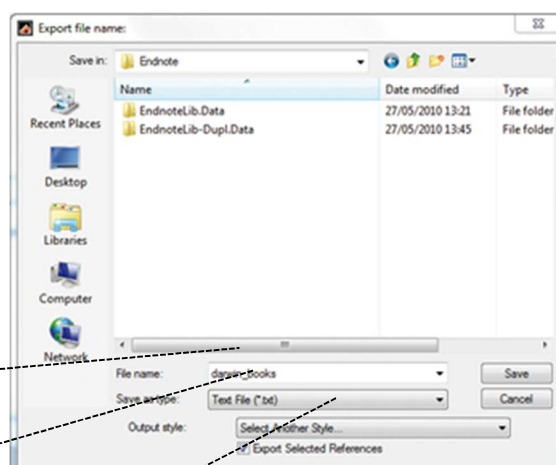
The window on the next page will appear, and you can choose a location and file name for your exported references.

*Create a group and add the relevant record types to it before exporting, or simply highlight a group of references in the main list*

Choose 'RefMan (RIS) Export' from the list of output styles.

If this doesn't appear in the output style drop-down menu, choose 'Select Another Style' and a comprehensive list of available styles will appear, from which you can select 'RefMan (RIS) Export'.

Then click on 'save' and the file will be created.

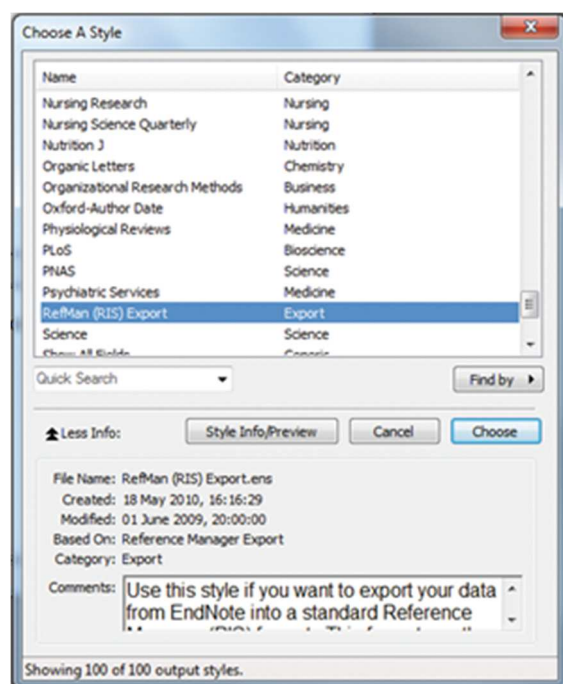


Choose a file name

File type should be 'Text File'

Choose output style 'RefMan (RIS) Export'

If this style doesn't appear on the list, choose 'select another style' and the window below will open.



## Importing files into Symplectic Elements

Once an RIS formatted text file has been exported from *EndNote*, the process of importing it into *Symplectic Elements* is identical to that for files created by Reference Manager.

See section 2.4 for details of this process.

*EndNote* does not store start and end pagination in separate fields, exporting both these numbers into a single 'SP' field, separated by a hyphen.

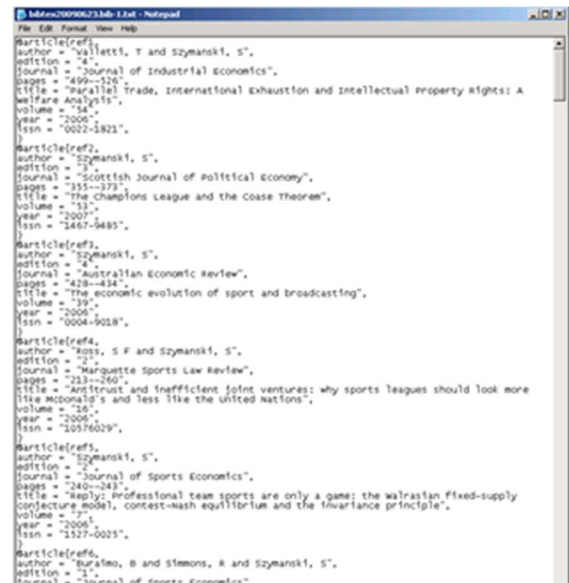
*Symplectic Elements* will read the pagination fields intelligently and put the start and end pages into separate fields, providing a standard separator, such as 'and' or a hyphen is used.

The system can also deal with complex expressions of pagination. So an expression such as:

- 45, 47-49

will be imported with a start page and an end page as follows:

- SP - 45
- EP – 49





# Exporting data from MathSciNet

Within *MathSciNet*, you first need to select the data to export. You may have a bookmarked link to your author profile, or you may need to run a search.

To search for your publications, navigate to *MathSciNet*'s search page ([www.ams.org/mathscinet/search.html](http://www.ams.org/mathscinet/search.html)), select the 'Authors' tab and type in the name associated with you on the site.

If your name is unique in the database you'll be taken directly to your author page.

Otherwise, you'll be asked to choose from a list of names.

Once on your author page, click the 'View Publications' link in the top right area.

Click on 'View Publications'

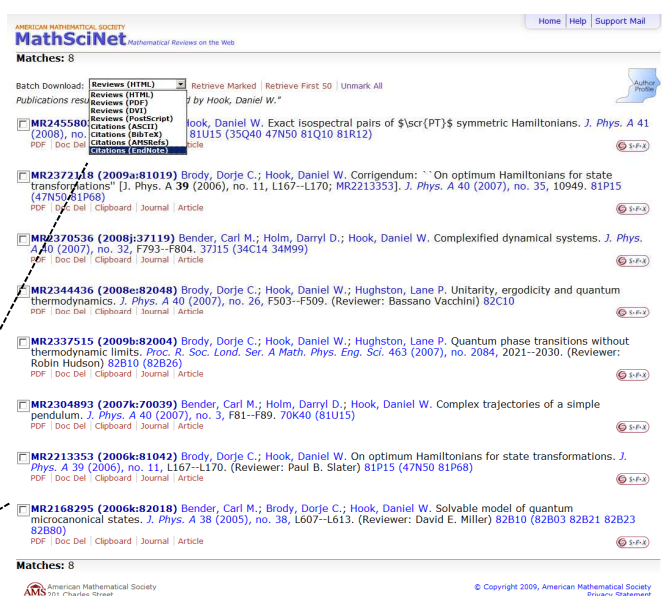
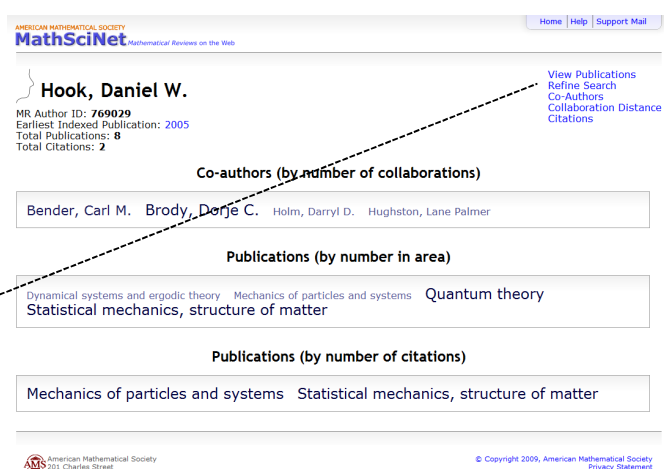
When you can see your publications, select the publications you wish to import into *Symplectic Elements* by checking the boxes to the left of each publication and then choosing to 'Retrieve Marked' publications.

Alternatively, to get as many publications as possible, you can click on the 'Retrieve First 50' link.

Choose the batch download style 'Citations (BibTeX)' or 'Citations (EndNote)' and click on the appropriate link to retrieve your citations.

Choose a batch download style

Mark references for downloading



The results, in BibTeX or RIS format, will be shown on a webpage, which you can then copy and paste into a plain text editing program.



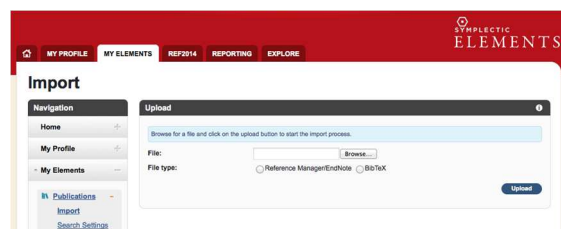
Copy and paste this text into a new plain text file

Then, save the file as a .txt document within your computer's filing system.

## Importing MathSciNet data into Symplectic Elements

The BibTeX or RIS files that you have exported from *MathSciNet* can now be imported into *Symplectic Elements*.

Choose 'import' from the main 'publications' menu in *Symplectic Elements*. Browse for the file you have saved, select the correct file type and then click on 'upload'.



The system will compare the new publications with your current publications list (including any declined publications) and look for it in other users' records as well. It will generate a list

showing the new publications and any matches found with existing publications.

For each publication that matches an existing record, you will be given a range of options.

For records that match an existing publication of yours, which has only online database records, you have three choices:

- Skip this record in the import file.
- Import as new – create a new record based on this data, separate to the existing record.
- Import - add a manual source to the existing publication record and make this the preferred source.

For records that match an existing publication of yours, which does have a manual source, you have three choices:

- Skip this record in the import file.
- Import as new - create a new record based on this data, in addition to the existing manual publication.
- Overwrite - overwrite the existing manual record with the new data.

For records that match another user's record with an existing manual source, you have four choices:

- Skip this record in the import file.
- Import as new – create a new record separate from the other user's record.
- Import as link – create a new record in your list, as a link to the existing record, without changing the details of the existing record.
- Overwrite existing – create a new record in your list, with a link to the existing record, and overwrite the data in the existing manual record.

For records that match another user's record with only online sources, you have three choices:

- Skip this record in the import file.
- Import as new – create a new record separate from the other user's record.
- Import as link – create a new record in your list, as a link to the existing record, and add a manual source to the record.

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Choose the option you prefer for each publication then click on 'import' to finish the process.

The screenshot shows the 'Import' page in Symplectic Elements v4.17. The interface includes a navigation sidebar on the left with links to Home, My Profile, My Elements, Publications, Grants, Professional Activities, Projects, and Equipment. The main content area is titled 'Import' and features an 'Upload' section with a file browser and an 'Upload' button. Below the upload section is a 'Records to Import' table. The table lists two records, each with a title, authors, a note about matching with existing publications, and options to 'Import as new', 'Overwrite existing', or 'Leave existing'. A 'Relationships' dropdown menu is also present for each record. At the bottom right of the table are 'Clear' and 'Import' buttons.

**Please note:** *MathSciNet* data will often only partially match Web of Science records since the objective of the *MathSciNet* database is to provide article reviews rather than complete bibliographic records. Therefore, matching between these records will be less accurate than with other data sources.