

Waisenhausgasse 36-38a  
D-50676 Köln

Tel.: +49 221 4724-1  
Fax +49 221 4724-444  
posteingang@dimdi.de  
www.dimdi.de

## Instructions for the Extension of the Import Filter of the Reference Manager

Ansprechpartner:  
Helpdesk Technik  
Tel: +49 221 4724-270  
helpdesk@dimdi.de

Search results from the different databases available at DIMDI can be easily transferred to literature management programs such as EndNote or Reference Manager. There the literature data can be managed, processed and to a great extent automatically inserted into your own documents via word processing.

Hereafter, three ways are described to transfer search results into Reference Manager:

- [Direct database access to a DIMDI database via the Z39.50 protocol](#) (without DIMDI search possibilities),
- [Using the Import Interface of Reference Manager](#) (with the possibility to adjust the filter for own needs) and
- [Use of the RIS exchange format](#) (most comfortable version with fixed mapping). The references apply to Reference Manager version 11; however, other versions are transferable as well.

### Direct Database Access via the Z39.50-Protocol

An online connection can be made to the databases of DIMDI from Reference Manager via the Z39.50 protocol. Database inquiries can be implemented and the results imported into the literature database using an entry mask.

To a large extent, the search possibilities correspond to those of the Reference Manager database and are strongly limited compared to the possibilities of DIMDI SmartSearch and ClassicSearch. However, for simply structured literature searches, access via Z39.50 offers a comfortable way to import data into your own literature management.

### Link Connections

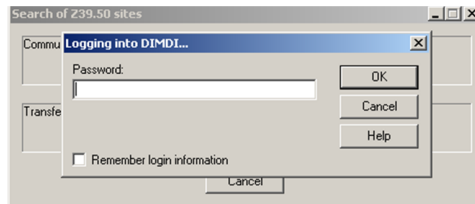
Activate the command *Internet Search* in the menu *Tools* in Reference Manager. Select *Z39.50 Sites* in the expand filed and click on the button left of hosts. A new window is opened, please select DIMDI and the database(s) you want to search (if DIMDI is not existing, first you must configure a profile, see above)

Im Geschäftsbereich des

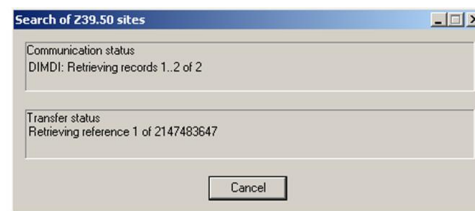


Bundesministerium  
für Gesundheit

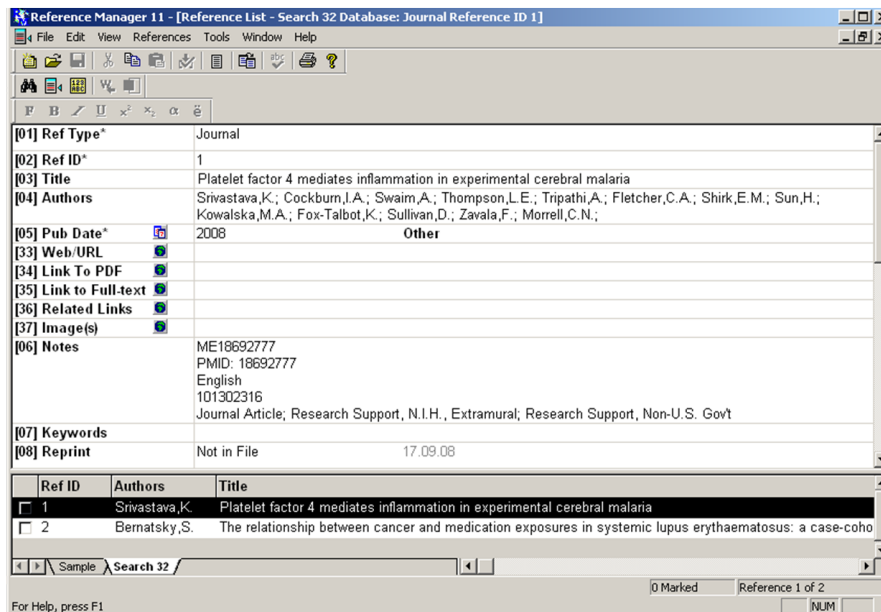




After input of access data and click on OK the connection is established, the search is carried out and the database documents are transmitted.



For a successful search the number of hits is shown (otherwise an error message is given) and the located documents are transferred. If the number of hits is too high or you want to refine the search, you can stop this transfer with 'Cancel'.



Transferred records are not copied into your Reference Manager database directly, they are collected in an own window (search nn). Via *References* and then *Copy between Databases ...* all or part of them can be taken to your Reference Manager Database.

For every further search you must call for Internet Search again. To finish the connection to the database, just close the window with the search results.

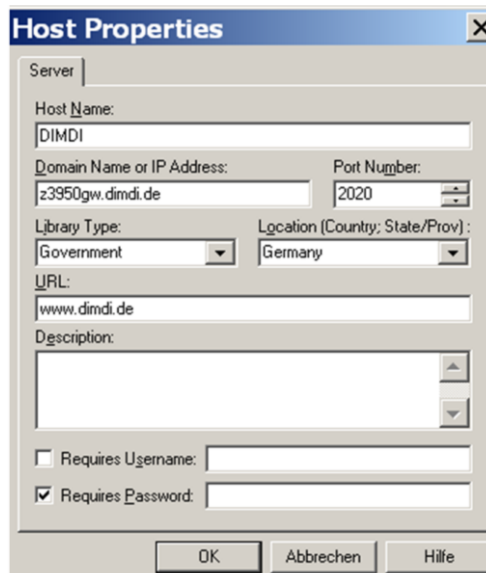
### Important Notice:

Via Z39.50-interface searches can be carried out directly from the literature management programs Endnote and Reference Manager.

Due to technical reasons for users with contract **the complete document** will be transferred to the literature management program and according **the whole document price** will be counted, though first only the titles are shown.

## Adjusting Connection Profiles

First save the file [DIMDI\\_Z39.50\\_Medline.cap](#) in your Reference Manager directory /Program/BkwrAPI/. In the program Reference Manager call in the menu *Tools* the command *Internet Search* . Select *Z39.50 Sites* in the opening field and then click on the button left beside *Hosts*. A new window will be opened, now click on *Configure Hosts*. Please select *New Host*. Again a new window is opened, which should be filled with the values shown in the image. The field password will be prompted by calling the connection. If you want to fix the Usercode and Password, you can enter the values in the field after '[Requires Password:](#)'.

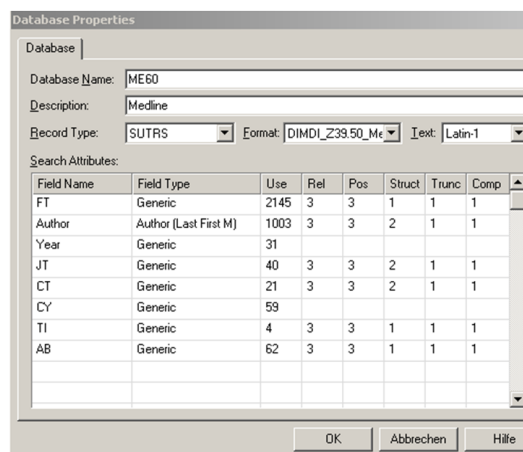


The 'Host Properties' dialog box contains the following fields and options:

- Host Name:** DIMDI
- Domain Name or IP Address:** z3950gw.dimdi.de
- Port Number:** 2020
- Library Type:** Government
- Location (Country; State/Prov):** Germany
- URL:** www.dimdi.de
- Description:** (empty text area)
- Requires Username: (empty text field)
- Requires Password: (empty text field)

Buttons: OK, Abbrechen, Hilfe

With click on 'OK' the connection data are saved and with 'Test Host' the connection can be tested. Via 'New Database' kann können die Recherchedaten für jede gewünschte Datenbank einzeln eingetragen werden.



The 'Database Properties' dialog box contains the following fields and options:

- Database Name:** MEG0
- Description:** Medline
- Record Type:** SUTRS
- Format:** DIMDI\_Z39.50\_Me
- Iext:** Latin-1

**Search Attributes:**

Field Name	Field Type	Use	Rel	Pos	Struct	Trunc	Comp
FT	Generic	2145	3	3	1	1	1
Author	Author (Last First M)	1003	3	3	2	1	1
Year	Generic	31					
JT	Generic	40	3	3	2	1	1
CT	Generic	21	3	3	2	1	1
CY	Generic	59					
TI	Generic	4	3	3	1	1	1
AB	Generic	62	3	3	1	1	1

Buttons: OK, Abbrechen, Hilfe

Tagen Sie dabei unter Database Name den Poolkey und unter Description den Langnamen der Datenbank ein. Die anderen Felder wählen Sie wie im Beispiel oben angezeigt. Mit den unter Search Attributes angegebenen Field Names kann dann in der Datenbank gesucht werden, die Zuordnung der übermittelten Datenbankdokumente zur Reference Manager Datenbank geschieht über DIMDI\_Z39.50\_Medline.cap.

## Using the Import Interface of Reference Manager

Only one selection of database fields is imported into the literature management program **Reference Manager** when using the import filter (DIMDI-IMPORT.cap, DIMDI-XML.cap) made available by DIMDI. To import further database fields the filters can be extended and adjusted to the individual needs.

To adjust the import filter to your individual needs proceed as follows:

First start the **Reference Manager** program. Then activate the **Import Filter Editor** (see illustration 1) via the menu **Tools** that opens in a new window (see illustration 2).

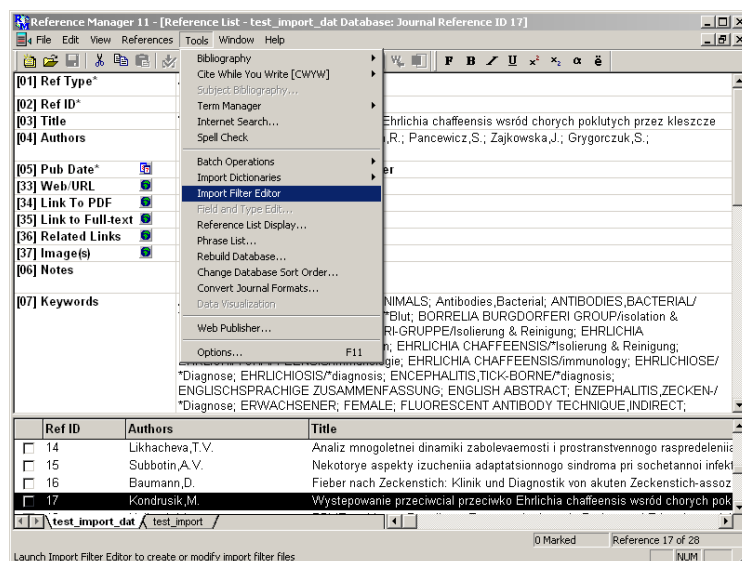
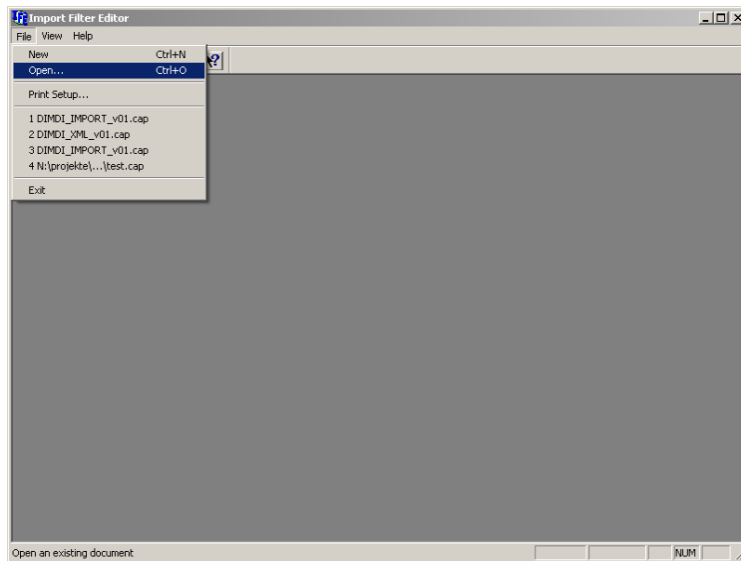


Illustration 1: Opening the Import Filter Editor

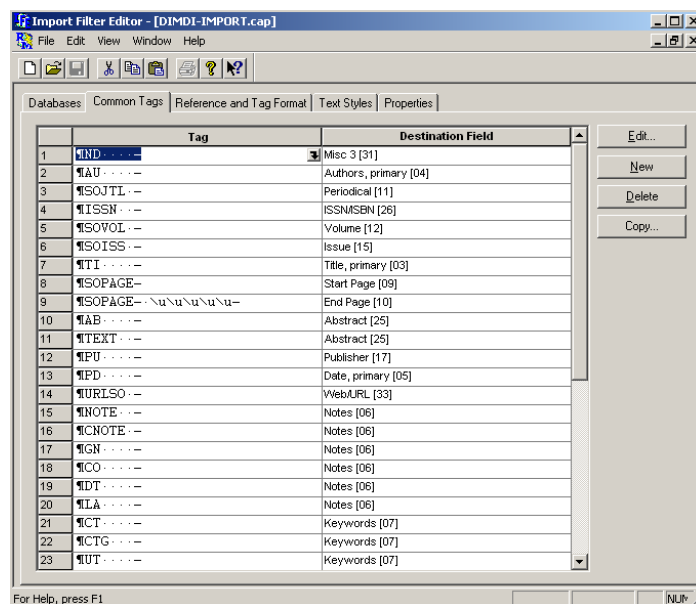
Click on **Open** in the **File** menu in the „Import Filter Editor“ window to select and load the desired filter (see illustration 2). The import filter of the **Reference Manager** is stored according to standard under "C:\Programme\Reference Manager 11\Import". Select the desired filter (**DIMDI-IMPORT.cap** or **DIMDI-XML.cap**).

You find the actual filter on DIMDI-Hompage under Database Search – Service – Output Formats (DIMDI-IMPORT.cap bzw DIMDI-XML.cap)

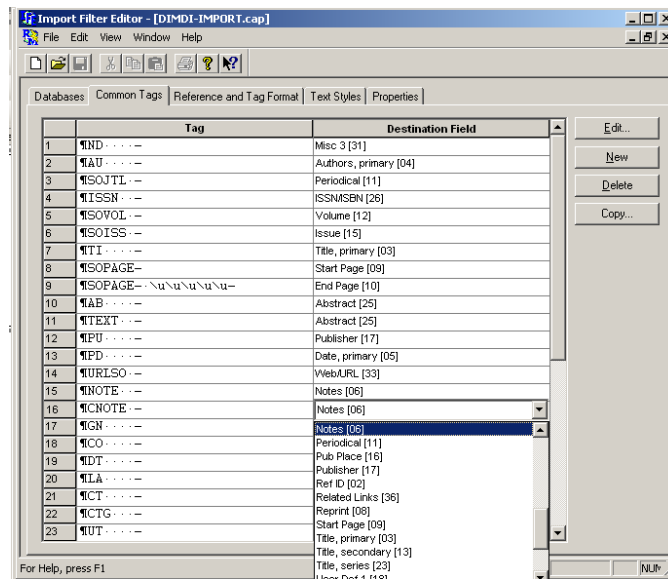


**Illustration 2:** Opening the Filter to be used (\*.cap) in **Import Filter Editor**

As soon as the desired filter is opened, you can select from 5 riders. Click on the rider **Common Tags** (see illustration 3). To import a further data field, click on the button **New**, as a result, a new sequence is added at the end of the list. Enter the field identifier of the data field which is to be imported additionally in the left field (**Tag**). When using the DIMDI IMPORT format, the field identifier must be supplemented with blanks for a total length of up to 6 characters (e.g. **ATC----**). However, if you use the XML format, you must use the appropriate tag element (e.g. **<ATC>**). In the right field (**Destination Field**) you can select the desired field, in which the new data is to be stored, from a drop down menu (see illustration 4).

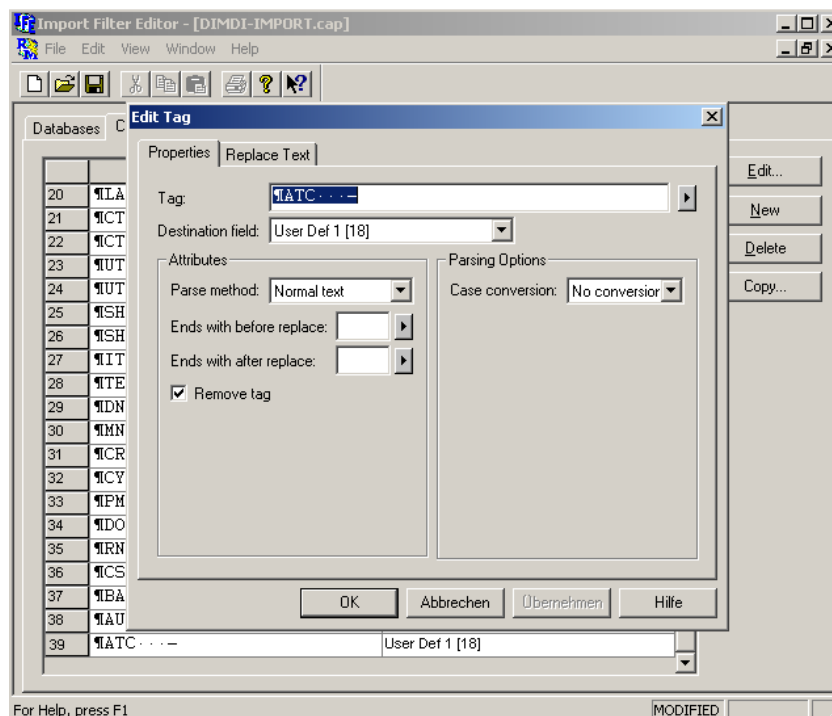


**Illustration 3:** The rider **Common Tags**; the field identifier of the database field to be imported is entered under **Tag**; under **Destination Field** a corresponding field is chosen for each **Tag** in which the data is to be stored within the **Reference Manager**.



**Illustration 4:** Selection of the desired Destination Fields in which the data to be imported is to be stored.

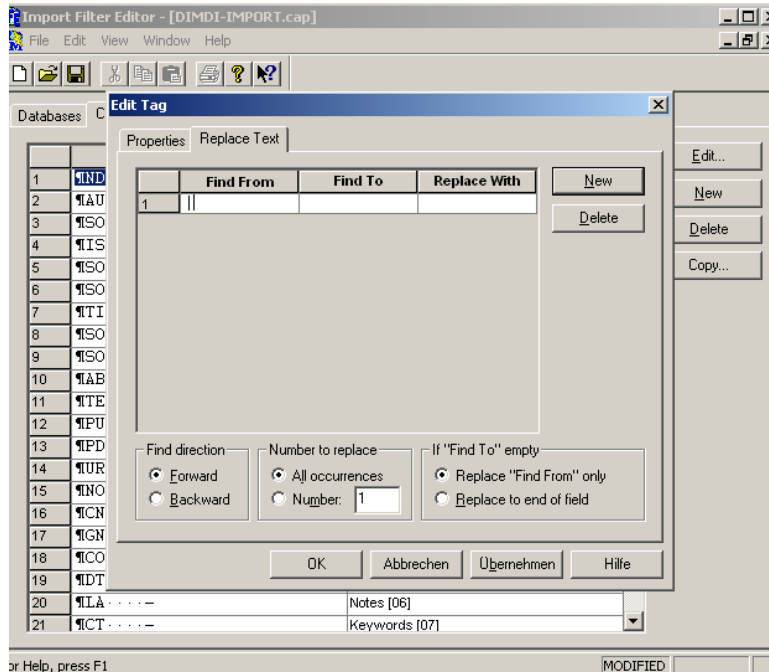
After preparing a new Tag and Destination Field, mark the new entry and click on the button **Edit** .... In the new window, **Edit Tag**, select a suitable Parse Method (see illustration 5) from the drop down list under the rider **properties**. If the field contains only one entry (ND, SOJT, TI, ...) select, for example, **Normal Text**, on fields with several entries (CT, UT, SH, ...), however, **Multi keys** (additionally the appropriate separator still has to be entered under **Keys separated by**).



**Illustration 5:** Editing the new Tag

In order to avoid the import of control characters, select the rider **Replace Text** in the **Edit Tag** window, click on **New** and add the separator used under **Find from**. With the DIMDI IMPORT format |

(short-cut: Alt Gr + <) is used as a separator according to standard (see Illustration 6). With the DIMDI IMPORT format, however, the “closing” tag element is used (e.g. </ATC>).



**Illustration 6:** Removing control characters with Replace Text

Afterwards, click on and OK. The filter changes are stored by clicking on the diskette symbol or selecting the entry Save in the menu under File.

### Important Notice:

Searches can be carried out directly from the literature management programs EndNote and Reference Manager via the Z39.50 interface. After the search has been performed the titles of the found documents are sighted first. Selected documents can be displayed afterwards.

For technical reasons, the full document price is estimated for all titles displayed at the contract customer's entrance although for the time being only titles of documents are issued.

## Use of the RIS exchange format

In order to conveniently transfer computer results into the literature management program, the RIS exchange format is offered. The documents are issued with specially defined field tags for the RIS format, and a default assignment takes place for the fields in the Reference-Manager database. Therefore, you cannot yourselves influence the filter.

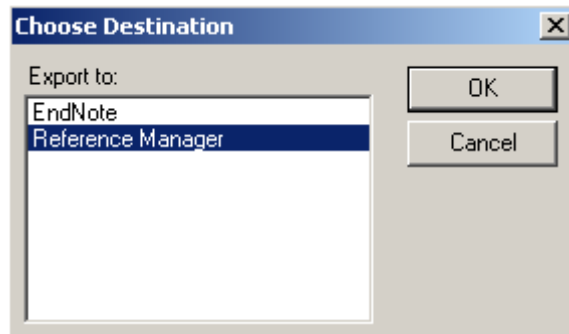
Please note that, on the basis of this default assignment, the bibliographic and content-indexed data fields are particularly attended to in the RIS format. Unfortunately, special data fields, such as the reference declarations in SciSearch cannot be converted in RIS format.

There are two selection possibilities, providing documents with automatically produced RIS data via email (simple variant) or the creation of RIS data in several steps (complex variant).

Generally, to avoid problems with the implementation of umlauts in advance you should enter the command DEFINE CHARSET=ASCII.

The provision of documents with automatically created RIS data via email is effected by entering the command MAIL with the parameters REPORT=RIS;F=XMLALL (MAIL REPORT=RIS;F=XMLALL). The RIS data can be found in the email attachment that you receive shortly afterwards. Double click on the data and a window opens up where you can select Reference-Manager.

After clicking on OK, Reference-Manager is opened and the database documents are read in.



The creation of RIS data in several steps takes place with the assistance of the command SHOW with the parameters REPORT=RIS;F=XMLALL.

The documents issued with the SHOW command can be stored with the function “store protocol” (Type:TXT=text data) (please delete the protocol file before the SHOW command). Now, open the txt data (file name.txt) and remove the first and last lines so that only the document stands in the data. Finally, rename this data into the file name.ris. Double clicking on file name.ris opens a window where you can select Reference-Manager. After clicking on OK, Reference-Manager is opened and the database documents are read in.

In DIMDI SmartSearch, select the output RIS and the document will be issued online or sent via email. Additional flow is described as above again.