Annual Faculty Reports – Importing Citations

The Citation Import feature allows faculty to import publication data from reference managers and databases, such as Google Scholar and PubMed, into the Intellectual Contributions section of their Annual Faculty Report (AFR). Use of this feature is optional; faculty can continue to enter this information manually.

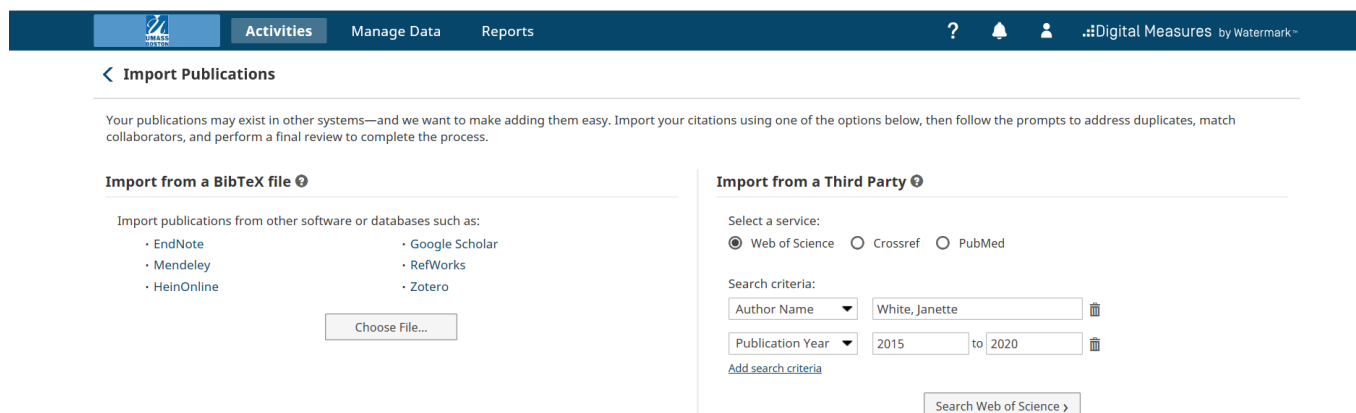Please follow the steps below to use Citation Imports:

1. Log in to AFR.
2. Under Scholarship/Research, click on Intellectual Contributions.
3. Click the Import button near the top of the screen to go to the Import Publications screen.

4. There are two options for importing citations from references managers/databases: import from a BibTex file and import from a third party. The type of import will depend upon the database you wish to use.

Using Google Scholar for citations requires a BibTex file that will be imported into AFR. Please note that other databases are listed under the BibTex option. The AFR Support Team beta tested only Google Scholar.

Citations from the following services can be imported directly into AFR without a BibTex file:
- PubMed
- CrossRef
- Web of Science

PLEASE NOTE: Citations with multiple UMass Boston authors are imported **only** into the user account of the faculty member who initiated the import; the import will **not** affect the AFR accounts of the other authors. Each faculty member can initiate their own citation import or enter the data manually.

Using Google Scholar for Citation Imports
- Before importing a BibTex file from Google Scholar, you should first aggregate your citations via Google Scholar Citations (https://scholar.google.com/intl/en/scholar/citations.html).
- To export the citations to a BibTex file:
  o In AFR's Import Publications screen, click on **Google Scholar**.
  o Select **My Citations**.
  o If you are not logged in to Google Scholar, enter your credentials to sign in. You should then see a list of your articles on your profile page.
  o If you would like to export specific articles to your BibTex file (for example, only those articles that were published during the academic year under review), select these from your profile. If you would like to export all of your articles, click on the checkbox labeled "Title" to select all of your articles. (If you previously entered any of these articles in your AFR, the import will result in duplicate citations.)
  o Select the **Export** option and choose BibTex to convert your articles into this format.
  o Copy the BibTex text into a text editor (such as Notepad for PC or TextEdit for Mac) and save it as a .txt or .bib file.

- To import the BibTex file to AFR:
  o Go to the Import Publications screen and click the **Choose File** button.
  o From the pop-up screen, select the BibTex file and click **Open**.
  o Select **Continue**.
  o The software will check for duplicate files. For each potential duplicate, you will need to select **Skip**, not Import. Regardless, duplicate citations will be imported, which will require you to go into AFR to delete the duplicates.
  o When finished, select the **Continue** button near the top of the screen.
  o For each name on the Match Collaborators screen, click on "Match to a user account." Only UMass Boston faculty with an AFR account can be matched to a user account.
  o Either select a name from the pop-up list and click OK or select "No Matching Account."
  o Review each record using forward and reverse arrows.
  o Select **Finish Import** button.

- On the confirmation screen, select the **Import** button
- After the records are imported successfully, click OK in the pop-up box.

Using PubMed, CrossRef, and Web of Science for Citation Imports

- To import citations from Pub Med:
  - On the Import Publications screen, select **PubMed, CrossRef, or Web of Science**.
  - Under search criteria:
    - Select "Name: Author" from the dropdown list and enter your name in the text box.
    - Select "Publication Date," then enter the start and stop dates. For instance, AY 2024-2025 would be entered as 2024/09/01 – 2025/08/31.
  - Click the **Search** button.
  - A list of publications will appear on the screen. Check the boxes of the articles you wish to import. (If you previously entered any of these articles in your AFR, the import will result in duplicate citations.)
  - Click the **Continue** button. (You can also click the **Cancel Import** button should you decide not to import the citations.)
  - For each name on the Match Collaborators screen, click on "Match to a user account." Only UMass Boston faculty with an AFR account can be matched to a user account.
  - Either select a name from the pop-up list and click OK or select "No Matching Account."
  - When finished, click on the **Continue** button.
  - Review each record using the forward and reverse arrows.
  - Click on the **Finish Import** button.
  - On the confirmation screen, select the **Import** button.
  - Click OK in the pop-up box.

After new records are entered into AFR with the citation import feature, we strongly recommend that you review each entry for accuracy. You can edit or add information, such as dates and comments, as well as delete entries.

There are several known issues with citation imports:
- International characters and diacritics (such as accent marks) will not import. Faculty will have to copy and paste those characters into the text fields.
- The AFR system will not recognize or eliminate duplicate entries. The faculty member is responsible for deleting duplicate entries after import.
- Some users might be matched incorrectly to a UMass Boston user account with a similar name. The faculty member can correct this during the "Match to a user account" step.

If you have any questions or concerns, please send an email to AFRsupport@umb.edu.