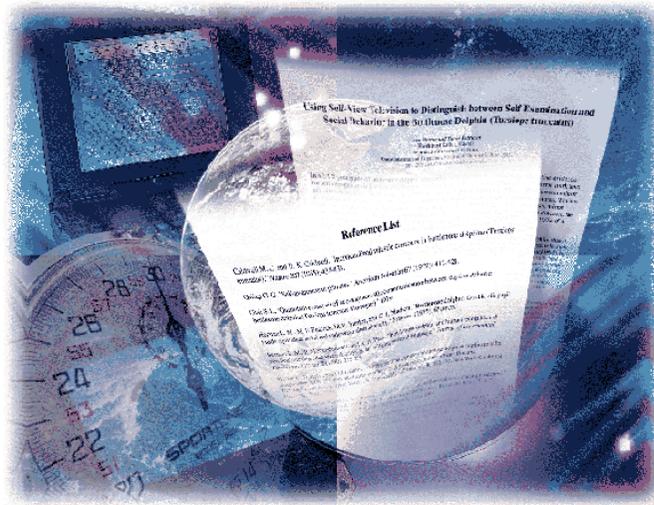




Reference Manager Version 9 for Windows

Getting Started Guide



Research Information Systems

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Introduction and Installation

Overview

Reference Manager is a personal reference bibliographic management system. It is designed to keep track of specific references in your field of interest. There are over 30 pre-defined reference types to choose from including journals, books, conference proceedings, patents, slides, and theses.

This Getting Started Guide contains useful information to help you begin using Reference Manager. It is a subset of the information contained in the Reference Manager User's Guide. While this information will be helpful in getting you started, it is recommended that you read the User's Guide so you have a full understanding of Reference Manager and can use it to the fullest. You can find a PDF version of the User's Guide on the CD.

Preparing to Install Reference Manager

Reference Manager and Import File Editor are easy to install on your Windows 95/98/NT computer. The installation instructions

assume that you have installed Windows 95/98/NT and are familiar with how to use the Windows operating system.

Hardware Requirements

The following requirements are the minimum needed to install Reference Manager and Import File Editor.

- ◆ Pentium or better
- ◆ 16 MB RAM minimum
- ◆ Monochrome or color monitor
- ◆ Hard disk with at least 10 MB available
- ◆ Keyboard and mouse
- ◆ CD ROM

Software Requirements

Prior to installing Reference Manager, you need the following software installed on your system.

- ◆ Microsoft Windows® 95 or higher, or Windows® NT 4.0
- ◆ Word processing software—if you plan to cite references in your manuscripts: Microsoft® Word for Windows® Version 7, 97 (or later), or Corel® WordPerfect® Version 7, 8 (or later)
- ◆ Web Browser (a current version)—if you want to use the URL field

Output Styles

When you install Reference Manager, over 300 output styles are automatically installed.

The output styles provide pre-defined bibliographic formats for journals. A file for each output style is installed in the Styles folder.

Check the format required by a journal before submitting a paper—to ensure the format is correct. If you notice an output style is incorrect, please contact us (tech@risinc.com) and let us know.

Sample Database

If you are new to Reference Manager, you may want to work with the Sample Database. This is provided for you in the program.

The Import Filter Editor Files

During the installation, Import Filter files are installed. These files consist of prepackaged definitions and sample text files for each definition. Import filters are files that identify data elements in your text files and map them to the appropriate fields in your Reference Manager database. Import Filter files are stored in the Import folder.

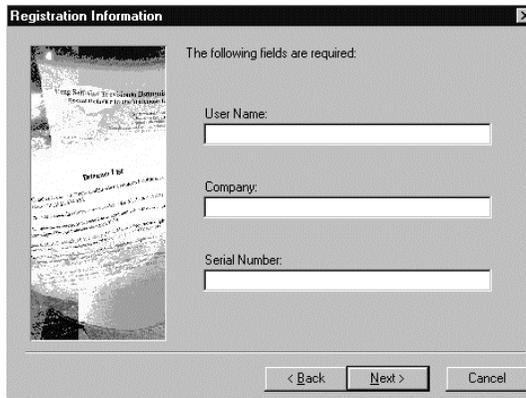
Starting the Installation

Before installing Reference Manager, close all other applications.

Make sure you meet the hardware and software requirements before installing Reference Manager.

To install Reference Manager:

1. Insert the Reference Manager Program CD into the drive.
*The installation program will automatically run.
You see the Reference Manager splash screen with the installation options.*
2. Click **Install**.
3. Click **Next**.
4. Click to accept the agreement, and click **Next**.
5. If you want to change the installation folder, click **Browse**, locate a new folder, and click **Next**. Otherwise, click **Next**.
6. Select the Program Group where Reference Manager 9 icons will be added, or use the default. Then, click **Next**.



The following fields are required:

User Name:

Company:

Serial Number:

< Back Next > Cancel

The image shows a 'Registration Information' dialog box with a splash screen on the left and three text input fields on the right. The splash screen contains text including 'Using 9-Ref Manager 9.0 - Gateway Edition' and 'Please read the following information'. The input fields are labeled 'User Name:', 'Company:', and 'Serial Number:'. At the bottom are buttons for '< Back', 'Next >', and 'Cancel'.

7. In the **User Name** field, type your user name.
8. In the **Company** field, type the company name.

9. In the **Serial Number** field, type the serial number.
10. Click **Next**.
11. At the Installation Complete screen, do one of the following:
 - To finish the installation and exit, click **Finish**.
 - To register the software, click **Register**.
 - To run Reference Manager now, click **Run**.

If you selected Register, follow instructions to register the product. If you selected Run, start using Reference Manager.

In some cases you may be prompted to restart your computer. You must do so or Reference Manager may not function correctly.

12. Click **OK** to restart your computer.

Existing Reference Manager Users—Conversions

Before using Reference Manager Version 9, you should update your database so you can take advantage of the new features in version 9.

If your database was created using Reference Manager version 4, you need the Database Conversion Utility disk to convert your database. To obtain this disk, contact Research Information Systems.

When Reference Manager converts a version 5, 6, or 7 database to version 9, it creates a new database and leaves the older version intact. This ensures that you do not lose the old database.

If you convert from version 8, Reference Manager does not create a new database. You should make a backup copy of the database prior to converting from version 8.

Once you have converted a version 5-7 database, it is not accessible to the older version of Reference Manager. To work in the converted database you need to access it using version 9 of Reference Manager.

You can access version 9 databases directly in version 8, but information in certain fields may be truncated due to the field length limitations in version 8.

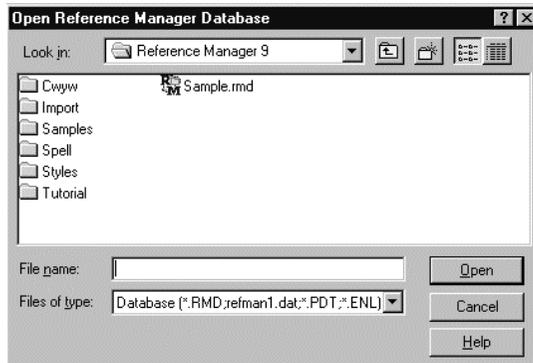
Perform a database conversion for each database you have.

Converting an Existing Database from Version 8

This section describes how to convert an existing database to version 9.

To convert a version 8 database to version 9:

1. From the **File** menu, select **Open Database**.



2. In the **Files of type** drop-down list, select **Database**.

3. Locate the database you are converting.

4. Select the database file and click **Open**.

A message appears asking if you want to convert the database.

5. Do one of the following:

- If you do not want to convert, click the **Leave in Version 8 format** button.

The database is opened in read-only mode and you are done with this procedure.

- To convert the database, click the **Upgrade** button.

Converting an Existing Database from Versions 5-7

This section describes how to convert an existing database to version 9.

To convert a version 5-7 database to version 9:

1. From the **File** menu, select **Open Database** to open the old database.

2. In the **Files of type** drop-down list, select **Database**.

3. Locate the database you are converting.

4. Select the **Refman1.dat** file and click **Open**.

A message appears asking if you want to convert the database.

5. Do one of the following:
 - If you do not want to convert, click the **Open in Version 7 Read-Only Mode** button.

The database is opened in read-only mode and you are done with this procedure.
 - To convert the database, click the **Convert to Version 9** button.

The Convert Database dialog box appears.

The database in the Source Database field is the name of the version 5/6/7 database you are converting.

6. In the **Destination Database** field, enter the complete path and database name for the database you want to create from the version 5/6/7 database. Either type the full path in the field, or navigate to the desired location using the **Browse** button.

A suggested database name appears that is based on the database you are converting. You do not need to use a file extension; Reference Manager appends the appropriate file extensions.

7. If you want to copy the database definition from your version 5/6/7 database, check the **Copy Database Definition** box.

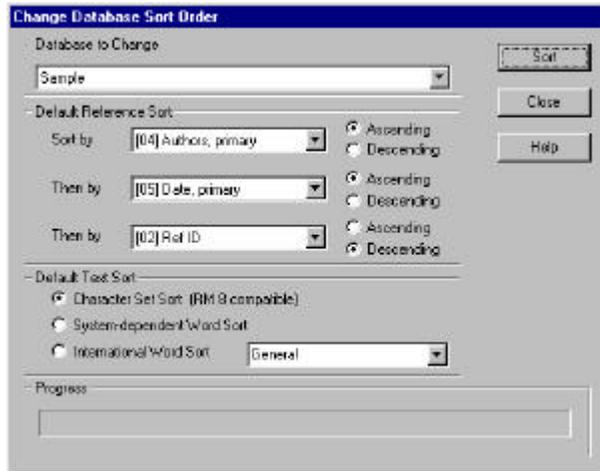
The database definition includes the reference types and fields that you have defined.

For detailed information, see Chapter 4 on the database definition—in the User's Guide.

8. If you want to copy the periodical synonyms from your version 5/6/7 database, check the **Copy Periodical Synonyms** box.

For detailed information, see Chapter 6 on Periodical Synonyms—in the User's Guide.

9. To change the sort order, click **Database Sort Order**. Make any changes, and click **OK**.



By default, it is sorted by Author (Primary—in ascending order), then by date (Primary—in ascending order).

The default text sort order is Character Set Sort. For detailed information on the Database Sort Order, see Chapter 12 in the User's Guide.

10. Do one of the following:
- To convert the database, click **Convert**.
 - To cancel the conversion, click **Cancel**. You are done with this procedure.

The conversion process begins. When complete the converted database will open.

Converting Existing Journal Formats

Included with Reference Manager is a utility to convert your existing journal formats to the new output style format. This

6. Click **OK**.

The journal format is converted.

7. Follow these steps for each journal format you want to convert.

Transferring Files from the Macintosh

To transfer a database from a Macintosh to Reference Manager you first need to rename the five Macintosh files.

To transfer files from the Macintosh:

1. Find the files.

They are named “databasename(1)” through “databasename(5).”

2. Rename the files to “REFMAN1.DAT” through “REFMAN5.DAT” respectively.
3. Move the files into a new folder (usually a folder under the Reference Manager 9 program folder).
4. Name the directory with the name you want the database to be named, with the extension “RM.”

For example, if you were moving the “Sample” database from the Macintosh, put the files into a folder named “Sample.RM.”

5. From the **File** menu, select **Open Database**.
6. Locate the database folder (*.rm), select the file named refman1.dat, and then click **Open**.

A message appears asking if you want to convert the database.

7. Do one of the following:
 - To convert the files, click **Convert to Version 9**.
 - If you want to view the references without making any edits, select **Open in Version 7 Read-Only** mode.
 - To cancel, click **Cancel**.

Using Reference Manager with ProCite or EndNote Databases

You can open and convert databases that you created using ProCite Version 4 or EndNote Version 2 or 3.

To open an EndNote or ProCite database:

1. From the **File** menu, select **Open Database**.
2. In the **File of type** field, select the database type (ProCite 4 Databases or EndNote 2/3 Libraries) to open.
3. Locate and open the folder (EndNote or ProCite) that contains the database.
4. Select the database and click **Open**.
5. Click **Create Reference Manager database**.

The screen you see varies depending on which database type you are converting.
6. If you are converting a ProCite database and you want to include the ProCite record number as a keyword in the Reference Manager database, select the checkbox.
7. Enter the name and location of the new database and click **Convert**.

Wait while the database converts.

8. Click **OK**.

When the database is converted, the new database Reference List window opens.

Network Users Installation Notes

Once Reference Manager has been installed or upgraded on your system, you must also run the workstation installation on each computer from which you plan to access Reference Manager. If the program is loaded on your local hard drive, run the workstation installation program on this computer as well.

To run the workstation installation:

1. Close all open programs.
2. From Windows Explorer, open the Reference Manager 9 Network folder.
3. Double-click the InstRM9W.exe file and follow the instructions.

During the workstation installation, you are prompted to select a User Directory path in which to store your personal files (such as search strategies).

When installation is complete, the program adds a "Reference Manager 9" shortcut to the Start menu under Programs.

4. To open Reference Manager, click on the Reference Manager 9 Network item from the Reference Manager submenu.

Establishing Access Privileges

By default, all users of the Reference Manager Network Edition have read-write access to the database. However, when you use Reference Manager, you can control privileges.

Using Read-Write Share

Read-Write Share lets you access all database functions, except Global Edit and Field and Type Edit. It is recommended that you do not conduct batch functions such as Batch Duplicate Check, in this mode. These functions can slow other workstations accessing the database.

Read-Only Share allows multiple users to simultaneously perform functions where you do not write to the database. In this mode, you cannot perform functions, such as editing, adding a new reference, deleting a reference, importing, or scanning for keywords.

Using Read-Write Exclusive

The Read-Write Exclusive mode prevents other users from accessing the database while you are using it. If you need to perform global edits or a batch function, you can do it when in this mode. Additionally, you can add synonyms using Term Manager.

To select the access privileges:

1. From the **File** menu, select **Open Database**.
2. Under **Access Rights**, select **Read-Write Share**, **Read-Only Share**, or **Read-Write Exclusive**.

If the network administrator limits a user's access, regardless of the access rights you select, the database is restricted to the method specified by the administrator.

If you create or edit Import Filter File definitions or output styles, save them to a file on your personal computer and not a network shared area. Other users may have access to the network, depending on the type of rights assigned by the network administrator.

How to Contact Us

You can contact us at the following numbers and addresses:

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Technical Support can be reached at:
E-mail: tech@risinc.com

You can also find answers to frequently-asked questions (FAQs) on our World Wide Web site:

URL: <http://www.risinc.com/>

Getting Started with Reference Manager

Launching Reference Manager

To launch Reference Manager:

1. In Windows, from the **Start** menu, select **Programs**, then **Reference Manager 9**, then **Reference Manager** .

2. To open a new database or to create one, from the **File** menu, select **Open Database** or **New Database**.

The Open Database or New Database dialog appears.

3. Do one of the following:

- To open a database, select a file, or browse  to select a database.
- To create a new database, in the **File name** field, type a name for the new database.

4. Click **Open** or **New**, appropriately.

Using the Toolbars

Three toolbars provide quick access to commonly used commands and functions. They are the Edit, General, and Format toolbars.

You can relocate a toolbar by dragging it to a new location anywhere in the window. You can hide a toolbar using the appropriate View menu command.

Hint: Many of the toolbar buttons are “grayed out” if a database is not open. If a toolbar button is grayed out, the function is not currently available.

The Edit Toolbar

Use the tools contained in the Edit toolbar to create, open, or save databases and output styles. You can also cut and paste text, copy text and references, add, edit, or delete references, check your spelling, print a bibliography, or access online help using toolbar buttons in this toolbar.



The Edit toolbar contains these toolbar buttons:

New—Creates a new database or output style (depending on the active window).

Open—Opens a database or output style (depending on the active window).

Save—Saves the reference, output style, or synonym list currently on the screen.

Cut—Cuts the highlighted text from any editable field.

Copy—Copies the highlighted text or highlighted reference from any editable field.

Paste—Pastes the last text you cut or copied.

Insert Marked References—Inserts the marked references into the open Microsoft Word or Word Perfect document, at the location of the cursor.

New Reference—Displays a new Reference Edit window, enabling you to add references.

Edit Reference—Displays the Reference Edit window for the highlighted reference, enabling you to edit the reference on a full screen.

Delete Reference—Deletes the highlighted reference(s) in the Reference List from your database.

Spell Check—Displays the Spell Check dialog box so you can check the spelling of text in the current reference.

Print—Lets you print references or terms, depending on which window is active.

Help—Displays online help.

The General Toolbar

The General toolbar provides functions that let you activate or open the Reference List, Term Manager, Retrieval, and Import windows.



The General toolbar contains these toolbar buttons:

Activate Reference List—Activates the Reference List, or makes it the active window.

Activate Term Manager—Opens the Term Manager window, or makes it the active window.

Activate Retrieval—Opens the Retrieval window, or makes it the active window.

Import Text File—Lets you import references from a text file. Opens (or activates) the Import Text file window.

Import Filter Editor—Launches Import Filter Editor.

The Format Toolbar

Use the tools in the Format toolbar to specify the font and formatting characteristics of selected text. These tools are used when you enter or retrieve references, or when you define output styles. You can also change text to Greek or insert symbols using tools in the Format toolbar.



The Format toolbar contains these toolbar buttons:

Font—Specifies the font, style, and effects of the selected text.

Bold—Applies the bold format style to text.

Italic—Applies the italic format style to text.

Underline—Applies the underline format style to text.

Superscript—Applies the superscript format style to text.

Subscript—Applies the subscript format style to text.

Greek—Changes certain characters to Greek.

Insert Symbol—Lets you insert a character from the extended ANSI character set. (The characters available are based on the font you select.)

Customizing Reference Manager

Before you begin working with Reference Manager, you might find it useful to customize the program settings. You can customize things such as the font used to display information, the information displayed, and many other settings.

Customizing the Options

There are six tabs that make up the Options tool. Each is described below.

For instructions on customizing the options in any of these tabs, see Chapter 12 in the Reference Manager User's Guide.

Overview of the Options Tabs

General—Defines the way in which information is displayed in all Reference Manager windows and dialog boxes.

Retrieval—Defines the defaults used when you choose a field on which a retrieval is based and when displaying sorted references.

Import—Defines the defaults used when you import references.

Reference Edit—Defines the defaults used when you add or edit references.

Duplicate Search—Defines the parameters to use when checking for duplicate references.

Internet Search—Specifies automatic display and number of displayed references.

Adding References Manually

To Add References

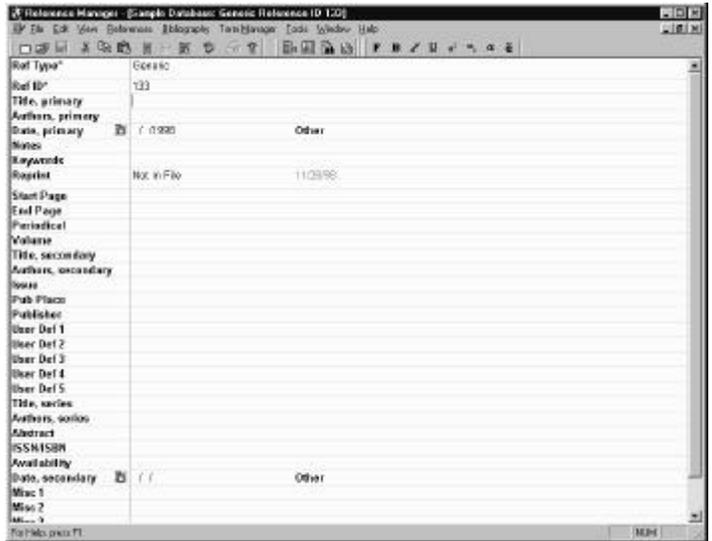
As you work with a database, you can add references to it automatically (importing) or manually. To add references manually, you will be typing information into each field.

The table in this procedure specifies the information you can add for each field.

As you add references, by default, Reference Manager automatically assigns a Reference ID number and numbers them in sequential order.

To enter references manually:

1. From the **References** menu, select **New**.



A blank Reference Edit window appears.

2. Enter information into each field as necessary.

Use the following table for guidance. Also, use the additional sections following this section.

Some information may be required, depending on what fields you have set to be mandatory in Field and Type Edit. Mandatory fields are designated by an asterisk () following the field name. In the example above, Ref Type and Ref ID are mandatory fields.*

3. When you are done entering text into each field, select **Save** from the **File** menu.

The references are saved. To add another reference, repeat the procedure.

Field	Enter this Information
Reference Type	<p>Choose the reference type from the available list.</p> <p><i>The reference types displayed are those reference types that are included in your database.</i></p>
Reference ID	<p><i>Can be system assigned. You can change this Option setting under Reference Edit. Make your selection in the Reference ID Assignment Mode. If not assigned, the cursor moves to this field and you will need to manually enter the ID.</i></p>
Title	<p>Type the title. Use upper or lowercase letters.</p> <p><i>Do not type a paragraph return (Enter) at the end of each line.</i></p>
Author Names	<p>Type the authors' name as follows: Type the last name first, a comma, the first initial, a period, and the last initial. Type a semicolon between authors.</p> <p><i>You can use the Font, Greek, and Symbol tools in the Format toolbar to change the font of authors' names, and insert Greek or extended characters. Do not use an asterisk (*) in this field. Usually you will use the Font button to access a different symbol set.</i></p>
Notes and Abstract	<p>Type any notes or abstract as desired.</p> <p><i>Do not type a paragraph return (Enter) at the end of each line.</i></p>
Date	<p>Type the year of publication.</p> <ul style="list-style-type: none"> • The full year (such as "1987") • The entire date (MM/DD/YYYY). <p>Use the format you specified in the Regional Settings in the Windows Control Panel. For example, if you set the international date format of YYYY/MM/DD, you must enter the publication date in that format. Your computer's system date (year) appears as the default option. For BC years, enter the year as a negative.</p>
Other (part of	<p>(Optional) Use this field to enter additional date information, such as</p>

Date) field	a season or a quarter.
Reprint Status	<p>From the drop-down list, select the reprint status.</p> <ul style="list-style-type: none"> • In File. Use this option if you have a reprint in your files. • Not in File. Use this option if you do not have a reprint, and do not expect to have one. • On Request. Use this option if you have requested a reprint (or copy) from the author. The Request Date field becomes available. Enter the date you requested the reprint, and you can generate reports of pending reprint requests. <i>The default date is the current date in your computer system (MM/DD/YY).</i>
Start Page/ End Page	<p>Type the start and end pages desired. You can enter numbers or letters. Use these guidelines:</p> <ul style="list-style-type: none"> • If the reference appears on only one page, or you do not know the last page number, leave the End Page blank. • If the reference appears on non-consecutive pages, enter the pages in the Start Page field. To separate page numbers, use commas • If you are including a range of page numbers, use a hyphen (for example, "20, 22-24, 32").
Periodical	<p>Type the periodical name—you can use any one of the four periodical synonyms.</p> <p><i>If you are generating bibliographies using both full periodical names and abbreviated periodical names, you must enter them in the Term Manager window as synonyms.</i></p> <p><i>The synonym you use is not important. When you generate a bibliography, the correct synonym name, as defined by the output style, is used.</i></p>
Volume	Type the volume number
Issue	Type the issue, if any. This is useful to enter a special designation for a supplement. For example, you might enter "45 (Suppl).
Publication Place	Type the place where the item being referenced was published, such as the city and state.

	<i>Do not type a paragraph return (Enter) at the end of each line.</i>
Publisher	Type the publisher's name.
Address	Type the address of the author, if available.
ISSN/ISBN	Type the International Serial Number of International Standard Book Number.
Availability	Type the location where the material is contained. For example, a periodical could be located in a specific filing cabinet, office, or library.
User Defined fields	Type any information you want into these fields. There are five user-defined fields for each reference (except motion picture, for which there are four). You can change the names of these fields to reflect the information they contain. To do so, use the Field and Type Edit utility.
Miscellaneous Fields	There are three miscellaneous fields available in a Generic reference. These three fields correspond to various different fields in other reference types. <i>For example, Misc 1 is the Number of Volumes for a Book or Book Chapter reference, or the International Class Code for a Patent reference. Not all references use the three miscellaneous fields.</i>
Web/URL	If applicable, type the Web URL address.

Entering the Reference Type

Different reference types allow you to enter different information in fields in the Reference Edit window. Refer to Appendix E in the Reference Manager User's Guide for a complete list of the different reference types and their associated fields.

To change the fields that define a reference:

1. On the **Tools** menu, select **Field and Type Edit**.
The Field and Type Edit dialog box appears.
2. Check the boxes to include or exclude specific fields for each reference type.

For more information, see the section "Defining a Database" in Chapter 4 in the User's Guide.

Entering the Author Names

When entering the authors for a reference, there are specific naming conventions to follow. It is important to follow these conventions for two reasons:

- ◆ Reference Manager's output styles provide a great deal of flexibility in the placement of initials and punctuation in authors' names. Naming conventions enable the program to understand where the last name ends and where the initials are placed.
- ◆ When you retrieve references, it is often convenient to type only the author's last name on the parameter line. Typing

the last name first enables the program to quickly locate all authors with a given last name.

To use the appropriate naming conventions:

1. In the **Author** field, type the last name, a comma, the first initial, a period, and the last initial followed by a period.

For example, “P.R. Smith” would be entered: Smith,P.R.

If there is a suffix such as “Jr.” or “II” enter it as follows: Smith,P.R.,Jr. or Smith,P.R.,II.

To enter full first names, type the last name, a comma, the first name, a space, and the middle name. For example, the name “Paul Roy Smith” would be entered: Smith,Paul Roy.

Hint: You can right-click with your mouse. To insert an author, choose **Insert New First Author**. To insert another author, choose **Insert New Author**.

2. If there is more than one author, type a semicolon to move to the next author.
3. Type the next author’s name using the same guidelines.

To insert an author between two existing authors, right-click immediately after the semicolon where you want to add the author. A second semicolon appears, allowing you to add another author.

Editing the Periodical Name

When you save the reference, the new periodical is automatically added to the periodical name term list. If the periodical name contains periods, the name is automatically placed in the Standard Abbreviation location in Term Manager.

If the name does not contain periods, it is placed in the Full location.

Once a periodical name has been saved in the term list, you cannot correct spelling in the reference edit screen. To correct spelling of the periodical name, see Chapter 8, in the User's Guide, for information on Term Manager.

Working with Synonyms

A synonym is a term having the same or similar meaning as another term in the term list. This section covers working with synonyms for Keywords and Authors. To make changes to Periodical Synonyms, you will need to use the global edit feature.

Important: prior to performing global editing, make sure to back up your database.

Adding Synonyms

There are several ways to add synonyms to Author, Keyword, or Periodical terms. These include adding a synonym to an existing term and adding a new synonym to a new term.

Adding a synonym to an existing term

Add a new synonym to an existing term:

1. From the **Term Manager** menu, select **Activate**.
The Term Manager dialog box appears.
2. Highlight the term in the Terms list to which you will add a synonym.

The synonyms for the term, if any, appear in the Synonyms list.

3. Click in the first empty field in the Synonyms list and type the new synonym.

If you are adding a periodical, enter the periodical name in one of the four fields.

4. Continue to add additional new synonyms for the term, as desired.
5. Click the **Save Synonyms** toolbar button to save the term and its new synonyms.

Adding a synonym to a new term

To create a new term and its synonyms:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Click the **Add Term** toolbar button.

A blank line at the end of the Terms list appears, and the Synonyms list to the right is blank.

3. In the blank line of the Synonyms list, enter the new term.

If you are adding a periodical, enter the periodical name in one of the four fields..

4. Add any synonyms in the following blank fields, as desired.
5. Click the **Save Synonyms** toolbar button to save the new term and its synonyms.

Combining Two or More Terms

You can combine two terms together that represent the same expression but are using different words or are spelled differently. Then, when you retrieve the reference, you will be able to retrieve it using either spelling.

Periodical synonyms are handled differently. You cannot use this procedure to combine periodical synonyms.

There are two ways to combine author or keyword terms.

The first method is:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Select the **Keyword** or **Author** tab.

3. Highlight the terms you want to combine.

Use Shift and Ctrl as needed to highlight the desired terms.

4. Click the **Combine Terms** toolbar button.

The synonym lists for both terms are combined and automatically saved.

The second method is:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Highlight the term in the Terms list.

The synonyms for the term, if any, appear in the Synonyms list.

3. Click in the first empty field in the Synonyms list and type the existing synonym.

4. Click the **Save Synonyms** toolbar button.

If the synonym you are adding doesn't have its own synonyms, it is added to the synonym list of the existing term.

If the synonym you are adding has its own synonyms, the Add Existing Term dialog box appears.

5. If you see this dialog, click **Yes** to add the term and its synonyms to the existing term.

Saving Synonyms

Save the changes you have made to terms by clicking the Save Synonyms icon or by selecting Save from the File menu.

Canceling Synonym Editing

Cancel Synonym Editing is used to cancel, or undo, the synonym editing that you have performed. This option is available only when adding or editing terms in the Synonyms list on the right side of the Term Manager window.

If you have performed a Global Edit (delete or replace), or have combined terms, those actions are saved immediately and you cannot undo or cancel them once the process has completed.

Extracting Synonyms (Deleting)

To extract a synonym from an Author or Keyword term means to remove it from the synonym list and place it in its own list. Or, you can completely delete a term.

To extract a synonym:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Select the term in the Terms list tab.

The synonyms for the term are displayed in the Synonyms list.

3. Do one of the following:

- To extract the synonym from the term and place it in its own list, press the **Delete** key on your keyboard.
The synonym is extracted from the synonyms list it was in and is left as an independent term. The synonym still exists in any reference in which it resides.
- To delete the synonym from the term list and the references it is associated with:

- a. Click the **Global Edit** toolbar button.

The Global edit dialog box appears.

- b. Verify that the term you want to delete is displayed in the Source field.

- c. Click **Delete**.

- d. Confirmation dialog appears, click **OK**.

- e. Click **Close**.

The term has been removed.

Working with Periodical Synonyms

Periodical synonyms are variations of Periodical names. They differ from the Author and Keyword synonyms in that they can only contain up to four synonyms for each periodical.

When you import references, periodical names are automatically added to the term list. Some services may use abbreviated names while others use full names for the same periodical.

For each periodical name, you can enter the Full name, Standard Abbreviation, User One, and User Two.

Synonyms	
Full	Zoo Biology
Std. Abrev.	
User One	
User Two	

Copying a Periodical Synonym

You can copy the periodical synonym list from a non-active database to the active database. You can also copy periodical synonyms from the lists provided with the program (Humanity, Chemical, Medical).

To copy periodical synonyms:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Select the **Periodicals** tab.
3. From the **Term Manager** menu, select **Copy Periodicals**.

The Copy Periodicals dialog box appears.

4. In the **Copy From** field, select the periodical synonyms list you want to copy from, or select the database.
5. In the **Select Database** field, enter or browse  for the database name to copy to.

The database you are copying to now appears in the Select Database box.

6. Click **OK**.

The periodical synonym is copied.

Moving a Periodical Synonym

You can move a periodical synonym from one position to another within the periodical name.

To move a periodical synonym:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Select the **Periodicals** tab.
3. Select a periodical name from the terms list.

The synonyms for the periodical name appears in the Synonyms list.

4. Highlight the synonym you want to move.
5. From the **Edit** menu, select **Cut**.

Or, use the Ctrl X shortcut keys.

6. Click the cursor in the paste location.
7. From the **Edit** menu, select **Paste**.
Or, use the Ctrl V shortcut keys.
8. Click the **Save Synonyms** toolbar button.

Combining Periodical Synonyms

You can use this procedure to associate a full periodical term with its standard abbreviation when the two are not currently associated.

Important: Prior to performing global editing, make sure to back up your database.

To associate periodical terms:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Select the **Periodicals** tab.

3. On the **Periodical term** tab, select one of the periodical names in the Terms list.

For this example, select the periodical term containing the Full name that you want to associate with a standard abbreviation.

4. In the **Standard Abbreviation** field, type a temporary, Standard Abbreviation synonym.

Be sure the temporary term does not already exist in the Terms list.

5. Click the **Save Synonyms** toolbar button.
6. On the Periodical term tab, select the name in the Term list for the desired Standard Abbreviation and click **Global Edit**.
The Global Edit dialog appears.
7. In the **Destination** field, select the temporary name
8. Click **Replace**.
9. In the confirmation dialog box, verify the change and click **OK**.
10. On the Periodical term tab, select the temporary term and select **Global Edit**.
11. In the **Destination** field, type the desired abbreviated term.
12. Click **Replace**.
You now have one periodical that contains both a Full and Standard Abbreviation that were previously not associated.
13. Click **Close** to close the Global Edit dialog box.

Using Quick Retrieval

The Quick Retrieval option allows you to retrieve references based on those term(s) highlighted in the Term Manager window. The retrieved references appear in the Retrieved tab of the Reference List window.

To perform a Quick Retrieval:

1. From the **Term Manager** menu, select **Activate** (or press F5).

The Term Manager dialog box appears.

2. Click to select the desired term (or terms).

Highlight multiple terms in two ways: hold down the [Shift] key and click the first and last terms to highlight a range , or hold down the [Ctrl] key and click each individual term.

3. Click the **Quick Retrieval** toolbar button. Or, select **Quick Retrieval** from the **References menu**.

When you choose a Quick Retrieval with two or more terms highlighted, the Quick Retrieve Connector dialog box appears. It lets you to specify whether or not you want these search terms connected using the AND or the OR logical connector.

Importing References

Importing References from a Text File

To import references:

1. Have the source text file available.
2. Open the destination database. (From the **File** menu, select **Open Database**.)
3. From the **References** menu, choose **Import Text File**.

The Import Text File screen appears.

4. In the **Database** drop-down list, select the database to import references into.

Read-only databases are not included in the list.

5. In the **Filter** drop-down list, select the service you used when you downloaded the references.

Or, click browse to display the Select filter dialog box. Locate the filter file and click Open.

You need to know the source of the text file. If it is coming from a database like Medline, you need to know who the

provider is or what service you used to download the text file.

6. In the **Text file** box, select the source text file name.

Select one from the drop-down list, or click browse to locate the downloaded text file. Then click Open.

To view the text file, click **View Text File**. Then click **Close** to close the text file.

7. In the **Reference range** section, select whether you want to import all references in the text file, or a range of references.

If you choose From, type in the range. Type the starting and ending reference numbers (the sequential numbers of the references in your text file).

For example, if you have ten references in your text file and you want to import only the fifth and sixth references, enter “5” in the From field and “6” in the To field.

8. (Optional) To add additional keywords to every reference imported from the text file, add them in the **Additional keywords** text boxes.
9. (Optional) To change the appearance of text in the keyword fields, highlight the text to change and click **Font**, **Greek**, or **Symbol**. Make the changes as desired.
10. (Optional) To change the **Default reprint status** box, in the **Status** field, make a selection from the drop-down list.
11. If the Default Reprint Status selected is On Request, the current date appears by default. Use the drop-down to select a new date.

12. Click **Import** to begin importing references.

As references are imported, they appear in the Import Text File dialog box.

13. At the confirmation dialog box, click **OK**.

14. (Optional) To save the Import log to a text file, click **Save Log**.

The Save Log As dialog box appears allowing you to specify the name and location of the Import log file. Usually you select Save if you have errors and you want to save the file to print and review at a later time.

15. To exit the Import dialog box, click **Close**.

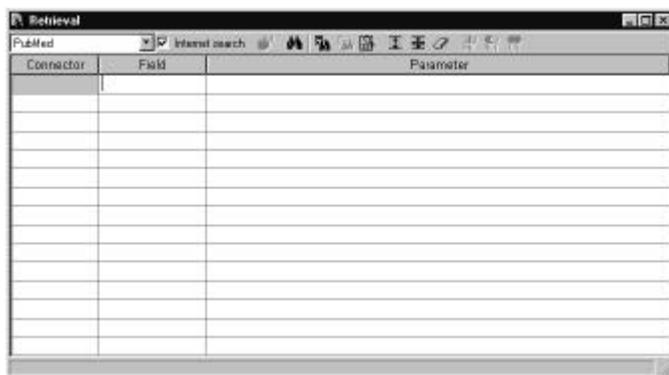
Importing from the Internet

Using the Z39.50 (powered by BookWhere?) and PubMed Internet retrieval choices, you can import references directly from the Internet. This feature is further covered in Chapter 9, Retrieving References, in the User's Guide.

Retrieving References from the Internet

To retrieve references from the Internet:

1. From the **References** menu, select **Internet Search**.



The options in the Select Database(s) drop-down are now Z39.50 and PubMed.

2. In the **Select Database(s)** drop-down, select **Z39.50** or **PubMed**.
3. In the **Field** column, type or select the field to search in. Press F3 to activate the **Browse** list, if desired.
4. In the **Parameter** column, type or select the content for the field you are searching for.
5. To modify the search, add another line using a connector as follows:
 - a. In the **Connector** field, type AND, OR, or NOT.
 - b. In the **Field** and **Parameter** columns, type in the appropriate information for the next item you are using to limit your search.
6. To access an existing retrieval strategy, click the **Strategy Files** toolbar button. At the Retrieval Strategy dialog, select the strategy and click **Load**.
7. Click the **Start Retrieval** toolbar button to begin the retrieval.

Wait while results are searched for. Either results appear automatically, or the Results screen appears.

8. If the results screen appears, select the number of results you want displayed.

If there are many results to download, you could do so in batches. Or, you may want to refine your search to bring up less, more specific, search results.

The search results are listed in a tab called Search1. Subsequent retrievals display tabs named Search2 (then 3, 4, etc.).

9. Do one of the following:
 - To discard the results, close the Search tab.
 - To save the results, use one of these methods:
 - ◆ Drag and drop them into another database
 - ◆ Copy them into another databases
 - ◆ Save them in a new database (from the File menu, select Save As)

Retrieving References

Overview

You can retrieve references from any Reference Manager database, PubMed database, or hundreds of Z39.50 libraries worldwide. While doing so, you can search any field or retrieve references based on one or more fields. You can also save the search strategies you create for later use.

Creating an Effective Retrieval Strategy

The *search strategy* (or *retrieval strategy*) is the formula you create to do a search, and it tells Reference Manager specifically what you are searching for.

The Retrieval Strategy contains the specific combination of information you want to search on. By limiting options, it narrows the search. The Retrieval Strategy can consist of one or more lines, with one or more fields per line.

If you don't like the results of a search you perform, you can always change or enhance the search strategy and search again.

For example, if you chose Periodical in the Field column, here you would choose or type in the name of the periodical you are searching for.

5. To limit the search to a reference that contains additional specific information, add another line using a connector as follows:
 - a. In the **Connector** field, type AND, OR, or NOT.
 - b. In the **Field** and **Parameter** columns, type in the appropriate information for the next item you are using for your search.
6. In the **Field** column, start typing the field upon which this search line is to be based. Or, press F3 to activate the browse list.
7. Click the **Start Retrieve** toolbar button to begin the retrieval.

If your search strategy is a single-line strategy, the results of the current retrieval appear immediately on the Retrieved tab of the Reference List.

8. To view the results of a retrieval, click the corresponding **Results** button.

The Results box displays the number of references found that match the criteria you entered for each line.

Saving and Loading a Search Strategy

As you retrieve references from the Internet or a database, you can use search strategies you have previously saved. If you have a specific search strategy you are using frequently, you can save it and load it later and perform the same retrieval. Then, you don't need to enter it each time you want to use it.

Saving a Search Strategy

To save a retrieval strategy:

1. Make sure the strategy is up on the screen.
2. Click the **Strategy Files** toolbar button.
The Retrieval Strategy screen appears.
3. Click **Save**.
The Save Retrieval screen appears.
4. In the **Retrieval Strategy Name** field, type a name for the strategy.
5. Click **OK**.
This strategy name will be in the Retrieval Strategy list next time you open it.

Loading a Retrieval Strategy

To load or delete a search strategy:

1. Click the **Strategy Files** toolbar button.
The Retrieval Strategy dialog box appears. It contains a list of saved search strategies.
2. To load a search strategy, highlight the strategy file and click **Load**.
3. To delete a search strategy, select it and click **Delete**. At the confirmation box, click **Yes**.
4. Click **Close**.

Using Copy Field

Overview

The Copy Field function lets you to copy data from a field in one reference to the same field in another reference. This option is useful if you want to copy information from one reference to another, without reentering the information.

For example, if what was entered in the reprint status field applies to another reference, you could use this function. This function can save you time, as it will change the information in this one field for multiple references.

Hint: If you have retrieved references and want to add a keyword to all references in the tab, add the keyword to one reference. Then, choose Copy Field to add it to all other references.

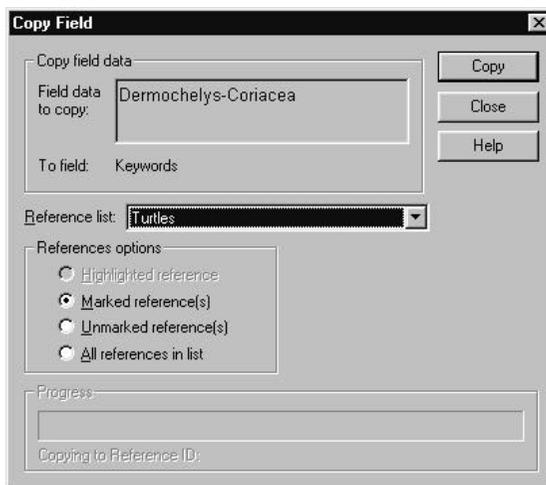
Copying Data from One Reference to Another

You can copy data in a field to a database, or to the Retrieved, Imported, or Duplicates tabs. You will not see Read-only and empty databases in the Reference List selection list.

Remember, the Retrieved, Imported, and Duplicates tabs are *subsets* of a database. When you copy information to a field in one of these tabs, you are also copying information to the reference in the database in which it resides.

To copy data to another reference:

1. Highlight data in a field (such as a keyword). Or, make the field from which to copy data the active field.
2. From the **Edit** menu, select **Copy Field**.



In the Field data to copy field, you'll see the data to be copied.

If the reference type you are copying information *to* does not include the field you are copying, the information will *not* be copied.

The To field contains field name you are copying data into.

3. In the **Reference list** drop-down, select the Reference List tab that contains the references you want to copy to.
4. In the **References options** box, click the button to indicate which references are to receive the copied data.
5. Do one of the following:
 - To overwrite existing information (if any) in the field you are moving data into, click to select **Overwrite existing data**, in the Field Options box.
 - To append data to the existing information in the field, click to select **Append to existing data**.

This option is available if you are copying data in the Titles (Primary, Secondary, Series), Notes/Abstract, Publisher, Publication Place, Volume, Issue, Start Page, End Page, ISSN/ISBN, Availability, Misc. (1, 2, 3) and User Defined (1-5) fields. Information is automatically appended to all other fields.

6. Click **Copy**.
7. Click **Yes** or **Yes to All** to copy the data in the field.

Yes to All is an option only if you are copying data to more than one reference.

A message appears when the Copy Field process is complete. It informs you of the number of references that were modified.
8. Click **OK** to exit the message box.

Printing References

You can print references in any of the Reference List tabs in any output style you choose. You can print to a printer, to a text file, or print a list to the screen.

You can change printer options and then print. Initially and occasionally, you may want to set the printing options.

Printing

To print references in the active Reference List tab:

1. On the **File** menu, choose **Print** or **Print Preview**.
(Or, from the **Bibliography** menu, select **Generate from Reference List**.)



The General tab should be selected.

2. Change selections as needed then click **OK**.

Setting Printer Options

The Setup Tabs

These are the General, Bibliography, and Page tabs. Each offers different options from which to select your printing preferences.

General tab—is used to specify style options when generating a bibliography from a reference list.

Bibliography tab—is used to specify the format of the references in the bibliography. These settings are associated with the output style you selected in the General tab. *This tab is used rarely.*

Page tab—is used to specify the format of the page when generating a bibliography from a reference list. *This tab is used rarely.*

Hint: The sort order of the references is the same for those printed as those on screen. If you want the printed list of references sorted, sort the Reference List first.

To set printer options:

1. On the **File** menu, choose **Print** or **Print Preview**. (Or, from the **Bibliography** menu, select **Generate from Reference List**.) You can also use the **Print** toolbar button.



The General tab should be selected.

2. In the **References to include** area, choose the desired option.
3. In the **Destination** area, select **Printer**, **Print Preview**, or **File**.

4. In the **Output Style** area, select the output style on which you want the format based. Select from the drop-down list or click the browse button. Then, locate and select the output style and click **Open**.

Output Styles are located in the Styles folder of the Reference Manager Program folder.

5. In the **Default Font and Size** area, select the font and point size for the generated bibliography output.
6. In the **Optional Fields** area, check the box next to each field type that you want included in the bibliography.

If you want data in any of the optional fields included, you must include that field in your output style and check it under Optional Fields. (See Chapter 10 in the User's Guide for assistance with output styles.)

7. If you want to change the options in the bibliography tab, click the **Bibliography** tab to change page options. Otherwise, click the **Page** tab and go to step 13, or click **OK** to go to the print dialog.



8. In the **Bibliography Title** area, type a new title if desired.
This title is used for all generated lists of references until changed again.
9. In the **Numbering** area, check the box if you want references numbered. Then, type the starting number.
You can modify the prefix, suffix, and the alignment of the number on the page, if desired.
10. In the **Spacing** area, select the spacing between lines and after each line, from the drop-down fields.
11. To reset settings to the defaults for the selected output style, click **Reset from Output Style**.
12. If you want to specify the page format for the bibliography, click the **Page** tab. Otherwise, click **OK** to go to the Print dialog.



13. In the **Margins** area, verify or change the margin settings.

14. In the **Page Numbers** area, select the desired options as follows:

- Check the box if you want pages to be numbered.
- Enter the starting number.
- Check the box if you want to suppress the first page number.
- Specify the location of the page number and the alignment.

15. Click **OK** to go to the Print dialog.

Depending on the print function you are performing, either the Print dialog box, the Preview window, or the Save As dialog appears.

16. Do one of the following:

- If the Print dialog box appears, click **OK**.
- If the Preview window appears, preview the file as desired. When done, click **Close** or click the **Print** toolbar button to print.
- If the Save As dialog box appears, specify the name in the **File Name** field. In the **Save as type** drop-down, select the file type, and click **Save**.

Creating Output Styles

Overview

Output styles are used to define how your references are cited and printed. Using output styles, you specify which fields to print in your in-text citations and list of references. You also specify the order of the fields and any punctuation associated with the data in the fields.

Output styles have also been called “journal formats.” You define output styles in the Styles window. You can have multiple Styles windows open at one time.

Although Reference Manager includes a set of pre-defined output styles, you may need to modify these styles, or even create your own. This chapter describes how to define and work with output styles.

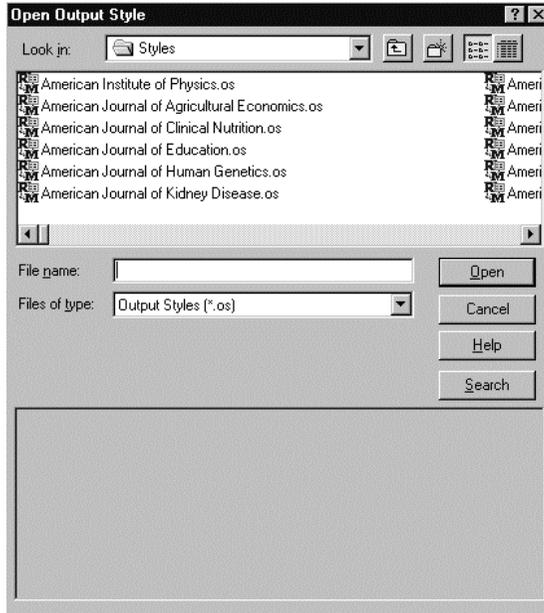
Opening an Output Style

You do not need to have a database open in order to open an output style, and you can have multiple output styles open at a

time. You can open a style you create or one that comes with Reference Manager.

To open an output style:

1. Do one of the following:
 - If a Styles window is active, from the **File** menu select **Open Output Style**.
 - If another window is active, from the **Bibliography** menu select **Open Output Style**.



If needed, navigate to the Styles folder in the Reference Manager folder.

2. Scroll to find the desired style and highlight it.
The style appears in the File name field.

The Styles Window Toolbar

The Styles window toolbar allows you to easily access various functions and fields so you can define an output style.



Insert Field—Lets you insert fields into an output style.

Edit Field Properties—Lets you define properties for Authors, Title, Date, Keywords, Periodicals, and Page Numbers.

Field Separator—Inserts a vertical bar to separate field and punctuation (if any).

Left Group Operator—Inserts a left group operator (<<).

Right Group Operator—Inserts a right group operator (>>)

Tab—Inserts a tab and moves the cursor to the next tab stop.

Line Break—Inserts a line feed (soft carriage return) and moves the cursor to the first indent on the next line.

New Paragraph—Inserts a carriage return-line feed character and moves the cursor to the left margin on the next line.

Page Break—Inserts a page break.

Copy Field Properties—Copies the field properties of the selected field to other reference types.

Copy Definition—Copies all fields and their properties to other reference types.

Check Syntax—Checks the output style definition to ensure the syntax is correct.

Creating an Output Style

You do not need to have a database open in order to create a new output style. You can create a style from an existing one or from scratch. A wizard is available to assist with creating a new style if desired.

To create a style from scratch is fairly labor intensive and is an advanced feature. An easier option is to start with an existing style and modify it to your needs.

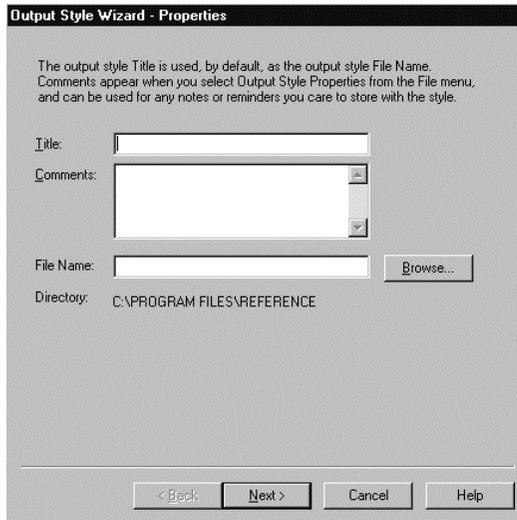
Creating An Output Style Using the Wizard

The wizard helps you create the Generic format for the in-text citation, the bibliography, or both, as appropriate. Then, the other reference types in the output style use the same format. To change these later, you can do it manually using other procedures in this chapter.

Using the wizard, you can create three types of output styles: Numeric citation; Author-Date citation; and Documentary-note or humanities.

To create an output style using the wizard:

1. From the **Bibliography** menu, select **New Output Style**.
2. Click **Yes**.



3. In the **Title** field, type the name of the output style you are creating and press the Tab key.
4. In the **Comments** field, type any desired comments on the output style.
5. In the **File Name** field, use the current name (same as the Title), enter a different name, or browse to a new location.
6. Click **Next**.
7. Select the type of output style you want to create and click **Next**.

If you select Numeric in-text citation, you will see this screen:

Output Style Wizard - Numeric In-text Citation Settings

For superscripted numeric in-text citations, check the Superscript box. The left and right delimiters are usually blanked for superscripted citations.

For non-superscripted numeric citations, delimiters are usually required.

Check Use Number Ranges to represent consecutive citations, cited at one location, as a range - for example, as "2-5"; rather than "2,3,4,5".

Delimiters Superscript numeric citation

Left Delimiter:

Right Delimiter:

Citation Separator:

Number Ranges Use Number Ranges

Range Separator:

< Back Next > Cancel Help

If you select Author-Date, you will see this screen:

Output Style Wizard - Author-Date In-text Citation Settings

Author-Date citations are almost always enclosed in parentheses or some other form of delimiters.

If several citations occur at the same place in the text, they are contained in one set of delimiters, separated by the Citation Separator, and they will be sorted according to the In-Text Citation Order.

(An In-Text Citation Order choice of "citation order" means the citations will be left in the order you entered them.)

Delimiters In-Text Citation Order

Left Delimiter:

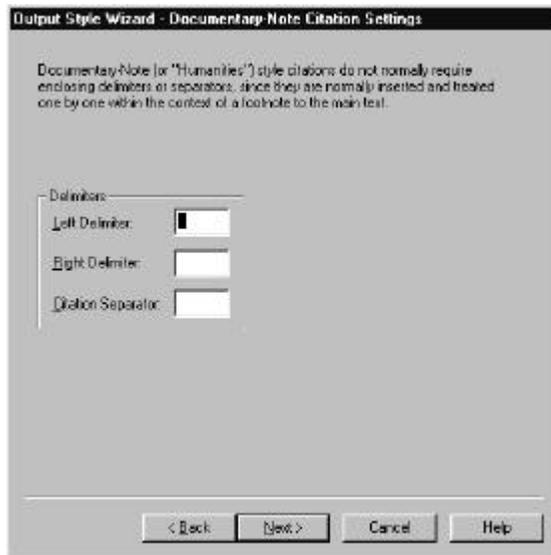
Right Delimiter:

Citation Separator:

In-Text Citation Order:

< Back Next > Cancel Help

If you select *Documentary-note* or *humanities* style, you will see this screen:



8. In the **Delimiters** box, type the text you want used to surround your in-text citations for the **Left Delimiter** and **Right Delimiter**.

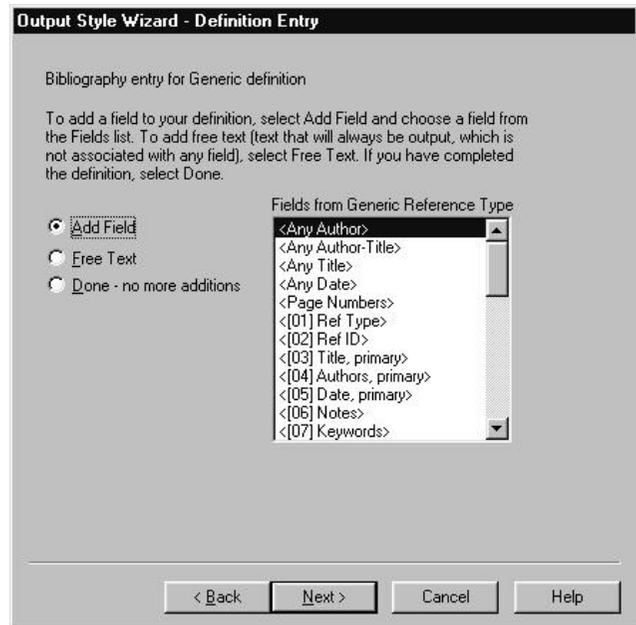
The defaults are already shown. Use them or replace them with your own.

9. In the **Citation Separator** field, type the text you want used to separate multiple, non-sequential citations in one location.
10. (Numeric citation only) To show citations in superscript, click the **Superscript numeric citation** checkbox.
11. (Numeric citation only) In the **Number Ranges** box, select the **Use Number Ranges** box if desired.

This lets you use number ranges as part of the citation.

12. (Numeric citation only) In the **Range Separator** field, type the text to use as the range separator when multiple, sequential citations are used in numeric citations.
13. (Author/date citation only) In the **In-Text Citation Order** drop-down, select the order.
14. Click **Next**.

If you are creating a **numeric citation**, the in-text citation field (citation number) is inserted for you automatically. You only need to define the fields for the bibliography. The Wizard takes you directly to the Bibliography Settings screen. Go to step 23.



The Definition Entry screen lets you add fields to the first in-text citation definitions.

For each field you will be adding, you will go through the next series of steps.

Likely fields to add are the Author, Date, and Title.

If you are creating a **documentary-note or humanities** output style, this first in-text citation will contain most of the fields. Later, when you create a subsequent citation, you will likely use less fields and use abbreviated fields. You also can choose not to include a bibliography.

15. Do one of the following:
 - To add a field, select **Add Field**. Then select the field to add from the list of fields.

Depending on the type of output style you are creating, the Wizard defaults to the most common field types to add, such as Author or Date.
 - To add free text which always appears, whether or not there is text in the database, select **Free Text**.

You see the Add Free Text screen.
16. If you see a screen, such as Author, Primary, with several fields to complete, fill in the fields as needed. Click **OK**.

You can locate detailed instructions on entering information in the appropriate section later in the chapter.

The Add field to definition screen appears.
17. In the **Preceding text** and **Following text** fields, type the text to precede and follow these fields in the output style.
18. Click **Next**.

You again see the Definition Entry screen.
19. Follow these same steps to add the other fields to the style or to add free text. When all fields are completed for the in-text citation, select **Done**. Then, click **Next**.

You are asked if you want to create a subsequent citation.

20. Click **Yes**.

You see the Definition Entry screen. This time through you are adding fields to the subsequent citation.

21. Follow the same steps to create a subsequent citation as you did to create the first citation. Include all the fields that you want included in the subsequent citation.

When done adding fields, select **Done**.

22. Click **Next**.

If you are creating a **documentary-note or humanities** output style, you are asked if you want to create a bibliography.

If so, click **Yes**. Go to the next step.

If not, click **No**. Then, at the final screen, click **Finish**.

Now that you are done inserting fields into the in-text citation fields, the Bibliography Settings screen appears. This is where you enter field information to define what is to be included in the bibliography.

First, you'll be specifying the bibliography settings. Then, you'll be entering fields. You will likely enter the author, title, date, and periodical fields into the bibliography, in addition to any others you want included.

23. In the **Bibliography Title** field, type the title for the generated bibliography, if any.
 24. In the **Bibliography Sort** drop-down list, select the order in which references will be listed in the bibliography.
 - If you are creating a numeric citation, you will likely choose **Citation Order**.
-

-
- If you are creating an author/date or documentary-note or humanities output style, you will likely choose **Author/Date**.
-

25. In the **Numbering** box, check the **Number References, Beginning With** checkbox if you want references in your bibliography to be numbered.

-
- If you are creating numeric citations, you will likely check this box to turn numbering **On**.
 - If you are creating author/date or documentary-note or humanities output styles, you will likely deselect this box to keep numbering **Off**.
-

26. If you checked the **Numbering** checkbox, in the blank field to the right, type the starting number for the references.

27. In the **Prefix** box, type the text, if any, to appear before the reference number.

28. In the **Suffix** box, type the text, if any, to appear after the reference number.

29. In the **Alignment** drop-down, select the alignment for reference numbers.

The alignment you select affects where the Reference number is located in the left margin to the left of the reference; either left, center, or right within the margin.

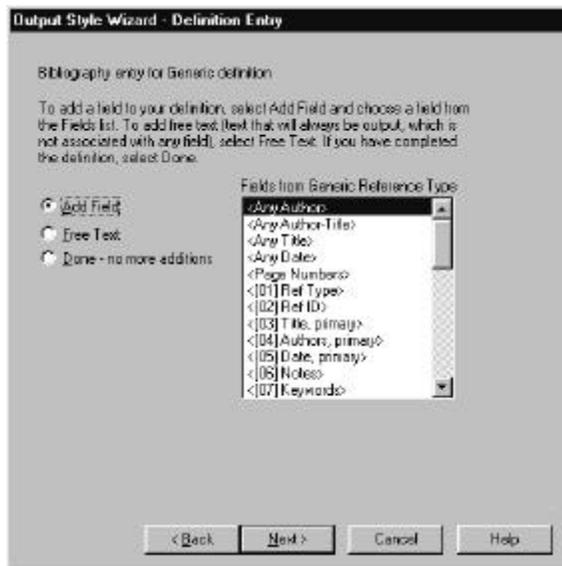
30. In the **Indentation** box, if you want references in the bibliography to be indented, use the default. To change the settings in the **First Line** field, type the value for the first line's indentation.

31. In the **Hanging** field, type the value for the hanging indent.

32. In the **Line Spacing** drop-down, select the space to appear between lines within each reference.
33. In the **Space After** drop-down, select the spacing to appear after each reference.

Use the Page Break option if you want each reference to appear on a separate page.

34. Click **Next**.



The Definition Entry screen appears. Now you are adding fields to be included in the Bibliography.

35. Do one of the following:
 - To add a field, select **Add Field**, then select the field to add from the list of fields.
 - To add free text which always appears, whether or not there is text in the database, select **Free Text**.

- If you are creating a documentary-note or humanities output style and do not want a bibliography, click **Done**. Then, at the final screen, click **Finish**.

36. Click **Next**.

The next screen you see depends on what you selected in the previous step.

37. If you selected to **Add Field** from the list, and another screen, such as Author, Primary screen appears, fill in the fields as needed. Then click **OK**.

For detailed instructions on filling in the fields, see the appropriate section later in this chapter.

The Add field to definition screen appears.

Output Style Wizard - Add field to definition

Enter any text you wish to precede or follow the field you selected to add to your definition. Be sure to include any spaces required.

For example, you may wish to precede a date with "" and follow it with "T", or precede a title with "" and follow it with "".

The preceding text is frequently used to separate a field from the previous field.

Note that preceding and following text is only printed if the field is printed, that is, only printed for a reference if the field is not empty.

Preceding text <Page Numbers> Following text

< Back Next > Cancel Help

38. In the **Preceding text** and **Following text** fields, type the text to precede and follow this field in the output style.

39. Click **Next**.

You again see the Definition Entry screen.

40. Go through the steps again to add the remaining fields to the bibliography. When you are done adding fields, click **Done**.
41. At the final screen, click **Finish**.

Creating an Output Style from Scratch

To create a style from scratch is fairly labor intensive and is an advanced feature. An easier option is to start with an existing style and modify it to your needs. See the User's Guide for instructions.

Using Cite While You Write

Overview

Cite While You Write is an add-on to your word processor. It allows you to cite references while you are writing your manuscript. It integrates with these word processors: Microsoft Word for Windows Version 7, Word 97, and Corel WordPerfect Versions 7 and 8.

You insert the references using Cite While You Write. Once you insert citations, you can then generate bibliographies. All the tools you use in Cite While You Write are in your word processor.

Generating a bibliography converts each unformatted citation in your document to the formatted citation. It uses the bibliographic style you select and adds a complete list of references to your document. You can generate formatted citations and a list of references from multiple documents.

Understanding the Types of Citations

Citations are the links in a document that cite references from the Reference Manager database. They can appear in your document in several forms:

- ◆ as the text you enter into the manuscript, surrounded by delimiters
- ◆ as the text that appears once linked to the Reference Manager database
- ◆ as the formatted text that appears in the final manuscript

These forms are labeled, correspondingly, as *identifying text*, *unformatted citations*, or *formatted citations*. Each is described below.

Understanding Identifying Text

Identifying text is information you enter to locate a reference in the Reference Manager database. This information is then used to perform a search of the database, which either inserts unformatted citations into the manuscript or brings up a dialog allowing you to select the correct reference(s).

Identifying text can be virtually any piece of information contained in a reference: author's last name, publication date, portion of a title or notes, periodical name, keyword, reference ID or a combination of fields.

For example, if you know that you want to cite reference ID 23, you would type: {23}

Or, if you know that you want to cite an article written by an author with the last name of Behrens that was published in 1997, you could enter {Behrens, 1997} as your identifying text.

If you know that Behrens published an article in 1997 that was about dolphins, you could restrict the search further by entering {Behrens, 1997, dolphins}.

You can enter identifying text by typing it right into the manuscript or you can select it from a pull-down list in the Insert Citation dialog.

Understanding Unformatted Citations

An unformatted citation is the text Reference Manager inserts based on the identifying text you entered. It is linked directly to a reference in your database. By default, an unformatted citation includes the author's last name, the year, and the reference ID, enclosed in delimiters. It looks like:

```
{Ridgway, Kamolnick, et al. 1995 23 /id}
```

Understanding Formatted (In-text) Citations

Formatted citations are the citations that appear in the final version of the manuscript.

You can format in-text citations to include any fields from your references. But, typically they are made up of the author's last name and date or a citation number. So, in the example above, the corresponding in-text citation could be:

“(Ridgway, Kamolnick, et al., 1995)” or it could just be¹ (or another superscript number).

Entering Identifying Text to Link with a Database

You use identifying text to locate each unique Reference Manager reference. Identifying text is linked to references, then converted to an unformatted citation.

You can enter any combination of authors' last names, publication years, reference ID, title, or keywords to identify a single reference. When you enter multiple elements as identifying text, Reference Manager automatically uses the AND logical connector when locating the reference to cite. Only references that contain all elements entered will be found.

Inserting Citations

You insert citations into your manuscript everywhere that you need to reference an item in the bibliography. Once you insert a citation, it is permanently linked to a reference in the Reference Manager database. Remember to occasionally save your document as you insert your citations.

To create citations, you enter identifying text. Reference Manager turns the identifying text into unformatted citations when you use the insert citation function or scan your document. When you generate the bibliography, the unformatted citations are turned into formatted citations. Each time you add or change any form of citation in the manuscript, you need to generate the bibliography to update it.

To insert unformatted citations:

1. If you have already typed identifying text in your document, highlight the text.

2. From the **Tools** menu, select **Insert Citation**.



3. In the **Identifying Text** field, type identifying text. Or, select from the pull-down.

In addition, you can:

- specify text to include before or after the citation
 - cite the publication year only
 - suppress the entire citation.
-

4. In the **Look In** field, select the database which contains the reference you want to cite. Or, click the Browse button  to find it.

The databases that appear are the last ten you accessed using Cite While You Write, plus the all open databases option.

5. Select the citation format.

The default is Author Date Ref ID. You can also select Ref ID.

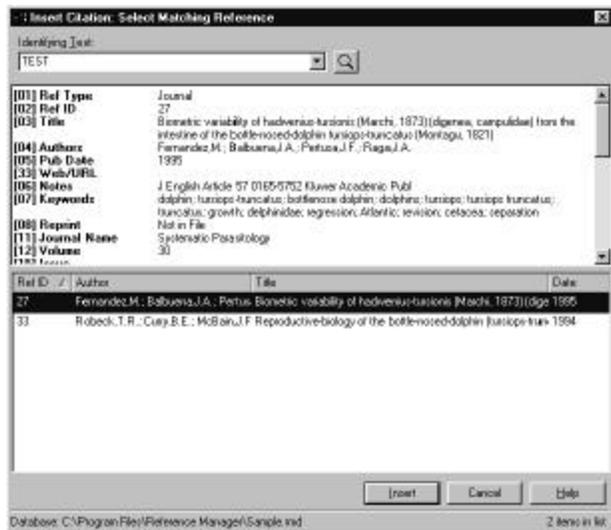
6. Click **Insert**.

If Reference Manager finds a match, it automatically inserts an unformatted citation, linked to the appropriate reference, at the cursor location in your document.

If Reference Manager finds multiple references, it lists all those found.

7. Do one of the following:

- If one reference is found, you are done with the procedure.
- If multiple references are found, go onto the next step.
- If no references are found, you see a message that you need to modify the identifying text. Either make the identifying text more specific, or confirm the spelling, etc. of the identifying text.



The references that match the identifying text appear in the Select Matching References screen.

8. If you cannot determine which reference to cite, type additional text in the text box and click the magnifying glass to locate a closer match.
9. Do one of the following:
 - To insert a reference, highlight it and click **Insert**.
You can insert more than one by selecting multiple references.

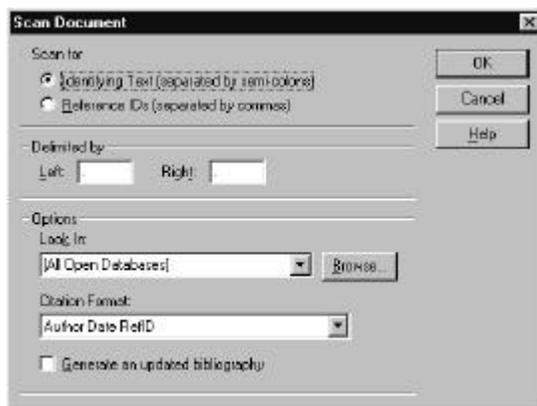
- If you do not want to insert any of the references from the list, click **Cancel**.

Scanning a Document to Insert Existing Citations

Rather than inserting citations one by one, you can have Reference Manager insert all citations in a single pass through the document. It does this by using the Scan Document feature. When scanning, Reference Manager finds the references that correspond to the identifying text you entered, and it places the unformatted references into the document.

To scan your document:

1. Have all your identifying text entered into the document, surrounded with delimiters.
2. From the **Tools** menu, select **Scan Document**.



The Scan Document dialog box appears.

3. Do one of the following:

- If the document contains reference IDs as identifying text, click the **Reference IDs** option button.
 - To indicate the text you entered is authors, keywords, or titles, click the **Identifying Text** option button.
4. In the **Delimited By** box, in the **Left** field, type the opening character(s) you use to delimit identifying text.

The default delimiters are curly brackets (“{” and “}”)

5. In the **Right** field, type the closing character(s) to use to delimit identifying text.
6. From the **Look In** drop-down, select the database containing the references you want to cite. Or, click **Browse**  to find it.

The list contains the last ten databases you accessed and an all open databases option.

7. In the **Citation Format** field, select the format from the drop-down.

The choices are Author Date RefID and RefID.

8. To generate an updated bibliography, check **Generate an updated bibliography**.

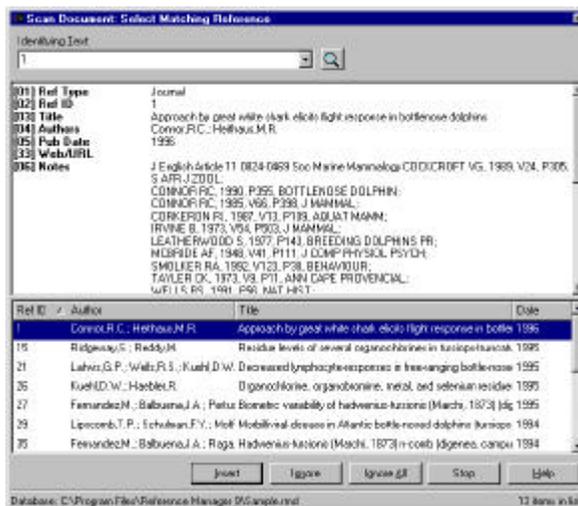
9. Do one of the following:

- To scan the document, click **OK**.
Reference Manager scans your document looking for text between the delimiters specified and matches that text to a reference or references in your database.
- To skip this citation and move to the next citation, click **Ignore**.
- To skip unmatched citations, click **Ignore All**.

10. Do one of the following:

- If there is one match found for each set of identifying text, you are done with this procedure.
- If there are multiple matches, go to step 11.
The Scan Document: Select Matching Reference dialog appears.
- If there are no matches, go to step 14.

11. Highlight the correct reference(s) and click **Insert**.



Or, you can click Ignore or Ignore All. Ignore skips this citation and moves to the next citation. Ignore All skips unmatched citations.

12. If this dialog appears again, repeat the last step.
13. At the message dialog, click **OK**.

*The references are inserted in your document as unformatted citations and you are finished with the procedure. To generate the final formatted manuscript see *Generating a Bibliography* later in this chapter.*

14. In the **Identifying Text** field, enter new text and click **Insert**.

This process changes the identifying text at this location in your document. If you do not wish to change the identifying text at this time, click Ignore or Ignore All.

Finding Unlinked Citations

If there are unlinked citations in your manuscript, you will want to find them prior to generating the bibliography. Once found, you can make the needed changes to the database so the citations can be linked. You can search backward or forward through the manuscript to locate unlinked citations. Once you change them, scan the document again.

To find unlinked citations:

1. Have the manuscript open.
2. From the **Tools** menu, select **Find Previous Unlinked Citation** or **Find Next Unlinked Citation**.

The program will search backward or forward accordingly to locate the first unlinked citation.

3. As you locate unlinked citations, note them or make necessary changes to the database.

Working with Multiple Citations

Multiple citations are sets of two or more citations enclosed in a single set of delimiters. For example, these multiple references show as (2-4) or (2,3,4) in your manuscript, depending on the

format you use. They are treated as one group of references, rather than separate, multiple references.

When inserting multiple citations, you can insert each citation separately, or you can select multiple references to insert at one citation location.

There are three ways to insert multiple citations:

- ◆ Inserting marked records.
- ◆ Using the Insert Citation feature.
- ◆ Entering identifying text and using Scan Document.

Generating a Bibliography

When you have inserted the citations and set up the options for the bibliography, you are ready to generate the bibliography.

A Note on Formatting the Bibliography

When generating the bibliography, Reference Manager uses the margins and any headers or footers from the document into which you inserted citations. The Bibliography Setup dialog provides you with options to change the title, default font, and size of the formatted references. You can also change the line spacing.

To Generate the Bibliography:

1. Have the manuscript open.
2. From the **Tools** menu, select **Generate Bibliography**.

The Bibliography Setup dialog appears.

3. Click **OK**.

Each of the citations you entered is converted to the in-text citation format required by the output style you selected.

The list containing the references you have cited is appended to the end of your document.

If you subsequently make changes and regenerate the bibliography, Reference Manager replaces the bibliography and regenerates the in-text citations.