



Reference Manager[®]

Version 9

Windows 98/95/NT

Research Information Systems
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February, 1999

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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 chapter covers:

- ◆ Understanding Reference Manager
- ◆ New Features in Reference Manager
- ◆ Chapters in the Manual
- ◆ How to Contact Us

Understanding Reference Manager

Reference Manager eliminates the need for recording article citations on file cards, and it replaces the unwieldy reprint

folders you may have saved as reminders of what has appeared in the literature.

You can search hundreds of libraries on the Internet from Reference Manager using a single search interface. You can enter literature references using the keyboard or the program's menus. You can use the Import function to easily import references from a text file. You obtain a text file by downloading references from an online or CD-ROM service, such as MEDLARS, Dialog, Ovid, ISI or SilverPlatter.

If you subscribe to a current awareness service, such as Web of Science™ Current Contents Connect ® or Reference Update® (available from the Institute for Scientific Information®), you can export references automatically into your database.

Once you enter references, you can retrieve them using any information you remember about them: such as an author, keyword, periodical name, year of publication, word or phrase appearing in the title or notes, reference type, or any other field. A special indicator reminds you whether you have a reprint of an article in your own file or whether one has been requested.

Reference Manager can generate bibliographies formatted in virtually any journal style in addition to incorporating the appropriate reference in-text citations into your manuscripts.

New Features in Reference Manager 9

Reference Manager Version 9 includes many new features and enhancements. Among these are:

Searching Internet Libraries

- ◆ Search PubMed and hundreds of Internet libraries for references.
- ◆ Directly import references from the Internet to your database.
- ◆ Search up to 255 databases simultaneously.

Output Styles

- ◆ Use Wizards to search for or create output styles.
- ◆ Choose between reference list or footnote style formatting.
- ◆ Define first and subsequent in-text citation styles separately for each reference type.

Import

- ◆ Customize import filters with Import Filter Editor.
- ◆ Assign a default Reprint Status when importing references.
- ◆ Build a list of terms where casing changes are ignored during importing (such as DNA).

Cite While You Write

- ◆ View full references within your word processor.
- ◆ Click to sort column headings.
- ◆ Check your document for unlinked citations.
- ◆ Search any field to locate a reference.
- ◆ Instantly recall your last search.
- ◆ Scan and generate your final document in one step.

- ◆ Keep track of your last ten citation searches.

Export

- ◆ Export comma and tab delimited files.

Edit

- ◆ Add unlimited information to your references in all text fields.
- ◆ Build a list to use with any text field. Simplifies entry of publishers, authors affiliation and more.
- ◆ Link to any published reference using the Web/URL field.
- ◆ Define a default sort order for the Database Reference list(s).

Retrieve References

- ◆ Search for embedded terms.

Keyword Sorting

- ◆ Sort your keywords alphabetically, either globally or reference by reference.

Drag and Drop

- ◆ Use fewer steps to copy or move references from one database to another.

Chapters in the Manual

This manual contains all the information you need for working with the program.

- ◆ Chapter 1 provides an introduction to Reference Manager and this User's Guide.
- ◆ Chapter 2 covers how to install Reference Manager and Network Version User information. It also covers existing users information that includes converting databases and journal formats. Uninstalling the software is also covered.
- ◆ Chapter 3 provides information on getting started. This includes launching the program and using Reference Manager windows, toolbars, and keyboard shortcuts. Methods to move text are also covered.
- ◆ Chapter 4 provides information on database functions: creating a database, working with a database, defining a database, and backing up a database. Other database functions are also covered.
- ◆ Chapter 5 provides information on working with the Reference List—descriptions of the Reference List window, customizing the reference display, sorting, marking, and printing references.
- ◆ Chapter 6 provides information on how to add and edit references. It includes adding references manually, importing references from a text file, and duplicating references.
- ◆ Chapter 7 describes how to work with references once added. This includes finding, copying, moving, and exporting references.

- ◆ Chapter 8 covers how to use the Term Manager, including information on adding, editing, and deleting terms in the databases. It also covers working with synonyms and purging terms.
- ◆ Chapter 9 provides information on retrieving references. This covers the needed preparatory information; creating an effective retrieval strategy, saving a retrieval strategy so you can use it over and over, and retrieving references from the Internet.
- ◆ Chapter 10 provides information on how to create and maintain output styles. Output styles are used when formatting in-text citations and bibliographic lists of references.
- ◆ Chapter 11 provides general information on creating a bibliography using Cite While You Write. It overviews the Cite While You Write function and familiarizes you with the types of citations and how they are used. It covers how to set up the options, generate the bibliography, and revise it as needed.
- ◆ Chapter 12 covers information on the tools used in Reference Manager—customizing Reference Manager, performing batch operations, and editing your database definition.

These chapters are followed by the appendices and index. The appendices provide technical information, such as a listing of the program files and troubleshooting information.

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:

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

Installing and Upgrading Reference Manager

Reference Manager and Import File Editor are easy to install on your Windows 95/98/NT computer. This chapter describes how to install these programs. The installation instructions assume that you have installed Windows 95/98/NT and are familiar with how to use the Windows operating system.

This chapter includes:

- ◆ System Requirements
- ◆ Components that Are Installed
- ◆ Installing Reference Manager
- ◆ Installing Cite While You Write
- ◆ Existing Reference Manager Users—Conversions
- ◆ Network Users Installation Notes
- ◆ Uninstalling the Software

System Requirements

Use the following system requirements as the minimum requirements needed to install Reference Manager.

This section covers:

- ◆ Determining the Hard Disk Space Needed
- ◆ Hardware Requirements
- ◆ Software Requirements
- ◆ Specifying a Default Internet Browser

Determining the Hard Disk Space Needed

The amount of hard disk space that you need varies according to the size of your database. The size of your database files varies according to the characteristics of your references. If most of your references contain no notes, or only short notes, each reference will be approximately 400 bytes. A typical database containing approximately 5,000 references will occupy about one megabyte (1 MB) of hard disk space.

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

Specifying a Default Internet Browser

To use the URL field in Reference Manager or to search for reference on the Internet, you need to have a browser installed.

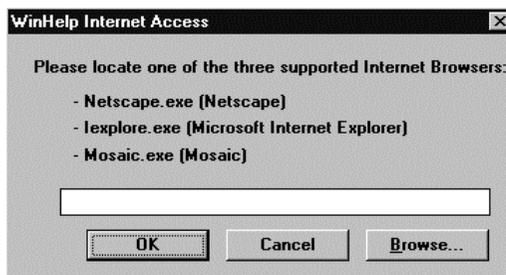
If you have more than one browser installed on your system and you want to specify a default browser, you can do so using the Setbrowse.exe program.

To specify a default browser:

1. Locate the Setbrowse.exe file from within Windows Explorer.

It is located in the Reference Manager directory in Program Files.

2. Double-click on the file to launch this program.



3. Type the path and name of the browser to set as the default. Or, click **Browse** to locate the browser.
4. Click **OK** until you exit the dialog box.

Components that Are Installed

The following components will be installed as part of the Reference Manager installation.

- ◆ Output Styles
- ◆ Sample Data
- ◆ Import Filter Editor

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 Data

If you are new to Reference Manager, you may want to work with the Sample Data. You can access this data in the Program folder.

The Import Filter Editor Files

During the installation, Import Filter Editor files are installed. These files consist of prepackaged import filter file 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.

You will be using the sample text files to confirm the format that you have received your text files in, match the format that was used when defining the import filter. The sample text files are stored in the Samples folder

Installing Reference Manager

Before installing Reference Manager, close all other applications.

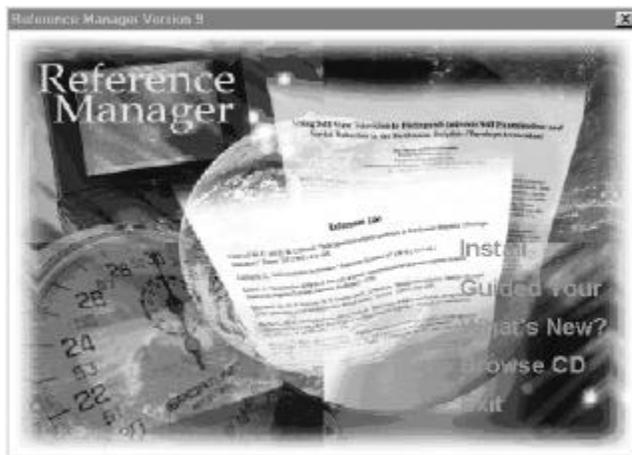
Install the prerequisite software (listed on page 10) before installing Reference Manager.

From the installation CD, you can:

- ◆ Install Reference Manager
- ◆ Take the Guided Tour
- ◆ View What's New
- ◆ Browse the contents of the CD
- ◆ Exit the CD

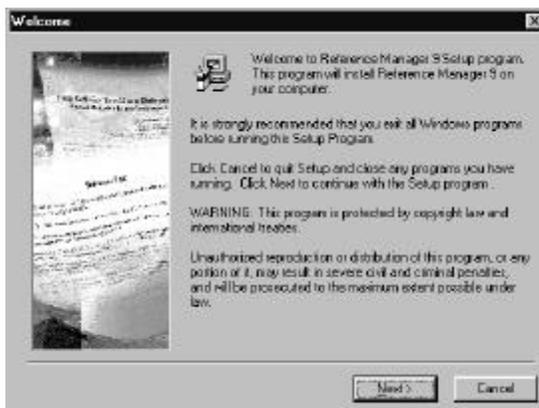
To install Reference Manager:

1. Insert the Reference Manager Program CD into the drive.
The installation program will automatically run.

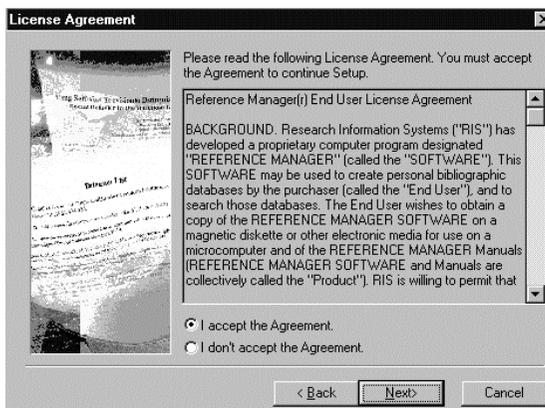


You see the Reference Manager splash screen with the installation options.

2. Click **Install**.



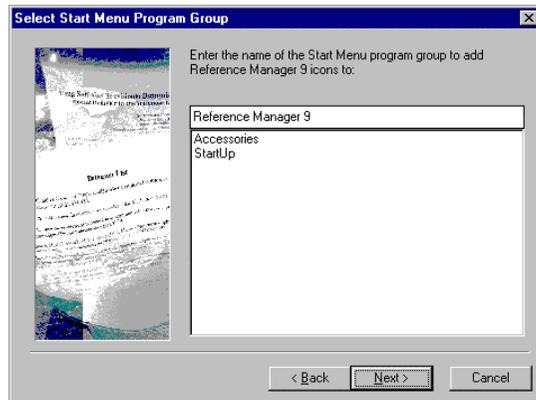
3. Click **Next**.



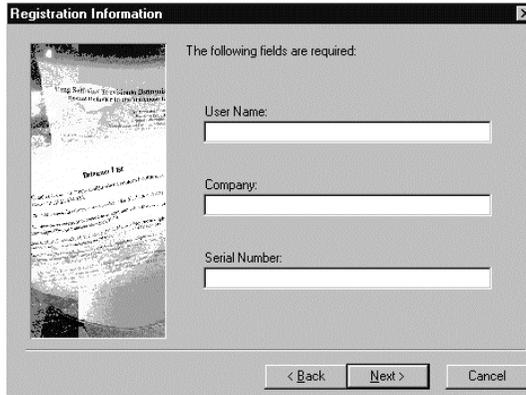
4. Click to accept the agreement, and click **Next**.



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**.



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.

12. If you selected **Finish**, in some cases you may see this screen:



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

You need to restart your computer to use Reference Manager.

Installing Cite While You Write

When you install Reference Manager, the installation program determines which versions of Word or WordPerfect are available. It then installs the appropriate files to support Cite While You Write functions.

If you install Word or WordPerfect *after* you install Reference Manager, you will need to do one of two things. Either:

- reinstall Reference Manager
 - run the Cwyw Setup.EXE
-

To run the Cwyw Setup.exe program:

1. Launch Windows Explorer.
2. Locate the executable in your Reference Manager 9 program folder.
3. Double-click the **Cwyw Setup.exe** executable and follow the instructions.

A program runs. A screen appears stating that you will need to restart the computer.

4. Click **OK**. (Or, you can cancel the installation and not restart. To do so, click **Cancel**.)

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. This section includes information on:

- ◆ A Note on Sorting Text in the Database
- ◆ Converting an existing database from Version 8
- ◆ Converting an existing database from Versions 5-7
- ◆ Using a database from Reference Manager for the Macintosh
- ◆ Converting ProCite databases
- ◆ Converting EndNote databases

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. When converting a version 8 database, it will still be accessible using version 8.

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.

A Note on Sorting Text in the Database

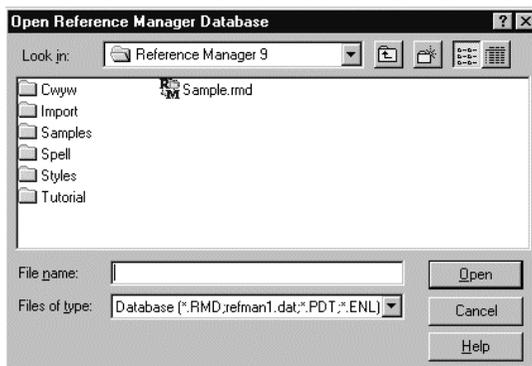
As you create or convert a database, the text in the database is sorted. As a database is created, it checks the Database Sort dialog to see which method is set to use. There are three methods you can use to sort the database. You can change the method used. For information on the methods and how to sort a database, see Chapter 12.

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** to open the old database.



2. In the **Files of type** drop-down list, select **Database** to see all files. Or, select another option to see a subset.
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.

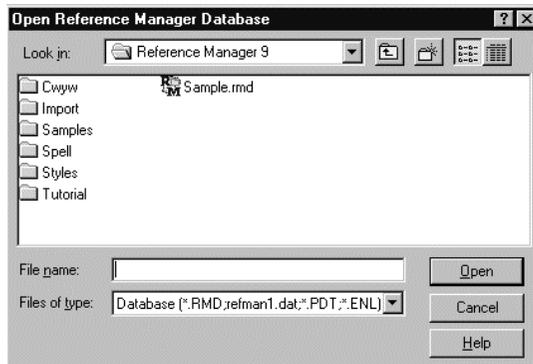
5. Do one of the following:
 - If you do not want to convert, click the **Leave in Version 8 format** button.
The database is opened in read-only mode and you are done with this procedure.
 - To convert the database, click the **Convert to Version 9** button.
6. At the dialog, click **Completed**.

Converting an Existing Database from Versions 5-7

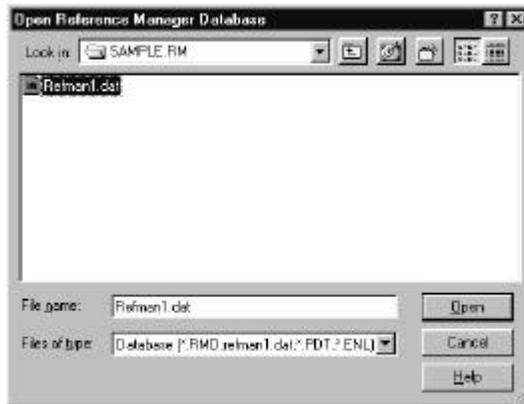
This section describes how to convert an existing database to version 9.

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

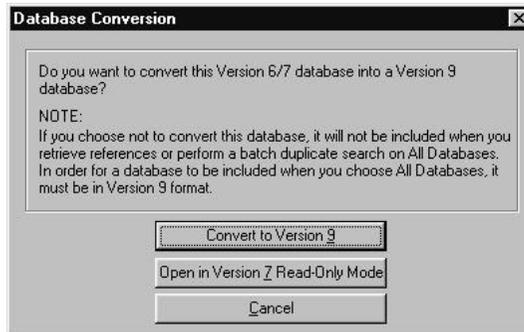
1. From the **File** menu, select **Open Database** to open the old database.



2. In the **Files of type** drop-down list, select **Database** to see all files. Or, select another option to see a subset.
3. Locate the database you are converting.



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

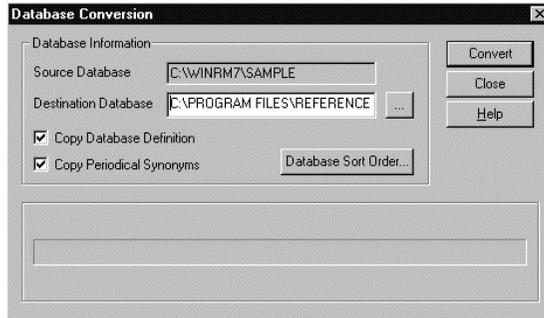


A message appears asking if you want to convert the database.

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.

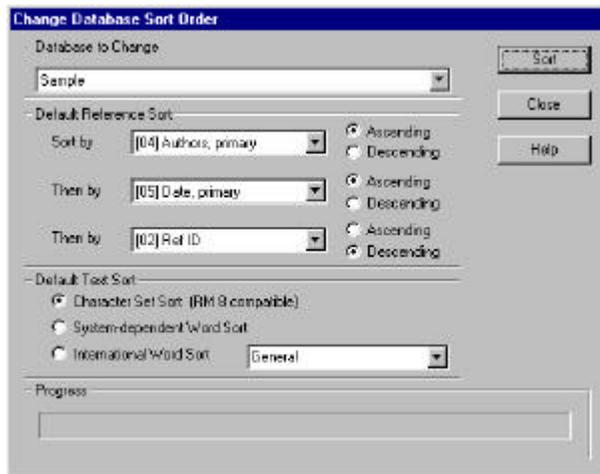
The database definition includes the reference types and fields that you have defined.

For detailed information, see Chapter 4 on the database definition.

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.

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.

10. Do one of the following:
 - To convert the database, click **Convert**.
 - To cancel the conversion, click **Cancel**. You are done with this procedure.
11. Click **Upgrade to version 9**.

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

Compatibility with Version 6, 7, or 8 Databases

Reference Manager Version 9 databases are not backward-compatible with versions prior to 8. Once you have converted a database to Reference Manager Version 9 format, you cannot access that database with versions 6 or 7 of Reference Manager.

If you need to transfer references into a version 6 or 7 database, you can export them from version 9 in the RIS format. Then, import them into version 6 or 7 using Capture. Your reference IDs will be changed during the import.

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. If you have selected the System-dependent Word Sort or International Word Sort on your version 9 database, you must rebuild the database in your version 8 program.

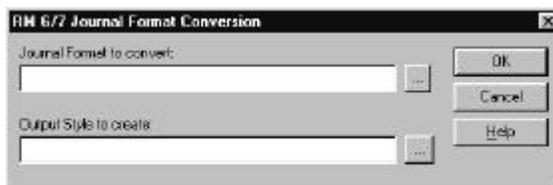
Converting Existing Journal Formats

Included with Reference Manager is a utility to convert your existing journal formats to the new output style format. This utility converts journal formats created with Reference Manager Version 5.5 or later.

This procedure assumes you have converted your old database to the version 9 database.

To convert journal formats:

1. From the **Tools** menu, select **Convert Journal Formats**.



2. In the **Journal Format to convert** field, click the browse button to locate the journal formats.

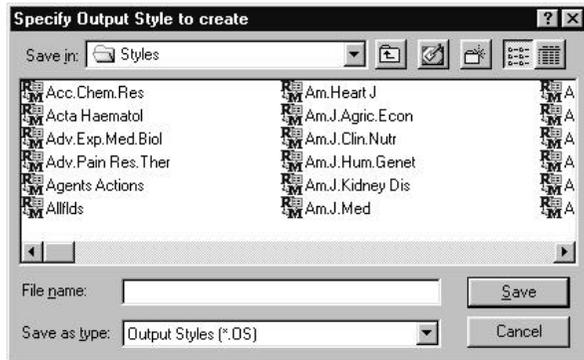
These are generally found in the folder called Jformats, contained in the folder where your previous version of Reference Manager resides.



3. Select the format and click **Open**.

The format name now appears in the field.

4. In the **Output Style to create** field, click the browse button to access the styles folder.



5. In the **File name** field, type the name of the output style to create and click **Save**.

The new style name now appears in the field.

6. Click **OK**.

The journal format is converted.



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

Using a Database from Reference Manager for the Macintosh

You can copy databases created with the Macintosh version of Reference Manager to your personal computer. You can then access them using Reference Manager Version 9. When you transfer the files to your personal computer, you can open them

in read-only mode. Or, you can convert the files to the Version 9 database format.

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 suffixed “databasename(1)” through “databasename(5).”

2. Rename the files to “REFMAN1.DAT” through “REFMAN5.DAT” respectively.

3. Move the files into a new directory (usually a folder under the Reference Manager 9 program directory).

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 directory named “Sample.RM.”

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

This opens the Macintosh 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 the Open Database process**.

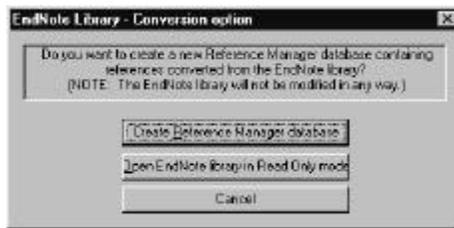
Using Reference Manager with ProCite or EndNote Databases

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:

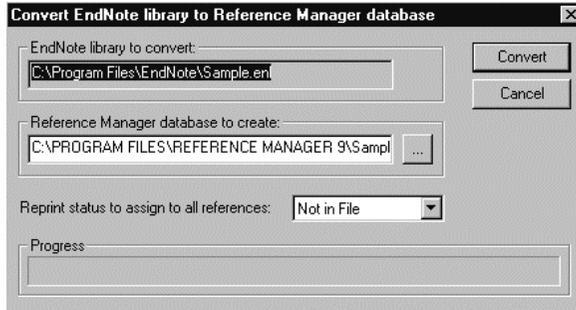
The screens in this procedure show an EndNote conversion. Both procedures are the same.

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**.

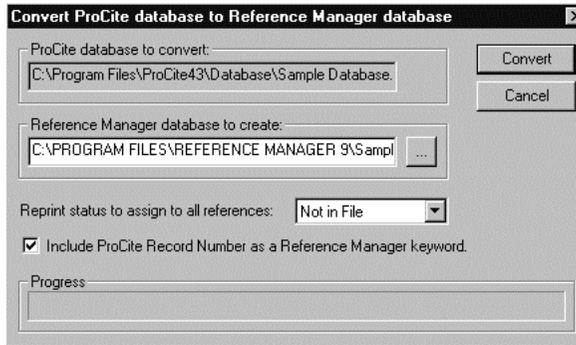


5. Click **Create Reference Manager database**.

For EndNote you see this screen:



For ProCite you see this screen:



6. If you are converting a ProCite database and you want to include the ProCite record number as a keyword in Reference Manager, 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

If you are working on a network, you will need to install workstations. Once Reference Manager has been installed or upgraded, 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.

This section covers:

- ◆ Procedures to install a workstation
- ◆ Establishing Access Privileges

To install on a workstation:

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 search strategies, Reference Index, and import duplicates (Imprtdups) database.

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

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, etc., in this mode. These functions can slow down 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 where you need to write to the database, 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.

Uninstalling the Software

You may need to uninstall Reference Manager or Import Filter Editor. To do so, follow these steps.

To uninstall the software:

1. On the **Start** menu, choose **Settings**, then **Control Panel**.

The Control Panel appears.

2. Double-click **Add/Remove Programs**.

The Add/Remove Programs Properties dialog box appears.

3. Select **Reference Manager 9**.
4. Click **Add/Remove**.
5. At the Select Uninstall Method, click **Automatic** and click **Next**. (To remove only certain parts of the program, click **Custom**.)

The Perform Uninstall window appears.

6. When ready to start the uninstall process, click **Finish**.

Getting Started

This chapter discusses how to get started in Reference Manager. It covers how to launch the program as well familiarizing you with the program's interface.

This chapter contains these sections:

- ◆ Launching Reference Manager
- ◆ Using the Main Window
- ◆ Using the Toolbars
- ◆ Using Accelerator Keys and Keyboard Shortcuts
- ◆ Moving Text
- ◆ A Note on Customizing Reference Manager
- ◆ A Note on Backups

Launching Reference Manager

When you are ready to work in Reference Manager, launch it using this procedure.

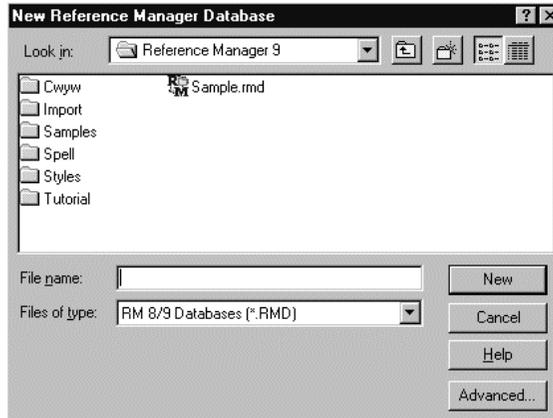
To launch Reference Manager:

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**.

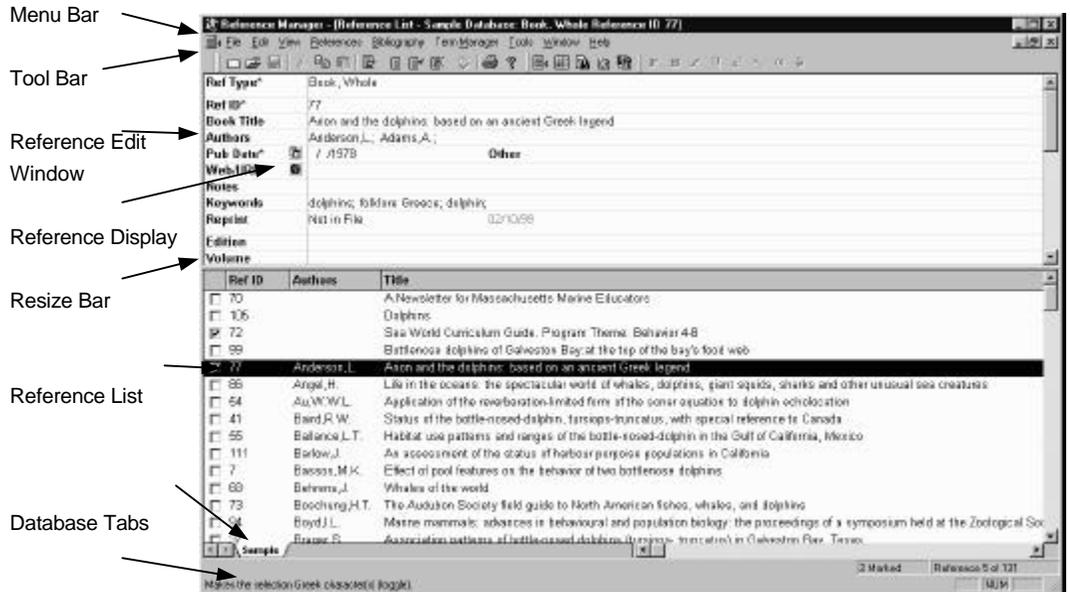
The Open Database or New Database dialog appears.



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 Main Window

The following illustration shows the components of Reference Manager's main window.



You can access functions in Reference Manager using any of these methods:

- ◆ selecting a menu option
- ◆ clicking a toolbar button
- ◆ using a keyboard shortcut

For example, you could open a database using any of these three methods. You could click the Open Database toolbar button, choose Open from the File menu, or press the [Ctrl] [O] keys (the keyboard shortcut).

The procedures in this guide instruct you to perform a function either using the menu command or the toolbar button. As you become familiar with the options, use the method you are most comfortable with. Using the toolbar buttons and keyboard shortcuts are described in the following sections.

Using the Toolbars

Three toolbars provide quick access to commonly used commands and functions. They are:

- ◆ The Edit toolbar
- ◆ The General toolbar
- ◆ The Format toolbar

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 references 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 all fields of the current reference. Or, it checks spelling of the highlighted text.

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.

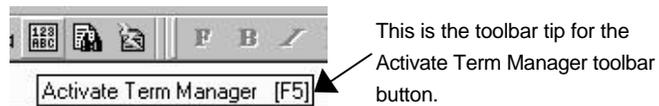
Subscript—Applies the subscript format style to text.

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.)

Using Toolbar Tips

If you are unsure of the exact function of a toolbar, you can read the toolbar tip. Each toolbar tip contains a few words that describe the function of the toolbar button. To access a toolbar tip, place the cursor over the toolbar button for a few seconds.



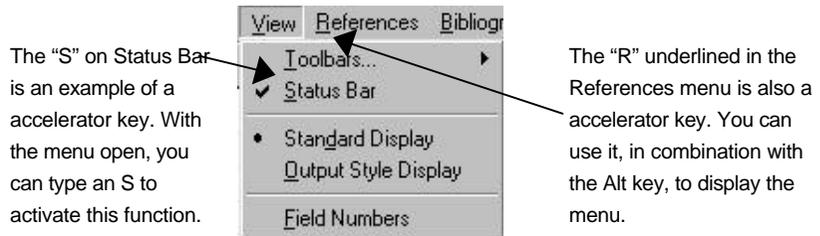
You can read more detailed information about a toolbar button in the status bar. This status information appears when you are viewing a toolbar tip.

Using Accelerator Keys and Keyboard Shortcuts

In addition to using the mouse to select menus and options, you can use accelerator keys, keyboard shortcuts, and cursor keys. You can access most functions using these methods.

Accelerator Keys

Accelerator keys provide keyboard access to menus and menu commands. To access a menu, type the underlined letter of the menu name (File) while holding down the ALT key. Once the menu is opened, type the underlined letter for the command you want to run (Print).



This list of accelerator keys is also available in the online help.

Following is a list of the accelerator keys (F1 though F12) and the functions they perform in Reference Manager:

[F1]—Activates Online help.

[F2]—Makes the Reference List window the active window.

[F3]—Displays the popup browser for the current field.

[F4]—Makes the Retrieval window the active window.

[F5]—Makes the Term Manager window the active window.

[F6]—Inserts the AND logical connector in Retrieval.

[F7]—Inserts the NOT logical connector in Retrieval.

[F8]—Inserts the OR logical connector in Retrieval.

[F9]—Saves the reference in the Reference Edit window and displays a new, blank Reference Edit window. This is available when entering a new reference using a Reference Edit window.

[F10]—Accesses the menu bar.

[F11]—Displays the Options dialog box (from the Tools menu).

[F12]—Begins Retrieval or Quick Retrieval when the Retrieval or Term Manager window is active.

Keyboard Shortcuts

Keyword shortcuts are key combinations you can press to perform a function. Below is a list of keyboard shortcuts to use while in Reference Manager. Then, following is a list of Reference Manager keyboard shortcuts you can use when in Microsoft Word or Corel Word Perfect.

[Ctrl] [N]—Creates a new database or output style, depending on the active window.

[Ctrl] [O]—Opens an existing database or output style, depending on the active window.

[Ctrl] [S]—Saves a reference or output style, depending on the active window.

[Ctrl] [F4]—When a reference appears in a Reference Edit window, saves the reference and closes the window. If the Reference List is the active window, it displays the Close Database dialog.

[Ctrl] [P]—Prints references or alphabetical listings, depending on the active window.

[Alt] [R]—Begins Retrieval when the Retrieval window is active.

[Ctrl] [Z]—Cancels the last editing function you performed.

[Ctrl] [X]—Cuts the highlighted text in a field.

[Ctrl] [C]—Copies the highlighted text in a field.

[Ctrl] [V]—Pastes the last text you cut or copied.

[Space]—Marks the selected reference in the active Reference List.

[Ctrl] [R]—Activates the Retrieval window.

[Ctrl] [L]—When the Reference List window is active, generates a bibliography from the Reference List.

[Ctrl] [D]—Duplicates the selected reference in the Reference List.

[Ctrl] [F]—Displays the Insert Field dialog in output styles.

[Ctrl] [T]—Displays the Field Properties dialog box for the selected field (if available) in the output style.

[Shift] [^]—Inserts a field separator in output styles.

[Alt] + 0171—Inserts a left group operator in output styles («).

[Alt] + 0187—Inserts a right group operator in output styles (»).

[Enter]—Inserts a new paragraph.

[Ctrl] [Enter]—Inserts a page break in output styles.

[Shift] [Enter]—Inserts a line break in output styles.

[Ctrl] [Shift] [T]—Inserts a tab in output styles.

[Ctrl] [B]—Changes text to bold.

[Ctrl] [I]—Changes text to italics.

[Ctrl] [U]—Changes text to underlined.

[Shift] [Ctrl] [+]—Changes text to superscript.

[Shift] [Ctrl] [-]—Changes text to subscript.

[Ctrl] [G]—Changes text to Greek.

The following Reference Manager keyboard shortcuts apply when in Microsoft Word or Corel WordPerfect:

[Alt] [1]—Displays the Insert Citation dialog box.

[Alt] [2]—Inserts the marked references from the active database Reference List tab.

[Alt] [3]—Displays the Bibliography Setup dialog box for Generate Bibliography.

Additional Keys

You can also use the arrow keys and the Esc key to assist you in moving through fields in Reference Manager. Although the Reference Manager dialog boxes generally contain buttons that use similar functions to the Special keys, you can use these keys for convenience or speed, to do the following:

[Enter]—Performs the same function as clicking the defaulted button when in a dialog.

[Tab]—Moves the cursor to the next field.

[Shift] [Tab]—Moves the cursor to the previous field.

[Esc]—Exits from a screen without saving the changes.

↑ or ↓ (Up or Down Arrow)—Moves the highlight up or down through a menu or a list.

← or → (Left or Right Arrow)—Moves the highlight through a horizontal menu. Also moves the cursor when you are entering or editing information in various fields, such as authors or title.

[PgUp] or **[PgDn]**—Pages through a vertical menu that is longer than the window or through text fields that fill more than one screen.

[Home]—Moves the highlight to the beginning of a list, or the cursor to the beginning of a field or line.

[End]—This key moves the highlight to the end of a list, or the cursor to the end of a field or line.

Moving Text

Using the Windows Clipboard, you can cut and copy text from a field and then paste text into another field in a reference. You can also paste text you copy from another source, such as a word processing document, into a reference in a Reference Manager database.

Or, you can drag and drop text from one field to another. These functions are described below.

Cutting Text

When you cut text, it is deleted from the reference. As long as it remains in the Clipboard, you can paste it into a new reference. (Once you exit the program or copy or cut different text, the text is gone from the clipboard.)

You can cut portions of a reference in the Reference Display or Reference Edit window. You can also cut text from the Retrieval, Term Manager, or Output Styles windows.

The cut text is removed from its location and placed into the Clipboard. You can then paste this text into a new location.

To cut text:

1. Highlight the text to cut.
2. From the **Edit** menu, select **Cut**.

You can use the **Ctrl X** keyboard shortcut or right mouse option to cut text.

Copying Text

When you copy text, it is copied from the reference. As long as it remains in the Clipboard, you can paste it into a new reference. (Once you exit the program or copy or cut different text, the text is gone from the clipboard.)

You can copy portions of a reference in the Reference Display or Reference Edit window. You can also copy text from the Retrieval, Term Manager, or Output Styles windows.

The copied text is duplicated from its location and placed into the Clipboard. You can then paste this text into a new location.

To copy text:

1. Highlight the text to copy.
2. From the **Edit** menu, select **Copy**.

You can use the **Ctrl C** keyboard shortcut or right mouse option to copy text.

Pasting Text

You can paste text from the Clipboard into a reference.

You can paste portions of a reference in the Reference Display or Reference Edit window. You can also paste text into the Retrieval, Term Manager, or Output Styles windows.

To paste text:

1. With cut or copied text in the Clipboard, click the field into which to paste text.

If the amount of text in the Clipboard exceeds the maximum allowable characters of the field into which you are pasting it, the Paste option in the Edit menu is grayed out.

2. From the **Edit** menu, select **Paste**.

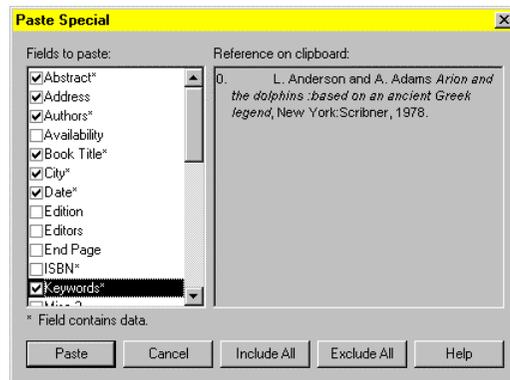
You can use the **Ctrl V** keyboard shortcut or right mouse option to paste text.

Using Paste Special

The Paste Special function lets you paste selected fields from a reference you have already copied to the clipboard.

To use paste special:

1. Select the reference to copy in the Reference List.
2. From the **Edit** menu, select **Copy**.
This is the reference from which fields are to be copied.
3. Select another reference in the Reference List or display it in the Reference Edit window
This is the reference to which fields are to be copied.
4. Choose **Paste Special**.



Warning: If the corresponding field in the reference you are pasting information into contains data, the existing data *will be replaced* by the data you are pasting. If you copy a blank reference field, pasting it into a new field will also delete existing data.

5. In the **Fields to paste** box, check the boxes for the fields you want to copy.

If a field in the reference in the Clipboard contains data, an asterisk () appears at the end of the field name.*

Note to users of Reference Manager Version 6-8:

Information is not merged (authors or keywords) or appended (titles or notes) as that which occurred when you used the Merge Paste option in Version 6-8. All fields in the reference you copied *replace* the data in the reference you selected to be pasted.

In the Reference on Clipboard box, you will see the reference in the Clipboard. The format is based upon the output style you select in the General tab of the Options dialog box for Copy/Paste Reference Output Style.

6. To select all of the Fields to Paste, click **Include All**.
7. To deselect all of the Fields to Paste, click **Exclude All**.
8. To copy, click **Paste**.

The information in the fields is automatically copied into the selected reference. Save the reference with the new data by clicking the Save tool in the General toolbar.

If you are merging two duplicate references together, the first reference you copied still resides in your database. To remove that reference, highlight it press the Del key.

Dragging and Dropping Text

You can use the mouse to move text from one field to another in a reference, or move text between references (if more than one is visible in the window). You can also drag and drop terms from the Term Manager into references or into a retrieval strategy.

To drag and drop text:

1. Highlight the text to move to a new location.
2. Release the cursor, then click the text again and hold down the mouse.

The cursor now had a box with a plus sign next to it.

3. Drag the cursor to the “drop” location and release the mouse.

You can drag the text to a different field in the reference or to a different reference if it is open on the window.

The copied text now appears in the new field.

Copying a Term from One Field to Another

You can copy text from one field to another in the Reference Display or Window to another. Or, you can copy it to another reference.

To copy text:

1. Select the text to copy by double-clicking it.

2. Move the cursor to the field in the Reference Edit window or display and release the mouse button.

A Note on Customizing Reference Manager

There are certain Reference Manager settings you can customize. These settings include the:

- ◆ default font
- ◆ text size
- ◆ output style to copy and paste references
- ◆ reference ID format
- ◆ duplicate check algorithm to use when checking for duplicate references
- ◆ sort order in which references are displayed in the Retrieved Reference List tab
- ◆ inserting common phrases

Refer to Chapter 12, the section titled, Customizing Reference Manager, for more information.

A Note on Backups

The importance of backing up your work cannot be overemphasized! Without a backup, all your work could be lost if your hard disk crashes or if a power failure occurs while you are working with your database.

Information on backing up data is covered in Chapter 4. Be sure to read this and practice it regularly.

Working With Databases

Overview

This chapter describes how to work with databases in Reference Manager. It covers creating, opening, closing, rebuilding, and defining databases.

This chapter includes these main sections:

- ◆ Understanding the Database Definition
- ◆ Creating New Databases
- ◆ Opening a Database
- ◆ Defining References and Formats in a Database
- ◆ Closing a Database
- ◆ Backing Up a Database
- ◆ Deleting a Database
- ◆ Fixing a Corrupted Database
- ◆ Viewing Database Properties and Statistics
- ◆ Working with Multiple Databases

Understanding the Database Definition

Database definitions contain information on the types of references in the database. They also define the fields and the field labels in each reference type.

Each database has its own database definition. When you create a new database, that database uses a default definition. You can copy a database definition from one database to another. For more information, see [Copying a Database Definition](#) on page 67.

Including and Excluding Reference Types

You can include or exclude reference types from a database definition. You do so using the Field and Type Editor. When you exclude a reference type from your database, it reduces the number of reference types that appear.

You can exclude reference types you no longer want or need. Once excluded, they no longer appear in any of the Reference Type browse lists. References of the same type, that already exist in a database, are not effected.

To define the database (where you can include or exclude reference types) see [Defining References and Formats in a Database](#) on page 63.

Creating New Databases

You can create and use more than one database. In fact, you can create an unlimited number of databases. The smaller the databases you work with, the faster they will be—as there is less information contained within them.

A Note on Organizing Data Across Multiple Databases

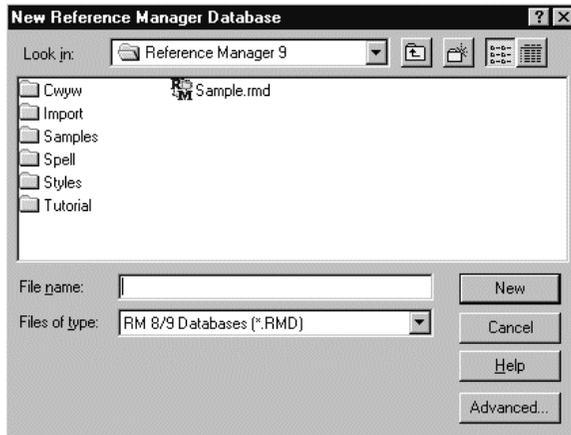
You might want to maintain different databases for different topics. Or, you might want subsets of different information contained in different databases. Before creating or splitting up a database, plan how you want to organize your data. Then, create databases accordingly.

You can create smaller, more manageable databases from an existing larger database. (To do so, mark the references you want included in the new, smaller database, and copy these references into a new database.)

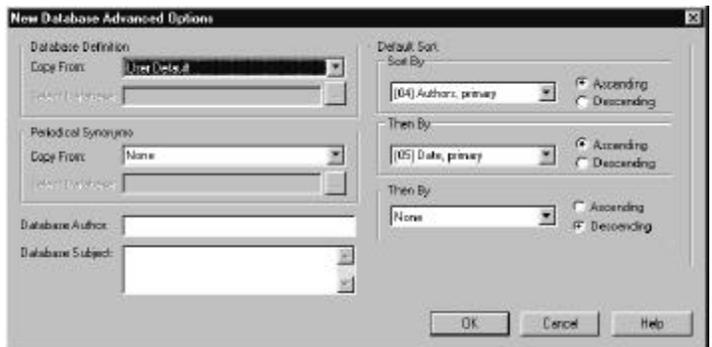
To create a new database:

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

The New Reference Manager Database dialog box allows you to enter the name of the database and the location where you want it stored.



2. Browse to locate the directory in which you want to store the new database.
3. In the **File name** field, type the name of the new database.
The name can be any length, including spaces.
4. (Optional) Click **Advanced** to specify a default database definition, to select a periodical synonym list to use, and to define a default sort order.



The New Database Advanced Options dialog box appears.

See the following section for information on the Advanced option. Or, click **OK** to exit this dialog.

5. Click **New**.

The new database is created in the folder you selected.

Using Advanced Options

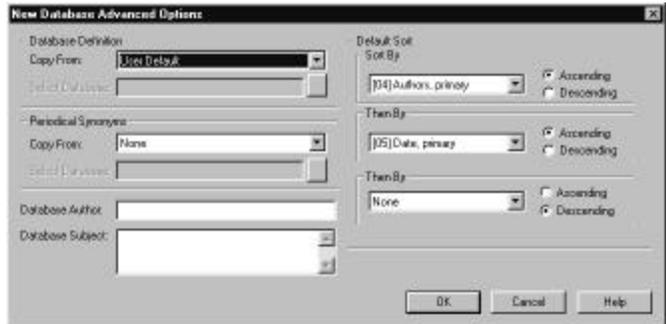
Advanced options let you specify a default database definition, select a periodical synonym list, and define a default sort order for a new database.

To use the Advanced options:

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

The New Reference Manager Database dialog box appears.

2. Click **Advanced**.



3. In the **Database Definition** box, select the database definition to use. To select:

- a definition you previously defined and specified as the default, choose **User Default** (explained later in the chapter).
- the default included with the program, choose **RM Standard**.
- a definition from an existing database, choose **Database**.

You can browse  for the database name.

4. In the **Periodical Synonyms** box, select the periodical synonym list to use. Select one of the following:

- **None**.
- **Database**—the periodical synonyms from an existing database.
You can browse for the database name.
- **Periodical synonyms** from the Humanity, Chemical, or Medical lists included with the Reference Manager program.

CHEMICAL.PST 1000+ chemistry Journals with CASSI abbreviations

HUMANITY.PST 2000+ Humanity Journals with MLA abbreviations

MEDICAL.PST 3000+ Medical Journals with Index Medicus abbreviations

5. (Optional) In the **Database Author** field, type the database's author's name.

6. In the **Database Subject** field, type a subject for the database.

7. In the **Default Sort** section, choose the first, second, and third levels of how you want to sort references in the database.
8. (Optional) For each choice, choose **Ascending** or **Descending**.
9. Click **OK**.

Opening a Database

You can open these types of databases in Reference Manager version 9:

- ◆ Version 9 Reference Manager Database
- ◆ Older Reference Manager Database (5-8)
- ◆ ProCite 4 Database
- ◆ EndNote 2-3 Library

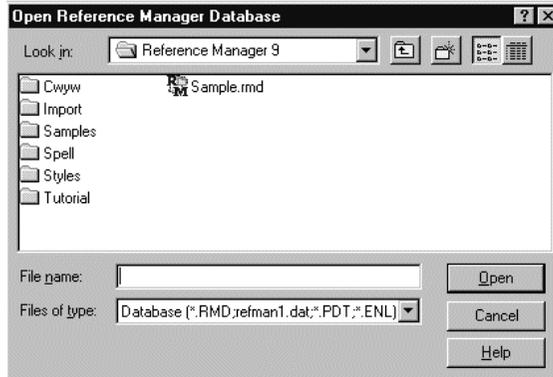
Opening a Version 9 Database

There are multiple ways to open and access a database in Reference Manager. These include:

- ◆ Open one of the last four databases accessed. To do so, choose the desired database from the bottom of the File menu.
- ◆ In Windows Explorer, double-click the desired database icon.
- ◆ Use the Open Database command on the File menu. (See the following procedure.)

To open a database using the Open Database command:

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



2. In the **File name** text box, type the database name to open. Or, navigate to the desired database and highlight it.
3. Click **Open**.

Opening an Older Database (v 5-7)

When you access an older version database (version 5-7), you can open it in version 9. You have the choice of whether or not to upgrade it to version 9.

If you do not upgrade the database, it is opened in read-only mode. Then, you can only retrieve references or generate a bibliography from a Reference List. You cannot add, edit, or delete references, nor can you perform global edits, sort references, or change the database definition.

You can only have one version 5-7 “read-only” database open at a time. For detailed instructions, see Chapter 2.

Opening an Older Database (v 8)

You can open an older Reference Manager database using Reference Manager version 9.

For detailed instructions, see Chapter 2.

Opening a ProCite 4 Database

In Reference Manager, you can open or upgrade a ProCite 4 database.

For information on how fields in a ProCite database map to corresponding Reference Manager fields, view the text file PC2RM.txt located in the Reference Manager program directory.

For detailed instructions, see Chapter 2.

Opening an EndNote Library

In Reference Manager, you can open or convert a EndNote 2/3 Library database to a Reference Manager database.

For information on how fields in an EndNote library map to corresponding Reference Manager fields, view the text file EN2RM.txt located in the Reference Manager program directory.

For detailed instructions, see Chapter 2.

Defining References and Formats in a Database

When creating your definition, you can change the names of the reference types and choose which types to include or exclude from a database. You can also rename the fields, determine which fields within each reference type to include, and reorder the appearance of fields in your database.

This section includes:

- ◆ Defining a Database
- ◆ Reordering Fields
- ◆ Copying a Database Definition

Network Users: If you are on the network and are not an exclusive user, the Field and Type Edit option will not be available. To have it available, sign on as a read-write exclusive user. See the Network User's Installation Notes in Chapter 2 for instructions.

Defining a Database

Defining a database involves choosing which reference types and fields are included in it. You can also modify field labels for the reference types.

As you go through the steps, remember that some are optional and you may or may not want to do them.

To define a database:

1. From the **Tools** menu, select **Field and Type Edit**.



The Field and Type Editor dialog box appears.

The default name of the selected reference type is listed in the Default Type Name field.

2. In the **Reference Type Edit** box, check the reference types to include. Uncheck any you do not want included.

The reference types you include are those that will be available as you enter or edit references. The default setting is to include all reference types.

3. (Optional) To include all reference types in your database, click **Include All** (on the left bottom).

4. (Optional) To change the name of a references type, highlight the reference type and edit the name.

You cannot change the Generic reference type.

5. (Optional) In the **Field Labels for Type** field, the reference type you are editing appears. To edit a different one, select it here.

6. (Optional) If you want only a few reference types in the database or a few fields in the selected reference type, you might find it easier to click **Exclude All**. Then, you can check the “include” box individually for the reference types or fields you want.

7. (Optional) In the **Field Label Edit** box, check the fields that you want available for the current reference type.

8. The **Reference Type** and **Reference ID** fields for each reference type.

These fields are mandatory.

You can specify if a field is mandatory and if it is included for each reference type.

9. (Optional) To include all fields in the selected reference type, click **Include All** (on the *right* bottom).

10. In the **M** column for each reference type, check here if the field is mandatory.

The M column allows you to specify fields as mandatory.

Mandatory means that you must insert data in the field, or you will not be able to save the record.

11. In the **I** column for each reference type. Check here if the field is included.

An included field is available when you enter or edit a reference. It can remain empty when saved.

12. (Optional) To change the name of a field, select the **Current Label** and edit the name.

You can enter any name for the field. You cannot edit the field labels in the Generic reference type.

13. (Optional) To copy the current field's status to all other reference types in this database, click **Update Field for All Types**.

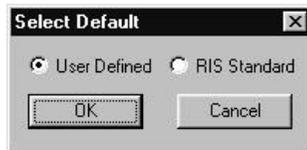
The current field's status includes the field's label and whether it is mandatory or included.

14. (Optional) To save this database definition as the default, click **Set Default**.

A message appears asking for confirmation.

15. Click **Yes**. Or, click **No** to cancel the process.

16. To specify the default database definition to use for the active database, click **Get Default**.



17. To copy the database definition from one database to another, click **Copy**.

The database definition contains information regarding reference types and their corresponding fields.

The Copy Field and Type Info dialog box appears. See Copying a Database Definition on page 67, for more information.

18. When you have made all necessary changes, click **OK**.

Reordering the Fields within a Reference Type

You can change the order in which fields appear within a reference type. This changes the order in which fields are displayed in the Reference Display and the Reference Edit windows.

To move one or a consecutive group of fields:

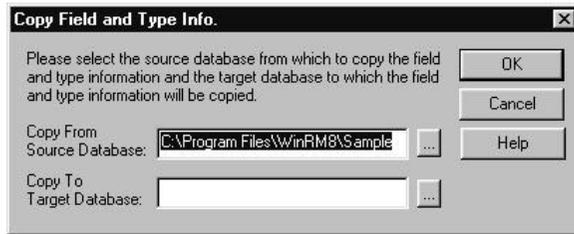
1. Start in the **Field and Type Edit** dialog.
2. Highlight the field(s) by dragging your mouse over their **Generic** field names.
3. Click and hold the mouse button, then drag the group of fields to the new location.

Copying a Database Definition

The database definition contains information regarding reference types and their corresponding fields. You can copy a database definition from one database to another.

To copy a database definition:

1. Click **Copy** in the Field and Type Edit dialog box (found on the **Tools** menu).



2. In the **Copy From Source Database** field, type or browse to locate the source database definition.
3. In the **Copy To Target Database** field, type or browse to locate the target database to which you want the definition applied.
4. Click **OK**.

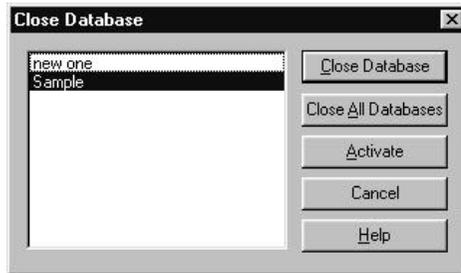
The database definition is copied.

Closing a Database

The process to close a database varies depending on what is showing on the screen. You can close one or multiple databases simultaneously.

To close a database:

1. On the **File** menu, select **Close Database**.



If you have more than one database open, the Close Database dialog box appears enabling you to select the database to close.

Hint: You can right-click with the mouse (when a Reference List is active) to close a database. From the shortcut menu, choose to close the active screen.

2. When you see the Close Database dialog, do one of the following:
 - To close one database, select the database and click **Close Database**.
 - To close all open databases, click **Close All Databases**.
 - To activate an open database, highlight the database and click **Activate**.
 - To exit the dialog without changing any databases, click **Cancel**.

Backing Up a Database

Backing up a database consists of making a copy of the database for safe keeping. Then, if your database becomes corrupt, you can use the backup copy as a replacement for the corrupt copy.

When you back up the database, you are also backing up the synonym lists created for that database.

The larger your Reference Manager database becomes, the more important it is for you to back it up regularly. Losing data is not only inconvenient, but it is expensive. Sometimes it may not be possible to replace data.

You can back up your database using the Backup utility included with Windows 98/95, or you can use a backup utility provided by a third-party vendor.

Files to Back Up

Your database consists of two files: *Database.RMD* and *Database.RMX*. When you backup a database, be sure to include *both* of these database files.

It is also a good idea to back up the entire Reference Manager directory on occasion. These files include the saved retrieval strategies, output styles, import definitions and dictionaries, and the phrase list.

Backup Frequency

It is recommend that you back up your database often, and keep a backup copy of your Reference Manager program directory. Although only you can determine how often to back up your database, a rule of thumb is to back up whenever you make more changes or additions than you would like to recreate!

It is recommended that you keep an “archive” backup of your database. Keep this stored separately from disks containing your

regular backups. Thus, you still have an old backup to restore from—should your regular backups become corrupt.

Deleting a Database

You can delete any database in Reference Manager. You might want to do this to save space on your system if you are no longer using a database. However, when you delete a Reference Manager database, it is not reversible. So, make sure you want to delete it before you start.

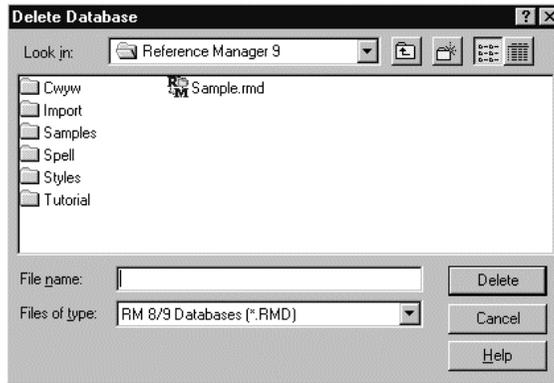
If you have generated a bibliography from a database, do not delete that database. If you have used references from a database you are deleting in a manuscript, you will have problems the next time you generated a bibliography.

Warning: Before deleting a database, you might want to back it up. Deleting a database is not reversible.

To delete a database:

1. Make sure the database you are deleting is closed.
2. From the **File** menu, click **Delete Database**.

The Delete Database dialog box appears.



Important: Do *not* delete a database by right-clicking the database name (*.RMD). This deletes only one of the two database files.

3. In the **File name** text box, type the database name. Or, navigate to the database location and select the database to delete.

The name of the database to delete now appears in the File name field.

4. Click **Delete**.

Both database files (.RMD and *.RMX) are deleted.*

A confirmation message appears.

5. Click **Yes** to confirm deletion of the database.

Fixing a Corrupted Database

Rebuilding (“reconstructing”—in older versions of Reference Manager) a database is the process of cleaning up any damage that might have occurred to the database file.

If your database becomes corrupted, Reference Manager lets you know and suggests these two solutions:

- ◆ Restore a backup of the database.
- ◆ Run the Database Rebuild utility.

Important: If you receive a warning about corrupted data, *do not ignore the warning!* You may be able to access parts of the database even after receiving a corrupted database message. Perform one of these two options to restore your database.

See, Rebuilding a Database in Chapter 12 for details and instructions on how to rebuild your database.

Viewing Database Properties and Statistics

The properties of a database include summary information, sort information, and statistics. You might use this procedure to view the statistics of a database. This includes the number of references in a database and provides an overview of database statistics.

To view the statistics or properties of the active database:

1. From the **File** menu, choose **Properties**.

This is all unchangeable information.

Summary Information			
Database Name	C:\Program Files\Reference Manager 9\Sample		
Database Type	Reference Manager Version 8		
Created	Tuesday, May 13, 1997 10:33:30 AM		
Last Modified	Saturday, February 06, 1999 08:43:24 AM		
Access	Read-Write Exclusive		
Database Author	<input type="text"/>		
Database Subject	<input type="text"/>		

Sort Information	
Reference	Authors, primary (ascending) + Date, primary (ascending)
Character	A#AAAAAA#EBCÇDÈÉÉÉÉFfGHIIJKLM ÑŃO°ÓÔÕÖØÇEPQRSŠÛTþ™UÚÛÜŸWXYŸZ

Statistics			
References	133	Highest Reference ID	133
Authors	260	Periodicals	43
Keywords	362	Publication Years	26

OK Cancel Help

The Database Name field displays the full path and name of the active database.

The Database Type field displays the database version.

The Created field displays the date and time the database was originally created (in version 5/6/7/8 databases, this information is not available).

The Last Modified field displays the date and time the database was last modified (if available).

The Access field displays the read/write status of the database

2. In the **Database Author** field, enter the database author's name.

3. In the **Database Subject** field, type information about the database.

You might include the subject, types of references included, a brief description of the database definition, and so on.

4. In the **Character** field, the order in which characters are sorted appears. To change the character sort order, see Chapter 12.

This is based on the language selected in the Regional Settings dialog box from the Windows 95/98/NT Control Panel.

Warning: If you change the Regional Settings in Windows, it affects all other programs on your computer.

See, Fixing a Corrupted Database on page 72, for assistance.

Warning: To retrieve across multiple databases, all databases must have the same character sorting. If you have databases with different character sort orders (the databases were created with a different language specified), you will not be able to retrieve across those databases.

5. The **Statistics** fields displays statistics about the database. You can not change this field.
6. When done, click **OK**.

Working with Multiple Databases

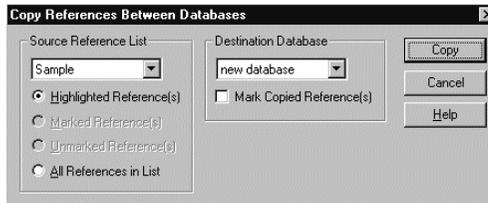
In Reference Manager, you can work with multiple databases simultaneously. You can have up to ten databases open at one time. You can apply many Reference Manager functions across all open databases. For example, you can retrieve references,

generate bibliographies, or check for duplicate references in more than one database simultaneously.

You can also drag and drop information between databases. (This is covered in Chapter 3.)

To copy information between databases:

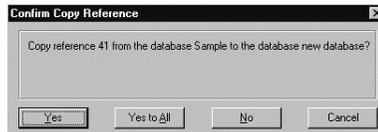
1. Open two or more databases to copy information between.
The last database opened appears on the screen.
2. From the **References** menu, select **Copy Between Databases**.



3. In the **Source Reference List** drop-down, select the database to copy information from.
4. Select the references you want copied by clicking on the appropriate option button.
5. In the **Destination Database** drop-down, select the database to copy information to.
6. To have the copied references marked in the database you are copying them to, click the **Marked Copied Reference(s)** checkbox.

You can use the marked references as a subset in the new database to copy them, delete them, and so forth during this session in Reference Manager.

7. Click **Copy**.



The confirmation screen appears.

8. Click **Yes** to copy references one at a time. Or, click **Yes to All** to copy all references at once.

The new references now appear in the database you copied them to.

If there are conflicting reference ID numbers now in the database, you will need to go and change the duplicates. See, *Assigning Reference IDs*, in Chapter 6.

Important Information on Multiple Databases

The following information is important to be aware of when working with multiple databases:

- ◆ When you copy references from one database to another:
 - Periodical synonyms are copied. However, the keyword and author synonyms are not copied.
 - Marked references are not copied. However, you can mark the references copied when using the Copy Between Database menu option (from the References menu).

- ◆ You can display terms for all open databases in Term Manager. But, you cannot edit or add terms.
- ◆ A database must be in Version 8 or 9 format to be included when you use All Databases. If an open database is in Version 5/6/7 format, it will not be included in the retrieval results, the list of terms in Term Manager, or any other place All Databases is available.
- ◆ If you have Version 8 or 9 databases with different character sort orders (the databases were created with a different language specified), you will not be able to retrieve using All Databases. To retrieve across multiple databases, all databases must have the same character sorting.

Working in the Reference Lists

Overview

This chapter covers how to work with references in the Reference Lists. It describes how references appear in the Reference List window and shows you how to customize and sort the display of references in the Reference List tabs.

Also described are how to mark references, print references, print an alphabetical list of terms and export references.

This chapter contains these sections:

- ◆ Getting Familiar with the Reference List Window
- ◆ Working with the Reference List
- ◆ Working with the Reference Display
- ◆ Marking References
- ◆ Printing References
- ◆ Exporting References to a Text File

Getting Familiar With the Reference List Window

The Reference List window lists all the references contained in the active database, or all references contained in a subset of your databases.

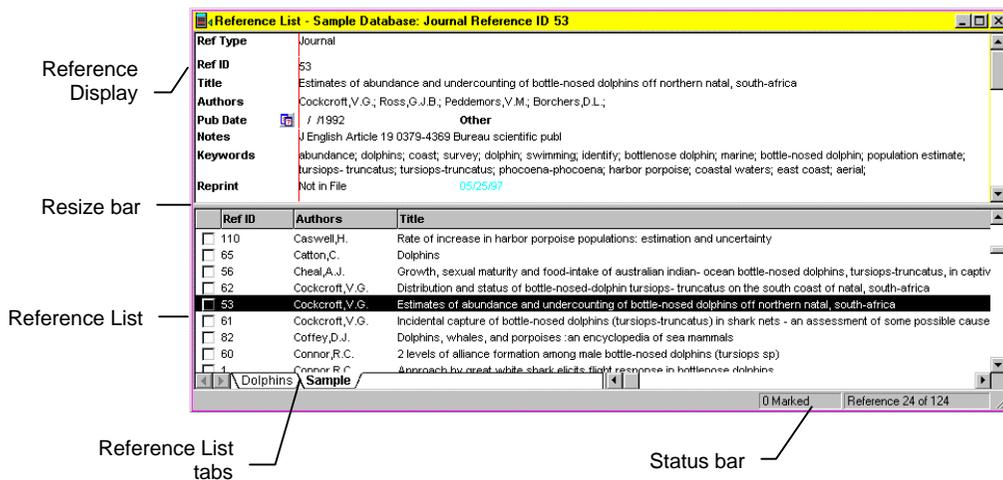
The tabs at the bottom of the Reference List window are used to access certain sets of references. These include references in:

- ◆ a single database
- ◆ the current retrieved set
- ◆ the recently imported references
- ◆ duplicate references
- ◆ the results of an Internet search

The Main Components

The Reference List window is made of two main components: the top, or the *Reference Display*, and the bottom, or *Reference List*. The sections of the screen are divided by the *split screen*.

The following screen shows the Reference Display and Reference List and the components that comprise them.



You can customize the appearance of the Reference List window by including adding/removing columns, resizing, and sorting information. The Reference List display is the same for all databases.

The Split Screen

You can resize this split screen to view more of the Reference Display or Reference List.

To resize the split screen:

1. Move your cursor to the bar separating the two windows.
The cursor becomes horizontal arrows on either side of a vertical bar.
2. Click and hold the mouse, and drag the cursor until the windows are resized as desired.

3. Release the mouse.

The Status Bar

The status bar is located at the bottom of the Reference List window. It provides information about the active tab. It also tells you the number of references currently marked or highlighted and shows the number of reference in the tab.

The Tabs

The Reference List window may have tabs at the bottom. You can use these tabs to display the types of references you want showing. Tabs might include: a single database; a currently Retrieved set; recently Imported references; or a Duplicates set located during a duplicate search.

Working with the Reference List

The Reference List occupies the lower half of the Reference List window. It is a scrollable list of references contained in the open database or subset. The Retrieved, Imported, and Duplicates Reference Lists (organized by tabs) are *subsets* of the current database.

A Reference List displays all the references contained in the database.

Customizing the Reference List

Reference Manager provides a utility to customize the fields that appear in the Reference List. By default, each reference is listed

showing the reference ID, the first author's name, and part of the title.

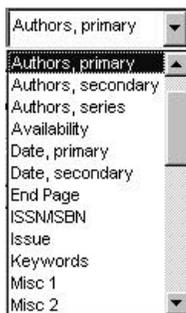
You can add, remove, and move columns, or you can specify the column heading titles. You can have different displays for the Database Reference List, and for the Retrieved, Imported, or Duplicates Reference Lists.

To customize the appearance of the Reference List:

1. On the **Tools** menu, select **Reference List Display**.



2. From the **Current List** drop-down list box, select the Reference List to customize.
3. In the **Number of Columns** field, either type a number or use the arrow keys to enter the number of columns to display.
4. In the **Field Type** row, change any information by clicking in the field, and selecting an option from the drop-down list box.



5. In the **Header** row, edit any heading names, as desired, by highlighting the name and typing over it.
6. To change the column order, click a column header (so the cursor changes appearance) and drag the column to the desired location.
7. To add a column, click **Insert Col.**

Column 1 has been added.

Field Order	1	2
Header	Ref ID	Ref ID
Field Type	Ref ID	Ref ID

A column is inserted before the selected column. By default, the header and field type are titled “Ref ID.”

8. After inserting a column, re-name the **Header** and **Field Type** for the new column.
9. To remove a column, highlight the column and click **Remove Col.**
10. After making changes, if you want to copy the new format to all reference lists, click **Copy To All.**
11. When done making changes, click **OK.**

The changes are applied immediately to any open Reference Lists.

Scrolling to View References

Use the scroll bar to move up and down the list. The *scroll tip* appears when you are scrolling. It signifies where you are in the list. The information shown in the scroll tip is determined by the criteria in which you sorted the list. For example, if the Reference List is sorted by authors, then the author's name appears in the scroll tip.

When you release the scroll bar, the reference showing in the scroll tip now appears as the top item in the Reference list.

Resizing Columns

You can resize the columns in the Reference Lists. The new column sizes will remain in place until you change them.

To resize a column:

1. Move the cursor over the vertical line between columns.

The cursor becomes horizontal arrows on either side of a vertical bar.

2. Click and hold with the mouse, and drag the column's border to the desired width.
3. Release the mouse.

Sorting the References

Reference Manager lets you easily sort the list of references by any column. For the column you choose to sort by, you can sort references in ascending or descending order. If you sort using the Marked column, it sorts by marked and unmarked references.

By default, the lists are sorted by author and then by date. You can change the default sorting criteria using the procedure below.

To sort references by a column:

1. Locate the column which you want to sort the list by.

	Ref ID	Title
<input type="checkbox"/>	9	"Pushy" behavior in a wild
<input type="checkbox"/>	4	'Pop' goes the dolphin: a
<input type="checkbox"/>	123	"Flipper"'s Captive Dolphin
<input type="checkbox"/>	60	2 levels of alliance format
<input type="checkbox"/>	124	A comparison of photo-id
<input type="checkbox"/>	67	A dolphin goes to school
<input type="checkbox"/>	20	A new quantitative techni
<input type="checkbox"/>	70	A Newsletter for Massacl
<input type="checkbox"/>	103	A preliminary study of the
<input type="checkbox"/>	45	A quantitative measure o
<input type="checkbox"/>	75	A ring of endless light

This list is currently sorted by title.

2. Click once on the column heading to sort by that column in ascending order.

	Ref ID	Title
<input type="checkbox"/>	1	Approach by grea
<input type="checkbox"/>	2	Changes in surfa
<input type="checkbox"/>	3	Morbillivirus infec
<input type="checkbox"/>	4	'Pop' goes the do
<input type="checkbox"/>	5	Seasonality of rej
<input type="checkbox"/>	6	Patterns of femal
<input checked="" type="checkbox"/>	7	Effect of pool feat
<input type="checkbox"/>	8	Violent interactio
<input type="checkbox"/>	9	"Pushy" behavior
<input type="checkbox"/>	10	Dolphin thyroid ai
<input type="checkbox"/>	11	Sexual dimorphis

Having clicked the Ref ID column heading, the references are now sorted in ascending order.

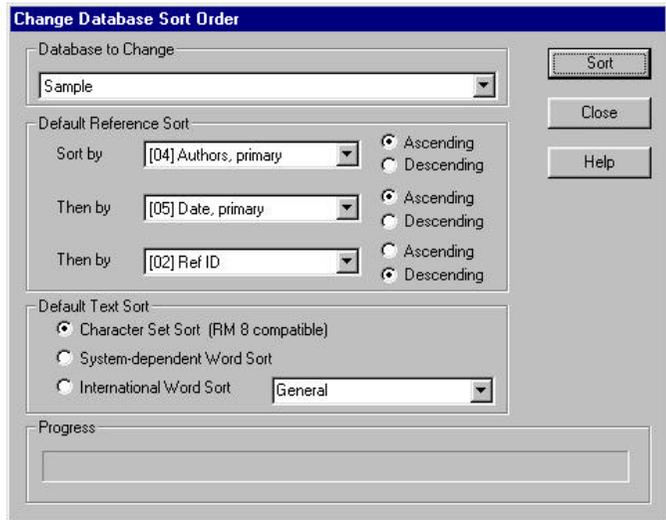
- To sort the column in descending order, click the column heading a second time.

	Ref ID	Title
<input type="checkbox"/>	131	Using self-view televi
<input type="checkbox"/>	130	Evidence of self-awa
<input type="checkbox"/>	129	Dolphin days: life an
<input type="checkbox"/>	128	Changes in aggressi
<input type="checkbox"/>	127	An ethnogram for do
<input type="checkbox"/>	126	Association between
<input checked="" type="checkbox"/>	125	Lads before the wind
<input type="checkbox"/>	124	A comparison of phc
<input type="checkbox"/>	123	"Flipper"'s Captive D
<input type="checkbox"/>	122	The "Dolphin-Death"
<input type="checkbox"/>	121	Dolphin Defense

Having clicked again on the Ref ID column heading, the references are now sorted in descending order.

To change the default sort order:

- On the **Tools** menu, select **Change Database Sort Order**.



2. In the **Database to Change** drop-down, select the database whose sort order you are changing.
3. In the **Default Text Sort** box, select the option for text sorting.
See Chapter 12 for a description of the sort options.
4. In the **Sort By** drop-down, select how the database will be sorted.
5. Choose **Ascending** or **Descending**.
6. In the **Then By** field, select how the database will be sorted next.
7. Choose Ascending or Descending.
8. Repeat this in the final **Sort By** field.

9. When you are ready to sort, click **Sort**.

The database is sorted.

10. Click **Close**.

Sorting Duplicate References

References in the Duplicates Reference List tab are sorted in ascending order by author, then title, then publication year. This allows you to view the duplicate references together.

Sorting Marked References

Click the first column to bring your marked references to the top of the Reference List.

Launching a Web/URL

You can automatically launch your web browser from within a reference. To do this, click the mini-button in the Web/URL field name. The browser opens the page for the address in the URL field. You can also double-click the URL to launch your Web browser.



Click this button to launch your browser and jump to the URL in the field

If you entered the file name of a document or file, Reference Manager launches the program and opens the document.

If you entered several URLs or file names in the field, the browser accesses the first address or file name you entered. You need a semicolon between each URL. It launches the address you highlight and double click.

Working with the Reference Display

The top portion, or pane, is called the Reference Display window. The Reference Display contains the full text of the highlighted reference. You can view it in the Standard or Output Style display. This pane has full edit capabilities using the Standard Display.

The fields appear in order based on the order you specified in Field and Type Edit. (This is covered in Chapter 4.) For example, if you move the Periodical name to the top of the list in the Field and Type Edit dialog box, that field is the first field displayed in the Reference Display window.

Changing the Way References Appear

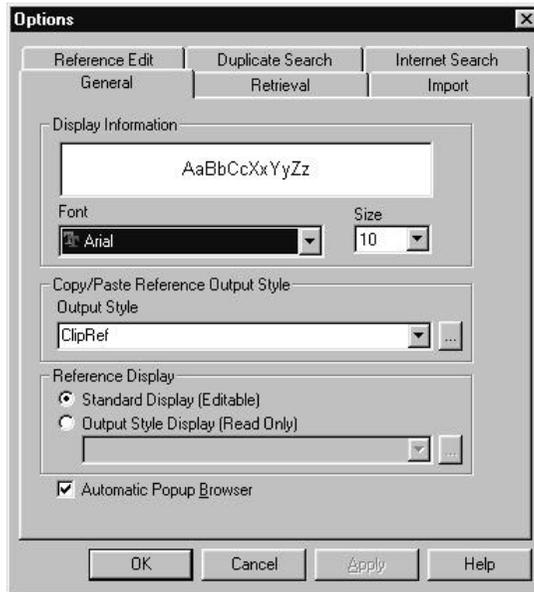
You can view references in the Standard Display or the Output Style Display.

To change the way references appear:

1. In the **View** menu, choose **Standard Display** or **Output Style Display**.

The Output Style Display shows what the references will look like printed with the selected output style. You cannot edit from this window.

2. To change the output style used for the Output Style Display, from the **Tools** menu choose **Options**.
3. Click the **General** tab.



4. In the Reference Display area, click **Output Style Display**.
5. In the drop-down box below, select a new style, or click the browse button  and browse for it.
6. Click **OK**.

The new output style is now in effect.

Viewing Field Numbers

You can view field numbers in all fields in all reference types. Field numbers display in the Reference Display and also appear when you define output styles. They look like this:

[01] Ref Type*
[02] Ref ID*
[03] Book Title
[04] Authors
[05] Pub Date* 
[33] Web/URL 
[06] Notes
[07] Keywords
[08] Reprint

You might find it easier to associate the fields by number than by name. This is especially true if you have customized field labels in your database.

To view field numbers:

1. On the **View** menu, select **Field Numbers**.

A check next to this View menu option indicates you have field numbers turned on.

2. To turn field numbers off, select **Field Numbers** again, and the checkmark is removed.

Browsing for Terms

Browsing for terms allows you to more easily select an existing term in your database. You can choose from existing words, rather than type your entry in from scratch. It displays the closest term matching the letters you have typed. You can pick from this list, rather than having to type the whole term.

You can press F3 to access the popup browser window. Or, you can start typing a word, and the Browser is automatically activated. It activates for these fields: any authors, keywords, periodical, publication year, reference ID, reprint status or

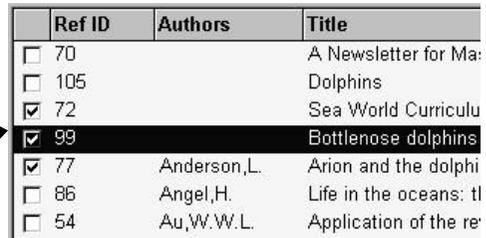
reference type fields—if you have set your options for it to do so. (See Chapter 12 for information on setting options.)

Marking References

Marked references are those references you checkmark to create a subset of references in the database. The set of marked references remain marked for that session of Reference Manager. When you exit the database, the marks are removed.

You can copy, print, or export the subset of marked references.

Here, three of the seven references are marked. You mark references by clicking in the box to insert a checkmark.



Ref ID	Authors	Title
<input type="checkbox"/> 70		A Newsletter for Ma:
<input type="checkbox"/> 105		Dolphins
<input checked="" type="checkbox"/> 72		Sea World Curriculu
<input checked="" type="checkbox"/> 99		Bottlenose dolphins
<input checked="" type="checkbox"/> 77	Anderson,L.	Arion and the dolphi
<input type="checkbox"/> 86	Angel,H.	Life in the oceans: tl
<input type="checkbox"/> 54	Au,W.W.L.	Application of the re

You can mark (or unmark) references individually, or mark all references in a Reference List tab.

Marks apply only to the active Reference List tab. They cannot be transferred across databases, nor are they “remembered” from one session to another.

If you copy references from one database to another, you can specify to copy marked references into the target database. See Copying References from One Database to Another, in Chapter 7, for information on copying references between databases.

To mark a single reference:

1. Highlight a reference to mark.
2. Do one of the following:
 - From the **Edit** menu, select **Toggle Mark**.
 - Click the checkbox to the left of the reference.
 - With a reference highlighted, press the space bar.

The reference is marked.

Ref ID	Title	Authors,
<input checked="" type="checkbox"/> 70	A Newsletter for Massachusetts Marine	
<input type="checkbox"/> 105	Dolphins	
<input checked="" type="checkbox"/> 72	Sea World Curriculum Guide: Program 1	
<input type="checkbox"/> 99	Bottlenose dolphins of Gakeston Bay: at	
<input type="checkbox"/> 77	Arion and the dolphins: based on an ancAnderson,	

Here, two of the five entries are marked.

*The status bar indicates the number of marked references.
In this case, it would read, "2 Marked."*

You can mark or unmark all references at once. To do so, from the **Edit** menu, choose **Mark All** or **Clear All Marks**, as desired.

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 or to a text file. You can also print the reference list to the screen.

When printing, you can print the references in the database, or you can change printer options and then print. Usually, you will just want to print. Initially and occasionally, you may want to set the printing options.

These procedures follow:

- ◆ Printing References
- ◆ Setting Printer Options
- ◆ Printing an Abbreviated Reference List

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. Click **OK**.

Setting Printer Options

To set up Reference List printing preferences, there are three tabs in the Bibliography Setup dialog box you will be using.

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 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, check the print settings and click **OK** to print.
 - 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**.

Printing an Abbreviated Reference List

You can print references in the current Reference List in an abbreviated format. The abbreviated format is a one-line format containing only those fields currently displayed in the Reference List. When you print references in the abbreviated format, all references in the current Reference List are printed and sorted according to the column header sort.

To print an abbreviated Reference List:

1. Right-click in the **Reference List** portion of the window.

C <u>l</u> ose Sample database	
Print Abbreviated Reference List...	
Properties	
<u>M</u> ark All	
Clear <u>A</u> ll Marks	
<u>N</u> ew...	Ins
<u>E</u> dit...	Enter
<u>D</u> elete...	Del
<u>D</u> uplicate...	Ctrl+D
Copy Between Databases...	
Reference Index...	
<u>R</u> etrieve...	F4
<u>G</u> enerate Bibliography...	Ctrl+L
Reference List Display...	
<u>O</u> ptions...	F11

2. Select Print Abbreviated Reference List.

The Print dialog appears.

3. Change any settings as desired, and click **OK**.

The list is printed.

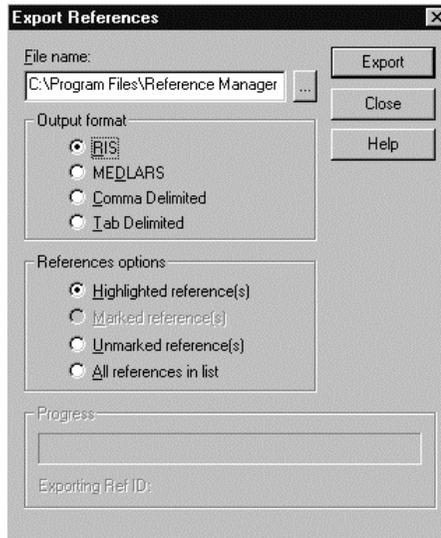
Exporting References to a Text File

You may occasionally need to output references in a tagged format to use to import references into another database. You can output references to a text file in the RIS, MEDLARS Comma Delimited, or Tab Delimited format. These formats are similar, except that the RIS format retains font attributes, such as bold and italic.

The file is saved as a text only file.

To export references to a text file:

1. From the **References** menu, choose **Export**.



2. In the **File name** drop-down, type the full path and file name of the file name into which you want references exported.
3. In the **Output format** area, select the format type for the exported file.
The RIS format allows for all Reference Manager reference types. Medlars allows for just journal references.
4. In the **References options** area, select the references you want exported.
5. Click **Export**.

The Progress bar shows the progress of the export.

Importing, Adding, and Editing References

Overview

You build a database by importing from a text file, manually adding references to your database, or copying references from another Reference Manager database. This chapter describes how to add references using these methods, and how to edit and delete references in your database.

When you download information from a commercial data provider be sure to download it in a format compatible with Reference Manager's import filter. For assistance, you can use the search utility on the RIS web site. It can help you determine the format to use. Or, check the sample files provided in the Samples folder located in your Reference Manager 9 folder.

This chapter contains these sections:

- ◆ Importing References
- ◆ After Importing References
- ◆ Preparing to Add Reference Manually
- ◆ Adding References Manually

Importing References

The Import Text File option, found under the References menu, allows you to import references from a text file. The text file results from downloading references from many online, CD-ROM, or World Wide Web database services. When importing references, you are adding them automatically. This method can be much quicker and more effective than manually entering references.

This section contains:

- ◆ Understanding Databases and Services
- ◆ Sources for Importing References
- ◆ Importing from a Database Service
- ◆ Browsing for an Import Filter
- ◆ Importing References from a Text File
- ◆ Formatting Imported Text
- ◆ Using Tagged Formats
- ◆ Using the Periodical Term Dictionary
- ◆ Using the Casing Term Dictionary
- ◆ Importing from Another Database Program
- ◆ Importing from the Internet
- ◆ Accessing Imported References
- ◆ Modifying an Import Filter Using the Mini-Editor
- ◆ Removing the Imported Tab

Understanding Databases and Services

You can import references from more than 50 different databases into Reference Manager. Databases include those such as CancerLit, Chemical Abstracts, MEDLINE, and PsycInfo. These databases can be supplied by a number of online or CD-ROM vendors. Vendors include those such as ISI, NLM, or SilverPlatter.

As an example, MEDLINE is a *database* compiled by the National Library of Medicine. It consists of references from thousands of biomedical journals. The references go back as far as 1966. MEDLINE is available from more than a dozen *services*. These services include OVID, DIMDI, Dialog, EBSCO, Knowledge Index, PaperChase, and SilverPlatter.

Each service receives new data from a variety of sources. While the basic data remains the same, each service outputs the data in its own format. For example, some services place a hyphen between an author's last name and initials (Jones-SK), while others use a comma (Jones,S.K.), and others use no delimiter at all (Jones SK).

Sources for Importing References

There are many sources from which you can import references. These include:

- ◆ Other database programs
- ◆ Online services
- ◆ CD-ROM diskette services
- ◆ World Wide Web database services

Importing from a Database Service

The Import Text File module supports numerous databases, such as Cancer Lit, Chemical Abstracts, MEDLINE, PsycInfo. These databases are supplied by a number of online or CD-ROM vendors such as ISI, NLM, or SilverPlatter. To Import text files from a Database Service, follow the Importing References section of this chapter on page 106.

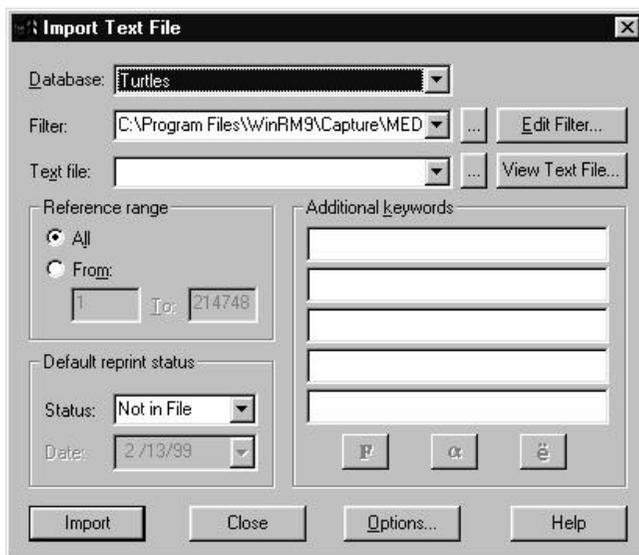
Browsing for an Import Filter

The import filter is a file used by Reference Manager when importing database text files. It tells Reference Manager how to format and organize the text as it is imported. The import filter list shows the import filter definitions available in Reference Manager. As you import a text file, you choose which import filter to use.

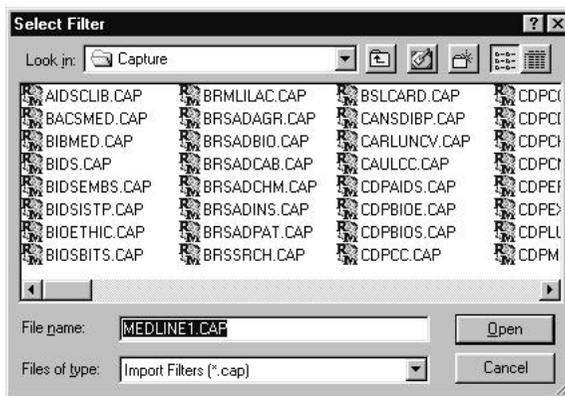
Each import filter is listed in the Import dialog box in alphabetical order by service name and database name. Definitions you have created or edited are displayed with an asterisk after the name. Those that come with the system do not have an asterisk. You need to know which service you are importing the text file from before starting the import function.

To access an import filter:

1. From the **References** menu, select **Import Text File**.



2. In the **Filter** field, click **Browse**.



The Select Filter dialog box appears.

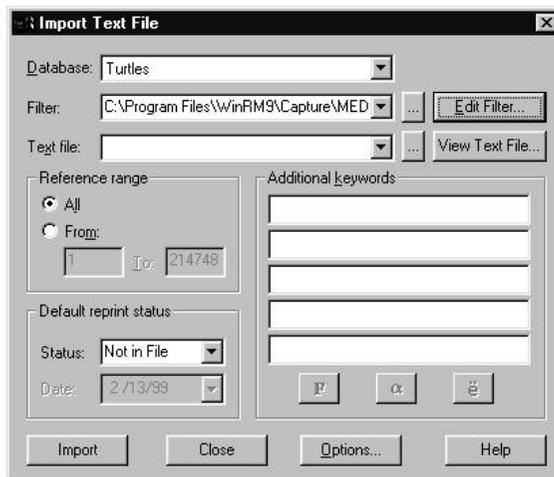
3. Select a filter name, and click **Open**.

The name appears in the Filter box.

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.**



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 definition 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 the save name and location 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**.

If your references did not import as you expected refer to the sections below.

Formatting Imported Text

You can use Import Text File, Edit Filter option, to define how the text is imported into the fields of each reference. Import filters are files that identify data elements in your text files and map them to the appropriate fields in your Reference Manager database.

You will be using sample text files to confirm that the format you received your text files in matches the format used by the import filter. Use the Import.txt file to view the sample text file

names. These are automatically installed into the Samples folder under the Reference Manager folder.

To view a sample text file:

1. Double-click to open the Import.txt file, located in the Reference Manager folder.
2. Scroll down to view the service and sample file names.
3. Note the name of the sample file for the service you are using.
4. Locate that file in the **Samples** folder under your Reference Manager folder and open it.
5. View the format of the file.

Using Tagged Formats

Before importing references, make sure the files are in a format that the import filter can read. In order for the import filter to read a text file, it must be in a delimited format. A delimiter is a character, like a hard return, that is inserted between fields. Each part of each reference needs to be preceded by a delimiter.

A *tagged* format has a label at the beginning of each field. For example, in MEDLARS format each author is on a separate line that begins with “AU - ” (without the quotation marks). The first line of each title begins with “TI - ”.

Each online or CD-ROM service uses a unique tagged format for its files. The Import module contains a specific translator for each service. The translator ensures that the text files can then be read by the Import program.

When downloading references from a database service, you may have a choice of formats. Various services have different names for their formats. The file you download must be a text file. Common choices to produce this type of file are “tagged” or “labeled.” This kind of format lets the import filter translate the various parts of the references into fields in your database.

If you have a choice of tagged formats, look at a sample text file for the database to see how the format should look. You can find a sample text file for each database service supported by Import in the \Samples folder. If your library staff downloads references for you, provide them with a printout of the sample so they know which format to use. Or, you can visit the RIS website and use the import filter search utility.

When you download information from commercial bibliographic services, the information and how you can use it is governed by the individual service’s database license agreement. Refer to the service’s license agreement for more information.

Using the Periodical Term Dictionary

Many services do not distinguish between abbreviated parts of periodical names (such as “Arch,” or “Proc.”) and parts that do not need to be followed by periods. The Import module uses a dictionary of non-abbreviated words found in abbreviated periodical names to assist you.

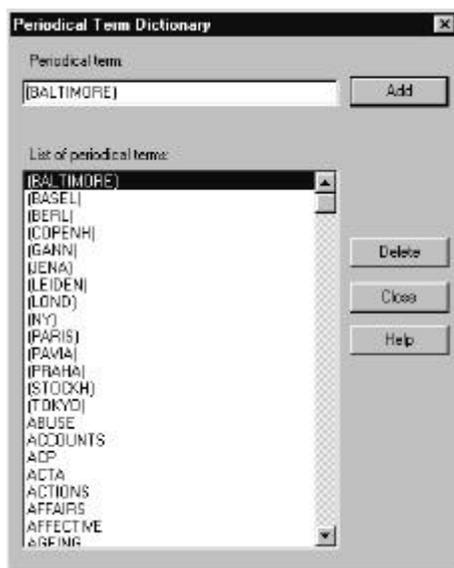
Whenever you add a periodical name to a database by typing it or importing it, words without periods are added to the dictionary. No action is required on your part. Once a word is in the dictionary, it is added to the periodical name of references without a period.

For example: the abbreviated form of Acta Cardiologica Supplementum, is Acta Cardiol.Suppl. In this case, the term Acta is not an abbreviated term and is entered in the Periodical Term Dictionary.

You can edit the Periodical Term dictionary at any time.

To edit the Periodical Term Dictionary:

1. From the **Tools** menu, select **Import Dictionaries**, then **Periodical Term Dictionary**.



The Periodical Term Dictionary dialog box appears.

2. You can do the following:
 - To add a term in the **Periodical term** box, type it. Then click **Add**.

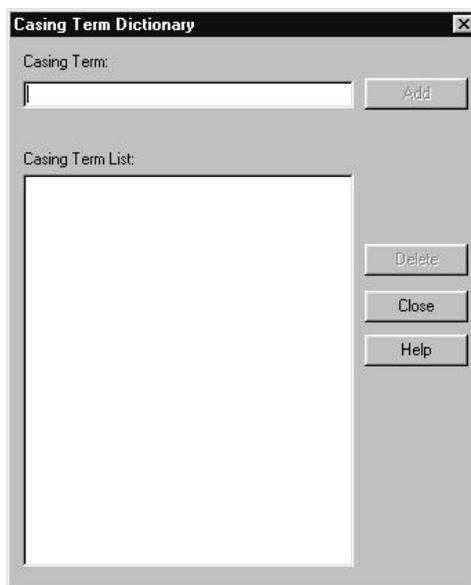
- To delete a word, select it and click **Delete**. At the prompt, click **Yes**.
3. When you are done, click **Close**.

Using the Casing Term Dictionary

The Casing Term Dictionary contains terms whose case remains unchanged as they are imported into Reference Manager. Mathematical formulas and other terms (such as DNA) are examples of terms you can enter into the dictionary.

To use the Casing Term Dictionary:

1. From the **Tools** menu, select **Import Dictionaries**, then **Casing Term Dictionary**.



2. You can do the following:
 - To add a term, in the **Casing term** field, type it. Then click **Add**.
 - To delete a word, select it from the list and click **Delete**. At the prompt, click **Yes**.
3. When you are done, click **Close**.

Importing from Another Database Program

You can use the Import Text File feature to import references from another bibliographic management or database program. Make sure the references are in a format supported by the Import module, such as MEDLARS format or RIS format.

The RIS format is a tagged format, similar to MEDLARS. It was developed by Research Information Systems for importing files that contain any or all of the reference types allowed in a Reference Manager database.

Using the MEDLARS Format

Many bibliographic database management programs (including Reference Manager) allow you to output references to a text file in several formats. If you have the option of outputting references from the database service in the MEDLARS format, use this option. Import lets you easily import files from this format, exactly as if they were downloaded from the National Library of Medicine's MEDLARS service.

Note that the MEDLARS format is consistent only for journal references. Other reference types, such as whole book or book chapter, may not be properly imported into Reference Manager.

Using Any Format to Output to a Text File

If you cannot output your references in MEDLARS format, or if you have a large number of non-journal reference types, you can import references into Reference Manager using a text file output. Use your word processor, and edit the file to convert it into RIS format. Or, write a macro to help you do this. Many word processors have macro capabilities that allow you to easily make global changes to a file.

Once the references in the text file are in RIS format, you can import the file into Reference Manager. See Appendix D for specifications of the RIS Format.

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 covered in Chapter 9, Retrieving References.

Before importing files, set up your import options. This is covered in Chapter 12, in the Customizing Reference Manager section.

Accessing Imported References

There are two methods you can use to save and view imported references. The first involves adding a keyword to the references. The second involves creating a reference index.

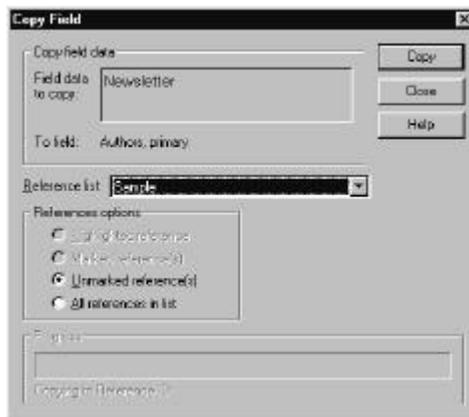
If you use a keyword, you might use the date the text file was imported or the topic of the file as the keyword. These keywords could help you remember the file's contents. You can also use

these methods to keep groups of references separate. The imported references are listed in the Imported tab.

Both procedures to access imported references by adding a keyword follow. If you want to work with only some of the references in the Imported tab, select or mark the desired references first.

Method 1—Using a keyword:

1. Add a keyword to one of the references in the Imported tab.
2. On the **Edit** menu, select **Copy Field** to copy the keyword to all other references in the Imported tab.



3. Select the references for which you want the keyword added, by clicking one of the buttons in Reference Options.
4. You can view or edit the references later by using this keyword to do a retrieval.

Method 2—Using a reference index:

1. Select the **Imported** tab.
2. From the **Reference** menu, select **Reference Index**.
3. From the Reference Selection drop-down list, select **Imported**.
4. Select which references are to be saved in the index by clicking one of the radio buttons.
5. From the Reference Index box, choose an existing reference index or create a new one.
 - a. To add a new one, click **New**.
 - b. In the **Reference Index Name** field, type the new name.
 - c. Click **OK**.
6. To add the reference to the reference index, click **Add**.

Modifying an Import Filter Using the Mini-Editor

The import filter is the template you choose to define how references appear in the database once they are imported. It defines formatting as well as which fields are imported.

You cannot overwrite definitions created by Research Information Systems. So, if you make changes to an RIS definition, you need to save it under a different name.

You might find it easier to name filters using both the database and service name. The filter name appears in the Select Filter

dialog box when you browse for a filter. Most tagged fields import into a single corresponding field in the Reference Manager database.

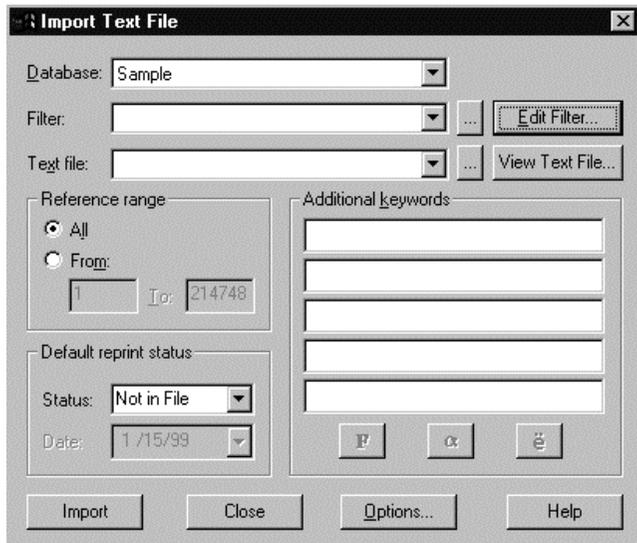
Using the Mini-Editor, you can make the following modifications to an import filter:

- ◆ include or exclude tags
- ◆ change the destination field
- ◆ change the tag label

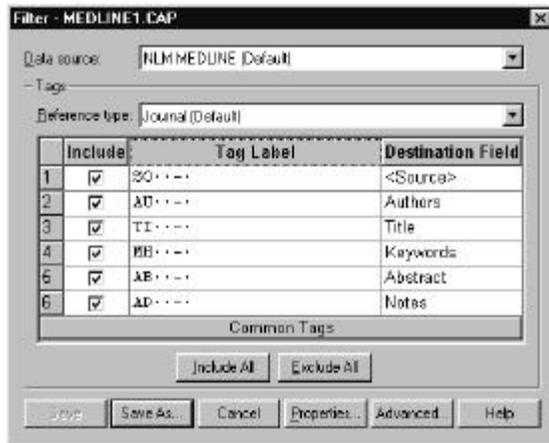
This procedure lets you make some limited changes to the import filter. For full editing functionality, see the Import Filter Editor User's Guide in PDF format or the online help.

To modify an import filter:

1. On the **References** menu, select **Import Text File**.



- In the **Filter** drop-down list, select the filter. Or, use Browse to select it.
- Click **Edit Filter**.



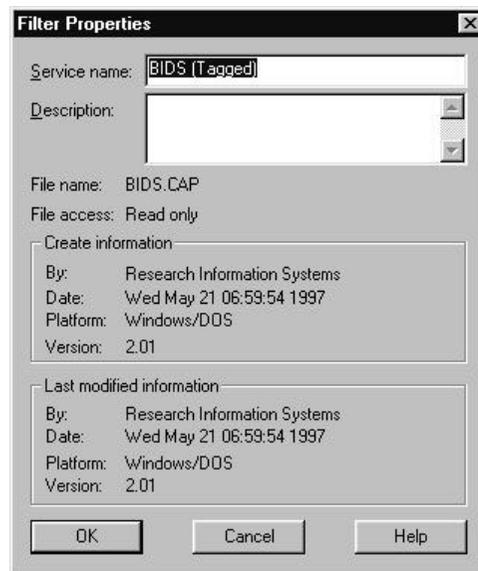
- In the **Reference type** drop-down list, select the reference type to change.
Some of the imported fields differ between various reference types. You can include or exclude fields for each reference type that could be imported using this filter.
- For each tag, you can select or clear the **Include** box to specify if you want data in that field to be imported with this filter.
- To select all fields for this reference type, click **Include All**.
- To deselect all fields for this reference type, click **Exclude All**.
- In the **Tag Label** column, change any tags, as desired.

This is the label of each tag imported into Reference Manager. The order of the tag labels is not important, however, the tag format must be same format as the other tags. Spaces appear as a small bullet (•) and a carriage return-line feed appears as a paragraph symbol (¶).

9. In the **Destination Field** column, make any changes in any field, as desired, selecting a new option from the drop-down list.

The drop-down list contains all available Reference Manager fields in the Reference Type selected.

10. To display information about this import filter, click **Properties**.



11. In the **Service name** field, type the name of the service if other than what is in this screen.

12. In the **Description** field, type information about the import filter.

This might include the name of the database service, a brief description of the types of tags, and so on.

13. When you are done, click **OK**.

14. If you need to make modifications to the filter, such as editing a multi-text source link or adding a new reference type, click **Advanced** to launch Import Filter Editor.

For instructions on using Import Filter Editor, see the online help or the PDF User's Guide.

15. When you are done, save the file as follows:

- If this is a definition you created, click **Save**.
- If this is a RIS definitions you modified:
 - a. Choose **Save As**.
 - b. In the **Definition name** field, type a name for the definition.

The name you choose must be different than the original name.
 - c. Click **Save**.

Removing the Imported Tab

The Imported Reference List tab appears when you import a text file. You can remove this tab in two ways:

- ◆ end the session
- ◆ select the Close Imported Reference List option (see below).

To remove the Imported Reference List tab:

1. Make sure the **Imported Reference List** tab is active (selected).
2. Right-click with the mouse button.
3. Select the **Close Imported Reference List** option.

The Imported Reference List is closed.

Imported references are located in the Imported tab of the reference list. These references are also automatically added to the database and are located in the appropriate Database tab.

After Importing References

This section covers:

- ◆ Sorting Keywords Once References are Imported
- ◆ Editing a Reference
- ◆ Deleting a Reference

Sorting Keywords Once References Are Imported

You can sort keywords automatically in alphabetical order, if you have this option set. You have a choice of sorting the keywords by the database as you import them, or you can sort keywords for one reference.

If you are upgrading from a version 7 database, you will want to sort keywords for the entire database.

To change how keywords are sorted for one reference:

1. Import the references.
2. With the cursor in the keyword field , right-click with the mouse.
3. Select **Sort Keyword List**.

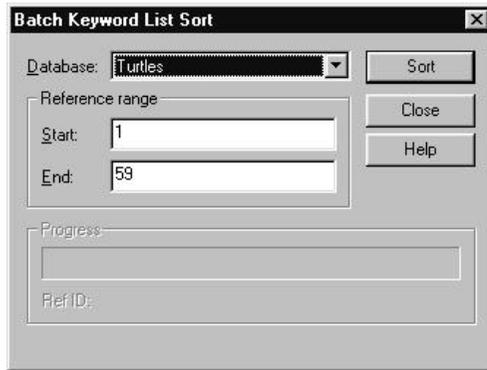
You can also choose to have the keywords sorted while importing references.

To sort keywords while importing references:

1. From the **Tools** menu, select **Options**.
2. Select the **Reference Edit** tab.
3. In the Automatic Settings box, click to select **Sort Keyword List**.
4. Click **OK**.

To sort keywords for an entire database:

1. From the **Tools** menu, select **Batch Operations**, then select **Keyword List Sort**.



2. In the **Database** drop-down list, select the database for which you are sorting the keywords.
3. In the **Start** and **End** fields, type the number of the start and end number references you want sorted.

By default, all are selected. Normally, you will not need to change this setting.

4. Click **Sort**.

The process complete dialog appears

5. Click **OK** when.

Editing a Reference

You can edit references to update information or make needed corrections (such as misspellings). Using Reference Manager Version 9, you can edit references in the Reference List window or the Reference Edit window.

To edit a reference:

1. Do one of the following:
 - In the Reference List (the screen bottom), highlight the reference to edit.
The reference now appears in the top portion of the Reference List window (the Reference Display).
 - Double-click the reference.
The reference fills the Reference Edit window.
2. Insert or move the cursor into the field, select the text, delete it or type changes as appropriate.
3. When you are finished, from the **File** menu, select **Save**.
4. If you were editing in the Reference Edit screen, click the X in the upper right corner to close the window.

Deleting a Reference

When you delete a reference, the reference is permanently removed from the database. There are two methods you can use to delete references. These include:

- ◆ Selecting the reference(s) from a Reference List
- ◆ Deleting a single reference from the active Reference Edit window

These methods are described below.

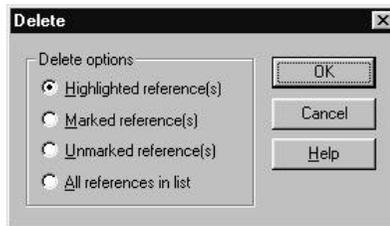
Deleting a Reference from the Reference List

You can delete more than one reference at a time by marking or selecting them. The Delete dialog box allows you to delete the

highlighted reference(s), all references, or the marked or unmarked reference(s).

To delete one or more references:

1. Select the reference(s) in the Reference List.
2. From the **References** menu, select **Delete**.



3. In the **Delete Options** box, select the reference(s) to delete.
4. Click **OK**.



5. Click **Yes** or **Yes to All**.

Yes to All is available if you are deleting more than one reference.

Deleting a Reference from the Reference Edit Window

You can also delete a reference that appears in the Reference Edit window.

To delete a reference from the edit window:

1. Select a reference.
2. From the **References** menu, select **Delete**.
A dialog box appears asking you to confirm that you want to delete the reference from your database.
3. Click **Yes** to delete the reference.

Preparing to Add References Manually

This section covers the tasks you might perform as you add references manually. Read through the following sections to become familiar with these functions:

- ◆ Browsing for a Term
- ◆ Changing the Font
- ◆ Entering Non-English Characters
- ◆ Using Keyboard Shortcuts
- ◆ Working with Duplicate References
- ◆ Working with Keywords

Browsing for a Term

Instead of typing information in certain fields, you can browse for a term and automatically insert it in the field. You can use browse in these fields:

- ◆ author's name
- ◆ keyword

- ◆ periodical name

Methods to Browse

Reference Manager uses *browse lists* to let you insert a term. Browse lists display all options for the field that are available in the database. As you type, the list automatically scrolls to values matching the letters you have entered. For example, if you type a “d” the browser lists words starting with “d.”

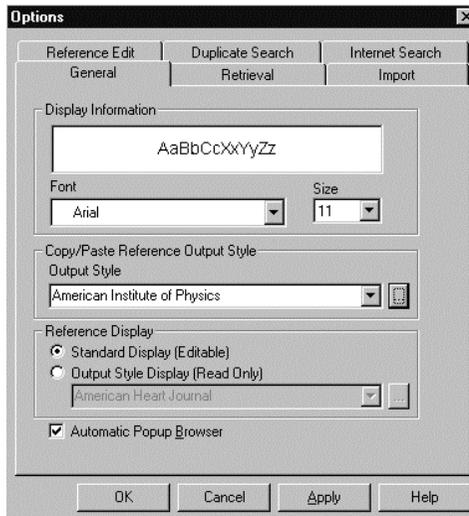


You can set Reference Manager to automatically use browse lists as you type. Or, you can access a browse list only when desired. Both procedures are described below.

To close a browse list, press the **Esc** key.

To set the browse list to appear automatically:

1. On the **Tools** menu, select **Options**.



2. Select the **General** tab.
3. Check the box for **Automatic Popup Browser**.



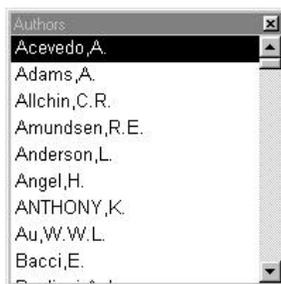
Each time you type in a browse field, the browse list appears.

If the Automatic Popup Browser option is cleared, you can still activate a browse list manually.

To activate the browse list manually:

1. Begin typing in a field.
2. Press the **F3** key.

The browse list appears listing terms most closely matching what you typed.



3. Scroll in the browse list to locate the desired term and double-click on the term, or press **Enter**.

If the term does not exist in the browse list, continue typing and ignore the browse list.

Selecting Multiple Items in a Browse List

You can also select multiple items simultaneously. If you select more than one item, all selected items are added to the field. For example, you can add more than one author at a time.

To select multiple authors or keywords simultaneously:

1. In the desired field, activate the browse list.
2. Do one of the following:
 - To select consecutive terms, hold down the **Shift** key and select the terms.
 - To select nonconsecutive terms, hold down the **Ctrl** key and select the terms.

You can combine selections using both the Shift and Ctrl keys.

3. When you have selected all the desired terms, press **Enter**.

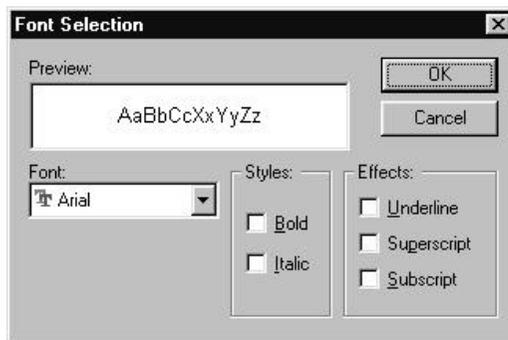
Changing the Font

You can change the font used for fields in a reference by choosing from any font available on your computer. The font is changed for the text you select. You might find this useful, for example, if you were adding a special character or WingDing character to a portion of a field.

Changing fonts is available when the cursor is in an editable field.

To change a font:

1. Select the text.
2. In the **Format** toolbar, click the **Font** toolbar button.



In the Preview box, you see a preview of the current font, including styles and effects. As you change the font, the new font appears here.

3. In the **Font** drop-down list, select the desired font.
The fonts available are those installed on your computer.

4. In the **Styles** box, check the appropriate box to indicate if you want bold or italic.

If you want plain text, leave all boxes unchecked.

5. In the **Effects** box, check the appropriate box to indicate if you want underline, superscript, or subscript.

If you want plain text, leave all boxes unchecked.

6. When you are done, click **OK**.

Entering Non-English Characters

You can enter non-English characters in any text field in a reference. Non-English characters are those that are not English letters, such as ä, or ß.

You cannot use the Global Edit feature to edit a word containing non-English characters.

To include non-English characters, use one of the following options:

- ◆ Inserting a Symbol character
- ◆ Inserting Greek character
- ◆ Using the ANSI equivalent

Each option is described below.

Inserting a Symbol Character

You can enter symbols and extended characters using the Insert Symbol toolbar button. This option is available when the cursor is in an editable field.

Reference Manager uses the currently active font for the symbol set. (To change the font, on the Format toolbar click the Font toolbar button, and select the desired font. Then, click OK.)

To ensure compatibility with future versions of Reference Manager, certain characters will not appear when you select them, even though they are in the Insert Symbol dialog box. Do not use these following characters, as they will not show up:

0138	Š	0188	¼
0154	š	0189	½
0178	²	0190	¾
0179	³	0208	Ð
0185	¹	0240	ǒ

To insert a Symbol character:

1. On the Format toolbar, click the **Insert Symbol** toolbar button.



The Insert Symbol dialog box appears.

2. Select the symbol to add and click **Insert**.
3. Select any additional symbols and click **Insert**.

4. When you are done, click **Close**.

Inserting Greek Characters

To insert Greek characters into your text, you use the Greek toolbar button. You can also access this function using the keyboard shortcut, Ctrl G. You can enter the full Greek alphabet, including upper and lowercase letters, using the Greek toolbar button.

To enter Greek characters:

1. Type or highlight the text to convert to Greek text.

For example, type or highlight an “a” if you want to insert the alpha character “α.”

2. From the **Format** toolbar, click the **Greek** toolbar button.

The text is converted to Greek.

3. (Optional) To return to Roman characters, click the **Greek** toolbar button a second time.

Alternatively, you can click the Greek toolbar button first and then enter the text.

Using the ANSI Equivalent

You can enter non-English characters by typing the ANSI equivalent for the characters. Refer to the Windows Character Map for a list of ANSI characters and their keyboard equivalents.

To type ANSI equivalents:

1. Place the cursor where you want to insert the ANSI text.
2. Hold down the **Alt** key and type the 4-digit ANSI code for the character.

Use your numeric keypad. Be sure you have NumLock engaged.

For example, to enter an “ä” (ANSI code 0228), hold down Alt and type “0228” on the numeric keypad.

3. Release the **Alt** key.

Using Keyboard Shortcuts

As you enter information into the keyword and author fields in a reference, you can use the following keyboard shortcuts:

Enter—moves to next location in the field (if there is one).

Shift Enter—moves to previous location in the field (if there is one).

Ctrl Enter—inserts a new location.

Semicolon—inserts a new location at the end of the current location.

Working with Duplicate References

A duplicate reference is the same reference entered into a database twice. The duplicate reference could show up in the database as a result of importing the same reference from more

than one service. From time to time, you may want to clean up the database and delete duplicate references.

You can check for the existence of duplicate references in a database, then view them and remove them if desired.

Checking for Duplicate References

Reference Manager lets you check for and identify duplicate references. You select a reference which is then compared with all other references in that database—or in all other databases. You are notified if one or more duplicate references are found.

To check for duplicate references:

1. From the **References** menu, select **Check for Duplicates**.

Reference Manager scans all references in the database(s) specified. If duplicates are found, you can choose to view them. If none are found, a message appears to let you know.

To specify different databases to search in or to change the duplicate detection settings, see Chapter 12, “Using the Tools.” Locate information on customizing the Options dialog box.



2. To display the possible duplicate(s), click **Yes**.

If there is more than one set of duplicate references, a Duplicates tab appears from which you can display all the duplicates.

Hint: To view these references later, add a keyword to all references using Copy Field. You can also print the references and then use the printout to verify that the duplicate references are actually duplicates.

Viewing Duplicate References

If any duplicates are found, you are notified with a message. If there is only one duplicate, it will appear in a reference edit window. Multiple duplicates appear in the Duplicates tab. This tab is temporary and contains only those duplicate references found in the current session.

Removing Duplicate References

When a duplicate reference is displayed in the reference edit window, you can remove (delete) it. The Duplicates tab appears when there is more than one duplicate reference. You can remove them, as desired.

To remove duplicate references from the Duplicates tab:

1. Be sure the **Duplicates** tab is the active tab.
2. Select the reference(s) to delete.
3. Right-click the mouse button.
The menu options appear.
4. Click the desired delete option then click **OK**.
The confirm delete dialog appears.
5. Click **Yes** or **Yes to all**.

Working with Keywords

As you build a database, keywords can be automatically added to the list of keywords using the scan for keywords feature.

You can use keywords to group together references by topic. To do so, you assign a keyword to a group of references to identify the topic of the group.

This section includes:

- ◆ Scanning for Keywords
- ◆ Entering Keywords

Scanning for Keywords

Scanning for keywords is a process where Reference Manager scans the title, notes/abstracts, and address of the current reference for any words or phrases contained in your database keyword list.

If Reference Manager finds any keywords, these words are automatically added to the keyword list for that reference.

To scan for keywords:

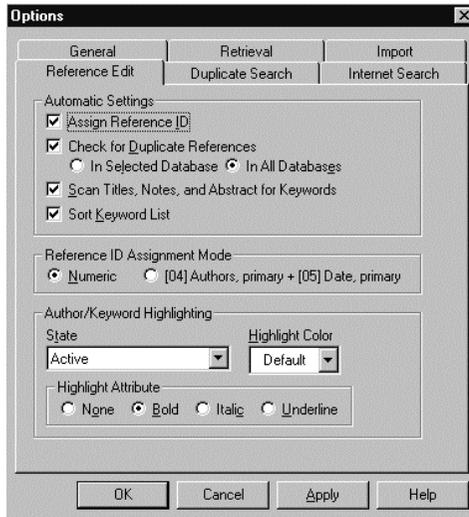
1. Place your cursor in the Reference Edit window.
2. From the **References** menu, select **Scan for Keywords**.
A message tells you the number of keywords located.
A message appears if no new keywords were found for this reference.
3. To save the added keywords, click the **Save** toolbar button.

Automatically Scanning for and Saving Keywords

You can customize Reference Manager to automatically scan titles, notes, abstracts, and addresses for keywords in your database. When a keyword is found, it is automatically added to the keyword list of the reference you are adding or editing. (It is added when you proceed to the next field, or when you save the reference.)

To customize Reference Manager to automatically scan for keywords:

1. On the **Tools** menu, select **Options**.
2. Select the **Reference Edit** tab.



3. Click to select **Scan Titles and Notes for Keywords**.
4. To have the keyword list sorted, select the check box.

5. Click **OK**.

Entering Keywords

Use this procedure to enter new keywords into the keyword list.

To enter keywords:

1. Click in the keyword field.
2. Type the new keyword or choose it from the browser list.

Navigating in Keywords

You can type a semicolon to move to the next keyword location in the keyword field, or use the right arrow key to move to the next keyword field.

Using Keyboard Shortcuts for Keywords

You can use these keywords shortcuts when navigating in the keyword list:

Enter—moves to next keyword location.

Shift Enter—moves to previous keyword location.

Ctrl Enter—inserts a new keyword location.

semicolon—inserts a new keyword location at the end of the current location.

clicking immediately after the semicolon—inserts a keyword between two existing keywords. A second semicolon appears, allowing you to add the keyword.

To add keywords when in a keyword field:

1. Right-click with the mouse where you want to add a keyword.
2. Do one of the following:
 - To insert a keyword in the first keyword location, choose **Insert New First Keyword**.
 - To insert a keyword *after* the current keyword, choose **Insert New Keyword**.
3. From the **File** menu, click **Save**.

Adding References Manually

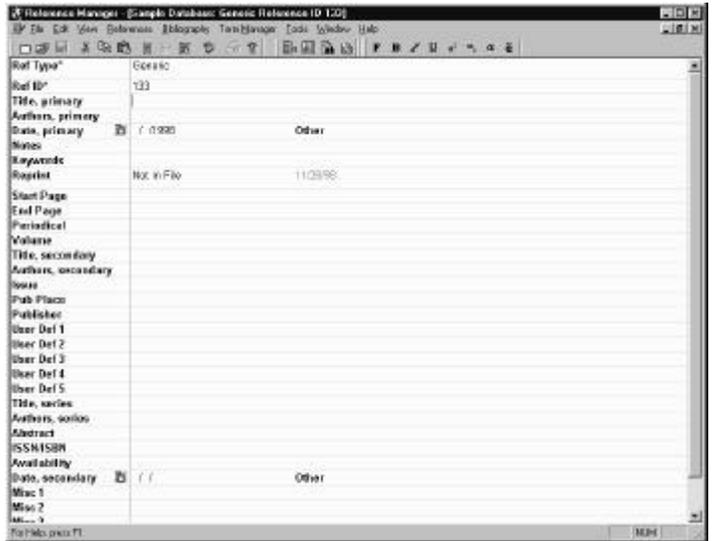
As you work with a database, you can add references to it automatically (importing) or manually. To add references manually, you will be typing information into each field.

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	See Page
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>	147
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>	147
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. To ensure you use the appropriate naming conventions, see page 149.</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>	149
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>	151

Other (part of Date) field	<p>(Optional) Use this field to enter additional date information, such as</p> <ul style="list-style-type: none"> • a season (Summer) • a quarter (First Quarter) • other information regarding the publication date. 	
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. <p><i>The default date is the current date in your computer system (MM/DD/YY).</i></p>	
Start Page/ End Page	<p>Type the start and end pages desired. You can use 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 (see page 152).</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>	152
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.	153

Entering the Reference Type

Different reference types allow you to enter different information in fields in the Reference Edit window. Refer to Appendix E.

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.

Understanding Reference IDs

Reference IDs are unique labels assigned to each reference within a database. They are used for retrieval and inserting a reference into a manuscript. You can choose the type of reference ID to assign, and how it is assigned. You can use IDs based on numbers or authors/date. You can assign IDs automatically, individually, or manually, as described below.

If you delete references, you can reuse the old reference ID number. Automatic reference ID assignment must be turned off to do this.

Assigning Reference IDs

There are three ways to assign a reference ID to a reference:

- ◆ Automatically assign reference IDs.
- ◆ Use the Assign Ref ID function to assign reference IDs Numerically or by Authors/Date.
- ◆ Manually type a reference ID.

Automatically Assigning Reference IDs

Automatic Reference Assignment assigns sequential reference numbers to each new reference you add. This is the system default. You cannot edit an automatically assigned reference ID unless you turn off this function and edit or assign them individually.

For each reference, the ID number is normally incremented by one (unless you assign them manually and use a different numbering system). To automatically assign all reference IDs, make sure this option is selected in the Options dialog box. See Chapter 12 for instructions.

A Note About Using Authors for IDs

You can also assign reference IDs based on the first author and the year. In this case, Reference Manager uses the Author Primary and Date Primary fields to create the ID. This type of reference ID would appear such as “SMITH1987” or “JONES1989.” Reference Manager saves reference ID letters as uppercase letters—whether or not you use uppercase letters.

If the same author publishes more than one paper in a given year, then alphabetic identifiers (letters) are added to the

reference ID (for example, “SMITH1987,” “SMITH1987A,” and “SMITH1987B”).

If you use identifiers based on the first author and year, and no author is available, then “ANON,” is used. (This is the abbreviation for anonymous).

To assign individual reference IDs using Assign Ref ID:

1. You need to turn off automatic reference ID.
See Customizing Options in Chapter 12 to do so.
2. Have a new reference on the screen with a blank ID field.
3. From the **References** menu, select **Assign Ref ID**.
Reference Manager assigns the next available ID (whether it is numeric or in the Author+Date format) for the reference.

Manually Assigning Reference IDs

If you don't use the Automatic Reference ID option or select Assign Reference ID, you can enter your own system of identifiers. When doing so, you can use any combination of letters and numbers, up to a maximum of 20 characters. You can also use uppercase alphabetic characters of the extended character set (such as Á or Ë) as part of the reference ID.

To manually assign reference IDs:

1. From the **Tools** menu, select **Options**.
2. Select the **Reference Edit** tab.

3. In the Automatic Settings box, make sure **Assign Reference ID** is not checked. Deselect and save your change if necessary.
4. In **Ref ID** field, type the ID number.

Each reference IDs you use needs to be unique.

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.

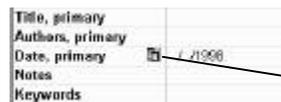
To insert an author between two existing authors, click immediately after the semicolon where you want to add the author. A second semicolon appears, allowing you to add another author.

Understanding Color Settings for Author Names

Author names appear in different colors, depending on certain factors, including how you set up the options in the Author/Keyword Highlighting (Reference Edit tab area). The colors appear when you move the cursor to next author name or field. See the Chapter 12, Using the Tools, for details.

Choosing the Date Format

You can switch between entering the full date or entering only the year. To do so, click the expand button next to the field title. You can have different settings for Date Primary and Date Secondary. (For example, you might want to use the full date for Date Primary and only the year for Date Secondary).



Switch date formats by clicking this button.

The default date format is the Short Format (MM/DD/YYYY). You can specify this in the Regional Settings dialog box, from the Control Panel in Windows 95/98/NT.

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 edit it in the reference edit screen. To edit the periodical name, see Chapter 8, on Term Manager.

Periodical Synonyms

Periodical names are handled in a special way in Reference Manager. Reference Manager allows four synonyms for each periodical. You can create new periodical names by entering the new name when you enter or edit a reference.

You can add new synonyms using the Term Manager.

You can use any of these names when you generate bibliographies for publication. If you copy references from another database, the periodical's synonyms are also copied. When you do a retrieval, you can use any of the four synonyms.

The four synonyms are:

Full Name—This should be the full and complete periodical name. Use this if you plan to generate any bibliographies for periodicals that require the full periodical name.

Standard Abbreviation—This should be the standard abbreviation you want to use in your bibliographies. Biomedical investigators, for example, normally use the *Index Medicus* abbreviation. Enter the name with a period after each abbreviated word, and put spaces only after complete words.

For example, the *Journal of Clinical Investigation* would become “J.Clin.Invest.”, but *Kidney International* would become “Kidney Int.” in the synonym list.

User Abbreviation One—This is any name or acronym used as an abbreviation for entering future references. Or, you can use it when specifying the name in a search strategy. For example, you may want to use “JCI” for the *Journal of Clinical Investigation*.

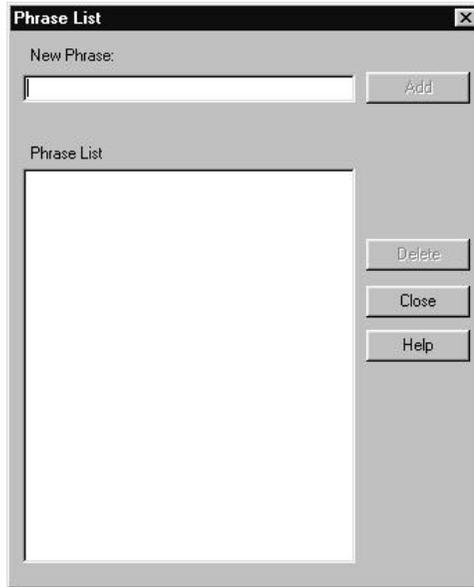
User Abbreviation Two—This enables you to enter a second abbreviation for the same periodical. This may be useful if two or more people are working with the same database and want to use different abbreviations.

Adding Commonly Used Phrases

You can add commonly used phrases to the database in Reference Manager. Once added, you can insert the phrases into fields as you create references. You might want to add phrases that are long or redundant so you don’t need to type them in each time. You can place phrases into any field—except authors, keywords, periodicals or dates. (Authors, keywords, and periodicals have their own browse lists).

To add a commonly used phrases:

1. From the **Tools** menu, select **Phrase List**.



2. In the **New Phrase** field, type the commonly used phrase.
3. Click **Add**.
The phrase appears in the phrase list.
4. Add any other phrases as desired.
5. To delete a phrase, highlight it in the list and click **Delete**.
6. Click **Close**.

To access a phrase:

1. Place your cursor in the field where you want to place the commonly used phrase.

2. Right-click with the mouse.

The menu options appear.

3. Select **Phrase List**.

The Phrase List appears with all the phrases listed that you previously entered.

4. Highlight the phrase to use and click **Select**.

Working with References

Overview

Once you have added references to your database, use this chapter to work with references. It covers how to copy references, group references, and export references.

Sections covered include:

- ◆ Using Find and Replace
- ◆ Copying References
- ◆ Using Reference Index
- ◆ Moving Data between fields within a Reference
- ◆ Moving and Copying References

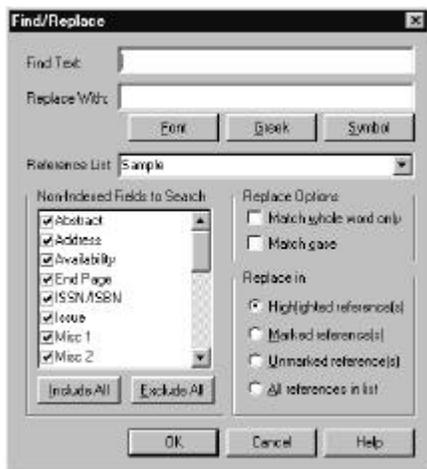
Using Find and Replace

Use find and replace to find particular text and replace it with revised text in one or more locations. You might use find and replace for misspellings or to correct other errors. You can use this function across multiple references.

To find and replace text:

1. From the **Edit** menu, select **Find/Replace**.

The Find/Replace dialog box appears.



2. In the **Find Text** field, type the text you want to find. Or, highlight the text before starting the procedure and it will appear automatically in this field.
3. In the **Replace With** field, type the replacement text.
4. If you are ready to replace the text, click **OK** and then **Replace** at the confirmation screen. Or, to set additional options, continue on.
5. To change the font of any of the text, highlight the text to change and click **Font**. Make the changes and click **OK**.
6. To toggle Greek characters on or off, click **Greek**.
7. To type a symbol (extended character), click **Symbol**.

If you are typing a special character, such as a WingDing character, change the font before you insert the symbol.

8. In the **Reference List** drop-down, select the Reference List tab you want to search and replace text in.

You can replace text in an open database, or the Retrieved, Imported, or Duplicates tabs (if any). Read-only and empty databases do not appear in the selection list.

9. In the **Non-Indexed Fields to Search** checkboxes, check the boxes for fields you want to search in.

You can choose any of the non-indexed fields.

10. To select all of the **Non-Indexed Fields to Search**, click **Include All**.

11. To deselect all of the Non-Indexed Fields to Search, click **Exclude All**.

12. In the **Replace Options** box, check the boxes as appropriate.

To specify to replace a whole word only or to locate text that matches the case entered, check the appropriate box.

13. In the **Replace In** box, click the button to specify the references in which you want to find and replace text.

Reference Manager will do a Find and Replace in just the references you select.

14. Click **OK**

The Confirm Find/Replace dialog box appears.



15. Click **Replace** to begin the search and replace process.

The replace process begins.

Copying References

You can copy references between databases or within a database. Copying references can save you time, as you do not need to recreate them.

There are three ways to copy references. You can:

- ◆ duplicate a reference
- ◆ copy a reference from one database to another
- ◆ copy data from one reference to another

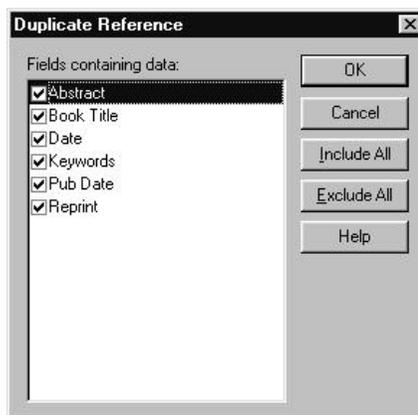
Duplicating References

The Duplicate References function lets you duplicate a selected reference. The duplicate reference is stored in the same database, and must be given a new reference ID. If you have selected *automatic assignment of Reference IDs* in the Reference Edit tab of the Options dialog box. The reference will automatically be assigned the next available ID#. If the automatic option has not been set then you will be prompted to enter an ID# prior to saving the reference.

You might want to use the Duplicate option when you are entering references for several book chapters. This lets you duplicate the specific fields that re consistent from chapter to chapter.

To duplicate references:

1. Highlight a reference in the Reference List.
2. From the **References** menu, select **Duplicate**.



The Duplicate References dialog box appears.

The field list changes with the reference type you select.

3. In the **Fields containing data** box, select the fields to copy into the new reference.

The fields displayed are those in the selected reference that contain data.

4. To copy all fields to the new reference, click **Include All**.
5. To deselect all the fields, click **Exclude All**.

You might find this option useful if you want to copy only a couple of fields. You can Exclude All fields, and then select only those fields you want to copy.

6. Click **OK**.

The reference is duplicated. The Reference Edit window appears with the new reference in it. You can make changes or corrections to it, if necessary.

If auto ID is turned off, the cursor is in the ID field.

7. In the **ID** field, type the ID (unless it is automatically generated).
8. Make any other changes.
9. From the **File** menu, select **Save**.

Copying References From One Database to Another

The Copy Between Databases function lets you copy references from an existing Reference Manager database into another database. You can also copy references from the Retrieved, Imported, or Duplicates tab into another database.

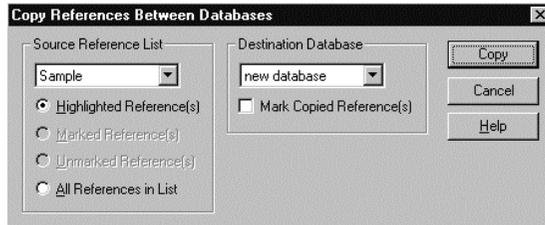
When copying references from one database to another, Reference Manager *does not* check for duplicates. To check for duplicate references, see Working with Duplicate References, in Chapter 6.

Titles and Notes will not be scanned for keywords during this process. To scan for keywords, see Scanning for Keywords in Chapter 6.

To copy references from one database to another, make sure both the source *and* the destination database are open.

To copy references between databases:

1. On the **Reference** menu, select **Copy Between Databases**.



2. In the **Source Reference List** drop-down, select the database *from* which to copy the references.

You can choose to copy references from a database, or the Retrieved, Imported or Duplicates tabs (if any).

3. In the **Destination Database** drop-down, select the database *to* which you are copying references.

You can copy references to any open database.

4. To mark the copied references, check the box to **Mark Copied Reference(s)**.

5. Click **Copy**.



A message appears asking you to confirm that you want to copy the reference.

6. Click **Yes** or **Yes to All**.

Yes to All copies all references without prompting you again.

If the reference ID of the reference being copied already exists in the Destination database, a message appears notifying you that a new reference ID will be assigned to this reference and prompts you to save the original ID in an alternate field.

Copying Data from One Reference to Another

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.

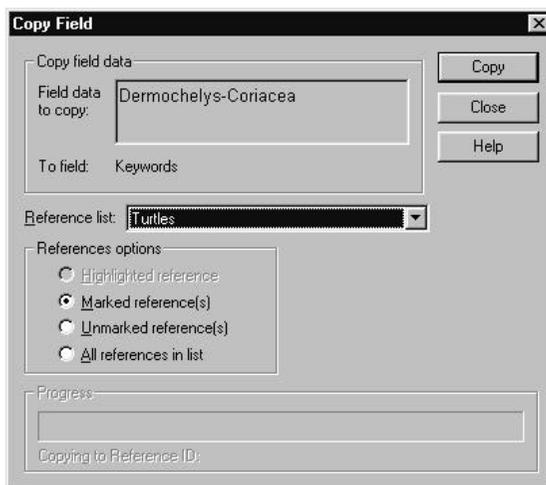
Hint: If you have retrieved or Imported references and want to add a keyword to all references in the tab, add the keyword to one reference. Then, choose Copy Field to add it to all other references.

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 or enter a new keyword.
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.

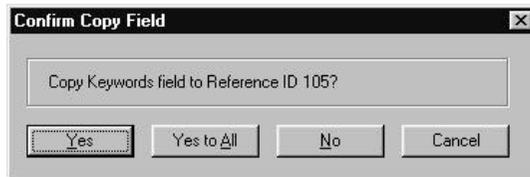
The To field contains field name you are copying data into.

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.

Using Reference Index

You can create a Reference Index from within any database. Reference index allows you to perform a function on all the

references in a group, simultaneously—thereby saving you time. You do so using the Reference Index function.

Once created, you can retrieve references using by selecting the reference index as the retrieval parameter. You can perform functions, such as the copy fields function to all references in the group, creating a new database from the group, or permanently saving the group to use at a later time.

When you delete a Reference Index, the original references in their original databases are *not* deleted. A Reference Index contains “pointers” to references in your databases. It does not contain the actual references—it contains a list of the reference ID#s.

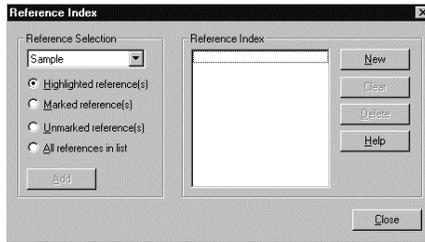
To add references to a reference index:

1. Mark all the references you want contained in the group.

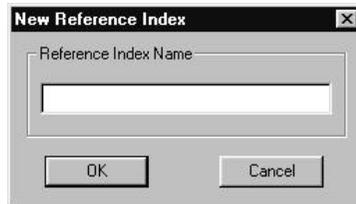
Ref ID	Authors	Title
<input type="checkbox"/>	105	Dolphins2
<input checked="" type="checkbox"/>	72	Sea World
<input checked="" type="checkbox"/>	99	Bottlenose
<input type="checkbox"/>	219	Abi-Hashem,Naji
<input checked="" type="checkbox"/>	77	Anderson,L
<input checked="" type="checkbox"/>	148	Andre,Thomas
<input type="checkbox"/>	86	Angel,H
<input checked="" type="checkbox"/>	54	Au,W.W.L.
<input checked="" type="checkbox"/>	41	Baird,R.W.
<input type="checkbox"/>	223	Ball,Gregory F.
<input type="checkbox"/>	65	Ballance,L.T.
<input type="checkbox"/>	111	Barlow,J.

Marked references are designated by the check mark in the first column of the reference list.

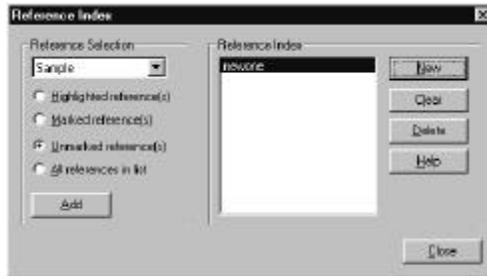
2. On the **References** menu, select **Reference Index**.



3. In the **Reference Selection** drop-down, select the reference list containing the reference(s) to add to the Reference Index.
4. Click the appropriate option button to indicate which references to add to the group.
5. Do one of the following:
 - To add a new reference index (if none are listed or if you want to create a new one), click **New**.



- To use an existing reference index from the list, select it, and go to step 10.
6. In the **Reference Index Name** field, type the name for the reference index you are creating, and click **OK**.



The new reference index is now listed in the Reference Index list.

7. In the **Reference Selection** box, select the references to add to this new reference index.
8. Click **Add**.
9. At the confirmation screens, click **Yes**, then **OK**.
10. In the **Reference Index** box, select the Reference Index to which you want to add the selected references.

You can use a reference index that you just added or an existing one.

11. Do any of the following:
 - To create another new Reference Index, click **New**. Then, enter the name of the reference index to create and click **OK**.
 - To remove all references contained in the selected Reference Index, click **Clear**.
 - To delete the Reference Index, click **Delete**.

The Reference Index is deleted. However, the actual references are not deleted. They still reside in the database in which they are located.

- To add the references you specified in Reference Selection to the highlighted Reference Index, choose the references to add and click **Add**.

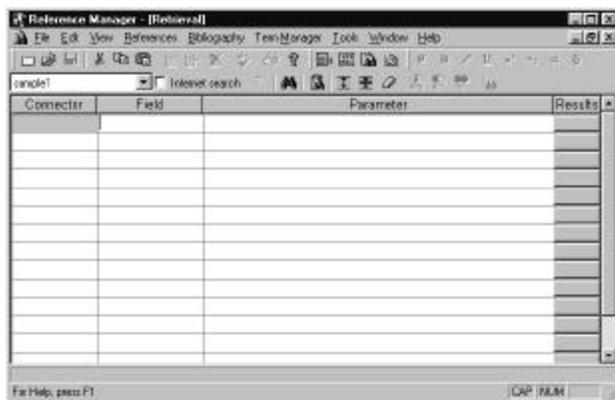
12. When done, click **Close**.

You can add additional references to a reference index at any time using these steps.

To retrieve references using a reference index:

To retrieve references using a reference index, you first need to have created a reference index.

1. On the **References** menu, select **Retrieve**.



2. In the **Field** column, press F3 to access the browse list and select **Reference Index**.

3. In the **Parameter** column, select the desired reference index.

You need to have already created a reference index for them to show here.

4. Click the **Retrieve** toolbar button.

The reference index appears at the bottom of the Retrieved tab.

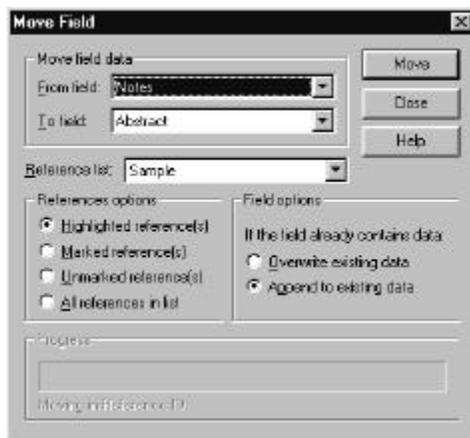
Moving Data between Fields within a Reference

The Move Field function enables you to move data from one field to another for a group of references in a database. This option is useful if, for example, the abstracts of most of the references in your database are in the Notes field, and you want them in the Abstract field. You could then move the text into the abstract field.

You can also move data between fields within a reference or between references using drag and drop. For more information, on drag and drop, see Chapter 3.

To move data between fields:

1. From the **Edit** menu, select **Move Field**.



2. In the **From field** select the field name that contains the data you want to move.

If a field is currently selected or active in the Reference Edit window, then that field name is displayed. The field names in the list are the field labels in the Generic reference type.

If the reference type that you are moving information to does not include the field you are moving, the information will *not* be moved.

3. In the **To Field**, select the field name into which you want to move the data.

The fields listed depend on the field you select in the From field; you must move data from one field into a similar type of field (for example, from Notes to Abstracts).

4. In the **Reference list** drop-down, select the Reference List tab containing the references you want moved.

You can choose to move data from one field to another in a database, or the Retrieved, Imported or Duplicates tabs (if any). Read-only and empty databases do not appear in the selection list.

5. In the **References options**, click the button to indicate if you want data in the field moved in the highlighted reference, any marked or unmarked references, or all references in the Reference List tab.

6. To overwrite existing information (if any) in the field you are moving data into, click in the **Field options**. Also click here to append the data to the existing information in the field.

This option is available if you are moving 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.

7. Click **Move**.

The Confirm Move Field dialog box appears asking you to confirm this move.

8. Click **Yes** or **Yes to All**, to move the data in the field.

The data moves from the one field to the other in the references you specified.

Yes to All is available if you are moving data within more than one reference

A message appears when the Move Field process is complete.

9. Click **OK** to exit the message box.

Moving and Copying References

This section includes these topics:

- ◆ Moving or Copying a Reference from One Database to Another
- ◆ Copying a Reference to a Document

Moving or Copying a Reference from One Database to Another

To move a reference from one database to another, you need to have both databases open. You can move multiple references at

once by selecting them in the Reference List before you drag them.

To move or copy a reference:

1. Do one of the following:
 - To move a reference, select it. Click and hold the mouse until there is a small square to the bottom and hold down the mouse.
The cursor will now move the selected item.
 - To copy a reference, select the reference to copy while holding down the **Ctrl** key.
2. Drag the item, with mouse still down, over the database tab into which you want to move the reference.
If you hold the cursor there, the tab will become active.
3. Move the cursor and dragged item over the field in the Reference List into which you are moving the reference.
4. Release the mouse button.
A confirmation message appears asking if you want to move the reference.
5. Click **Yes** to move the reference.

Copying a Reference to a Document

You can copy a reference into files, such as word processor documents, that accept information in Rich Text Format (RTF) or ASCII text format.

To copy a reference to another application, you must have the database open in Reference Manager *and* the application open.

The application can be minimized, but it must appear in the Windows task bar.

To copy a reference to another application,

1. Select the reference to copy and hold down the mouse.
2. Move your cursor to the Windows task bar and activate your application.
3. Move your cursor into your document and release the mouse button.

The reference is pasted into your document

Using the Term Manager

Overview

The Term Manager is used to edit, add, or delete terms (authors, keywords, and periodical names) in your database. You can also perform global editing functions, such as replacing one term with another. Other functions that you can perform include a quick retrieval based on terms highlighted in the Term Manager window. You can also print an alphabetical listing of terms in your database.

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

This chapter includes these sections:

- ◆ Getting Familiar with Term Manager
- ◆ Working with Synonyms
- ◆ Working with Periodical Synonyms
- ◆ Using Quick Retrieval
- ◆ Global Editing
- ◆ Purging Terms

◆ Copying Terms

Network Users: You must open the database as READ/WRITE EXCLUSIVE to access the Term Manager global editing functions. See the Network User's Notes for instructions

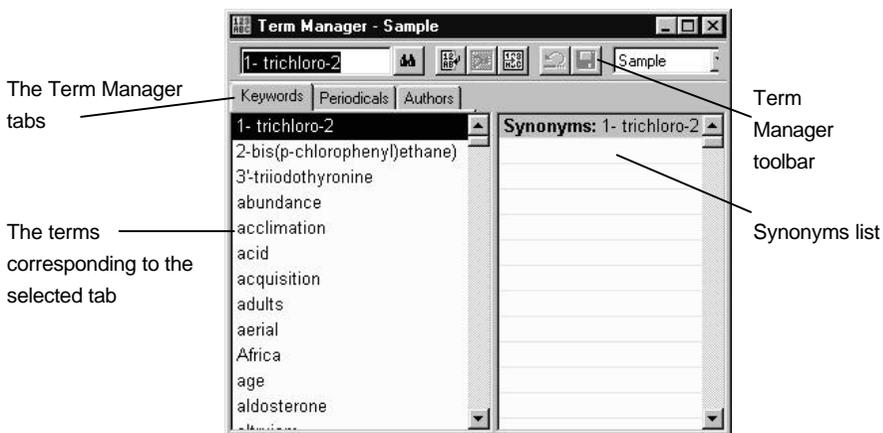
Getting Familiar with Term Manager

Term Manager allows you to easily work with terms in your database. You can edit authors, keywords, and periodical names. This section introduces you to the Term Manager window and toolbar.

Using the Term Manager Window

All the functions you perform in Term Manager will be with the Term Manager window open. To open the Term Manager, from the Term Manager menu, select Activate (or press F5).

The Term Manager window contains the following components:

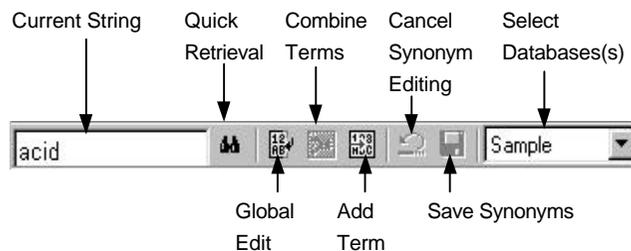


The left side of the Term Manager window contains tabs and the list of terms under each tab. The right side of the window displays the synonyms, if any, for the highlighted term.

You can have up to 255 synonyms for each author's name or keyword, and three synonyms for each periodical name.

Using the Term Manager Toolbar

The Term Manager toolbar is only available after you activate the Term Manager. The toolbar includes several functions.



Current String—displays the currently highlighted term in the window. It can also be used to locate the term you type in this field.

Quick Retrieval—retrieves the highlighted term. If you highlight multiple terms, you can use the Connector dialog box to specify the AND or OR connector.

Global Edit—enables you to replace or delete a term.

Combine Terms—combines multiple selected author or keyword (only) terms as synonyms.

Add Term—adds a new author, keyword, or periodical.

Cancel Synonym Editing—cancels the edits you made and reverts to the last saved list.

Save Synonyms—saves the changes made after editing Synonyms.

Select Database—A drop-down list containing the names of all open databases, and an option for “All Databases” allowing you to select the database you want to view with 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. To do so, see Working with Periodical Synonyms later in this chapter.

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

In working with synonyms, you can:

- ◆ Save synonyms
- ◆ Cancel synonym editing
- ◆ Add synonyms
- ◆ Combine two or more terms
- ◆ Extract synonyms (delete)

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.

Adding Synonyms

There are several ways to add synonyms to Author, Keyword, or Periodical terms. These include adding:

- ◆ A synonym to an existing term
- ◆ A new synonym to a new term

These methods are described in the following sections.

Adding a synonym to an existing term

A *new* synonym is a term that *does not yet exist* in your database. An *existing* synonym is a term that *already exists* in your database.

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. Then add a synonym.

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. See, *Working with Periodical Synonyms* on page 184.

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.

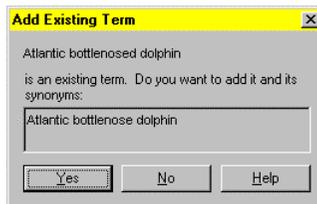
The synonyms for the term, if any, appear in the Synonyms list.

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.

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 altogether:

- 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 from the term list and the references it was associated with.

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	

When working with Periodical Synonyms, you can:

- ◆ Copy a Periodical Synonym
- ◆ Move a Periodical Synonym
- ◆ Combine Periodical Synonyms

Each section is covered below.

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.

You can choose the periodical synonyms from an existing database (Database), or the periodical synonyms from the Humanity, Chemical, or Medical lists included with the program.

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.

Reference Manager handles periodical synonyms differently than Author and Keyword Synonyms. You cannot use the Combine Terms tool to combine periodical terms.

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 to that term.

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.

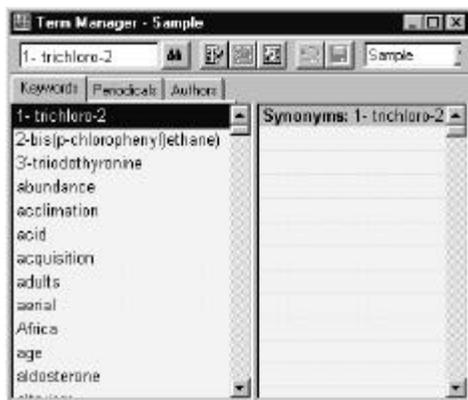
Printing from the Term Manager

You can print an alphabetical list of terms. This prints terms for the selected tab showing one term on each line. You might want to print the term list to check for misspellings, to find similar terms in a list to combine, or terms to purge.

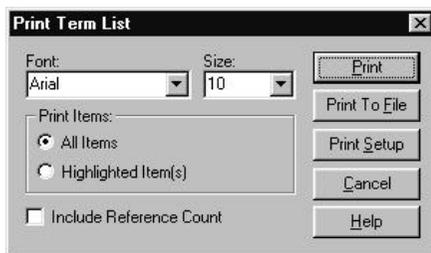
You can use the list in other applications if you save it.

To print an alphabetical list:

1. From the **Term Manager** menu, select **Activate**.



2. From the **File** menu, select **Print**. Or, click the **Print** toolbar button.



3. In the **Font** drop-down box, select the font for the printout.
4. In the **Size** drop-down box, select the font size for the printout.
5. In the **Print Items** area, select which items to print: All or Highlighted items.

6. Check the **Include Reference Count** check box if you want the number of references that contain the term included in the printout.

This shows the number of references that use each term.

7. Do one of the following:
 - To print, click **Print**.
 - To print to a file:
Click **Print To File**.
In the Save As screen, fill in the **File name**.
Choose a save location.
Click **Save**.
 - To change printer settings, click **Print Setup**. You can change any settings, then click **OK** to print.
 - To cancel out of this screen, click **Cancel**.
 - To launch online help, click **Help**.

Global Editing

Global editing allows you to make global, or universal, changes to the selected term within a database.

It is strongly recommend you back up your database before making global edits. Global edits change references in your database. Therefore, having a backup copy of your database will protect you in case of error.

This section contains information on the global edits you can perform. It includes:

- ◆ Using the Wild Card Character

- ◆ Editing Terms in the List
- ◆ Replacing terms
- ◆ Deleting Terms

Using the Wild Card Character

When you do a Global Edit, you can make the process easier by using the asterisk (*) as a wild card character. Type it as the last character in the Source name. When the search is done, the asterisk stands in for other letters. Otherwise, the search bears only results that match exactly what you typed.

You can use the asterisk wild card for a global *replace* on periodicals. To do so, enter the asterisk as the last character in the Source name *when the destination name already exists*. You cannot use the asterisk wild card when performing a global *delete* on periodical names.

Editing Terms in a List

You can replace or edit terms with a new or existing term. When you replace a term, the term is also replaced in any references in which it appears. You can replace a term with a new term or an existing term.

Replacing a Term with a New or Existing Term

To edit or replace terms:

1. Select the term you want to edit or replace.

2. Click **Global Edit**.



The Global Edit dialog box appears.

3. In the **Source** field, the term you selected appears. Or, type the term here.
4. In the **Destination** field, type the new spelling or text for the term.
5. Click **Symbol** to insert a symbol (extended character).
6. Click **Greek** to toggle Greek characters on or off.
7. Click **Replace** to replace the term in the Source field with the term in the Destination field.

The Destination term replaces the Source term in all references in which it appears.

8. At the confirmation dialog, click **OK**.
9. Click **Close**.

Deleting Terms

When you delete a term, you are deleting that term *and all its synonyms* from your database (and from any references in which it resides). For example, if you delete Term1 (which has synonyms SYN1 and SYN2), then the keywords Term1, SYN1,

and SYN2 are deleted from any references in the selected database.

You cannot delete a periodical if any of its synonyms are used in a reference.

When you delete a periodical synonym, the periodical is placed in its own separate synonym list. To delete the periodical name from your database, choose Purge from the Term Manager menu.

To delete a term:

1. From the **Term Manager** menu, select **Activate**.

The Term Manager dialog box appears.

2. Highlight the term to delete.

3. Click the **Global Edit** toolbar button.

The Global Edit dialog box appears.

4. In the **Source**, verify that the term displayed is the term you want to delete.

5. Click **Delete**.



If the term you are deleting has any synonyms, they are listed in the dialog box.

6. Click **OK**.

The term you deleted, and all of its synonyms, are removed from your database and any associated references.

Purging Terms

You can purge, or remove, terms that no longer exist in your references.

To Purge a term:

1. From the **Term Manager** menu, select **Activate**.

The Term Manager dialog box appears.

2. From the **Term Manager** menu, select **Purge**.

Reference Manager searches the Terms list for the active tab in the Term Manager window.



If a term is located that does not appear in any references and none of its synonyms appear in any references, the Confirm Purge Term dialog box appears.

3. Do one of the following:
 - To remove the term and its synonyms from your Terms list, click **Yes**.
 - To remove all other terms that Reference Manager finds, click **Yes to All**.
 - To retain this term in your Terms list, click **No**.

- To stop the purge process, click **Cancel**.

Copying Terms

This section covers copying a term from Term Manager to various locations.

Copying Terms from Term Manager

From Term Manager, you can copy terms to:

- ◆ A Reference
- ◆ The Reference List
- ◆ A Word Processor Document
- ◆ The Retrieval Window

Each of these is described below.

Copying to References

You can easily add terms to references from Term Manager. You do this by dragging them from the Term Manager and dropping them in the desired location. You can copy multiple terms by selecting them in the Term Manager before you drag them.

Usually, you will want to copy an author into the author field, a keyword into the keyword field, and a periodical into the periodical field, but you can also copy these terms into any text field such as the Notes or Title fields.

Term Manager cannot be in full screen mode for you to complete this procedure.

To copy a term to a reference using drag and drop:

1. Select the term(s) to copy.
2. Release the mouse and re-click on the term.
3. Drag the cursor to the desired location in the reference to copy the term.
4. Release the cursor.

Copying to the Reference List

You can add terms to references by dragging them from the Term Manager to the Reference List. You can copy multiple terms by selecting them in the Term Manager before you drag them. When you copy a term to the Reference List, you can only copy it into the same type of field it came from.

For example, you can copy authors to the Authors field, keywords to the Keywords field, and a periodical to the Periodical field.

To copy a term to the Reference List:

Term Manager must not be in full screen mode, or you can not complete this procedure.

1. Select the term to copy.

2. Move the cursor to the reference in the Reference List and release the mouse button.

The Copy Field dialog box appears.

3. Confirm the reference list and references options then click **Copy**.

Copying to a Word Processor or Other Document

You can copy a term into any application that accepts information in Rich Text Format (RTF) or ASCII text format. To copy a term to another application, make sure the database is open in Reference Manager *and* the application is open.

You can copy multiple terms by selecting them in the Term Manager before you drag them. You can minimize the application, but it must appear in the Windows task bar.

To copy a term to another application:

1. Select the term in the Term Manager.
2. Move your cursor to the Windows task bar and activate your application.
3. Move your cursor into your document and release the mouse button.

Copying to the Retrieval Window

You can add terms to your retrieval strategy by dragging them from Term Manager. You can copy multiple terms by selecting them in the Term Manager before you drag them.

To copy a term to the Retrieval window:

Term Manager must not be in full screen mode, or you can not complete this procedure.

1. Select the term to copy.
2. Move your cursor to the Parameter field in the Retrieval window and release the mouse button.

You need to select the corresponding field before dropping the term in the Parameter field.

Retrieving References and Saving Retrieval Strategies

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.

This chapter includes these sections:

- ◆ Understanding Reference Retrieval
- ◆ Creating an Effective Retrieval Strategy
- ◆ Searching the Internet to Retrieve Reference
- ◆ Searching Databases to Retrieve References
- ◆ After the References are Retrieved
- ◆ Saving and Loading a Search Strategy
- ◆ Editing a Search Strategy

Understanding Reference Retrieval

The Reference Retrieval function can be used in two ways; you can locate references in existing databases or search and retrieve references from Internet databases. Once you have retrieved references from an Internet database, you can add them to existing databases or save them as a new database. You can retrieve references from any field containing data.

As you retrieve references, you set up a retrieval strategy that helps identify the types of reference you want to retrieve. You can create, save, and load (and therefore reuse) any retrieval strategy you develop. Saving a retrieval strategy lets you reuse it without having to recreate it again in Reference manager.

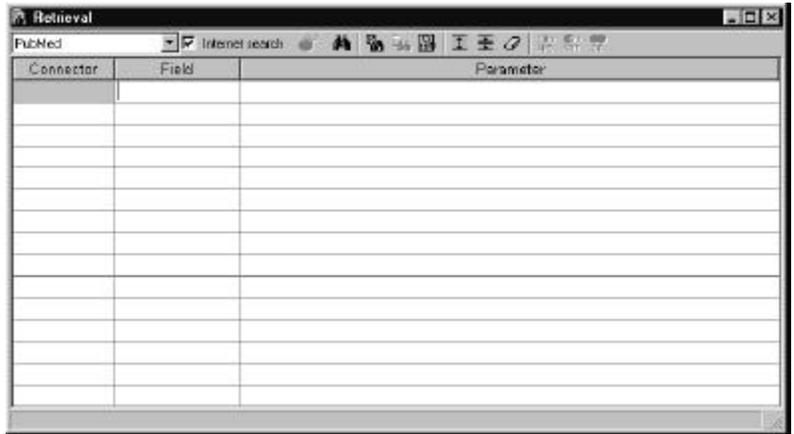
There are two ways to retrieve references in Reference Manager. You can use:

- ◆ Retrieve References
- ◆ Quick Retrieval

If you are retrieving authors, keywords, or periodical names only, use Quick Retrieval. See Chapter 8 for more information on Quick Retrieval. To retrieve references from data in any field, you'll use the Retrieve Reference function, detailed in this chapter.

The Retrieval Window

When using the Retrieving References function, you will be working in the Retrieval window. A sample is displayed below:



The Retrieval window contains its own toolbar, described and displayed below.

Using the Retrieval Toolbar

The Retrieval Toolbar allows you to access various functions as you enter your search parameters.



The Retrieval toolbar contains:

Select Databases— Select the database on which to perform the retrieval. Or, choose All Databases.

Internet Search—Check here if you are doing a retrieval on the Internet. The search settings toggle between the Internet and local database searches.

Select Z39.50 Hosts and Databases—Used to select the hosts and databases to search on when using Z39.50 for an Internet search.

Start Retrieval—Starts the retrieval.

Strategy Files—Save or restores a retrieval strategy.

Insert Parameter—Inserts space for a new parameter above the current parameter line.

Delete Parameter—Deletes the current parameter.

Clear All Entries—Clears all retrieval parameters currently displayed.

Browse Terms—Displays the browser list from which you can select terms.

AND Subparameters—Inserts the AND logical connector to connect two search lines, or to connect parameters inside a search line.

NOT Subparameters—Inserts the NOT logical connector to connect two search lines, or to connect parameters inside a search line.

OR Subparameters—Inserts the OR logical connector to connect two search lines, or to connect parameters inside a search line.

Last Retrievals—Displays a list of the last ten (10) retrievals you performed.

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 line with information in one field, or it can consist of several lines, or even pages of information.

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

You can save a Retrieval Strategy and use it again. In some cases, for example, the strategy is very detailed, it is far easier to save the strategy and use it again than try to recreate it. For information on saving strategies, go to page 228.

This section contains:

- ◆ Using Logical Connectors
- ◆ Searching for Non-English Characters
- ◆ Using the Wild Card in Searches
- ◆ Searching for Whole Words
- ◆ Searching for Titles Versus Keywords
- ◆ Searching for a Group or Range of Items
- ◆ Using the Browse List
- ◆ Sort Orders and Different Languages

Using Logical Connectors

Logical connectors are used to help you specify the search criteria as you create a search strategy. Logical connectors are the words, AND, OR, and NOT. As you specify the first line of criteria on which to perform the search, you can add additional lines of criteria. They are tied together via the logical connector. For example, you could have Reference Manager search for both criteria in line one and line two—using the AND connector. Or, you could search for either criteria using the OR connector.

If you want to search for all references that contain the word *Dolphin* and contain the word *Water*, you would set up the first search criteria as *Dolphin*. For example, then you would use the AND connector to identify the second criteria—of *Water*. Reference Manager would look for all references containing

both Dolphin and Water. The OR and NOT connectors are used similarly.

Understanding the AND Logical Connector

This connector finds references in which both *A and B* are true, both criteria need to be met. It will not find references containing only *A* or only *B*.

Understanding the OR Logical Connector

This connector finds references in which either *A or B* are true or met. OR is useful for finding references pertaining to several topics of interest.

For example, you could use OR to find all references that are either about dolphins or porpoises. Reference Manager examines all references about dolphins or all references about porpoises, and identifies any of these references in the retrieved list.

Understanding the NOT Logical Connector

The NOT connector eliminates specific references from your retrieval. It finds references containing *A* but *not B*.

Use NOT, for example, if you know that the author J. E. Smith has worked mainly on dolphins, but you are looking for a particular reference that is not about dolphins. Reference Manager examines all references by J. E. Smith, and all references about dolphins, and identifies those references by J. E. Smith that do not contain the term “dolphins.”

Combining Logical Connectors

You can use the Logical Connectors (AND, OR, or NOT) to include/exclude specific parameters on the same search line. Click one of the logical connector buttons on the toolbar and the connector is inserted in your parameter, along with curly braces to separate and identify your parameters.

If you are using the Popup Browser, you can select multiple parameters to be combined using a particular Logical Connector on one line.

You can use this procedure for Internet or other database retrievals.

To combine connectors:

1. Have the Retrieval dialog displaying.
2. Press **F3** to activate the browsers, and select the first parameter to search on.
3. In the browser list, select additional parameters (using the **Ctrl** and **Shift** keys to select multiple items).
4. When you have selected all parameters, press **Enter**.



The Connection dialog box appears.

5. Select the logical connector (AND, OR, or NOT).

Searching for Non-English Characters

You can include Non-English Characters (such as ä or ß) in your searches. Use Non-English Characters in the authors, keywords, titles, and notes fields.

To retrieve characters, such as an asterisk or curly bracket in an indexed field, precede the character with a backslash (for example, to search with an asterisk, you would type: *).

Using the Wild Card in Searches

When you do a search, the asterisk (*) acts as a *wild card*. A wild card represents any character or characters at the end of a term.

You type the asterisk after one or more letters on a parameter line to substitute for any letter(s) following the “*.” When the search is run, the results will include all words (or names) in the database that begin with the letters you entered, regardless of what comes after. In other words, the “*” symbol will display any characters after its use.

For example, if you search for the keyword “LEU*” the references found could include “leukemia,” “leukopenia,” “leukocyte,” and “leukotriene.”

Searching for Whole Words

You can search the title, notes, abstract, or address fields for a whole word, part of a word, or a phrase. For example, if you want to retrieve references that contain the complete word "local," enter the search parameter as "local" followed by a space.

If you search for a whole word followed by a space, any instances of "local" followed by a punctuation mark such as a period or comma will not be included in the search results, such as "localization."

Searching for Titles Versus Keywords

In addition to Reference Manager searching titles directly, you can also use keywords for searching. Keyword searching offers an advantage in that it is faster than retrieving reference by a word in the title. This becomes more apparent as your database grows larger.

Reference Manager lets you scan titles and notes for Keywords. The Keywords are inserted automatically while importing—if you have this option enabled. As you import references, the Keyword list is checked and any words in the reference (in the Title, Notes, and Abstract fields) that match, are placed in the Keyword field in the reference. The result is that your references will have more Keywords added, without your having to type them in.

Searching for a Group or Range of Items

In the dates, publication years, and reference IDs fields, you can search for a Group or Range of items, rather than just one item.

To search for a Range of items, enter the lower numbered item first, followed by a hyphen, and then the second numbered item in the range. For example 1990-1993 searches for all items between those years.

To search for several items, use commas in-between the items. For example, you could search for the years 1990,1993,1998. Do not include a space after the commas in the list.

Using the Browse List

As you create a strategy and enter information into the search fields, you can type the information, or you can select it from the Browse List. At any time, to activate the Browse List, press F3.

Sort Orders and Different Languages

If you have databases with different character Sort Orders, you will not be able to retrieve references using All Databases. Different languages sort differently, and you can not search across different language—as they are not indexed in the same way. To retrieve across multiple databases, all databases must have the same character sorting.

You can specify primary, secondary, and tertiary sort orders in the Retrieval tab of the Options dialog box.

To customize the sort field's appearance, see Chapter 12.

Searching the Internet to Retrieve References

Using the Z39.50 (powered by BookWhere?) and PubMed options, you can directly Retrieve References from the Internet. This feature works similarly to Retrieving References from Reference Manager databases. When you indicate on the toolbar that you are retrieving using Z39.50 or PubMed, the items in the keyword list change accordingly.

Introduction to Z39.50

The Z39.50 Internet Search option allows you to search library collections online in a fast and efficient manner. This option searches the databases you select simultaneously, and provides fast results.

Introduction to PubMed

The PubMed option provides access to the PubMed database of bibliographic information. It includes all articles from the MEDLINE and PREMEDLINE databases. It also provides access to the molecular biology databases included in the NCBI's Entrez retrieval system. There are approximately 9 million records dating back to 1966.

Using Z39.50

When retrieving references using Z39.50 you do not have the option of not showing results, or of limiting the number of results that appear.

When you search to the Z39.50 site, you can search up to 255 sites simultaneously. You can select the sites to search from a comprehensive list.

To configure the Z39.50 search, see *Configuring the Z39.50 Search*, on page 211.

A Note on Saving Search Results

After you retrieve reference from the Internet, you might want to save the results you receive. If you don't save them, they will

be lost when you exit the database. You can save the results in one of three ways:

- Drag and drop them into another database
- Copy them into another databases
- Save them in a new database

Configuring the Z39.50 Search Sites

When you run a retrieval using Z39.50, you have the option of selecting which Internet sites are searched.

For each site listed, the service name is shown, followed by the database. For services with more than one database, the service is listed once for each database. You can select from the list provided. You can also configure the settings and add additional sites and databases to the list. These functions are described in the following procedures.

To select the Z39.50 search sites:

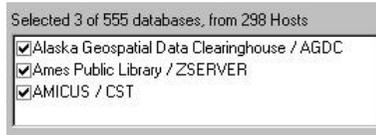
1. Start with the retrieval screen showing, and **Z39.50 sites** selected in the Select Database(s) drop-down.
2. Click the **Select Z39.50 Hosts and Databases** toolbar button.



The Z39.50 Hosts and Databases screen appears.

The databases searched during a retrieval are listed in the top box. All the databases you can choose from are listed in the bottom.

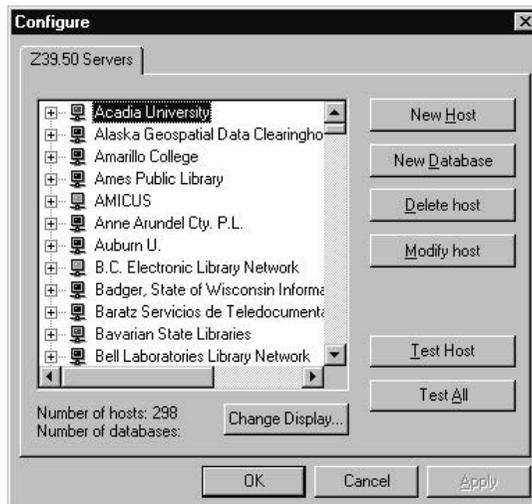
3. In the bottom list, click to select the databases you want searched during a retrieval.



As you check each one, they also appears listed in the top box.

4. To deselect any selected option, uncheck it and it will be removed from the list.
5. To see this selection list each time you run a retrieval, click the **Show this dialog for every search** checkbox.
6. Do one of the following:

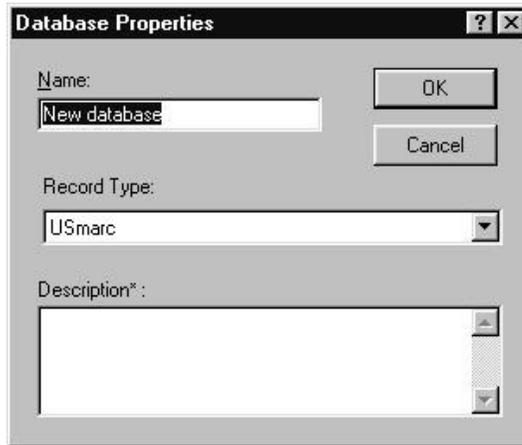
- If you are finished, click **OK** to exit the screen.
- If you want to add, delete, or modify a site or database listed, click **Configure**, and go to the following procedure, Configuring the Z39.50 Search Sites.



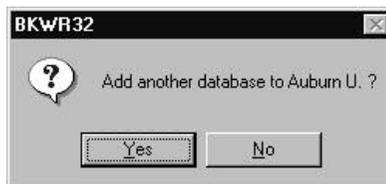
Configuring the Z39.50 search sites:

This procedure assumes you just completed the previous procedure and the Configure screen appears.

1. (Optional) To delete an item (the service and the database), select it and click **Delete Host**. At the confirmation screen, click **Yes**.
2. (Optional) To add a new database to an already listed host, select the host and click **New Database**. Otherwise, go to step 7.



3. In the **Name** field, type the name of the new database.
4. In the **Record Type** field, from the drop-down select a record type.
5. In the **Description** field, type a description of the database, if desired.
6. When done, click **OK**.



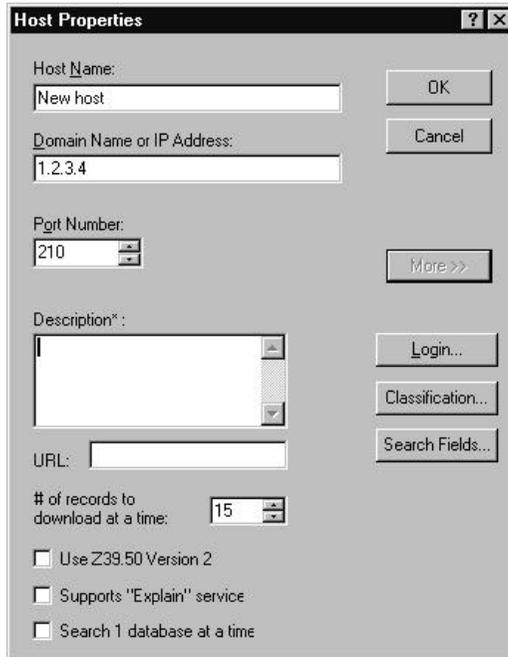
*The confirmation screen asks if you want to add **another** database to the service you initially selected.*

7. To add another database to this service, click **Yes**. Otherwise, if you are finished adding databases to this service, click **No**.

- (Optional) To create a new host, click **New Host**. Otherwise, go to step 19.



- In the **Host Name** field, type the name for the host.
- In the **Domain Name or IP Address** field, type the Domain Name or IP Address.
- In the **Port Number** field, enter the correct number.
- Click **More**.



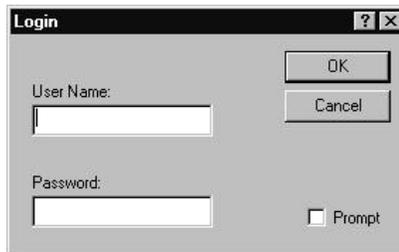
The **Host Properties** dialog box contains the following fields and controls:

- Host Name:** Text input field containing "New host".
- Domain Name or IP Address:** Text input field containing "1.2.3.4".
- Port Number:** Spin box set to "210".
- Description*:** Text area.
- URL:** Text input field.
- # of records to download at a time:** Spin box set to "15".
- Use Z39.50 Version 2
- Supports "Explain" service
- Search 1 database at a time

Buttons on the right side include: **OK**, **Cancel**, **More >>**, **Login...**, **Classification...**, and **Search Fields...**

The screen extends.

13. If the host is password protected, click **Login**.



The **Login** dialog box contains the following fields and controls:

- User Name:** Text input field.
- Password:** Text input field.
- Prompt

Buttons on the right side include: **OK** and **Cancel**.

14. In the **User Name** field, type the name.
15. In the **Password** field, type the password.

16. If you want to be prompted for the password each time you perform a retrieval, click the **Prompt** checkbox.
17. Click **OK**.
18. When done adding the host, click **OK**. Click **OK** again to exit the Host Properties dialog box. Click **OK** again to exit the Database properties dialog box. At the “Add another Database” dialog, choose **No**, unless you want to add a database.
19. Click **OK** to exit the dialog, and again to exit the final dialog.

After you’ve created a new host, you’re prompted to create a database. Each host requires at least one database entry.
20. In the Database Properties dialog, choose the record format (or select “not specified”).

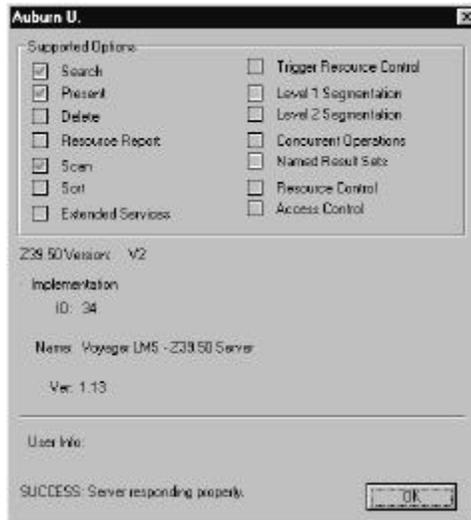
Most databases support the MARC record format.
21. (Optional) In the Description field, type a description.

Testing the Server

You can test the “responsiveness” of any server.

To test the server:

1. With the Z39.50 Servers screen open, select the server you want to test.
2. Click **Test Host**.



You should see a similar screen, indicating the test was successful.

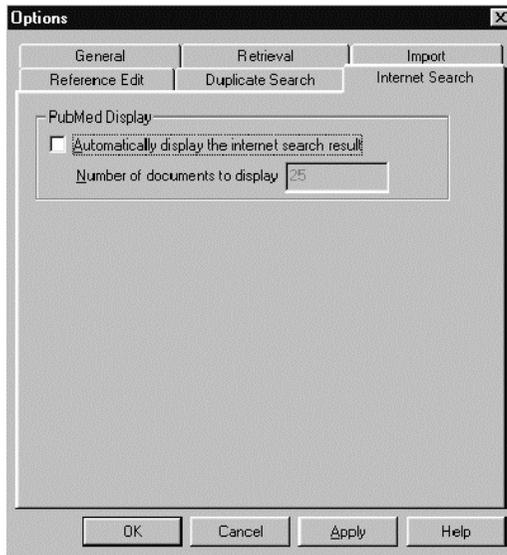
Use Test All to test the responsiveness of all servers in the list. The server list is large, so this may take several minutes.

Using PubMed

When retrieving references using PubMed, you have the option to have all results automatically downloaded to your system to appear in the Retrieval screen. Or, you can choose the number of references you want to appear.

To change the PubMed settings:

1. From the **Tools** menu, select **Options**.
2. Select the **Internet Search** tab.



3. To display search results upon retrieval, click the **Automatically display the Internet search results** checkbox.

If you do not select this, you will be given a choice after retrieval if you want to see the results or not.

4. If selected as displayed in the checkbox above, in the **Number of documents to display** box, type in the number of references you want to see displayed from the retrieval.

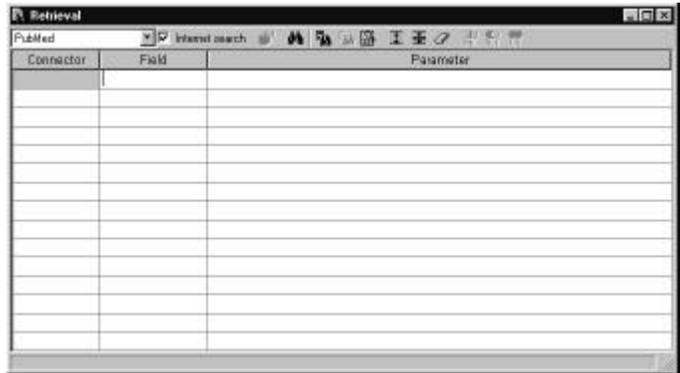
Reference Manager will then display the first references in the series of results, limiting the display to the number you select.

5. Click **OK**.

Retrieving References from the Internet

To retrieve references from the Internet:

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



2. In the toolbar, click the **Internet Search** box.



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

3. In the **Select Database(s)** drop-down, select **Z39.50** or **PubMed**.
4. In the **Field** column, type or select the field to search in. Press F3 to activate the Browse list, if desired.
5. In the **Parameter** column, type or select the content for the field you are searching for.

6. 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.
7. To access an existing retrieval strategy, click the **Strategy Files** toolbar button. At the Retrieval Strategy dialog, select the strategy and click **Load**.
8. 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.
9. If the results screen appears, select a range for 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 Search. Another retrieval displays a tab names Search2 (then 3, 4, etc.).
10. Do one of the following:
 - To not save the results, close the results screen.
 - 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.)

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.
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.
You can change text to Greek (or back to Roman).
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.

For information on searching in different fields, see the table at the end of this procedure.

7. 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.
8. 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.

Information on Fields in a Retrieval

Use this table for additional information on how to use each field when creating a search strategy.

Field	Information
Authors	All author fields are searched (Primary, Secondary, etc.) To search only one author field, select that author type for the field. Enter the last name only; case does not matter. You can use a wildcard in the search. You can retrieve the author name or a synonym.
Keywords	Case does not matter. You can retrieve the keywords using a synonym. This lets you retrieve all references that contain all synonyms for the keyword. <i>For example, suppose you have some references with the keyword Atlantic Bottlenose Dolphin and some references with the keyword Atlantic Dolphin. When you create a synonym list containing these two keywords, you need only retrieve on one of the keywords to obtain all references that contain either keyword.</i>
Periodicals	Use the full name, standard abbreviation, or a user' defined synonym. Case does not matter. You can use the wild card. See page 225.
Publication Year	Use the year (such as 1980) or a range of years (such as 1990-1998). Reference Manager searches the Date Primary field for this information.
Titles, Notes, Abstracts, and Address	Use any combination of letters, number, and symbols. Case does not matter, but spaces and spelling do. The wild card search is implied—don't search for the asterisk (*) unless you are actually searching for an asterisk symbol. See page 207.
Reference Type	You can retrieve references based on the type of reference, such as journal, chapter, thesis, etc.
Pending Reprints	You can retrieve references for which you are awaiting receipt of reprints. by entering the date you requested the reprint. References on request and for which the request date is earlier or the same as the entered date will be retrieved. Use the same date format you specified in the Windows Control Panel—in the Regional Settings dialog.
Reprint Status	You can retrieve reference for which you have reprints in file, that are on request, or that are not in file.
Reference Indexes	You can retrieve any reference in a reference index you created. To retrieve references in a reference index, be sure the database is open.

Reference ID	You may want to retrieve references by their ID. Enter the IDs as single parameters (such as 110) or as a range separated by a hyphen or comma (such as 110, 45, 120-125, 134)
Non-Indexed Fields	Searches all non-indexed fields at once. Use any combination of letters, number, and symbols. Case does not matter, but spaces and spelling do. See the section on searching for whole words, on page 207.
Indexed Fields	Searches all indexed fields at once. Case does not matter, but spaces and spelling do.
Page Numbers, Volume, Issue, Publication Place, Publisher, ISSN/ISBN, Availability, User Defined, Misc., Web/URL	Use any combination of letters, number, and symbols. Case does not matter, but spaces and spelling do. The wild card search is implied—don't search for the asterisk (*) unless you are actually searching for an asterisk symbol. See the section on searching for whole words, on page 207.

Searching for Periodicals

In whole book and book chapter references, names of books are not stored as periodical names. Therefore, you cannot retrieve them as such. You can retrieve whole book and book references by titles and/or any of the other parameters—such as authors, keywords, reference type, year of publication, and so on.

Retrieving using Periodical synonyms

The advantage of creating synonyms for periodical names is that it allows you to retrieve *all* references that contain *all* synonyms for that periodical.

For example, suppose some references in your database contain the full periodical name (*Zoological Society of San Diego*) and some contain the Standard Abbreviation (Zoo.Soc.San Diego). When you create a synonym list containing these two names, you need only retrieve on one of the periodical names to obtain *all* references published in that journal.

After the References Are Retrieved

This section covers some functions you may want to do after retrieving references. It covers information on:

- ◆ Removing the Retrieved Tab
- ◆ Defining the Style of the Display

Removing the Retrieved Tab

Once you are finished using the Retrieval tab, you can remove the tab from the screen using the following procedure. Or, you can leave the tab visible and it will be removed automatically when you exit Reference Manager and reenter the program later.

To remove the Retrieved Reference List tab:

1. Make the **Retrieved** tab active.
The active tab is bold.
2. Right-click with the mouse button.

C <u>l</u> ose Retrieved reference list	
P <u>r</u> int Abbreviated Reference List...	
P <u>r</u> op <u>e</u> r <u>t</u> i <u>e</u> s	
M <u>a</u> r <u>k</u> A <u>l</u> l	
C <u>l</u> ear A <u>l</u> l M <u>a</u> r <u>k</u> s	
N <u>e</u> w...	Ins
E <u>d</u> it...	Enter
D <u>e</u> lete...	Del
D <u>y</u> plicate...	Ctrl+D
C <u>o</u> py B <u>e</u> tween D <u>a</u> t <u>a</u> b <u>a</u> s <u>e</u> s...	
R <u>e</u> ference I <u>n</u> d <u>e</u> x...	
R <u>e</u> trieve...	F4
G <u>e</u> nerate B <u>i</u> bliography...	Ctrl+L
R <u>e</u> ference L <u>i</u> st D <u>i</u> splay...	
O <u>p</u> tions...	F11

3. Select **Close Retrieved reference list**.

The Retrieved Reference List is closed.

Defining the Style of the Display

Sometimes when you retrieve references and receive the retrieval results, the screen is such that you cannot see the word that was searched for. You can set it up so that the word retrieved is highlighted. Then, you know what the match was that Reference Manager found.

To highlight the retrieved word(s):

1. From the **View** menu, select **Output Style Display**.
2. In the **Reference Display** section, of the **General** tab, of the **Options** dialog box, available from the Tools menu, specify the output style you want to use.

You see the retrieved word(s) highlighted in the displayed reference

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.

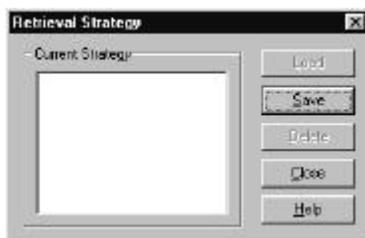
- ◆ Saving a Retrieval Strategy
- ◆ Loading a Retrieval Strategy

Saving a Search Strategy

You can use this procedure with Internet and other database search strategies.

To save a retrieval strategy:

1. Make sure the strategy is up on the screen.
2. Click the **Strategy Files** toolbar button.



3. Click **Save**.



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

You can use this procedure with Internet and other database search strategies.

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**.

Editing a Search Strategy

If you do not obtain the desired results from your retrieval strategy, it is easy to edit your strategy to change the search results.

You can access previously created retrievals. You can view them in the Last Retrievals list box. This dialog box shows you the last ten retrieval strategies performed, in this session using Reference Manager. If there are more than six listed, you will need to scroll down to see the bottom of the list.

To edit the retrieval strategy:

1. On the **Reference** menu, select **Retrieve**.
The retrieval strategy reappears.
2. Highlight the strategy to edit and click **Load**.
The strategy now appears on the screen.
3. Make any of these changes as desired:
 - To change a line, choose the line and type or select the new information.
 - To insert a new line, place your cursor where you want a new line inserted *above* and click the **Insert Parameter** toolbar button. Then enter the new information.

- To delete a line, insert the cursor in the line and click the **Delete Parameter** toolbar button.
 - Clear the strategy and enter another one, click the **Clear All Entries** toolbar button.
3. Click the **Strategy Files** toolbar button.
The Retrieval Strategy box appears.
 4. Click **Save**.
The Save dialog box appears.
 5. In the **Retrieval Strategy name** field, type the name of the strategy.

It will have just been highlighted in the list, but you need to type it here also.

6. At the message to “overwrite existing?” click **OK**.

Creating and Maintaining 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.

This chapter includes these sections:

- ◆ Opening an Output Style
- ◆ The Styles Window
- ◆ Understanding Output Styles

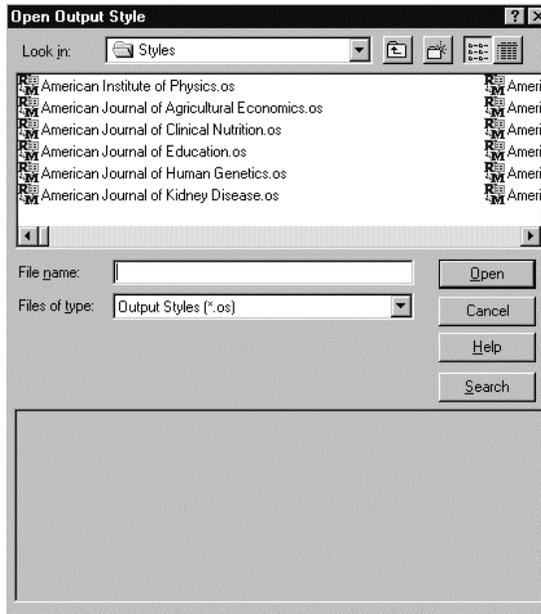
- ◆ Creating an Output Style
- ◆ Working with Fields
- ◆ Inserting Punctuation in Output Styles
- ◆ Copying Reference Type Definitions
- ◆ Moving a Field within an Output Style

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.

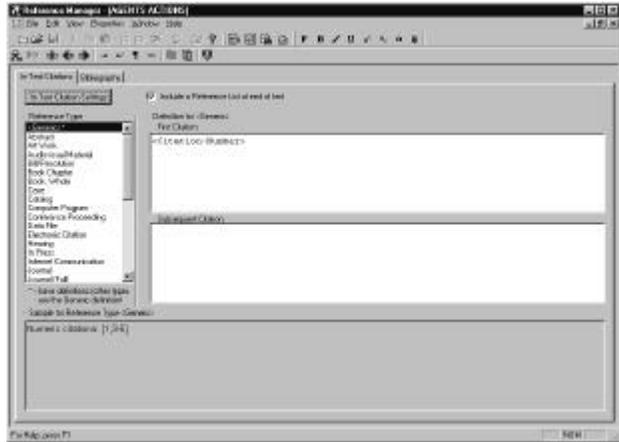
To open an output style:

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.

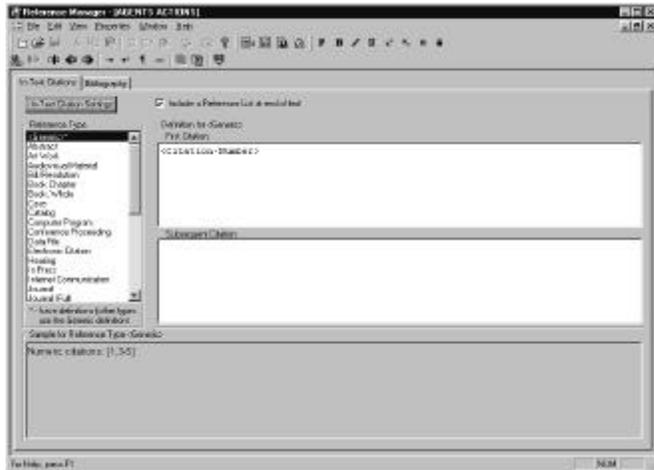
2. Scroll to find the desired style and highlight it.
The style appears in the File name field.
3. In the **Files of Type** field select **Output Styles (*.os)**.
This ensures that the files listed are output styles.
An example of the currently selected output style appears at the screen bottom.
4. Click **Open**.
The Styles window appears.



The Styles Window

When an Output Styles window is active, a new menu appears in the menu bar (the Properties menu) and many of the File menu options change.

The Properties menu displays a list of fields that have special formatting properties. The File menu options become specific for output styles. For example, New Database becomes New Output Style.



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. Text before the vertical bar and after a field name is “following punctuation.” Text after the vertical bar and before a field name is “preceding punctuation.”

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.

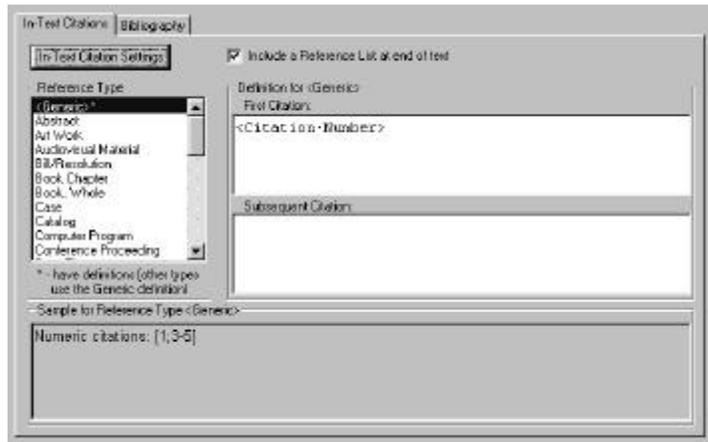
Understanding the Output Style Tabs

There are two tabs that appear in the Output Styles dialog. These tabs are:

- ◆ In-Text Citations
- ◆ Bibliography

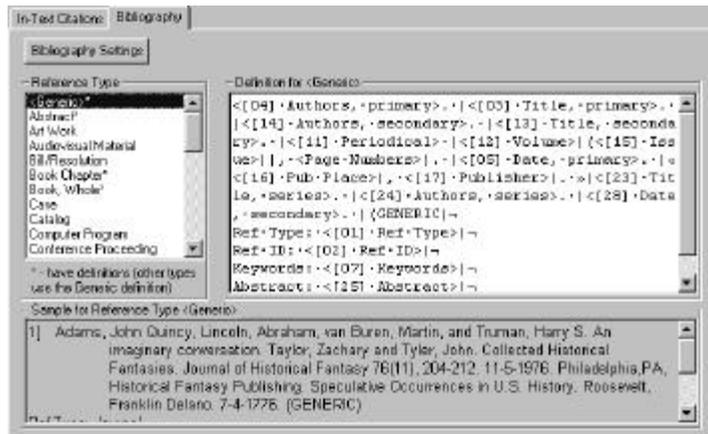
The In-Text Citations Tab

This tab is used to define how the in-text citations will appear in your document. In-text citations are the numbers or text in the body of the document that cite a reference in the bibliography. Or, for Humanities output styles, in-text citations consist of the full bibliographic information for a reference. You can define multiple in-text citation style for each output style. Whether you will need to do this or not depends on the type of output style you are creating.



The Bibliography Tab

This tab is used to define how the bibliography will be formatted. It contains options for sorting, page numbering, indentations, and spacing.



Understanding Output Styles

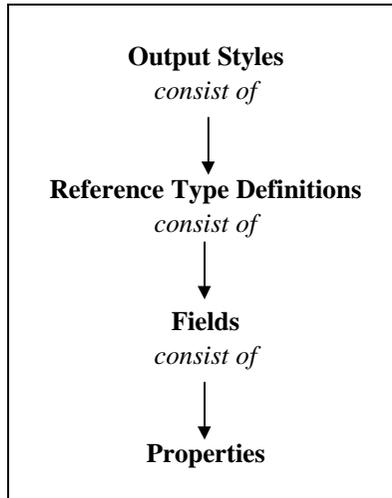
The output styles determine what the references look like on the screen and in printed final manuscripts and bibliographies. You can choose to use any output style for your manuscript. Reference Manager comes with over 300 output styles. Or, you can create your own output styles or edit existing ones.

Each output style defines in-text citation formats or bibliography entry formats or both for one or more Reference Types. For example, an output style might include in-text or bibliography definitions for Generic, Art Work, Case, and Journal reference types.

You do not need to define a format for each reference type. The Generic reference type format is used for any reference that doesn't have a format definition specific to its reference type. Each output style that comes with Reference Manager, contains instructions for the reference types defined by the publication for which the style is intended.

How Output Styles are Built

Reference type definitions consist of fields and text. Examples of fields might include author, title, and date. The fields for each reference type vary.



Some fields contain properties. Again, the fields need to be defined. Reference types that come with Reference Manager are predefined as are their fields and properties.

A lot of work is involved in defining properties for fields, in defining fields and text for reference types, and in defining reference types for output styles. You can copy predefined fields and reference types into an output style so you do not need to recreate them. Then, you can alter them as desired.

Types of Citations Used in Output Styles

As you create, edit, or use output styles you will be aware of the type of citations they use. The citation style determines what type of information is included in the references (citations) within a manuscript and in the bibliography.

There are three general citation types you can use with Reference Manager. These are:

- ◆ Numeric
- ◆ Author/Date
- ◆ Humanities

Using Numeric Citations

Numeric in-text citations are generally parenthesized or superscript numbers that appears in the text, such as this (2) or ¹, or this^{2,3}. They are referenced in a numbered bibliography at the end of the manuscript. Only a single Generic in-text citation definition is used, and this consists solely of the "Citation Number" field.

The bulk of the work in creating this type of output style takes place in the Bibliography tab. This is where you tell Reference Manager exactly what information you want to appear for each reference in the bibliography.

Using Author/Date Citations

Author/Date citations work similarly to numeric in-text citations, but the text that appears directly in the manuscript consists of the author's name and the date of the publication, such as (Jones, 1992) or (Jones, S., 1992). You determine the format of the citation as well as the format of the references as they appear in the bibliography, which is normally sorted alphabetically by author.

Using Humanities Citations

The Humanities style citations work a bit differently. The citation generally contains more information directly in the manuscript than with the Numeric or Author/Date citations. Usually you will indicate a footnote in the text, and include the whole citation in the footnote. An Humanities citation might be included in a footnote and look like this:

John Lovell, "Appreciating Whitman: 'Passage to India,'" *Modern Language Quarterly* 21 (June 1960): 131-41

Again, as you create the output style, you define the format for the Humanities citations within it and for the bibliography listings. When using Humanities citations, the bibliography is optional. Since all the references are complete on the page in which they appear, the bibliography is not necessary.

Formatting Reference Types within an Output Style

As you create output styles, you can define a different format for each reference type within an output style. This means that you can use more than one format for in-text citations or bibliography entries within an output style. So, the format for the Journal reference type can be different from that of the Book. The Generic reference type format is used whenever a format for a specific reference type is not defined.

Humanities output styles usually have different *in-text citation* definitions for a number of reference types. They only need bibliography definitions if a bibliography is required for the style. Numeric and Author/Date citation styles almost always have different *bibliography* definitions for different reference types.

On both the In-Text Citation and Bibliography tabs, an asterisk is placed next to the reference types that have been defined. Any reference types without an asterisk have a blank definition. In this case, the Generic definition is used.

Some Author/Date styles require different in-text citation definitions for different reference types. Numeric in-text styles never have different in-text citation definitions. Only the Generic in-text citation definition is required. That consists solely of the single field "Citation Number."

Inserting Formatting Characters

When you create output styles, you use formatting characters to help create the styles. You can include formatting characters just as you include other punctuation. Formatting characters include:

- ◆ **Line break**—moves the cursor to the indent (or outdent) on the next line.
- ◆ **New paragraphs**—moves the cursor to the left margin on the next line.
- ◆ **Page breaks**—moves the cursor to the top of the next page.
- ◆ **Tabs**—moves the cursor to the next tab stop.

First and Subsequent Citations

The output style enables you to define the *first* citation and any *subsequent* citations. The first citation is the first instance of a reference to a particular work in the manuscript. For Humanities output styles in particular, and also for some Author/Date styles, this is generally a more full, complete citation without abbreviations.

The subsequent citations are all other instances of references to the same work previously cited. This information is usually in an abbreviated format.

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. To do so, you can use the wizard, or you can create one without the wizard.

Three procedures follow—use the one most appropriate for you. They are:

- ◆ Creating a new output style using the wizard
- ◆ Creating a new output style from scratch
- ◆ Creating a new output style from an existing style

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 either 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:

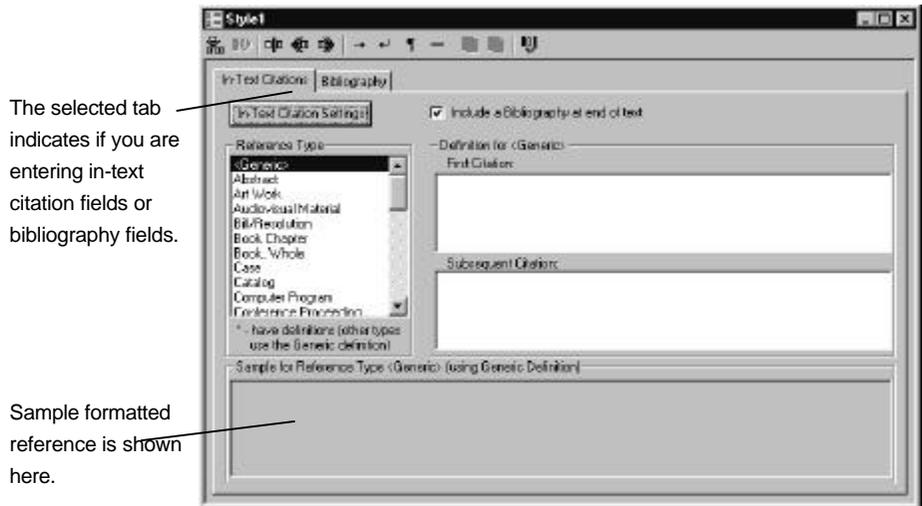
- ◆ Numeric citation
- ◆ Author-Date citation
- ◆ Documentary-note or humanities

Overview of the Output Style Creation Process

As you create output styles, it is a three-step process. First, the Wizard guides you through defining the In-text citation information. Then, you add fields for the subsequent citation. Finally, you are taken through steps to define the Bibliography information. (If you were to do this process manually, you would be filling in the same information in the In-text Citation and Bibliography tabs in the Styles window.)

The procedure to create these three different types of output styles using the Wizard is slightly different for each output style type. For each output style you create, first you determine the settings (for the in-text citations and later for the bibliography) and then you add the fields. The variations for creating each style type are explained as you move through the steps in the procedure.

As you create the output style using the Wizard, the Style window (shown below) appears in the background. Notice that as you insert fields into the in-text citations and bibliography, the fields and sample of how they appear show in the Style window.



Determining which Fields to Include

As you create the output styles, you will be adding the fields that you want showing as the in-text citations and the fields in the bibliography. Before starting, you might want an idea of what you want both the citations and the bibliography to look like. The following guidelines may assist you.

Determining Fields for a Numeric Citation

When 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. After defining the citation delimiter information, the Wizard takes you directly to the Bibliography Settings screen.

When adding fields for the bibliography, you will likely include the author, title, date, and periodical fields, in addition to any others you want included.

Determining Fields for an Author/Date Citation

When creating an author/date type citation, the likely fields you will add to the citation are the Author and Date.

When adding fields for the bibliography, you may want to include the author, title, date, and periodical fields, in addition to any other desired fields.

Determining Fields for a Documentation-note or Humanities Output Style

When creating a documentary-note or humanities output style, the first in-text citation will contain most of the fields. Then, when you create the subsequent citation style, you will likely use less fields and use abbreviated fields.

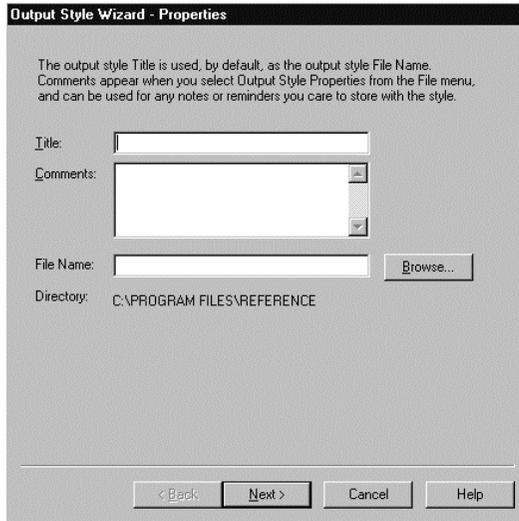
You have the choice whether or not to include a bibliography. As the in-text citation information is complete, the bibliography is not necessary.

To create an output style using the wizard:

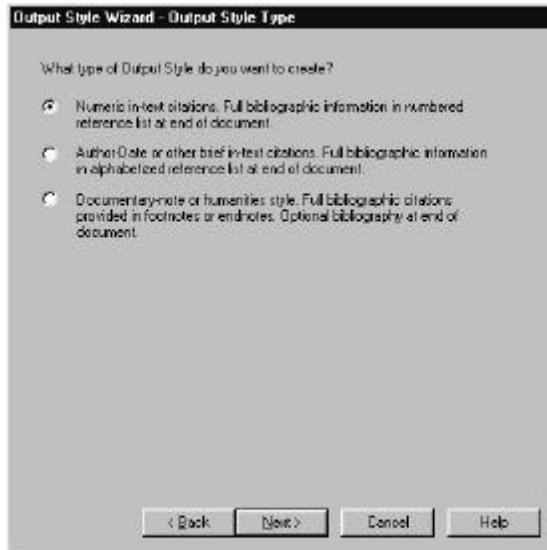
1. From the **Bibliography** menu, select **New Output Style**.



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) or browse to a new name.
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:

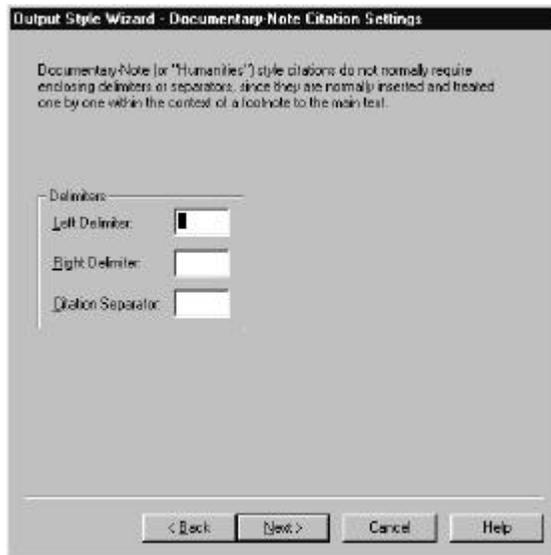
Right Delimiter:

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.

Superscript raises the citation text slightly above the other text.

11. (Numeric citation only) In the **Number Ranges** box, select the **Use Number Ranges** box if desired.

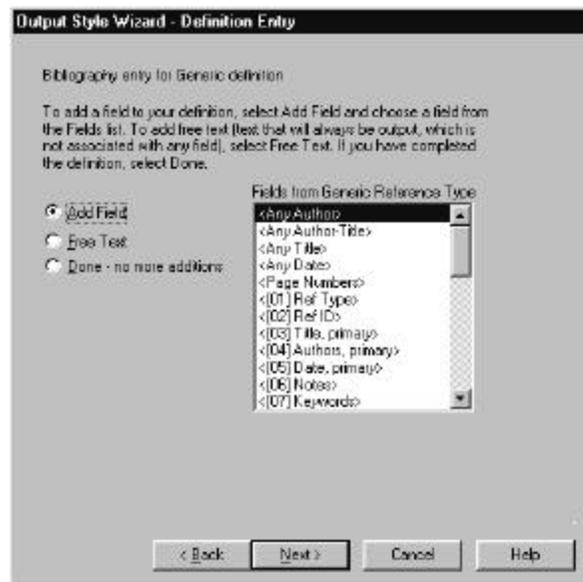
This lets you use number ranges as part of the citation.

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, Title, and so forth.

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 applicable) 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 create 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 ID number is located in the left margin to the left of the reference; either left, center, or right within the margin.

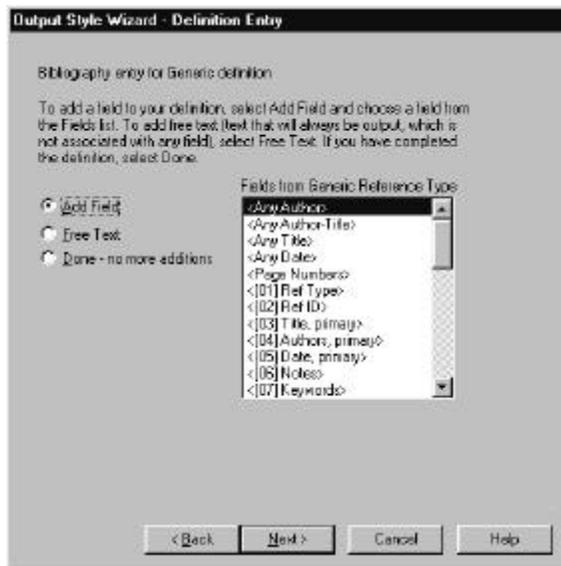
30. In the **Indentation** box, if you want references in the bibliography to be indented, use the default. To change the settings in the **First Line** field, type the value for the first line's indentation.

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 applicable) 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:

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.

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

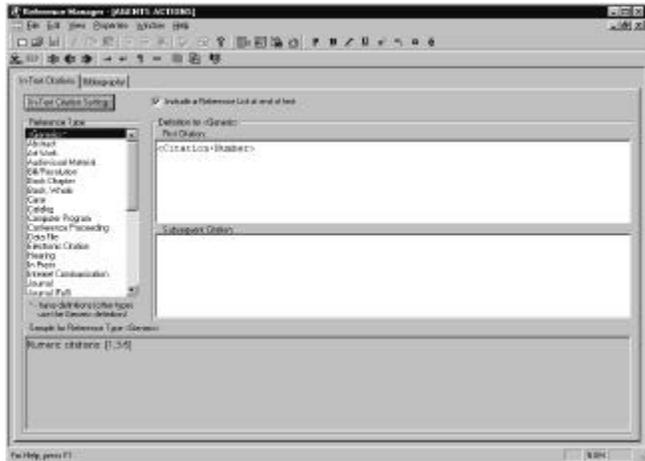
Creating an Output Style from Scratch

To create a new output style from scratch:

This procedure includes three sub-procedures—one for each of the two tabs you will be working in and one to save the output style.

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.

1. Do one of the following:
 - If the Styles window is active, from the **File** menu, select **New Output Style**.
 - If the Reference List, Term Manager, or Retrieval window is active, from the **Bibliography** menu, select **New Output Styles**.



A new Styles window appears. There are two tabs in the Styles window. You will be entering data into each to define your output style.

Completing the In-Text Citations Tab

2. Select the **In-Text Citations** tab.
3. In the **Reference Type** box, select the reference type you want to define a style for.

Define a style for the Generic reference type, since this will be the style used by default if there is no definition for a specific reference type. Many output styles will only require Generic in-text citation definitions. In particular, output styles that call for numeric or simple author/date in-text citations will not usually require different definitions for each reference type.

4. To include a bibliography, click to select **Include Bibliography at end of text**.

If you are using Humanities style citations, only check this if you want a bibliography.

If using Numeric in-text citations or Author/Date citations, be sure this button is checked.

5. In the **First Citation** box, enter the fields that will compose the first occurrence of a citation in a work.

To access fields to enter, click the Insert Field toolbar button or select Insert Field from the Edit menu.

For instructions on how to fill text into this box, see Working with Fields on page 268.

6. For each field you enter, define the properties for the field.

Some fields have properties that can be defined. Others do not. To define properties, either click the Define Properties toolbar button, double-click on the field you entered, or choose the appropriate choice from the Properties menu.

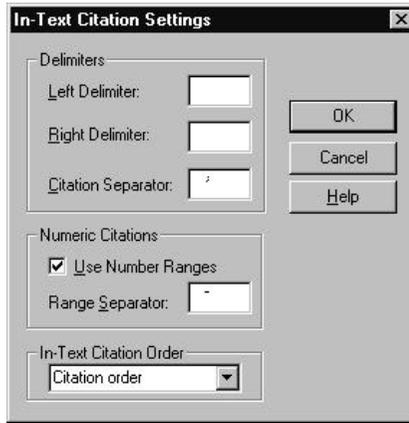
For instructions on how to define properties for each field, see page 271.

7. In the **Subsequent Citation** box, enter the fields that will compose second and subsequent citations of a work.

Use this if this definition differs from the First Citation definition.

For instructions on how to fill text into this box, see Working with Fields on page 268.

8. Click the **In-Text Citation Settings** button.



The In-Text Citation Settings dialog appears.

9. In the **Delimiters** box, type the text you want used to surround your in-text citations for the Left Delimiter and Right Delimiter.
The default is the left and right parenthesis “(” and “).”
10. In the **Citation Separator** field, type the text you want used to separate multiple, non-sequential citations in one location.
11. In the **Numeric Citations** box, check the **Use Number Ranges** checkbox if you want to use Number Ranges in numeric citations.
12. In the **Range Separator** field, type the text to use as the range separator when multiple, sequential citations are used in numeric citations.
13. In the **In-Text Citation Order** drop-down, choose the order in which you want in-text citations sorted.
14. Click **OK**.

Completing the Bibliography Tab

15. Click on the **Bibliography** tab.
16. In the **Reference Type** box, select the reference type you want to define a style for.

Define a style for the Generic reference type, since this is the format used by default when there is no definition for a specific reference type.

17. In the **Definition for** box, enter the fields that will compose the citation.

For instructions on how to fill text into this box, see Working with Fields on page 268.

18. Click the **Bibliography Settings** button.



19. In the **Bibliography Title** field, type the title of the generated bibliography, if any.
20. In the **Bibliography Sort** drop-down, select the order in which references are to be sorted.

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

If you did not check this, go to step 26.

22. In the blank field to the right, type the starting number for the references.

23. In the **Prefix** box, type the text to use as the prefix (if any) to appear before the reference number.

24. In the **Suffix** box, type the text to use as the suffix (if any) to appear after the reference number.

25. In the **Alignment** drop-down, select the alignment for references.

The alignment you select affects the printout and the screen layout.

26. In the **Indentation** box, if you want references in the bibliography to be indented, use the default. Or, to change it in the **First Line** field, type the value.

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

28. In the **Spacing** box, select the space to appear between lines in each reference.

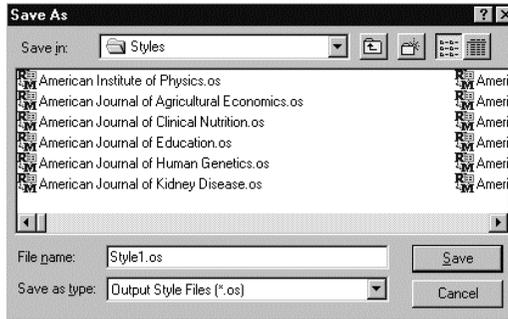
29. In the **Space After** drop-down, select the spacing to appear after each reference.

The Page Break option indicates you want each reference to appear on a separate page.

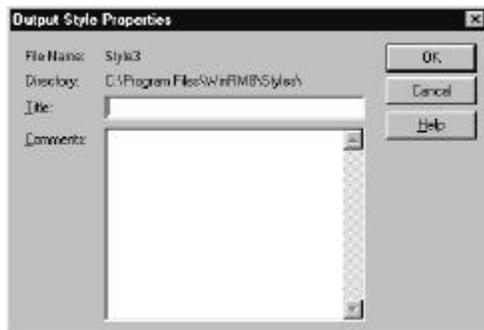
30. Click **OK**.

Saving the Output Style

31. On the **File** menu, select **Save**.



32. In the **File name** field, type the name for the new style.
33. Click **Save**.



If you created a new style, you see this Output Style properties box now. Otherwise, if you modified an existing style, from the **File** menu, select **Output Style Properties**. Then this dialog appears, with the fields filled in.

34. In the **Title** field, give the style a new name.

This name appears in the title bar on the screen only. The File Name is the one used in drop-down menus and in Windows Explorer.

35. In the **Comments** field, type any comments about this style.

These comments will appear in the Properties dialog. They are simply for your use.

You can enter a maximum of 255 characters in this field.

For example, you could enter a note that this output style is Note-Bibliography format.

36. Click **Save**.

Creating an Output Style from an Existing One

To create a new output style from an existing one:

1. On the **Bibliography** menu, select **Open Output Style**.
2. Highlight the style you will be creating a new one from.
3. Click **Open**.
The style appears in the dialog.
4. From the **File** menu select **Save As**.
5. In the **File name** field, type the name for the new style.
6. Click **Save**.
7. Make the necessary changes to the style.

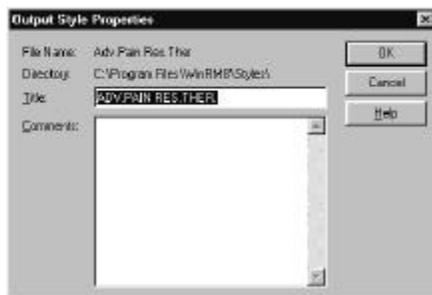
See the previous procedure on steps to create an output style for guidance.

8. When done, from the **File** menu select **Save**.

Viewing and Changing Output Style Properties

To save the output style name associated with the file name:

1. Activate the Output Style window.
2. On the **File** menu, select **Output Style Properties**.



3. Make changes and view the information as needed.
You can change the descriptive name of the output style and any additional comments or notes pertaining to the style.
4. Click **OK**.
5. The information is saved and you returned to the Styles window.

Working with Fields

As you insert fields and specify field properties, you are specifying the formatting for the in-text citations and the bibliography. The formatting includes how text appears on the screen and in print.

This section describes how to enter and change information in fields, and includes these topics:

- ◆ Inserting a Field
- ◆ Specifying the Field Properties
- ◆ Copying Field Properties

Inserting a Field

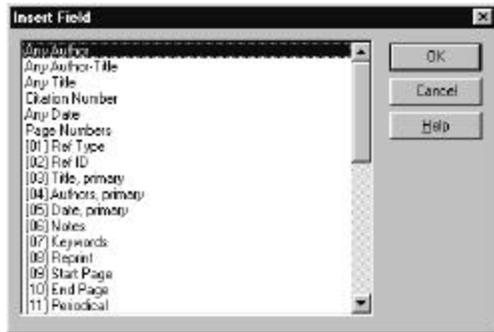
As you create or edit output styles, you use fields to create the format for the in-text citation and bibliography. Fields are the text that creates what the citations look like. You can type field names in by hand, but usually you insert fields from a list of fields provided by Reference Manager. Fields include Title, Author, Date, and so forth. Each field you insert appears in the reference.

So, for example, if you wanted your references to appear with author names, you would insert an Author field. As you insert fields, the fields available from the list to choose from are specific to the reference type you are defining.

To insert a field when creating or editing an output style:

1. Start from First Citation, Subsequent Citation, or Definition for field—depending on where you are in the editing or creation of the output style.

- From an output style window, click the **Insert Field** toolbar button. Or, from the **Edit** menu, select **Insert Field** (if an output style is the active window).



The default field names listed are specific to the Generic reference type.

The Generic field names are shown because the output styles are used with all databases.

- Highlight the field to insert and click **OK**.
- The inserted field name appears in the Definition for box.*
- Continue to insert fields until you have added all fields you want to the selected reference type.

Once you have inserted the fields, you can define the field properties. To do so, see page 271.

Understanding and Using the “Any” Fields

The first five or six fields (for Bibliography and In-text Citation definitions, respectively) in the list of available fields do not contain ID numbers. These fields do not correspond to single, specific fields in the database records. (Each of the other fields

in the list corresponds to a single, specific data field in the database records.)

Of these six initial fields, four are called *Any* fields, one is a citation number field, (available only for In-text Citation definitions) and one is a page number field.

The Citation Number field is the position of the reference within the generated bibliography. It is only available for In-text Citation definitions, and is used almost exclusively for Numeric in-text citations

The Page Number field combines the Start Page and End Page reference fields, making it easier to provide for a variety of page number formats (selected in the Page Numbers properties dialog).

The four Any fields, if used, will search on the first occurrence of that field type looking for data. If found, it will be used in the reference. If not, it searches for the next similar type of field. For example, if you insert the Any Author field, first it searches for Authors-Primary. If not found, it searches for Authors—Secondary. And if this is not found, it searches for Authors—Series. Using an Any field is less restrictive than using one of the specific fields, such as Authors—Series. Any fields include Any Author, Any Author-Title, Any Title, and Any Date.

When you insert an Any field, you should edit the field properties for all of the fields that might be used when the reference is formatted. For example, if you insert Any Author, edit the field properties for each of the three Authors fields (Primary, Secondary and Series). The properties then apply to the field that is actually used in the in-text citation or bibliography.

Any fields include:

Any Author—prints the first author field that contains data, checking in this order (Authors Primary, Authors Secondary, or Authors Series).

Any Title—prints the first title field that contains data, checking in this order (Title Primary, Title Secondary, or Title Series).

Any Author-Title—prints the first author or title field that contains data, checking in this order (Authors Primary, Secondary or Series or Title, Primary, Secondary or Series). Reference Manager looks first at all of the Authors fields; if there is no data in any Author fields then the program looks at the Title fields.

Any Date—prints the first date field that contains data, checking in this order (Date Primary or Date Secondary).

Defining the Field Properties

You can specify what the fields look like and how you want them formatted when you specify the field properties.

To define a field:

1. Open the output style definition.
For assistance, Opening an Output Style on page 233.
2. Select the field to define and click **Field Properties**. Or, double-click on the field.
3. You can define the field properties for the following fields:
 - Authors (Primary, Secondary or Series)
 - Title (Primary, Secondary or Series)

- Date (Primary, Secondary)
- Keywords
- Periodical
- Page Number

How you define the properties for each field is described, by field, in the following procedures.

Defining Authors Properties

In the Author properties, there are several different items to be defined. These include:

- ◆ Author List tab in Authors Properties (Reference Styles tab)
- ◆ Author List tab in Authors properties (In-Text Citations tab)
- ◆ Separators tab in Authors properties
- ◆ Names tab in Authors properties
- ◆ Text tab in Authors properties

To define properties for Authors:

1. Select an **Authors** field and click the **Field Properties** toolbar button. Or, choose one of the Authors option from the **Properties** menu.

This field properties dialog box appears.

2. Define the properties for all of the three authors fields included in the definition.

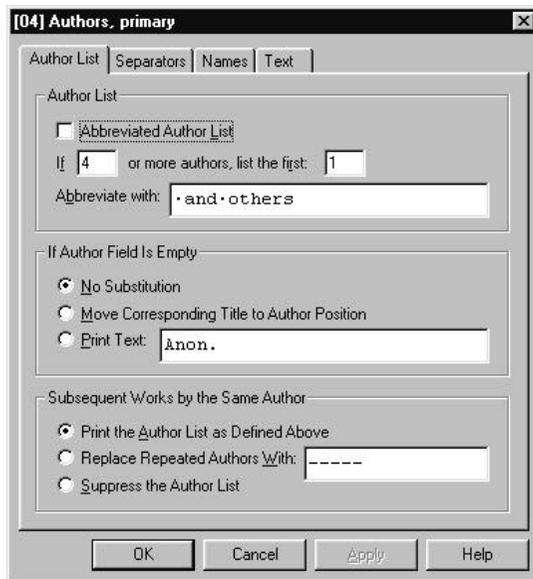
You can use the same or different, properties for each.

Defining how Authors are Listed—in Bibliographic References

You can define how the authors are listed in each bibliographic reference of a specific reference type. Then, you can copy the settings to other reference types.

To define how authors are listed:

1. From the **Properties** menu, select an **Authors** option.
2. In the **Authors properties** dialog box, select the **Author List** tab.



3. In the **Author List** box, check the **Abbreviated Author List** checkbox if you want to use an abbreviated author list in a bibliographic reference.

If this box is not checked, all authors will be listed for all references.

4. In the next box, type the minimum number of authors needed in a reference to use an abbreviated list.
5. In the second box, type the number of authors to include in the abbreviated list.
6. In the **Abbreviated with** box, type any abbreviation you want used, such as “et al,” for abbreviated author lists.

You can apply a style to the abbreviation, use the keyboard shortcuts for bold text or italicized text.

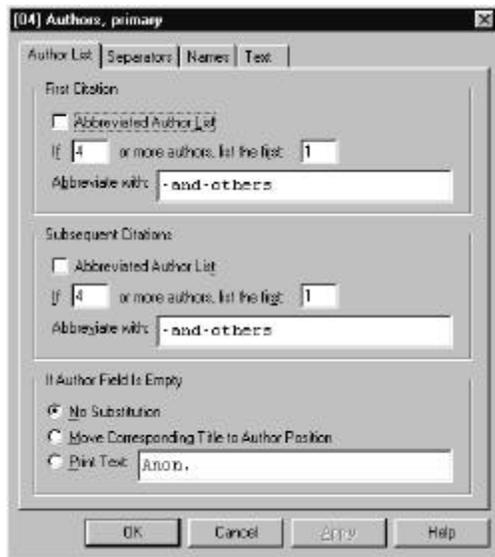
7. In the **If Author Field is Empty** box, select the desired option.
8. In the **Subsequent Works by the Same Author** box, select the desired option.
9. When done, click **OK**.

Defining how Authors are Listed—in In-text Citations

You can define how the authors are listed in each in-text citation.

To define how authors are listed:

1. In the Authors properties dialog box, select the **Author List** tab.



2. To use an abbreviated author list in in-text citations in the **Author List** box, check the **Abbreviated Author List** checkbox.

If this box is not checked, all authors will be listed.

3. In the next box, type the minimum number of authors needed in a reference to result in using an abbreviated list
4. In the second box, type the number of authors needed to use an abbreviated list

Use this if multiple authors are included in a reference

5. In the **Abbreviated with** box, type any abbreviation you want used, such as “et al,” for abbreviated author lists.

You can apply a style to the abbreviation, use the keyboard shortcuts for bold text or italicized text.

6. In the **If Author Field is Empty** box, choose the desired option.
7. When done, click **OK**.

Defining how Authors are Separated

You can define how the authors are separated in each formatted reference. To do so:

1. In the Authors properties dialog box, select the **Separators** tab.



2. In the **Exactly Two Authors** field, type the text (and spaces) that you want to appear between the authors name.
This will be used if there are exactly two authors for the reference.

3. In the **More Than Two Authors** box, in the **Between Each Author** field, type the text (and spaces) you want to appear between authors.

This will be used if there are more than two authors for the reference.

4. In the **Before Last Author** field, type the text (and spaces) you want to appear before the last author.

This will be used if there are more than two authors for the reference.

Defining how the Author's Names Appear

You can define how the author's names appear in each formatted reference. To do so:

1. In the **Authors** properties dialog box, select the **Names** tab.



2. In the **First Author** box, in the **Name Order** drop-down, select the order that the name will appear in.

3. In the **Initials** drop-down box, select the option for the format display of the first and middle names or initials.
4. In the **Uppercasing** box, click the button to indicate the portion of the name to appear in uppercase.
5. In the **All Other Authors** box, complete the **Name Order**, **Initials**, and **Uppercasing** the same way as the First Author field, indicating the format of all other authors.

Defining Additional Text for the Author Field

To define additional text to be included in the author field for each formatted reference.

1. Select the **Text** tab.



2. In the **A Single Author** box, in the **Preceding Text** field, type any text to appear before references containing only one author.

3. In the **Following Text** field, type any text to appear following that author.
4. In the **Multiple Authors** box, type any text to appear before a reference containing more than one author.
5. In the **Following Text** field, type any text to appear following those authors.
This text is added to the abbreviated list of authors as well.
6. Click **OK**.

Defining Title Properties

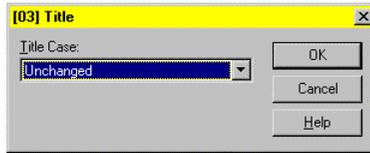
You can define different properties for each of the three titles fields (primary, secondary, and series). You can include the titles as they have been entered into your database, or you can display them in Uppercase, Lowercase, or Headline type.

If you display titles in Uppercase, *all* characters in the title will be in uppercase letters. Similarly, if you display them in Lowercase, *all* characters in the title will be lowercase. If you choose the Headline option, the title will be in initial caps. (The first letter in the first word and each significant word in the title are capitalized.)

When you choose Headline, specific articles, prepositions, and conjunctions (such as “a,” “an,” “the,”) are not capitalized. In addition, words in uppercase in the title are changed to lowercase.

To define properties for the Title field:

1. From the **Properties** menu, select a **Title** field.



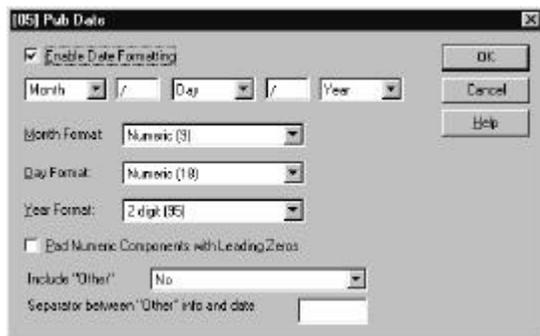
2. In the **Title Case** drop-down, select how you want titles to appear in bibliographic references.
3. Click **OK**.

Defining Date Properties

You can define how the publication dates are formatted for each reference in your bibliography. You can choose different properties for each of the two date fields (primary and secondary).

To select the properties for the date fields:

1. From the **Properties** menu, select a **Date** field.



2. Check the **Enable Date Formatting** checkbox if you want to enable date formatting.

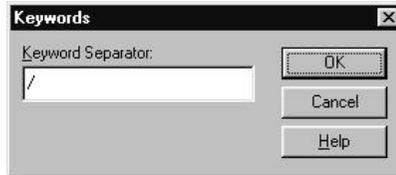
If you check this, Reference Manager will use the date formatting you specify here. Otherwise, a default format is used. The Month and Day entries will print according to your system settings. The year will print as it is entered in the database.

3. If you enabled date formatting, specify the components of the date in the fields below.
4. Enter the separators between the date components in the text boxes (for example, a “-” or “/”).
5. In the **Month** format drop-down, select the format to use.
6. In the **Day** format drop-down, select the format to use.
7. In the **Year** format drop-down, select the format to use.
8. If you have selected numeric formatting for any of the date components, and you want a leading zero added to a single-digit day or month, check the **Pad Numeric Components with Leading Zeros** check box.
9. In the **Include “Other”** field, do one of the following:
 - To include information contained in the **Other** field of the Date in your database reference, select a **Yes** option.
 - Otherwise, select **No**.
10. In the **Separator Between “Other” Info and Date** field, type the characters, spaces, or punctuation to use to separate the Date and Other field in each formatted reference.
11. Click **OK**.

Defining Keywords Properties

To define keyword properties:

1. From the **Properties** menu, select the **Keyword** field

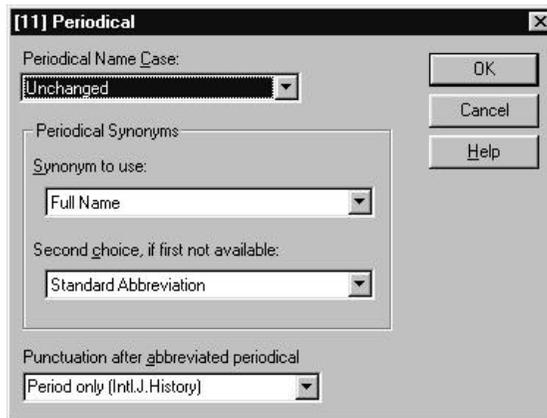


2. In the **Keyword Separator** field, type the text to use to separate multiple keywords in each formatted reference.
3. Click **OK**.

Defining Periodical Properties

To define periodical properties:

1. From the **Properties** menu, select **Periodical**.

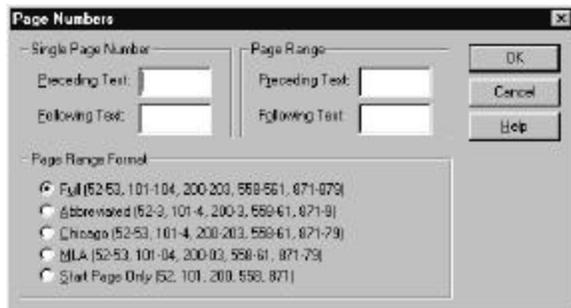


2. In the **Periodical Name Case** drop-down, select the desired case.
3. In the **Periodical Synonyms** box, in the **Synonym to Use** drop-down, choose the desired option.
4. In the **Second choice** drop-down, select a second choice.
This will be used if the first choice is not available. For example, if you specified to use Full Name in the Synonym to use drop-down and a full name is not available, the program looks here for the second choice.
5. In the **Punctuation After Abbreviated Periodical** drop-down, choose how to punctuate abbreviated words in periodical names.
6. Click **OK**

Defining Page Number Properties

To define **Page Number** properties:

1. From the **Properties** menu, select **Page Numbers**.



2. In the **Single Page Number** box, in the **Preceding Text** field, type the text to appear before the page number.
Use this if a database reference contains only a start page.
3. In the **Following Text** field, type the text to appear after the page number.
4. In the **Page Range** box, in the **Preceding Text** field, type the text to appear before the page numbers.
Use this for database references that contain both a start page and an end page.
5. In the **Following Text** field, type the text to appear after the page number.
6. In the **Page Range Format** box, click the appropriate radio button to indicate the format to use.
Use this for database references that contains both a start page and an end page.
7. Click **OK**.

Copying Field Properties

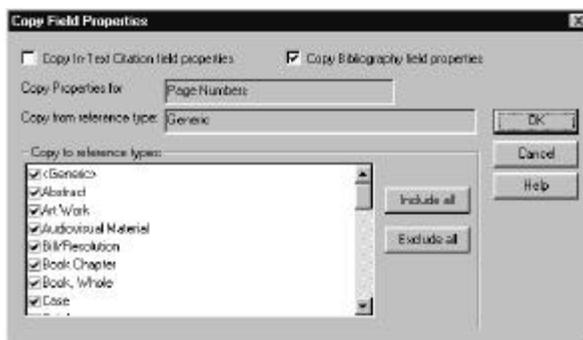
After you define reference type field properties in an output style, you can copy the properties to another reference type. Copying properties, rather than defining them again, saves you time.

To copy output style field properties:

1. In a Definition pane of the Styles window, highlight the field containing the properties you want to copy.



2. From the **Edit** menu, select **Copy Field**. Or, click the **Copy Field Properties** toolbar button.



3. Check either or both of the **Copy In-Text Citation** field properties or **Copy Bibliography** field properties boxes.
4. In the **Copy to reference types** box, check the checkboxes to select the reference types to which you want the field properties copied. Uncheck the boxes you do not want to copy the field properties to.
5. To select all of the reference types, click **Include All**.
6. To include only a few references, click **Exclude** all to deselect all reference types. Then, click the checkboxes to include.

6. Click **OK**.

Applying Punctuation to Groups of Fields

You can apply preceding and following punctuation to a group of fields in an output style. To do so, you surround the entire group with “grouping operators.”

This function is helpful when you want a series of fields to be separated with commas and end with a period. In fact, the only way to end with a period if one or more of the fields contains no data, is to use the group operators.

Buttons at the top of the Output Styles window allow you to insert the group operators. Insert a left (◀) group operator at the start of the group and end the group with a right (▶) operator.

Using an Example

A typical example of the use of group operators is to end author information with a period, whether or not data for the field is in the reference. For example:

```
◀◀Authors, primary>|, <Authors,  
secondary>|.▶
```

In the above example, the group operators surround the group of two fields. There is no preceding group or field punctuation before the <Authors, primary> field, and there is no ending field punctuation after the field. The first vertical bar indicates the comma and space that follows it are part of the following field. There is no ending punctuation after the second field.

The second vertical bar indicates that the period and space that follow it are part of the group of fields. The ending period and space are enclosed within the group operators. They will be printed whenever *any* element from the group is printed.

When you use grouping operators, it is important to determine whether the punctuation between fields should be included as preceding punctuation for the next field. The choice depends on which field(s) you think are most likely to be empty.

Inserting Punctuation in Output Styles

Punctuation consists of standard punctuation marks, such as periods and commas. It also includes spaces, paragraph breaks, or any characters you include before a field, after a field, or between fields.

Preceding punctuation is printed before the data in the field. Ending punctuation prints after the data in the field. Additional text prints whether or not there is data in the field. For example, if you type:

```
<Journal> | , .pages . <Page Numbers> | .
```

prints the comma, spaces, and the word “pages” whenever the Page Numbers field is printed. The above example prints as

Nature, pages 45-53.

You can enter punctuation and spaces into your output styles as follows:

To Insert	Enter from Keyboard	Click Tool in Toolbar	Description of Punctuation
< >		Insert Field	Field Name Delimiters surround a field name, such as <Authors Primary>, so that the contents of that field are printed in your bibliography.
	[Shift] [N]	Field Separator	Vertical Bar Text after a vertical bar and before a field name prints as <i>preceding punctuation for the following field</i> . Text before a vertical bar and after a field name prints as <i>following punctuation for the preceding field</i> . Text between vertical bars is “static text” and is always printed in your formatted references.
« »		Left or Right Group Operator	Left or Right Group Operators Surround a group of fields to attach punctuation before or after the group.
¶	[Enter]	New Paragraph	New Paragraph Inserts a new paragraph (the cursor moves to the first line indent on the next line).
↵	[Shift] [Enter]	Line Break	Line Break Inserts a line feed (the cursor moves to the hanging indent on the next line, whether it is an hanging outdent or an indent).
(Tab)	[Ctrl] [Shift] [T]	Tab	Tab inserts a tab, which moves the cursor to the next tab stop (every half-inch in Reference Manager, or the tab stops as set in your word processor document).
...		Page Break	Page Break Inserts a page break, which moves the cursor to the top of the next page.

.	[Space]		Space Spaces that are typed appear as a small bullet (to allow you to more easily see all punctuation and spaces).
---	---------	--	---

Preceding and Following Punctuation

You may find it best to enter punctuation, such as a space and a comma, as preceding text for a field. This prevents the possibility of ending a reference with a comma.

To enter punctuation:

1. Position your cursor between the fields in the Definition of the output style.
2. Enter the text as you want it to appear.

Any text you enter after a field name is considered to be following punctuation.

If you associate punctuation—either preceding or following—with a field, this ensures the punctuation prints *only* when there is data in the field. When the field is empty, its associated punctuation is automatically omitted from the output. If the text you enter is following punctuation for a field, separate it from the following field name with the Field Separator (the vertical bar, |). For example, if you enter:

```
<Authors> . . | <Title> . . | <Pub Date> .
```

It results in a single period followed by a space between fields. When the field is empty, the period and space following it are not printed.

In another example, if you enter:

<Authors>. | <Title>. | (<Pub Date>).

It surrounds the publications date with parentheses, preceded by a space, and followed by a period. The Field Separator (vertical bar) forces the space and left parenthesis to print *before* the date, rather than *after* the title. If there is no date associated with a reference, the space, parentheses and period are not printed.

Inserting Additional Text

Use additional text when:

- ◆ You always want to print text before or after a field—even when the field is empty.
- ◆ You want to print text associated with an output style, but not associated with any particular field in a reference. For example, information that is part of a standard form, or typesetting codes you want to include as part of the bibliography.

Since Additional Text is not associated with any particular field, it is always included in output, even if you have unchecked optional fields from printing using the Bibliography Setup dialog box.

Inserting Text Between Fields

To insert text between fields:

1. Use vertical bars (|) to separate the additional text from the punctuation attached to the surrounding fields.

2. Type the additional text between the vertical bars, exactly as you want it to appear.

In the following example, the text “Available from: ” prints even when the Availability field is empty in the reference:

```
<Title>. . | Available from: | <Availability>.
```

Inserting Text Before the First Field

You do not need a vertical bar when you want additional text to print before the first field. Text preceding the first field is assumed to be additional text and always prints. For example, if you enter:

```
Vol. . <Volume>
```

it results in “Vol.” always printing as additional text. If you insert a vertical bar by entering:

```
| Vol. . <Volume>
```

“Vol.” will become preceding punctuation for the field, and prints only if there are data in the field.

Inserting Text After the Last Field

You need to separate additional text at the end of your output style definition from preceding fields and from punctuation with a vertical bar. For example:

```
<Title>. | . Requested by
```

You can omit the vertical bar if the additional text follows a closing group operator (»).

Copying Reference Type Definitions

Once you have defined the output style for a reference type, you can copy that definition to other reference types. This can save you time, as you need only define the definition for one reference type, and then copy it to other reference types.

You can choose to copy the entire definition of a reference type style, including all fields and field properties. Or, you can customize the copy definition process and select only the field properties you want to copy. Both processes are described below.

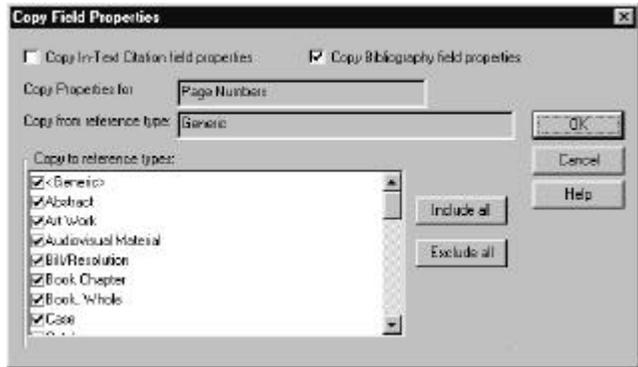
Copying an Entire Reference Type Definition

To copy the entire reference type definition:

1. In the Styles window, select the reference type containing the definition you want to copy.

There needs to be a definition in the Definition box!

2. From the **Edit** menu, select **Copy Definition**. Or, click the **Copy Definition** toolbar button.



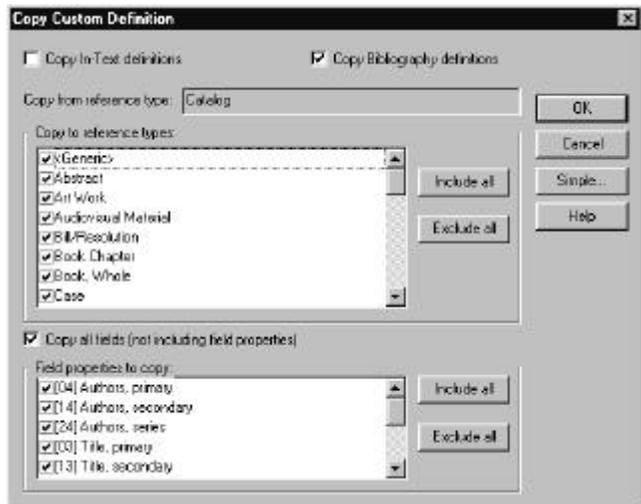
3. To copy in-text definitions, click **Copy In-Text Definition** checkbox.
4. To copy bibliography definitions, click the **Copy Bibliography definitions** check-box.
5. In the **Copy to reference types** box, check the boxes to select the reference types to which you want the definition copied. Uncheck the boxes if you do not want to copy the definition to specific reference types.
6. To select all of the reference types, click **Include All**.
7. To deselect all of the reference types, click **Exclude All**.
If you want to include only a few reference types, you can click Exclude All and then individually select those you want included.
8. To specify the field properties you want to copy, rather than copying them all, click **Advanced**.
See the following section for instructions.
9. When done, click **OK**.

Custom Copying of Reference Type Definitions

You can also copy only part of a reference type definition. This lets you customize the copy process to copy only those parts you desire.

To custom copy a reference type definition:

1. In the Styles window, select the reference type containing the definition you want to copy.
2. From the **Edit** menu, select **Copy Definition**.
The Copy Definition dialog box appears.
3. Click **Advanced**.



4. To copy in-text definitions, click **Copy In-Text Definition** checkbox.

5. To copy bibliography definitions, click the **Copy Bibliography definitions** check-box.
6. In the **Copy to reference types** box, check the boxes to select the reference types to which you want the definition copied. Uncheck the boxes whose definitions you do not want to copy.
7. To select all of the reference types, click **Include All**.
8. To deselect all of the reference types, click **Exclude All**.
9. To include only a few reference types, click **Exclude All** reference types, and then individually select those you want included.
10. To copy all fields in the definition without copying the field properties for all fields, click the **Copy All Fields (not including field properties)** checkbox.
Copying all fields means you are copying everything in the Definition panes.
11. In the **Field properties to copy** box, check the boxes to select the field properties to copy. Uncheck the boxes you do not want to copy.
12. To select all of the field properties, click **Include All**.
13. To deselect all of the field properties, click **Exclude All**.
14. To include only a few field properties, click **Exclude All** field properties, and then individually select those you want included.
15. To copy all fields and their properties, click **Simple**.

You are taken back to the Copy Definition dialog. From here you can click OK.

Use this if you decide not to do a custom copy, but rather to copy everything.

16. Click **OK**.

The fields and/or properties are copied.

Moving a Field within an Output Style

You can move text around in an output style. You might want to do this while you are creating or editing the output style.

1. Select the field to move.
2. Hold down the mouse button.
3. Move the cursor to the new location of the field, and release the mouse button.

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. See “Generating a Bibliography from Multiple Documents” on page 333 for more information.

This chapter contains these sections:

- ◆ A Note on Accessing Cite While You Write
- ◆ Getting Familiar with Cite While You Write
- ◆ Understanding the Types of Citations
- ◆ Entering Identifying Text to Link with a Database
- ◆ Inserting Citations
- ◆ Using Scan Document
- ◆ Refining a Search
- ◆ Customizing Citations
- ◆ Finding Unlinked Citations
- ◆ Working with Multiple Citations
- ◆ Using Scan Document with Manuscripts Formatted for Previous Versions of Reference Manager
- ◆ Setting up the Bibliography Options
- ◆ Generating a Bibliography
- ◆ Making Changes to Citations
- ◆ Word Processor Notes

A Note on Accessing Cite While You Write

In order for Cite While You Write to be installed, you need to install Reference Manager *after* you install your word processing program. If this is not the case, please see the word processor notes later in this chapter.

As you use Cite While You Write, you will either be working in Microsoft Word or Word Perfect. Although the Cite While You

Write functions are the same, the way you access the functions through the menus may vary slightly.

Getting Familiar with Cite While You Write

Using Cite While You Write, you can link references from Reference Manager databases *without leaving your word processor*. It is easy to cite references, and then generate a bibliography. The bibliography is appended to the end of the word processing document.

With Cite While You Write, you can:

- ◆ Enter author names or other identifying text to search for references you want to cite.
- ◆ Insert individual references.
- ◆ Insert marked references from the active Reference Manager database

There are two ways to link the citations into the text file in your word processor. You can type in references and use the scan feature, or you can insert references individually by using the insert citation feature.

Reference Manager supports references cited in these locations:

- ◆ The main text document
- ◆ Tables within the main text document
- ◆ Endnotes
- ◆ Footnotes

References cited within other sections of the document (such as footers, headers, text boxes and so on) will not be included when a bibliography and/or final manuscript is generated.

Before using Cite While You Write, decide what delimiters you will use. The delimiters are a set of beginning and ending characters which tell Cite While You Write the starting and ending points of a citation.

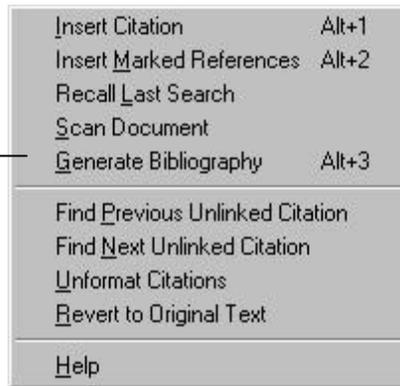
By default, the delimiters are curly brackets ("{" for the beginning delimiter and "}" for the ending delimiter). Use delimiters that will not interfere with your writing. For example, if you use curly brackets in your writing, use a different set of delimiters (such as square brackets) to surround the identifying text. Each delimiter can be up to eight characters.

Understanding the Cite Menu Options

The Cite While You Write menu options appear in your word processor. You access them while working on your manuscript and use them to insert citations into the manuscript.

This menu, in Microsoft Word, shows the Cite While You Write menu options.

Cite While You Write menu options appear in the Reference Manager 9 menu or submenu, depending on which word processing program you are using.



Using the Cite While You Write Toolbar

The Cite While You Write toolbar lets you easily insert citations, scan your document, and generate a bibliography as you write. The toolbar, known as the Reference Manager 9 toolbar, is located in your word processing program. It contains the following functions:



Insert Citation—Allows you to enter identifying text to locate, match, and cite one or more references in your database.

Insert Marked References—Inserts the references marked in the active Reference List tab in Reference Manager as unformatted citations.

Recall Last Search—Brings up your search criteria from the last several searches performed.

Scan Document—Scans the document for identifying text you entered (surrounded by delimiters). Converts the text to unformatted citations.

Generate Bibliography—Converts the unformatted citations to formatted citations. Generates a bibliography at the bottom of your manuscript—according to the output style you selected.

Find Previous Unlinked Citation—Allows you to locate unlinked citations scanning backward through the manuscript.

Find Next Unlinked Citation— Lets you locate unlinked citations scanning forward through the manuscript.

Unformat Citations—Converts formatted citations back to unformatted citations.

Revert to Original Text—Converts formatted or unformatted citations back to the original identifying text you entered.

Help—Displays online help for Cite While You Write and Reference Manager.

If the Reference Manager toolbar does not appear, see the Word Processor Notes later in this chapter for instructions.

Using Cite While You Write Keyboard Shortcuts

Following is a list of Cite While You Write keyboard shortcuts. You can use these from within your word processor.

Alt 1— Allows you to insert a citation from your Reference Manager database, using the Insert Citation dialog.

Alt 2—Inserts marked references into the document from the active reference list tab, at the location of the cursor.

Alt 3—Allows you to generate a bibliography using the Bibliography Setup dialog.

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:

“Walters” or it could just be¹ (or another superscript number).

Entering Identifying Text to Link with a Database

You use identifying text to identify 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.

Guidelines for Entering Identifying Text

As you enter text into the manuscript, follow these guidelines:

- ◆ Separate each element of a single reference with a comma, a space, an ampersand (&), or the word “and.”
- ◆ When you use the Insert Citation command, do not enter delimiters, such as parentheses, around identifying text. (Reference Manager supplies the delimiters for your final manuscript based on the output style you select.)
- ◆ If you are using Scan Document to process all citations, enter delimiters around identifying text in the manuscript. Reference Manager replaces or removes the delimiters for your final manuscript based on the output style you select.

- ◆ Reference Manager assumes that authors' names and keywords in identifying text may be right truncated (for example, "Smith" will also find "Smithsonian"). Reference IDs and publication years are assumed to be an exact match.
- ◆ Enter only the author's last name. If there is more than one author with that last name, or multiple references by an author, you will see a list of references that match the author. You then specify exactly which reference to cite.
- ◆ When you enter multi-word identifying text, surround it with quotes. For example, if you entered "Atlantic Bottlenosed Dolphins" or the author's name "Van Buren," use quotes. Then Reference Manager treats the text as one citation.
- ◆ To include punctuation with text, enclose the text and punctuation in quotations. Then Reference Manager matches it as a single element. For example, if the keyword is *dolphins,bottlenose* then enter the identifying text as "dolphins,bottlenose".
- ◆ When you enter a publication year, use the complete four-digit year (for example, 1996).
- ◆ If you want Reference Manager to search for only a reference ID, follow the identifying text with */id*. For example, to locate the reference ID 1990, type **1990 /id**. This allows you locate the one reference that matches the reference ID, and not other references that may contain the same number in a keyword or publication date field.

Common Examples of Identifying Text

This table shows some examples of identifying text with formats you could use.

Identifying Text	What Reference Manager Will Search For
Connor, 1996	A work from 1996 that lists <i>Connor</i> as one of any number of authors.
Connor, Smolker, and Richards, 1992	A work published in 1992 that lists all three authors (in any order and in any author fields).
Connor & Richards	A work that lists both <i>Connor</i> and <i>Richards</i> as authors (including references that contain Connor, Richards and any number of other authors).
23	Any Reference Manager reference which contains the number 23.
23 /id	Any Reference Manager reference with the reference ID 23.
Connor, 60 /id	A reference numbered 60 that contains an author named <i>Connor</i> or the keyword <i>Connor</i> . It is helpful if you include the author's name <i>and</i> reference ID when you cite references from multiple databases.
Sea Word Curriculum Guide	Any Reference Manager reference which contains all of these words in the title field.

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.

See Customizing Citations in this chapter for more information.

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.

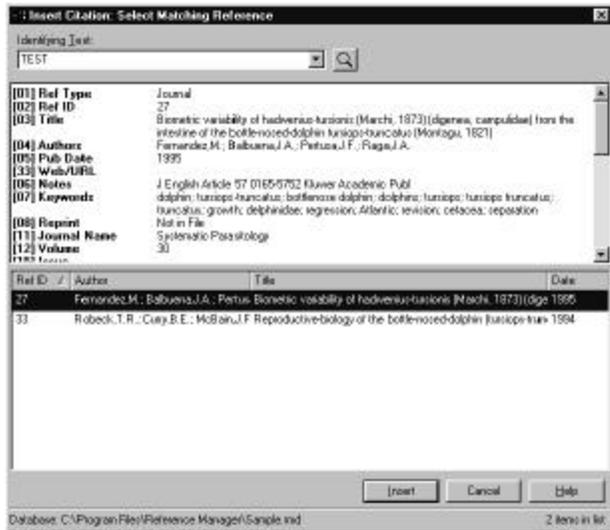
The default is Author Date Ref ID. You can also select Ref ID.

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 reference 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 Matching References field.

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**.

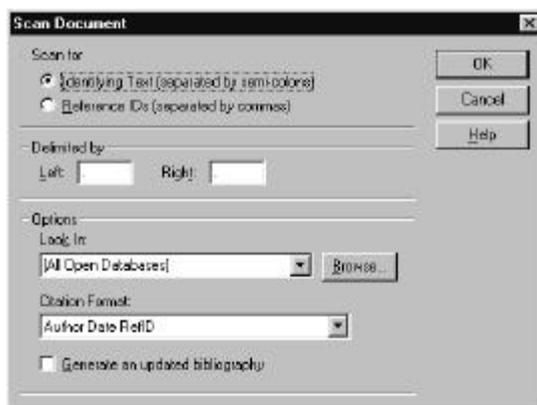
Using Scan Document

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 character(s) you use to delimit identifying text.

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

5. In the **Right** field, type the 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**.

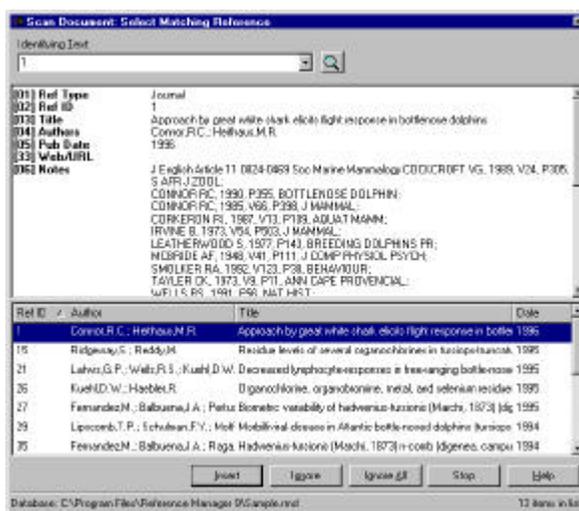
Reference Manager scans your document looking for text between the delimiters specified and matches that text to a reference or references in your database.

- 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.



Refining a Search

When you insert citations, Reference Manager matches the identifying text you entered with references in your database. However, there are limitations to how large the search results can be. The maximum number of matches is 499. If there are 500 or more matches, you need to refine the search and make it more specific, so fewer matches are found.

Remember to surround multi-word identifying text with quotation marks. Then, Reference Manager treats the text as one unit.

For example, if the reference you are citing describes the sexual dimorphism of bottlenose dolphins, and the identifying text you entered was simply *dolphins*, you could modify the identifying search text to include bottlenose dolphins. For example, you could enter *dolphins*, "*bottlenose dolphins*". Then, only references containing both parameters would be found.

When you enter multiple parameters, Reference Manager automatically uses the AND logical connector when searching your database).

In the above example, if Reference Manager still found more references than you desire, you could further refine the search

(using, for example, *dolphin*; “*bottlenose dolphins*”; “*sexual dimorphism*”).

To refine your search:

1. From the **Tools** menu, select **Insert Citation**.
2. In the identifying text field, locate the search in the pull-down.
3. Add additional parameters, as desired. Or, re-enter your identifying text if it was not available from the pull-down.

Customizing Citations

There are switches you can use when you enter identifying text to get the results you want in the citations of the final manuscript. These switches allow you to add preceding or following text, to cite the publication date only or to suppress entire citations.

You can also use multiple commands (more than one at a time). The order in which you type commands does not matter. However, if you suppress citations, this overrides all other commands you can use.

You do not have to enter spaces before or after the command, but you do need to include spaces within the quotation delimiters—if you want spaces to print. The commands are not case-sensitive.

Type these commands right into the identifying text. The commands are shown below and explained following:

Type	For this Effect
/pt	preceding text; enclose text in quotation marks
/ft	following text; enclose text in quotation marks
/d	suppress author names and display the publication year only
/h	suppress entire citation. Ignored for numeric citations; overrides all other switches used

Adding Preceding or Following Text

You can enter any amount of text to precede or follow a citation. The preceding or following text is ignored when matching references, but is included in the formatted output—as part of the in-text citation. The text, including spaces, must be enclosed by quotations. For example, if you enter your identifying text as:

Behavior of whales.{Behrens /ft “ pages 95-117”}

the result is:

Behavior of whales.(Behrens 1987 pages 95-117)

You can use single or double quotes but the quotes cannot also be used as part of the text. For example, if you want to include following text that contains double quotations, then enclose the text using single quotations. For example, if you enter your identifying text as:

Behavior of whales.{Behrens /ft ‘ see “Introduction Chapter”}

the result is:

Behavior of whales.(Behrens 1987 see “Introduction Chapter”)

To add preceding or following text to a linked citation:

1. Highlight the citation.
2. From the **Tools** menu, select **Revert to Original Text**.
The citation is changed back to its original identifying text.
3. Add the additional text using the appropriate command to the citation.
4. Highlight the citation.
5. From the **Tools** menu, select **Scan Document**.
The citation is linked to a reference in the Reference Manager database.

Using Publication Year Only

You can specify to print just the publication year in your formatted, in-text citations in your document. To do so, use the suppress author names command (/d). For example, if you type:

Behavior of whales.{Behrens /d}

the result is a citation as follows:

Behavior of whales.(1987)

You need to use this switch for each citation in which you want to suppress the authors' name. For example, if you are citing multiple reference IDs to use when you scan your document, you need to follow each reference ID with the publication year only switch entering identifying text of:

Behavior of whales.{23/d,99/d}

results in a citation as follows:

Behavior of whales.(1987, 1995)

Suppressing Citations in a Manuscript

You can specify to include a citation in the list of references, but not in the manuscript. To do so, you use the suppress citation command (/h). This command is ignored when you are using numeric in-text citations. Otherwise, it overrides all other commands.

Suppress a citation in your manuscript by typing:

Behavior of whales.{Behrens /h}

The resulting text appears as:

Behavior of whales.

If you are using numeric in-text citations, this command is ignored and the resulting text appears as:

Behavior of whales.^{1,5}

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.

To view a procedure on the first two methods, see the section on Inserting Citations on page 308 or Using Scan Document on page 310, as appropriate.

Understanding the Identifying Text to Input

An example of identifying text for a multiple citation might look like the following. Notice the semi-colons separating them:

{Ross, 1992; Fish, 1993} or {tursiops; porpoise}

If you use reference IDs, an example of identifying text might look like this. Notice the commas separating them:

{43, 197, 16}

Understanding the Resulting Citations

After inserting citations using the procedure above, the unformatted citations appear in your document as follows:

{Christine 1988 23 /id}{Adams 1996 99 /id}

When you generate a bibliography, the formatted citations appear within the same set of delimiters:

Author-Date style: (Christie, 1988; Adams, 1966)
Numeric style: (1,2)

To insert multiple citations into one location in the manuscript using Insert Marked Records:

1. In Reference Manager, mark the references to insert.
2. In the Word Processing program, from the **Tools** menu, select **Insert Marked References**.

Using Scan Document with Manuscripts Formatted for Previous Versions of Reference Manager

Manuscripts that you created for previous versions of Reference Manager used reference IDs surrounded by start and end delimiters (such as left and right brackets). You can use the Scan Document feature to insert the unformatted citations required by Cite While You Write in order to generate a bibliography.

Your manuscript may contain citations which use the percent symbol (%) to indicate that the citation was not to be included in the manuscript. We recommend that you use the /h command rather than the percent symbol (%) command for new documents.

A pound sign (#) was used in previous versions of Reference Manager to indicate that only the publication year of the citation should print. For example, you may have a citation in your manuscript that looks like "{#2269}". We recommend that you change this to {2269 /d} for new documents.

The examples in the following procedure use curly brackets to delimit the reference ID. Curly brackets are the default delimiters in previous versions of Reference Manager.

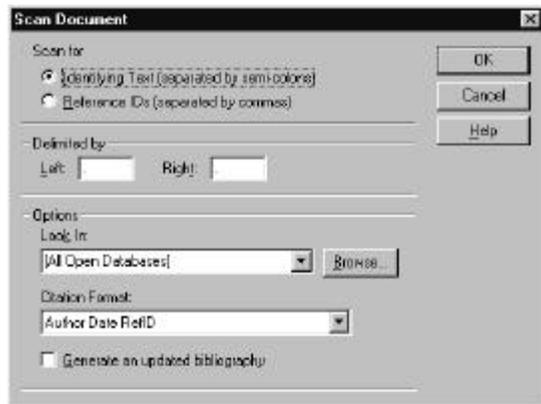
To use a document created for use with previous versions of Reference Manager:

1. Open the document that you used with a previous version of Reference Manager.

Reference IDs in your document are where your in-text citations are to be inserted.

For example, "This is the first citation.{23}" already exists in your document.

2. From the **Tools** menu, select **Scan Document**.



The Scan Document dialog box appears.

3. Make sure the **Scan For** option is set to **Reference IDs** (separated by commas).
4. Make sure the left and right delimiters specified in the **Delimited by** box are correct.

5. In the **Options** box, in the **Look in** field, select or browse for the database to use for scanning.
6. In the **Citation Format** field, select the format from the drop-down.
7. To generate an updated bibliography, check **Generate an updated bibliography**.
8. Click **OK**.

Reference Manager starts the scan document process and inserts the unformatted citation into your document.

If a match is made, the citation is automatically inserted.

If you selected RefID as your citation format, the unformatted citations will appear as {23}{137}.

If you selected Author Date RefID the unformatted citations appear as {Behrens, Weeks, et al. 1992 23 /id}{Edeling, Frederiksen, et al. 1987 137 /id}.

Setting Up the Bibliography Options

The default settings for the output style you select appear in the Reference List and Font and Fields tabs of the Bibliography Settings dialog. These settings affect the format of the in-text citations and the bibliography of your manuscript. You can modify any of these settings, as desired.

This section contains these topics:

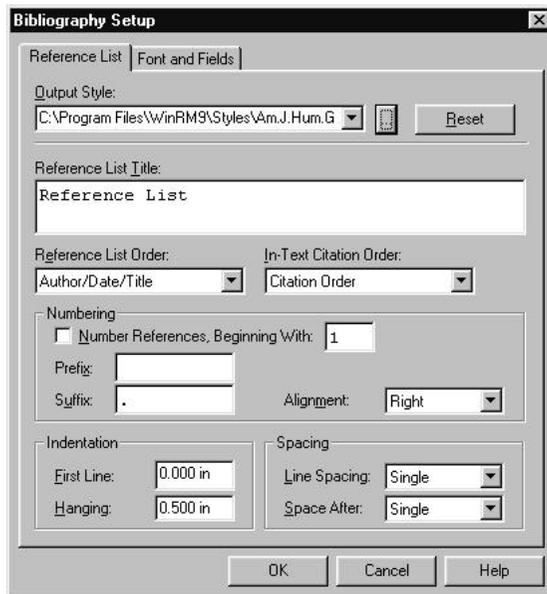
- ◆ Specifying Reference List Options
- ◆ Specifying Font and Field Options
- ◆ Resetting Bibliography Options

Specifying Reference List Options

The default settings for the output style you select appear on this tab.

To change settings as desired:

1. Start in your word processor.
2. From the Reference Manager toolbar, click the **Generate Bibliography** toolbar button.



The Bibliography Setup screen appears.

3. Select the Reference List tab.

4. In the **Output Style** drop-down, select the name of the output style on which you want the format based. Or, browse to locate the output style.

The last ten output styles you selected are displayed in the list. If the output style is not located in the \STYLES folder, enter the full path and file name.

5. To reset the Bibliography settings in this dialog box to the defaults as specified in the selected output style, click **Reset**.

6. In the **Reference List Title** field, type the text, if any, to use as the title of the generated list of references.

This title appears before the list of bibliographic references inserted at the end of your document.

7. In the **Reference List Order** drop-down, select the order in which you want references listed in the reference list.

8. In the **In-Text Citation Order** drop-down, select the order in which you want in-text citations sorted.

9. In the **Numbering** box, if you want references in your reference list to be numbered, check the **Number References** checkbox.

10. If you check the checkbox, in the **Beginning With** box, type the starting number.

11. In the **Prefix** field, type the text to use as the prefix.

12. In the **Suffix** field, type the text to use as a suffix for each reference number in the reference list.

13. In the **Alignment** drop-down, select the alignment for reference number.

12. In the **Indentation** box, to indent references in the bibliography, in the **First Line** field, type the value for the First Line.
14. In the **Hanging** field, type the value for a Hanging Indent.
15. In the **Spacing** box, in the **Line Spacing** drop-down, select the line spacing for each reference.

This is the amount of space between each line of a reference.

16. In the **Space After**, select the space between one reference and the next.

Page Break indicates you want each reference to appear on a single page.

Specifying Font and Field Options

If you want the font for the Bibliography to be different than it is for the manuscript, you can specify your choices in this tab. You can also specify optional fields to print.

To specify the font and optional fields:

1. In your word processor, from the **Tools** menu, select **Generate Bibliography**.
2. Select the **Font and Fields** tab.



3. In the **Font** drop-down, select the font for references in the reference list.
4. In the **Size** drop-down, select the font size for references in the reference list.
5. In the **Optional Fields** box, check the box next to each field in which you want data included in your generated reference list.
6. Click **OK**.

In order to print data in any optional field, you need to include the field in the output style.

For example, if you want the abstracts of journal references included in the list of references, insert the Abstracts field in the output style definition *in addition to* checking the Optional Fields box for Abstract.

Resetting Bibliography Options

There may be occasions when you need to "start from scratch" with your bibliography. Perhaps you have changed settings in the reference list tab and the resulting bibliography is not formatted as you expected. Or, you may have made changes to your output style but the changes are not reflected in your bibliography. In either case, you can reset the bibliography options back to the default for your selected output style.

To reset the options to the defaults for the selected output style:

1. In your word processor, from the **Tools** menu, select **Generate Bibliography**.
2. Select the **Reference List** tab.



3. Click **Reset**.

The Fonts and Fields tab is not set back to the default with the Reset button. You must manually change this information. Normally, the font and font size should match the text in your manuscript. The optional fields are not selected.

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.

Moving the Bibliography

Reference Manager initially places the list of references at the end of your document. In the rare event that you want to move the list to a different location in the manuscript, you can do so. Several procedures follow. Use the one appropriate for you.

To move the bibliography in Microsoft Word:

1. Cut (not copy) the reference list bookmark from the end of the document. (From the **Edit** menu, select **Cut**.)
2. Paste the reference list bookmark at the new location for the reference list.

The next time you generate the bibliography, the list of references will remain at the new location.

Alternatively, you can specify the location of the bibliography prior to generating the bibliography:

1. Position the cursor at the desired location for the reference list.
2. From the **Edit** menu, select **Bookmark** .



3. In the **Bookmark Name** field, type **RMRefList**.
4. Click **Add**.

The bookmark is inserted.

When you generate the bibliography, the list of references is inserted at the bookmark location.

To delete the Reference Manager bookmark:

1. Delete the entire bibliography, including the title and the line before it.
2. From the **Tools** menu, select **Options**.
3. Select the **View** tab and check the option to **Show Bookmarks**.

View the bookmarks and make sure the bookmark is deleted.

In Corel WordPerfect Version 7 and 8:

Use this procedure to specify the location of the reference list before generating the bibliography.

1. Position the cursor where you want the reference list located.
2. Do one of the following:
 - In Word Perfect 7, from the **Insert** menu, select **Bookmark**.
 - In Word Perfect 8, from the **Tools** menu, select **Bookmark**.
3. Choose **Create**.
4. In the **Bookmark Name** field, type **RMRefList**.
5. Check the box for **Selected Bookmark**.
6. Click **Add**.

The bookmark is inserted.

To move the bookmark:

1. Do one of the following:
 - In Word Perfect 7, from the **Insert** menu, select **Bookmark**.
 - In Word Perfect 8, from the **Tools** menu, select **Bookmark**.
2. Select the **RMRefList** bookmark, then click on **Delete**.
3. At the confirmation prompt, click **Yes**.
4. Position the cursor at the new location for the reference list.
5. Do one of the following:

- In Word Perfect 7, from the **Insert** menu, select **Bookmark**.
 - In Word Perfect 8, from the **Tools** menu, select **Bookmark**.
6. Click **Create**.
 7. In the **Bookmark Name** field, type **RMRefList**.
 8. Check the box for **Selected Bookmark**.
 9. Click **Add**.

The bookmark is inserted.

To delete the Reference Manager bookmark:

1. Do one of the following:
 - In Word Perfect 7, from the **Insert** menu, select **Bookmark**.
 - In Word Perfect 8, from the **Tools** menu, select **Bookmark**.
2. Select the **RMRefList** bookmark, then click on **Delete**.
3. At the confirmation prompt, click **Yes**.
4. Delete the entire bibliography, including the title and the line before it.

Generating a Bibliography from Multiple Documents

You can use the Master Document feature in Microsoft Word or Corel WordPerfect to generate a single bibliography from

multiple documents. This feature allows you to create a cumulative bibliography from any number of book chapters.

Reference Manager generates the bibliography, using in-text citations from the master document and all subdocuments. It places the bibliography at the end of the master document.

Before generating a bibliography in the master document, close all subdocuments. If you open a subdocument for editing, the subdocument becomes locked. Reference Manager cannot generate a bibliography from a locked document.

Multiple Documents in Microsoft Word

1. In each document, or chapter, insert citations to link them to a Reference Manager database.
You can use Insert Citation to enter the identifying text, or enter text and use Scan Document.
2. Create a new document.
3. From the **View** menu, select **Master Document**.
4. Click the **Insert Subdocument** toolbar button to place each of your documents in the master document.
5. From the **Tools** menu, select **Generate Bibliography**.
The Bibliography Setup dialog appears.
6. Verify the Bibliography Setup settings and click **OK**.

Multiple Documents in Corel WordPerfect

1. In each document, or chapter, insert citations to link them to a Reference Manager database.

You can use Insert Citation to enter the identifying text, or enter text and use Scan Document.

2. Open or create the file you want to use as a master document.
3. Click where you want to insert a subdocument link.
4. From the **File** menu, select **Choose Document**, then choose **Subdocument**.
5. Specify the file name of a document to link and click **Include**.
6. Repeat steps 3-5 above to add other subdocument links.
7. From the **Tools** menu, select **Generate Bibliography**.
8. Verify the Bibliography Setup settings and click **OK**.

Making Changes to Citations

You can edit individual citations or sets of citations in your manuscript once you have generated the bibliography. To do so, you revert them back to original text first. Then you can edit or delete them as needed. This section covers:

- ◆ Reverting to original text
- ◆ Unformatting citations

- ◆ Editing or deleting citations
- ◆ Linking citations to different databases

Reverting to Original Text

If you edit or delete a formatted citation, the link is broken with the reference, and you will have problems generating the bibliography.

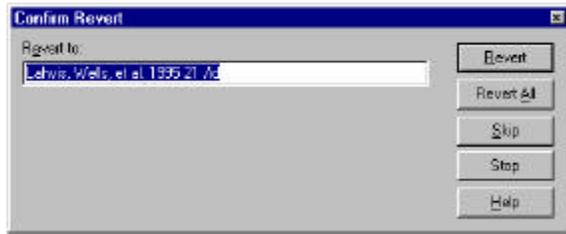
Reverting citations back to original identifying text:

1. To revert just one reference, highlight the reference first.
If you don't highlight one, all references in the document are reverted.

2. From the **Tools** menu, select **Revert to Original text**.
The Revert to Original Text dialog box appears.



3. In the Revert Format box, select the format to revert the text to.
You can choose Reference ID or Author Date Ref ID.
4. In the **Delimiters** box, to change the delimiters, make any needed changes.
5. Click **OK**.



6. Do one of the following:
 - To remove the link to the Reference Manager reference and insert the original text, click **Revert**.
 - To remove all links to Reference Manager references and insert all the original identifying text, click **Revert All**.
 - To ignore this citation and select the next citation to revert, click **Skip**
 - To stop the Revert to Original Text process and return to your document click **Stop**.
7. Click **OK**.

Unformatting Citations

Do not edit unformatted citations. To edit citations, first revert them to original text and then edit the original text. You can, however, delete unformatted citations. When doing so, be sure to delete the *entire* unformatted citation.

Each unformatted citation includes the last name of the author (title if there is no author), the date, and the reference ID. If there are exactly two authors, both authors are listed. If there are more than two authors, then the first is listed followed by “et al.”

To unformat citations:

1. To unformat one citation, highlight the citation.
2. From the **Tools** menu, select **Unformat Citation**.
The unformatted citations dialog appears.
3. Select the Citation Format: Author Date RefID or RefID
4. Click **OK**.

The process complete dialog appears.



5. Click **OK**.

Linking Citations to Different Databases

If you want to change the database with which a citation is associated, you can do this.

It is not necessary to Revert to Original Text if the database has been moved or renamed. Reference Manager prompts you to locate the database if it cannot find it.

1. Highlight the entire citation you want to change.
2. From the **Tools** menu, select **Revert to Original Text**.
3. Select the citation.

4. From the **Tools** menu, select **Scan Document**.
5. Click **OK**.
6. Generate the Bibliography again.

Word Processor Notes

Corel WordPerfect Notes

Reference Manager adds two styles to your WordPerfect style list: RMCitation and RMRefList. Do not delete or modify these styles! Reference Manager uses them when inserting references and when generating the reference list.

If the Reference Manager toolbar is not available, proceed with the steps below.

To make the Reference Manager toolbar available:

1. From the **View** menu, select **Toolbar**.
2. Select the **Reference Manager 9** toolbar.
3. Toggle between the available toolbars by right-clicking on the current toolbar and selecting it from the list.
4. If the toolbar is still not available, you may need to re-install the Cite While You Write Support files.

Microsoft Word Notes

If the Reference Manager toolbar is not available, choose Toolbars from the View menu and select the Reference Manager 9 toolbar.

If the toolbar is still not available, you may need to reinstall the Cite While You write support files.

To install the Cite While You Write support files:

1. Launch the Windows Explorer.
2. Locate the Reference Manager 9 folder.
3. Double-click on the file called CWYW.EXE.

The appropriate support files will now be installed.

Versions of Microsoft Word that Are Supported

Reference Manager integrates with Microsoft Word Version 7 and Word 97. Cite While You Write support works correctly for versions of Word localized for these languages:

Danish	French	Italian	Russian
Dutch	German	Norwegian	Spanish
English	Hungarian	Polish	Swedish
Finnish	Indian	Portuguese	Turkish

Languages that are variants of the languages listed above may also be supported.

Overview

This chapter describes the functions you use to customize Reference Manager. Use these functions with a database open and displaying on your screen. Included are functions such as performing batch operations, customizing the Reference Manager display, and converting journal formats from previous versions of Reference Manager to the current output styles format. All these functions are available from the Tools menu.

This chapter includes these sections:

- ◆ Customizing Reference Manager
- ◆ Performing Batch Operations
- ◆ Changing the Database Sort Order
- ◆ Converting Journal Formats
- ◆ Using Field and Type Edit to Modify the Database Definition
- ◆ Using the Import Dictionaries
- ◆ Accessing Import Filter Editor

- ◆ Using the Phrase List
- ◆ Rebuilding a Database
- ◆ Checking Spelling

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.

This section contains these items:

- ◆ Customizing the Options
- ◆ Defining the Reference List Display
- ◆ Customizing the Field Retrieval Search List

Customizing the Options

You can customize the appearance and operation of many components of Reference Manager using the Options tool. There are six tabs that make up the Options tool. Each is described below, followed by one procedure which guides you through the steps to customize Reference Manager, using all the tabs.

If you want to skip a tab, skip that section of the procedure.

Overview of the Options Tabs

When you customize Reference Manager, you can use any of these 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 such as assign reference id, check for duplicate references, scan, sort, and more.

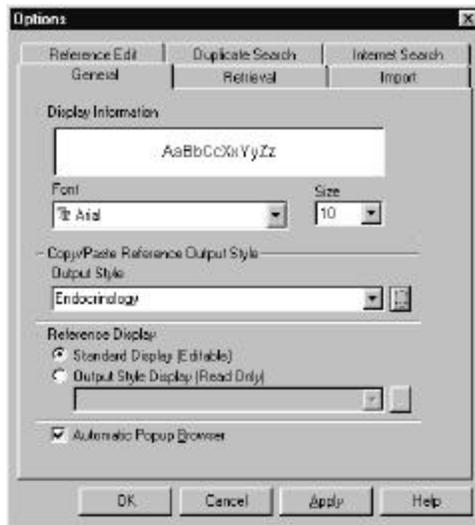
Duplicate Search—Defines your choices to use when checking for duplicate references (the duplicate search algorithm).

Internet Search—You can use this tab to choose to automatically display the Internet search result.

To Customize Reference Manager:

1. From the **Tools** menu, select **Options**.

Options in the General Tab



The Display Information field shows the font and size you select. This information changes as you select different fonts.

2. In the **Font** drop-down arrow, select the font you want information displayed in.
Only fonts available on your computer appear in the list.
3. In the **Size** drop-down, select the size of the font you want to appear in Reference Manager windows.
4. In the **Copy/Paste Reference Output Style** drop-down arrow, select the output style to use.

This is used when you copy a reference from a Reference List to the Windows Clipboard. The default output style is clipref.os.

You can modify the ClipRef output style, or select another style to use when you copy and paste references.

5. In the **Reference Display** box, select the option to indicate how you want references displayed in the Reference Display.

The Reference Display is the top pane of the Reference List window. The default setting is Standard Display which is editable.

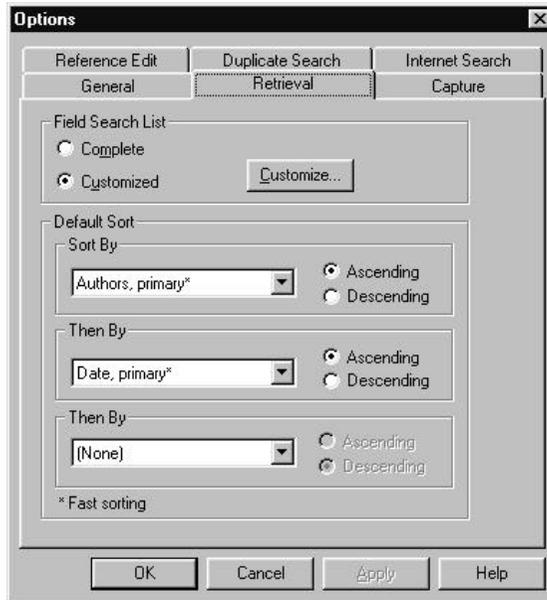
6. To automatically activate the Popup Browser when you are in a browser field, click the **Automatic Popup Browser** button.

The Automatic Popup Browser is a browse list that contains terms that are relevant to the field you are in. It automatically appears when you start typing when you are in a Popup Browser field.

If you do not use the Automatic Popup Browser, you can still activate it manually by pressing **F3**.

7. Do one of the following:
 - To finish, click **OK**.
The Options dialog closes.
 - To define more options, click the **Retrieval** tab (or another tab) and go to that section in this procedure.

Options in the Retrieval Tab



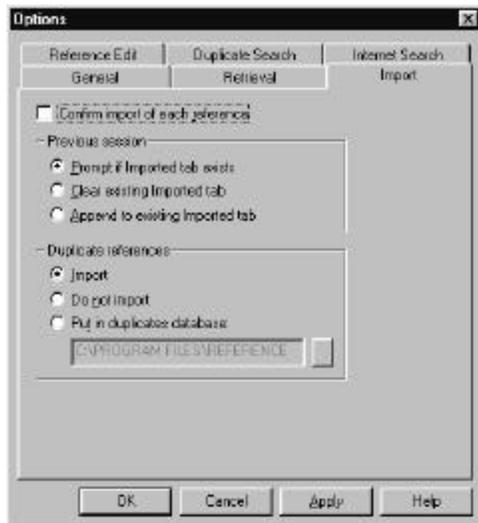
The Retrieval tab appears.

8. In the **Field Search List** box, do one of the following:
 - To display all search parameter types, click **Complete**.
This includes all generic reference type fields.
 - To create and use your own Field list, click **Customize**.
A field followed by an asterisk () indicates an indexed field.*
9. In the **Default Sort** box, you can specify three levels of sorting to be used when references appear in the Retrieval Reference List.
10. In the **Sort By** drop-down, select the field on which you want the sort based.

11. Click **Ascending** or **Descending** to indicate the order for references to be sorted in.
12. In the **Then By** box, select the information for the second level of sorting.
13. In the second **Then By** box, select the information for the third level of sorting.
14. Do one of the following:
 - To finish, click **OK**.
The Options dialog is closed.
 - To define more options, click the **Import** tab (or another tab) and go to that section in this procedure.

To customize the field retrieval search list, done from this tab, go to 355.

Options in the Import Tab



15. To individually confirm the importing of each reference as it is displayed, click **Confirm import of each reference**.
16. In the **Previous Session** box, click the button to indicate the desired option. The options are:
 - To be prompted if there is an Imported Reference List tab already when you import references into a database.
 - To clear the references in the Imported Reference List tab before the next import.
 - To append references from additional import processes to those existing in the Imported tab.
17. In the **Duplicate references** box, click the button to indicate the desired option. The options are:
 - Duplicate references will be imported.
 - Duplicate references are not imported.
 - Duplicate References are placed into a “duplicates” database.

In this case, you can specify the database you want to use for any duplicates.

If you select this option, the location field is active.
18. If you selected **Put in duplicate database**, enter the complete path and database name. If you specify a database that does not exist, the database is created.

The database you specify for duplicates is an actual database, and not a subset of references. If you want to keep the references, copy them (using Copy Between Databases) into another database. If you do not want the references, delete them by highlighting or marking them and clicking Delete in the Edit toolbar.

19. Do one of the following:
 - To finish, click **OK**.

The Options dialog is closed.

- To define more options, click the **Reference Edit** tab (or another tab) and go to that section in this procedure.

Options in the Reference Edit Tab



In the Automatic Settings box you are choosing which settings you want used when editing or adding new references.

20. To automatically assign the next reference ID to a new reference, click the **Assign Reference ID** checkbox.

If you do not select this, you can have IDs assigned one at a time, using the Assign Ref ID on the References menu.

21. To automatically perform a duplicate reference check when you save a reference, click the **Check for Duplicate References** checkbox.

Choose whether you want to check for duplicates in only the active database or in all databases by clicking on a selection button. This works whether you are adding, editing, or importing references.

Any changes you make in this field are automatically reflected in the Check for Duplicate References field of the Options - Duplicate Search tab.

22. To automatically scan words in the title notes and abstracts of new references, and then compare them against the keywords in the database, click the **Scan Titles, Notes, and Abstracts for Keywords** checkbox.

Any matching words are automatically added to the keyword list for the reference.

23. To sort the keyword list automatically on import, click **Sort Keyword List**.

24. In the **Reference ID Assignment Mode** box, select the desired option from the following:

- To assign reference IDs numerically (such as 1, 2, 3), select **Numeric**.
- To have reference IDs be a combination of the first author's last name and the year of publication, select **Authors Primary + Date Primary**.

For example, if the first author is "Smith,B." and the year of publication is "1987," then the reference ID would appear as "SMITH1987."

If an author publishes more than one paper in a given year, then alphabetic identifiers are added to the reference ID. So, if "Smith,B." published two papers in 1987, the ID for the first reference entered would be "SMITH1987". The ID for the second reference would be "SMITH1987A."

25. In the **State** drop-down, select the highlighting instance you want to define. Select one of the following:

- To define the highlight for the currently selected author or keyword, select **Active**.
- To define the highlight for a new author or keyword, select **New to Database**.
- To define the highlight when you've entered an author's name using invalid syntax, select **Invalid Syntax**

This option is for the Author Only.

26. In the **Highlight Color** drop-down field, select the color in which you want the highlighted author or keyword to appear.

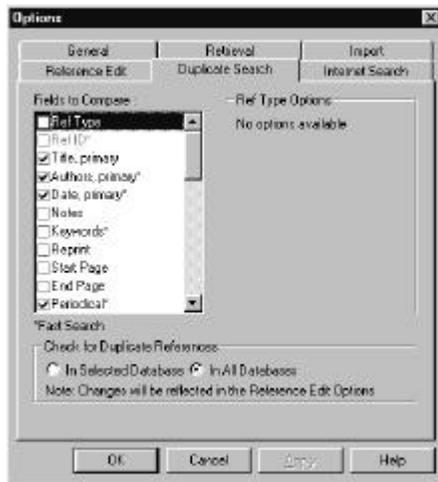
The default colors are black for Active, blue for New to Database and red for Invalid Syntax.

27. In the **Highlight Attribute** box, click the appropriate button to indicate the text attributes to apply to the author and keywords.

28. Do one of the following:

- To finish, click **OK**.
The Options dialog is closed.
- To define more options, click the **Duplicate Search** tab (or another tab) and go to that section in this procedure.

Options in the Duplicate Search Tab



29. In the **Fields to Compare** box, click to select each field you want compared when performing a duplicate check.

When performing a duplicate search, Reference Manager compares the indexed fields first, and then compares the non-indexed fields.

30. If you selected certain fields above, you will want to enter additional information in the Options box to the right, as the field becomes available.
31. If you selected one of the Title or notes fields above, in the **Percent** box, select the percentage of the field that must match for references to be considered duplicates.
32. If you selected an authors fields (Authors Primary, Secondary, and Series), check the **Check Last Name Only** box if you want to compare last names only.

33. In the **Check for Duplicate References** box, select an option:
- To automatically perform a duplicate reference check in the active database only, select **In Selected Database**.
 - To check for duplicates in all (open) Databases, select **In All Databases**.

Any changes you make in this field are automatically reflected in the Check for Duplicate References field of the Options - Reference Edit tab.

Options in the Internet Search Tab



34. To automatically display search results, click the checkbox.
If you do not select this option, you can choose to display results after they are retrieved.

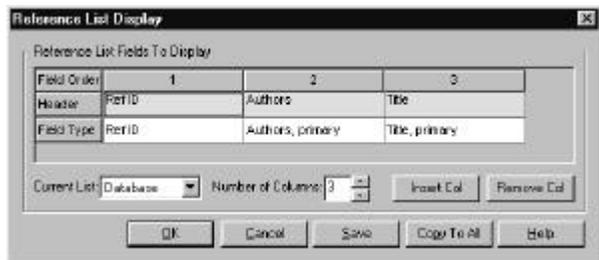
35. If you select this, in the **Number of documents to display** field, type the number of references you want automatically displayed.
36. Click **OK**.

Defining the Reference List Display

You can define the fields to display and the order in which they are displayed in your reference list display tab. You can define different displays for the Database tabs, the Retrieval tab, the Imported tab, and the Duplicate tab.

To define the order in which fields are displayed in the Reference List Display:

1. From the **Tools** menu, select **Reference List Display**.



2. In the **Current List** field, select the tab name for which you want to change the display.
3. Change the order as desired.
4. You can move columns by dragging and dropping the column to the desired locations.

For drag and drop instructions, see Chapter 3.

5. To add a column, click **Insert Col.**
It is added as column #1. Type in new headings for the column. Move the column if desired.
6. To remove a column, select it and click **Remove Col.**
7. To display more or less columns in the dialog box, select the number to display in the **Number of Columns** field.
8. When done, click **OK.**

Customizing the Field Retrieval Search List

You can specify the field and keyboard shortcuts to use when you enter a field parameter in the Retrieval window.

To specify shortcuts:

1. From the **Tools** menu, select **Options.**
2. Select the **Retrieval** tab.
3. Click **Customize.**



Customize Field Search List toolbar buttons.

4. You can do the following:

- To add a field above the current field, click the **Add Field** toolbar button.
- To remove the current field, click the **Remove Field** toolbar button.
- To move the current field up one position, click the **Move Field Up** toolbar button.
- To move the current field down one position, click the **Move Field Down** toolbar button.

The Generic Label shows the generic field label (refer to Appendix E in your Reference Manager User's Guide for a complete list of the generic field names). You cannot edit this section.

5. In the **Custom Label** column, type the name of the field as you want it to appear when you browse for it in the Retrieval window.
6. In the **Shortcut** column, type one character to use to select the field in the Retrieval window.

This can be any letter or number, but must be unique.

7. To return to the default settings included with Reference Manager, click **Default**.
8. When done, click **OK**.

Customizing the Reference List Display

You can resize columns in the Reference Lists when the Reference List window is active.

To resize a column:

1. Click and hold the cursor on the edge of a column.

The cursor becomes a vertical bar with arrows on either side.

2. Drag the column's border to the width you want.

The size of the column is automatically saved.

Performing Batch Operations

Batch operations are functions you can perform on all references in a list, database, or across multiple databases. For instance, if you are adding a large number of imported references from an online database service, it is faster to add the references without turning automatic keyword scanning on. Then, at a later time, you can perform the keyword scan as a batch operation, and even allow the batch operation unattended.

The three batch operations are:

- ◆ Duplicate Search
- ◆ Keyword List Sort
- ◆ Keyword Scan

Batch Operation—Duplicate Search

This section contains the following information:

- ◆ Performing a Batch Duplicate Search
- ◆ Printing the Duplicates Reference List
- ◆ Viewing Duplicate References
- ◆ Deleting Duplicate References
- ◆ Merging Duplicate References

Performing a Batch Duplicate Search

You can perform a duplicate check on the references in your database. If the Check for Duplicate References option is selected, you should never need to do a batch duplicate check—duplicates will be flagged when they are saved.

To check one reference for duplicates, select the reference and choose Check for Duplicates from the References menu.

To do a batch duplicate search:

1. On the **Tools** menu, select **Batch Duplicate Search**.



2. In the **Reference List to Compare** drop-down, select the database that will be checked for duplicate references.

You can choose to search any open database, All Databases, or the Retrieved or Imported Reference List tabs.

The databases against which references are compared are specified in the Duplicate Search tab of Options. This can be Selected Databases or All Databases.

Databases opened from an older version format are not included in the duplicate search.

3. To search the entire database, in the **Start** and **End** field, keep the default settings. Otherwise, change these settings as desired:
 - In the **Start** field, type the reference ID where you want the search to begin.
 - In the **End** field, type the reference ID for the last reference you want included in the search.
4. To see the Duplicate Search tab in the Options dialog box, or make any desired changes, click **Options**.

5. Click **Search** to begin the batch duplicate search process.
Once started, you can stop the search by clicking Cancel. When complete, you can view the pairs of duplicate references in the Duplicates Reference List tab. This temporary tab contains only those duplicates found in the current session.
6. To remove the Duplicates Reference List tab, make it the active tab, right click the mouse, and select **Close Duplicates Reference List** from the menu.

Printing the Duplicates Reference List

Printing a listing of the duplicates can be useful if you don't have time to determine which references to delete, but you want to review them later.

If you want to use a printed list of duplicates from which you can later delete duplicate references, it is a good idea to include the reference ID when you print the list.

To obtain a printout of the duplicates found:

1. Click the **Print** toolbar button.
2. Select an output style that includes enough of the fields in a reference type to help you determine if the references are, in fact, duplicates.
3. Click **OK**.

Viewing Duplicate References

When you view duplicate references, each reference is opened in its own Reference Edit window. The windows are tiled so it is

easy to view the selected references. You can copy portions of one reference to another to combine them, and then delete the duplicate, if desired.

To view duplicate references:

1. From the **References** menu, select **Open and Tile**.

This is available when you have more than one reference selected in the Reference List.

Both references should now show on your screen.

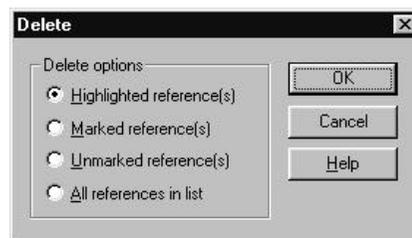
2. View the references as needed, and to return to the original view, close one reference by clicking the close (x) box in the upper right.

Deleting Duplicate References

You can delete individual duplicate references using the Delete Duplicate References procedure.

To delete a duplicate reference:

1. Mark or unmark the reference.
2. Click the **Delete** toolbar button.



3. Click **Marked References** or **Unmarked References**.
4. Click **OK**.



A confirmation screen such as this appears.

Important: In the next step, do NOT select **Yes to All**. This option deletes both of the references. You want to keep one.

5. Click **Yes**.

Merging Duplicate References

You can merge duplicate references together using the Paste Special function. This option lets you to combine the information contained in duplicate references, into one reference.

Merging duplicates using paste Special *replaces* data within references—it does not merge or append data in references. All the data in the fields you select to paste from one reference replaces data in those fields in the second reference.

To merge two references together:

1. Select one reference.
2. On the **Edit** menu, select **Copy**.
The reference is copied to the Windows Clipboard.
3. Select a second reference.

4. From the **Edit** menu, select **Paste Special**.



The Paste Special dialog box appears.

5. In the **Fields to Paste** box, click in the checkboxes of all the fields you want to copy onto the other reference.

You can use Include All or Exclude All to speed up selecting all or none of the fields.

After you select at least one field, the Paste button is functional.

6. Click **Paste**.
7. Select the first reference and click the **Delete** toolbar button.

The Delete Options dialog box appears.

8. Make sure **Highlighted References** is selected. Then click **Yes** to confirm.

The first reference is deleted.

Batch Operation—Keyword List Sort

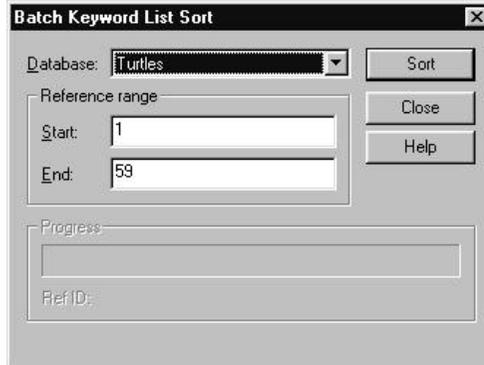
Sorting Keywords Once References Are Imported

Once the references are imported, you can sort keywords automatically in alphabetical order, if you set this option. This function lets you sort keywords for the database.

If you are upgrading from a version 7 database, you will want to sort keywords for the entire database.

To sort keywords using **Keyword List Sort**:

1. From the **Tools** menu, select **Batch Operations**, then select **Keyword List Sort**.



2. In the **Database** drop-down list, select the database for which you are sorting the keywords.
3. In the **Start** and **End** fields, type the number of the first and the last references you want sorted.

By default, all are selected. Normally, you will not need to change this setting.

4. Click **Sort**.

Batch Operation—Scanning for Terms from the Keywords List

You can use the Batch Keyword Scan function to scan for terms that already exist in your database's keywords list. It searches for titles, notes/abstracts, and address fields of references. Any matches found are added to the keyword list of the reference they are found in.

This feature reduces the need to search the titles, notes/abstracts, and address fields when you retrieve references.

Even if you set Reference Manager to automatically scan for keywords, you may still want to perform a batch scan on all references or on a range of references.

To do a batch keyword scan:

1. From the **Tools** menu, select **Batch Keyword Scan**.



2. In the **Database** drop-down, select the database to be scanned.
3. To scan your entire database for keywords, keep the default settings for **Start** and **End**. Otherwise, change these settings as follows:
 - In the **Start** field, type the reference ID where you want the search to begin.
 - In the **End** field, type the reference ID for the last reference you want included in the search.
4. In the **Fields to Scan** box, check the boxes for the fields you want to scan for keywords.
5. Click **Scan** to begin the batch keyword scan process.
6. Once started, you can stop the scan by clicking **Cancel**.

The Progress meter indicates the approximate status of the keyword scan. The reference ID of the reference being checked appears.

Changing the Database Sort Order

You can choose how to sort the text in your database. When you create the database, the text is sorted. You can change the way text is sorted anytime thereafter. The sort method used affects the way references are listed, the order of information in popup lists, like the Keyword list, and so forth.

Understanding the Text Sort Methods

There are three different text sorting methods you can choose between. These methods include:

- ◆ Character Set Sort
- ◆ System-dependent Word Sort
- ◆ International Word Sort

These options appear on the Change Database Sort Order screen

Character Set Sort

The default sort order Reference Manager uses is the Character Set Sort method. This is the most simple sort order, and is the method that older versions of Reference Manager use to sort text in the database.

When you sort using the character sort set, it sorts text on a character-by-character basis. Diacritics, ligatures, and compressions are sorted at the end of English language characters. Because of this, the resulting sort order is not always accurate. So, if you use this method, the results would look like the following example:

cot, cote, cõt, late, llama, lye

If you used one of the other two methods, the sort order would look like the following. Notice that the words with an accent character and letter (not found in the English language) are sorted differently, but more accurately:

cot, cõt, cote, late, lye, llama

Using the Character Set Sort method, you can use the database on other computers that use a different version of the Windows operating system.

System-dependent Word Sort

The System-dependent Word Sort method is a more sophisticated tool than the Character Set Sort method. It sorts words based on the Windows Regional Settings in use, instead of sorting on each character.

With this method, however, you cannot safely move the database from one system to another system that uses a different version of Windows or a different locale setting. To move the database, you would need to first rebuild it (thus re-sorting the indexes and references).

Use the System-dependent word sort if you need to have correct language sorting, and the specific language sort you want is not available for the International Word Sort.

International Word Sort

The International Word Sort method provides both correct language-specific sorting and database portability so you can move the database from one system to another.

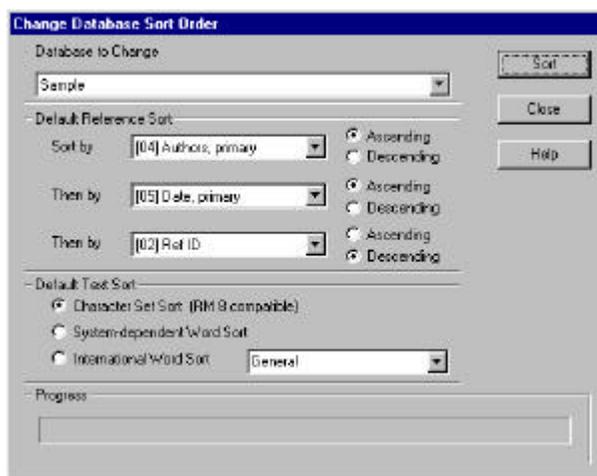
The sorting is based on tables and algorithms built into the Reference Manager program. This functionality correctly handles diacritics, ligatures, etc., for a number of languages. The "General" sort is appropriate for Dutch, English, German, Indonesian, Italian, Portuguese, and modern Spanish. Other International Word Sorts available as of version 9 are Danish and Norwegian, Finnish and Swedish, French, and traditional Spanish.

This is the preferred sort method, unless the specific language sort you desire is not yet available. Or, if you need to be

compatible with version 8 of Reference Manager, you will need to choose the Character Set Sort method.

To change the sort order of a database:

1. Open the database to work with.
2. From the **Tools** menu, select **Change Database Sort Order**.



3. In the **Database to Change** field, have the database selected.
4. In the **Default Reference Sort** field, in the **Sort by** field, select the primary field to sort by, then in the **Then by** fields, select the secondary, and tertiary sort fields.
5. In the **Default Text Sort** box, select the default sort order option.

This is the sort order that will be used in the reference list window. For more information on the default sort order, see Chapter 4.

6. Click **Sort**.

To change the sort order that will be used for new databases:

1. From the **Tools** menu, select **Change Database Sort Order**.
2. In the **Database to Change** field, select <Default settings for new databases>.
3. In the **Default Reference Sort** field, in the **Sort by** field, select the primary field to sort by, then in the **Then by** fields, select the secondary, and tertiary sort fields.
4. In the **Default Text Sort** box, select the sort order option.
5. Click **Save**.

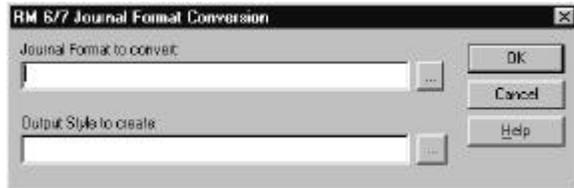
Converting Journal Formats

You can convert existing journal formats created with older versions of Reference Manager. They are converted to the current output styles format. You do this using the Convert Journal Formats utility. You can convert one format at a time.

As you convert journal formats, you need to specify file names. If the files are stored on a server that does not support long filenames, then make sure the output style names are no longer than eight characters.

To convert your journal formats:

1. From the **Tools** menu, select **Convert Journal Formats**.



2. In the **Journal Format to Convert** drop-down, type the full path and name of the journal format file to convert. Or, you can browse to the path by clicking the browse button , locating the file, and clicking **Open**.
3. In the **Output Style to Create** drop-down, type the name of the output style to create. Or, you can browse to a new location by clicking the browse button , selecting the locations, and clicking **Save**.
4. Click **OK**.

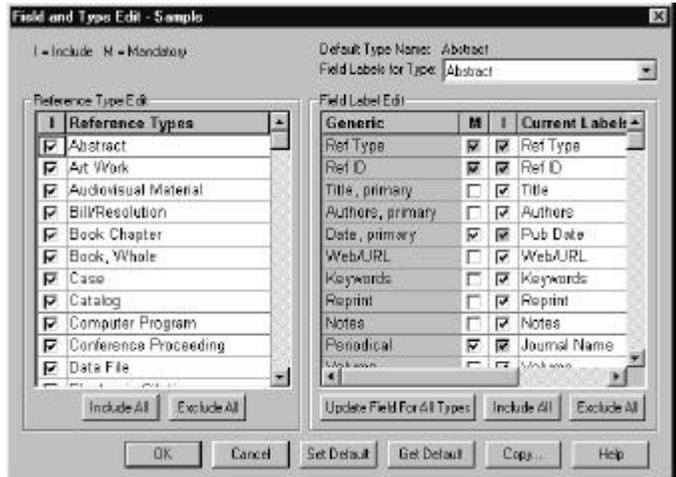
The journal format is converted to an output style.

Using Field and Type Edit to Modify the Database Definition

You can change the Reference Types and the field labels in your database.

To modify the database definition:

1. From the **Tools** menu, select **Field and Type Edit**.



2. In the **Reference Type Edit** column, choose the reference types desired by placing a checkmark next to them. Or, remove the checkmark if you do not want it included.
3. In the **Field Label Edit** column, for each generic field label, check M if it is mandatory and I if it is to be included.

“M” indicates the field is mandatory and therefore required when you enter or edit a reference. A check in the box under “I” indicates the field is included, and is therefore available when you enter or edit a reference.
4. In the **Current Label** column for each label, you can edit the label as desired.
5. To copy definitions to another database, click **Copy**. Then choose the database you are copying to and press **OK**.
6. When you are finished, click **OK**.

Using the Import Dictionaries

There are two dictionaries in Reference Manager that assist you when importing text into the database. The dictionaries help to maintain the integrity of the terminology and the casing of terms as they are imported. These dictionaries are the:

- ◆ Periodical Term Dictionary
- ◆ Casing Term Dictionary

Using the Periodical Term Dictionary

Many services do not distinguish between abbreviated parts of periodical names (such as “Arch,” or “Proc.”) and parts that do not need to be followed by periods. The Import module uses a dictionary of non-abbreviated words found in abbreviated periodical names to assist you.

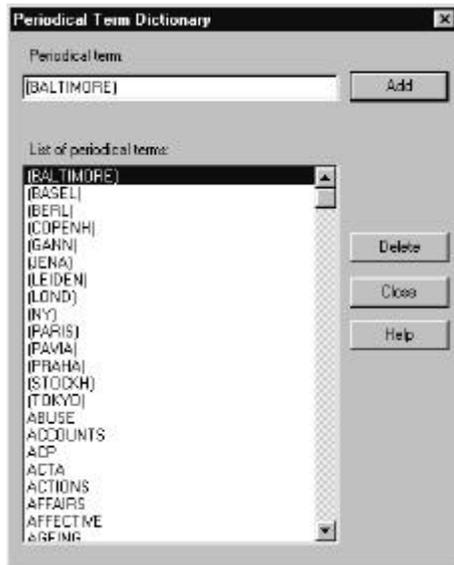
Whenever you add a periodical name to a database by typing it or importing it, words without periods are added to the dictionary. No action is required on your part. Once a word is in the dictionary, it is added to the periodical name of references without a period.

For example: the abbreviated form of Acta Cardiologica Supplementum, is Acta Cardiol.Suppl. In this case, the term Acta is not an abbreviated term and is entered in the Periodical Term Dictionary.

You can edit the Periodical Term dictionary at any time.

To edit the Periodical Term Dictionary:

1. From the **Tools** menu, select **Import Dictionaries**, then **Periodical Term Dictionary**.



The Periodical Term Dictionary dialog box appears.

2. You can do the following:
 - To add a term in the **Periodical term** box, type it. Then click **Add**.
 - To delete a word, select it and click **Delete**. At the prompt, click **Yes**.
3. When you are done, click **Close**.

Using the Casing Term Dictionary

The Casing Term Dictionary contains terms whose case is ignored as they are imported into Reference Manager. Mathematical formulas and other terms (such as DNA) that you do not want to have the case changed on are good terms to enter into the dictionary.

To use the Casing Term Dictionary:

1. From the **Tools** menu, select **Import Dictionaries**, then **Casing Term Dictionary**.



2. You can do the following:
 - To add a term, In the **Casing term** field, type it. Then click **Add**.
 - To delete a word, select it from the list and click **Delete**. At the prompt, click **Yes**.

3. When you are done, click **Close**.

Accessing Import Filter Editor

You can access the Import Filter Editor from the Tools menu. This brings up the program to enable you to work with it. Use Import Filter Editor to create and set up import filters to assist with importing references into Reference Manager.

The import filter determines how database text files are to be read by Reference Manager. For more information on using Import Filter Editor, see the PDF version of the User's Guide or the online help.

Using the Phrase List

You can add commonly used phrases to the database in Reference Manager. Once added, you can also insert the phrases into fields as you create references. You might want to add phrases that are long or redundant so you don't need to type them again each time you need to use them. You can place phrases into any field.

To add a commonly used phrases:

1. From the **Tools** menu, select **Phrase List**.



2. In the **New Phrase** field, type the commonly used phrase.
3. Click **Add**.
The phrase appears in the phrase list.
4. Add any other phrases as desired.
5. To delete a phrase, highlight it in the list and click **Delete**.
6. Click **Close**.

To use words from the Phase List:

1. From the **Tools** menu, select **Phrase List**.
2. Highlight the phrase to insert and click **Insert**.

Rebuilding a Database

Rebuilding (“reconstructing”—in older versions of Reference Manager) a database is the process of cleaning up any damage that might have occurred to the database file.

Damage can occur due to:

- ◆ a power failure that interrupts power to your computer when a database is open.
- ◆ resetting or restarting your computer when a database is open.
- ◆ a disk that comes in contact with a magnetic source.
- ◆ a disk that develops bad sectors.

If your database becomes corrupted, Reference Manager lets you know and suggests these two solutions:

- ◆ Restore a backup of the database.
- ◆ Run the Database Rebuild utility.

Important: If you receive a warning about corrupted data, *do not ignore the warning!* You may be able to access parts of the database even after receiving a corrupted database message. Perform one of these two options to restore your database.

Restoring a backup takes less time than rebuilding. However, you can only restore data if you have a current backup. If you do not have a backup, you will want to rebuild the database.

It is important that you back up your database *before* running Rebuild Database. The backup protects you should a failure occur during the rebuild process. In addition, be sure to back up your database after you rebuild it.

During the rebuild process, Reference Manager will notify you of the number of references it checks and/or rebuilds. It will also identify the number of references it cannot fix. If a problem is detectable and not repairable, it is listed by reference ID (so you can view, and possibly make corrections to, the reference).

Time Needed to Rebuild a Database

Plan to run the Database Rebuild utility when you don't need to use your computer for a period of time. The time required to rebuild your database is proportional to the size of your database — the larger the database, the more time needed. The type of computer is also a factor, as is the content makeup of the database.

A Note About Interrupting the Rebuild Process

You can cancel a database rebuild while it is in process. However, if you do so, you will not be able to access this database. To access the database, you will need to perform the rebuild process again in its entirety. Or, you will need to restore a backup copy of the database.

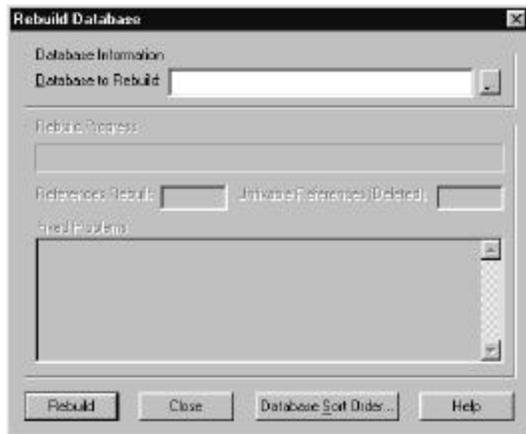
If you encounter a problem during a rebuild, such as a power failure, the process will stop before the database is rebuilt. You will need to start the rebuild process over to access your database.

To rebuild a database:

1. Backup the database.

For instructions, see the procedure in this chapter.

2. From the **Tools** menu, select **Rebuild Database**.

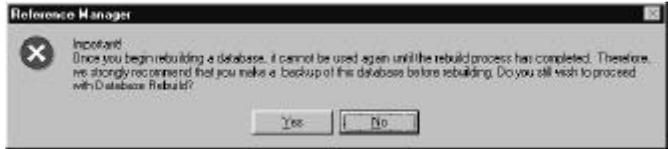


The Rebuild Database dialog box appears.

To rebuild a database, it must be closed. No other users can be using it.

3. In the **Database to Rebuild** field, do one of the following:
 - Type the database name to rebuild.
 - Browse for the database by clicking the browse button to the right.

The Select Reference Manager Database dialog box appears.
 - Select the database, and click **Open**.
4. (Optional) To change the order in which items in the database are sorted, click **Database Sort Order**. At the next screen, change the order as desired, and click **OK**.
5. Click **Rebuild**.



The warning dialog appears.

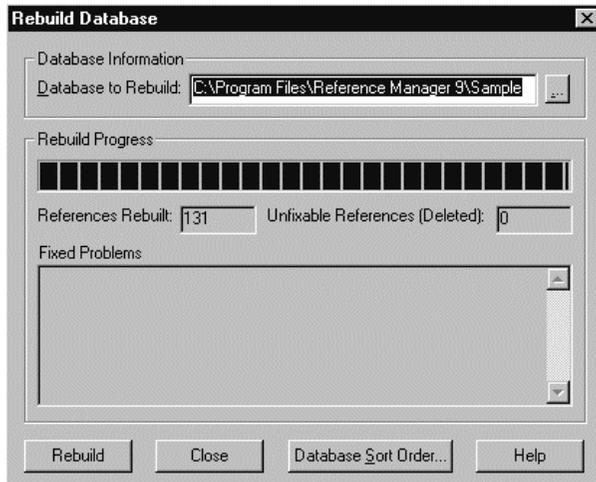
6. Click **Yes**.

This starts the rebuilding process.

If for some reason you need to interrupt the rebuild process, click **Cancel**. Then, at the prompt, click **No**. This stops the process.

A message appears when the rebuild process is complete. If there are references that could not be fixed, some reference information will be lost.

7. At the completion message, click **OK** again.



8. Click **Close**.

This reactivates Reference Manager and places you back where you originated the rebuild.

9. Back up your database again.

This is a clean copy of the database and you will want to save a copy of this version.

Checking Spelling

You can check your spelling in text fields such as Titles, Notes, and Availability. To do so, you use the spell checker. Start with your cursor in a field, and the spell checker will check all fields in the reference.

To check the spelling of words in a field:

1. Place your cursor in a field of the reference you want to spell check.
2. From the **Tools** menu, select **Spell Check**.



The Spell Check dialog box is similar to those included with most word processors.

3. You can do the following:

- Ignore the word or all occurrences of the word
- Change the word or all occurrences of the word
- Add the word to your dictionary,
- Change dictionaries
- Specify the options you want to use during the spell check process.

When the spell check is done, a confirmation box appears.

4. Click **Yes**.

A

Glossary

Back up	The process of making a copy of the database for storage purposes.
Browse list	A list showing all of the existing terms associated with a field.
Cite While You Write	An add-on program to your word processor. This program allows you to cite references while you are writing a manuscript.
Database definition	Specifies the types of references in the database, the field labels in each reference type, and the sort order of references in the database. Each database has its own database definition.
Database properties	Summary information about the database, including dates, sort criteria, and statistics.
Database	File in which Reference Manager stores your collection of references.
Delimiter	For importing, character(s) that separate fields. For Cite While You Write, character(s) which specify an insertion point in your manuscript for unformatted citations.

Fields	The individual components of references. As you create or edit output styles, you use fields to specify the format for the in-text citation and bibliography. Fields include Title, Author, Date, and so forth.
Formatted citations	Citations that appear in the final version of the manuscript.
Identifying text	The text you enter to locate a reference in the Reference Manager database.
Import filters	Templates that identify data in a text file. Used by the Import function to map the data to the appropriate fields in your Reference Manager database.
Keyword	A term or phrase associated with a reference that can be used for retrievals. The keyword field is indexed, which allows for faster retrieval of references.
Multiple citation	Two or more citations enclosed within one set of delimiters in a manuscript.
Output styles	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.
Periodical synonyms	Periodical Synonyms are alternate names for the same Periodical. Each set of Periodical Synonyms can have four entries: Full, Standard Abbreviation, User One, and User Two. You can use any of these synonyms for data entry, retrieving, and formatting bibliographies.

Periodical Term Dictionary	Contains non-abbreviated words found in abbreviated periodical names. For example, terms like "Acta" and "Cancer" may be part of an abbreviated periodical name in your text file. When these terms are in the dictionary, the Import function will not automatically put a period after them in the abbreviated periodical name.
Reference ID	Unique labels assigned to each reference within a database. They are used for retrieval and for inserting references in a manuscript.
Reference index	A user-defined group of references. Reference index allows you to perform a function on all the references in an index at the same time, such as pasting fields or creating a new database from the group.
Reference list	The one-line summary view of each reference, that is displayed in the lower portion of the active database tab. Also, the formatted listing produced by generating a bibliography.
Reference retrieval	Specifies field names, parameters, and connectors used for locating records. The information entered here is called a Retrieval Strategy. You can retrieve references from an existing database, or use the Internet Retrieval function to build a new database.
Reference types	Category of reference, such as: journals, books, conference proceedings, patents, slides, and theses.
Retrieval strategy	The criteria that tells Reference Manager exactly what to search for in a database. Each strategy must contain at least one field name (such as author, title or keyword) and one parameter (the contents of the field). It may also contain one or more Boolean connectors (and, or, not).

Synonym	A term having the same or similar meaning as another term in the term list.
Tagged format	A label at the beginning of each field in a text file. For example, in MEDLARS format each author is on a separate line that begins with “AU - ” (without the quotation marks).
Tags	Label at the beginning of a field in a text file that identifies the type of information contained in that field. Tags include text such as TI for title and AU for author.
Term	Word or phrase in the authors, keywords, or periodical field of a database.
Term Manager	A utility used to edit, add, or delete terms (authors, keywords, and periodical names) in your database. You can also perform global editing functions, such as replacing one term with another, deleting terms, and quickly retrieving terms.
Unformatted citation	The text Reference Manager inserts into your manuscript based on the identifying text you entered.

B

Troubleshooting

Word Processor Notes

Corel WordPerfect Notes

Reference Manager supports references cited in the main text document, endnotes, footnotes, and tables only.

Reference Manager installs the following files in the CWYW folder under your Reference Manager program folder. As updates to Reference Manager are released, the installed file list may change.

- ◆ RMWPW32.DLL—adds Reference Manager commands to WordPerfect 7
- ◆ RMWPW7.WPT—adds Reference Manager menu items and toolbar to WordPerfect 7
- ◆ RMWPW8.WPT—adds Reference Manager toolbar to WordPerfect 8

If you install WordPerfect *after* you installed Reference Manager, you can reinstall Reference Manager in order to add the Cite While You Write support to your word processor. Or,

you can run the CWYW Setup.exe located in the Reference Manager program folder.

New Styles and Toolbar

Reference Manager adds two styles to your WordPerfect style list: Citation and RefList. Do not delete or modify these styles! Reference Manager uses them when inserting references and when generating the reference list.

If the Reference Manager toolbar is not available, you can make it available.

To make the Reference Manager toolbar available:

1. From the **View** menu, select **Toolbar**.
2. Select the **Reference Manager toolbar**.

Toggle between the available toolbars by right-clicking on the current toolbar and selecting it from the list.

Microsoft Word Notes

Reference Manager supports references cited in these locations:

- ◆ The main text document
- ◆ Tables within the main text document
- ◆ Endnotes
- ◆ Footnotes

References cited within other sections of the document (such as footers, headers, and text boxes) will not be included when a bibliography and/or final manuscript is generated.

Using the Installed Files

Reference Manager installs the following files in the STARTUP folder under your Microsoft Word program folder (usually WINWORD\STARTUP). As updates to Reference Manager are released, the installed file list may change.

- ◆ RMWORD32.WL—adds Reference Manager commands to Word 7 and Word 97
- ◆ RMWORD.DOT—adds the Reference Manager menu items and toolbar to Word 7
- ◆ RMWORD97.DOT—adds Reference Manager menu items and toolbar to Word 97

In Microsoft Word 97, the Reference Manager commands appear in a *submenu* of the Tools menu.

When you install Reference Manager, the installation program determines which versions of Word are available and installs the appropriate Cite While You Write support.

If you install Microsoft Word *after* you installed Reference Manager, you can either reinstall Reference Manager in order to add the Cite While You Write support to your word processor, or run the CWYW Setup.exe located in the Reference Manager program folder.

Toolbar

If the Reference Manager toolbar is not available, choose Toolbars from the View menu and select the Reference Manager toolbar.

Versions of Microsoft Word Supported

Reference Manager integrates with Microsoft Word Version 7 and Word 97. Cite While You Write support works correctly for versions of Word localized for these languages:

Danish	French	Italian	Russian
Dutch	German	Norwegian	Spanish
English	Hungarian	Polish	Swedish
Finnish	Indian	Portuguese	Turkish

Languages that are variants of the languages listed above may also be supported.

Using Reference Update

For assistance with Reference Update, call ISI at 1-800-523-1850 or E-mail to: help@isinet.com

Using Z39.50

Why Did the Search Fail?

When you do a search, it's possible that no search results are generated. Here are some reasons why:

- ◆ You're not connected to the Internet.
- ◆ You encountered Firewall problems.
- ◆ No records satisfied the query. Try a broader query or different search fields.
- ◆ The server(s) you are connecting to may be offline at the moment. Try searching some other sites.
- ◆ Your query uses unsupported search fields—check the log file for “Unsupported Use Attribute...” Try using different search fields in your query.
- ◆ Experiment with the database record types (in the database properties dialog in **Settings | Hosts & Databases**).
- ◆ The site(s) you are searching may require a login and password. This information is specified in the host properties dialog. (You will need to modify the host in **Settings | Hosts & Databases**.)

Firewall Considerations

A firewall is a security measure that restricts access between your computer and the Internet. Most firewalls, by default, do not have port 210 enabled. If port 210 and the other port numbers used by BookWhere (Library of Congress uses port 2210) are not enabled, then BookWhere will not be able to search properly.

If you are having problems with a firewall, you will get the error message: “Failed to connect...”

Check the port number for the server and consult your Network Administrator.

Reference Manager Files

This appendix contains a list of the files installed by the Reference Manager program.

Files in the Program Folder

The following files should be in your Reference Manager program folder. Some of these files are specific to modules available with Reference Manager. These are grouped together separately by module.

- ◆ CHEMICAL.PST—Periodical synonym file for chemical journals
- ◆ DEFAULT.DEF—Default database definition, if present
- ◆ EN2RM.TXT—Text file containing information on how an EndNote library is converted to Reference Manager format
- ◆ HUMANITY.PST—Periodical synonym file for humanities journals
- ◆ IMPORT.DAT—Support file for importing
- ◆ INSTALL.LOG—Support file to uninstall Reference Manager

- ◆ README.WRI—If present, this contains the latest program information, which might not be in the User's Guide
- ◆ RM5DEFDB.DAT—Database support file
- ◆ RM6DEFDB.DAT—Database support file
- ◆ SAMPLE.RMD—Sample database file; required to access the Sample database
- ◆ SAMPLE.RMX—Sample database file; required to access the Sample database
- ◆ UNWISE.EXE—Reference Manager uninstall program file
- ◆ WINRM9.EXE—Reference Manager program file
- ◆ *.PRM—Search strategy files, if present

Import Module Files

- ◆ CAPTOKEN.DAT—Import support file
- ◆ IMPORT.TXT—Import information and instructions for using the sample files
- ◆ PERDICT.DAT—Periodical word dictionary support file

Online Help Files

- ◆ INETWH32.DLL—Online help support file; used when launching Web URL from within online help
- ◆ MAINT.HLP—Online help file for Maintenance Service
- ◆ MAINT.CNT—Online help contents file for Maintenance Service
- ◆ MAINT.GID—Online help index file for Maintenance Service

- ◆ RMWORD7.HLP—Online help file for Cite While You Write
- ◆ RMWORD7.CNT—Online help contents file for Cite While You Write
- ◆ RMWORD7.GID—Online help index file for Cite While You Write
- ◆ SETBROWS.EXE—Online help support file; sets default Web browser to use when launching Web URL from within online help
- ◆ WINRM9.HLP—Online help file for Reference Manager
- ◆ WINRM9.CNT—Online help contents file for Reference Manager
- ◆ WINRM9.GID—Online help index file for Reference Manager

Subfolders of the Program Folder

These subfolders, file lists for which follow, should be in your Reference Manager program folder.

- ◆ IMPORT—Contains data translation files for import
- ◆ CWYW—Contains files that are used for Cite While You Write
- ◆ STYLES—Contains output style files
- ◆ SAMPLES—Contains Import sample text files
- ◆ BKWRAPI.REG
- ◆ YAR32.DLL
- ◆ HOST.DAT

Files in the IMPORT Folder

The IMPORT folder contains a filter file for each database service supported by the IMPORT module. There are over 150 Import filters provided with this module. Each filter file has the file extension “.CAP.” See the IMPORT.TXT file for a listing of the filenames that correspond to each database and service.

Files in the CWYW Subfolder

The following files are automatically installed into the CWYW folder when the program is initially installed.

- ◆ RM9WD32.WLL—Adds Reference Manager commands to Word 7 and Word 97; also installed into your WINWORD\STARTUP subfolder if the installation program detected Word 7 or Word 97
- ◆ RM9WD7.DOT—Adds Reference Manager menu items and toolbar to Word 7; also installed into your WINWORD\STARTUP subfolder if the installation program detected Word 7
- ◆ RM9WD8.DOT—Adds Reference Manager menu items and toolbar to Word 97; also installed into your WINWORD\STARTUP subfolder if the installation program detected Word 97
- ◆ RM9WP32.DLL—Adds Reference Manager commands to WordPerfect 7 and WordPerfect 8
- ◆ RM9WP7.WPT—Adds Reference Manager menu items and toolbar to WordPerfect 7
- ◆ RM9WP8.WPT—Adds Reference Manager toolbar to WordPerfect 8

Files in the STYLES Subfolder

The STYLES subfolder contains a file for each different output style. There are over two hundred output style files included with Reference Manager that are installed when you install the program. Each output style file has the file extension “.OS.” In addition, the following files are located in the STYLES subfolder.

- ◆ CLIPREF.OS—Default output style used for copying references to the Windows Clipboard
- ◆ ALLFLDS.OS—An output style that includes all fields defined in the Generic reference type

Files in SAMPLES Subfolder

The SAMPLES subfolder contains samples of imported formats used by the Import module.

Files Installed in the Windows System Folder

Several system files are required to run Reference Manager. Most of these files are already present and used by other programs. The installation program checks for the required files and installs them in your Windows System folder if they are not already present.

- ◆ RISXTD16.DLL
- ◆ RISXTD32.DLL
- ◆ MSVCRT.DLL
- ◆ MFC42.DLL

- ◆ MCVCIRT.DLL
- ◆ MSVCP60.DLL

RIS Format Specifications

Overview

The complete specification for the RIS format is provided here for your convenience. It is probably the most flexible format in which to change any references you want to import into Reference Manager.

All reference types supported by Reference Manager are supported by the Import routines for RIS format.

Field Types and Tags

Each reference is composed of a variable number of fields, and each field is preceded by a six-character label or “tag.” Some tags are specific only to certain reference types. Each tag must be in a specific format, and certain other rules apply to all tags. This information is provided below.

Tag Format

As mentioned above, each tag consists of six characters, and must be in the following format:

- ◆ Character 1—Uppercase alphabetic character. (These are described in the following sections.)
- ◆ Character 2—Uppercase alphabetic or numeric character. (These are described in the following sections.)
- ◆ Characters 3 and 4—Spaces (ANSI 32)
- ◆ Character 5—Dash (ANSI 45)
- ◆ Character 6—Space (ANSI 32)

Use Separate Lines for Each Tag

Each tag and its contents must be on a separate line, preceded by a “carriage return/line feed” (ANSI 13 10).

Tag Order

Except for the first tag of each reference, which must be “TY - ” and the last tag of each reference, which must be “ER - ,” the tags within each reference can be in any order.

Characters Allowed in Fields

The characters allowed in the reference ID fields can be in the set “0” through “9,” or “A” through “Z.” The characters allowed in all other fields can be in the set from “space” (character 32) to character 255 in the Windows ANSI Character Set. Note, however, that the asterisk (character 42) is not allowed in the author, keywords, or periodical name fields.

How to Handle Long Fields

If the information following any one tag is more than 70 characters long, it is allowable (though not necessary) to insert a carriage return/line feed at the end of 70 characters, and continue on the next line.

Tag Definitions

This section details the syntax required for all possible tags in the RIS format. Note that the required tags are “TY” which must be the first tag in the reference, and “ER” which must be the last tag in the reference. Other tags can be in any order. These tags are described below.

For clarification purposes, spaces within the tags are depicted with a small bullet (·).

TY···	Type of reference. This must contain one of the field names as defined in the following section, “Reference Type field names.”
ER···	End of reference. Must be the last tag in a reference.
ID···	Reference ID. (Note that any information in this field is not imported.)
T1···	Title Primary. Note that the BT tag maps to
TI···	This field only for Whole Book and
CT···	Unpublished Work references. This
BT···	field can contain alphanumeric characters; there is no practical length limit to this field.

A1... Author Primary. Each author must be on a separate

AU... line, preceded by this tag. Each reference can contain unlimited author fields, and can contain up to 255 characters for each field. The author name must be in the following syntax:

Lastname,Firstname,Suffix

For Firstname, you can use full names, initials, or both. The format for the author's first name is as follows:

Phillips,A.J.
Phillips,Albert John
Phillips,Albert

Lastname = Any string of letters, spaces, and hyphens

Firstname = Any string of letters, spaces, and hyphens

Initial = Any single letter followed by a period

Full Name = Any string of letters, spaces, and hyphens

Suffix = Jr/Sr/II/III/MD etc. (Phillips,A.J.,Sr.); use of the suffix is optional

Y1... Date Primary. This date must be in the

PY... following format:

YYYY/MM/DD/other info

The year, month and day fields are all numeric. The other info field can be any string of letters,

spaces and hyphens. Note that each specific date information is optional, however the slashes (“/”) are not. For example, if you just had the <year> and <other info>, then the output would look like: “1993///Spring.”

- N1 Notes. These are free text fields and can contain
- AB alphanumeric characters; there is no practical length limit to this field.
- KW Keywords. Each keyword or phrase must be on its own line, preceded by this tag. A keyword can consist of multiple words (phrases) and can be up to 255 characters long. There can unlimited keywords in a reference.
- RP Reprint status. This optional field can contain one of three status notes. Each must be in uppercase, and the date after “ON REQUEST” must be in USA format, in parentheses: (MM/DD/YY). If this field is blank in your downloaded text file, the Import function assumes the reprint status is “NOT IN FILE.”

The three options are:

IN FILE - This is for references that you have a physical copy of in your files.

NOT IN FILE - This is for references that you do not have physical copies of in your files.

ON REQUEST (mm/dd/yy) - This means that you have sent for a reprint of the reference; the date is the date on which the reprint was requested (in mm/dd/yy format).

- SP Start page number; an alphanumeric string, there is no practical length limit to this field.
- EP Ending page number, as above.
- JF Periodical name: full format. This is an alphanumeric field of up to 255 characters.
- JO Periodical name: standard abbreviation. This is the
- JA periodical in which the article was (or is to be, in the case of in-press references) published. This is an alphanumeric field of up to 255 characters.
- If possible, periodical names should be abbreviated in the *Index Medicus* style, with periods after the abbreviations. If this is not possible (your large bibliography file in your wordprocessor has no periods after abbreviations), you can use the “RIS Format (Adds periods)” Import filter definition. This definition uses the Periodical Word Dictionary.
- J1 Periodical name: user abbreviation 1. This is an alphanumeric field of up to 255 characters.
- J2 Periodical name: user abbreviation 2. This is an alphanumeric field of up to 255 characters.
- VL Volume number. This is an optional field, there is no practical length limit to this field.
- T2 Title Secondary. Note that the BT tag maps to this field
- BT for all reference types except for Whole Book and Unpublished Work references. This field can contain alphanumeric characters; there is no practical length limit to this field.

- A2 Author Secondary. Each author must be on a separate line,
- ED preceded by this tag. Each reference can contain unlimited author fields. The author name must be in the correct syntax (refer to A1 and AU fields). This author name can be up to 255 characters long.
- IS Issue. This is an alphanumeric field, there is no practical
- CP length limit to this field.
- CY City of publication; this is an alphanumeric field; there is no practical length limit to this field.
- PB Publisher; this is an alphanumeric field; there is no practical length limit to this field.
- U1 User definable 1. This is an alphanumeric field; there is no practical length limit to this field.
- U2 User definable 2. This is an alphanumeric field; there is no practical length limit to this field.
- U3 User definable 3. This is an alphanumeric field ; there is no practical length limit to this field.
- U4 User definable 4. This is an alphanumeric field, there is no practical length limit to this field.
- U5 User definable 5. This is an alphanumeric field; there is no practical length limit to this field.
- T3 Title Series. This field can contain alphanumeric characters; there is no practical length limit to this field.

- A3 Author Series. Each author must be on a separate line, preceded by this tag. Each reference can unlimited author fields. The author name must be in the correct syntax (refer to A1 and AU fields). Each author name can be up to 255 characters long.
- N2 Abstract. This is a free text field and can contain alphanumeric characters; there is no practical length limit to this field.
- SN ISSN/ISBN. This field can contain alphanumeric characters. There is no practical length limit to this field.
- AV Availability. This field can contain alphanumeric characters. There is no practical length limit to this field.
- Y2 Date Secondary. (Refer to Y1 and PY fields).
- M1 Miscellaneous 1. This field can contain alphanumeric characters. There is no practical length limit to this field.
- M2 Miscellaneous 2. This field can contain alphanumeric characters. There is no practical length limit to this field.
- M3 Miscellaneous 3. This field can contain alphanumeric characters. There is no practical length limit to this field.
- AD Address. This is a free text field and contain alphanumeric characters; there is no practical length limit to this field.
- UR Web/URL. There is no practical length limit to this field. URL addresses can be entered

individually, one per tag or multiple addresses can be entered on one line using a semi-colon as a separator.

Reference Type Field Names

The following describes the valid reference type field names that can be used with for the reference type field when importing references into Reference Manager.

Field Name	Reference Type
ABST	Abstract
ADVS	Audiovisual material
ART	Art Work
BILL	Bill/Resolution
BOOK	Book, Whole
CASE	Case
CHAP	Book chapter
COMP	Computer program
CONF	Conference proceeding
CTLG	Catalog
DATA	Data file
ELEC	Electronic Citation
GEN	Generic

HEAR	Hearing
ICOMM	Internet Communication
INPR	In Press
JFULL	Journal (full)
JOUR	Journal
MAP	Map
MGZN	Magazine article
MPCT	Motion picture
MUSIC	Music score
NEWS	Newspaper
PAMP	Pamphlet
PAT	Patent
PCOMM	Personal communication
RPRT	Report
SER	Serial (Book, Monograph)
SLIDE	Slide
SOUND	Sound recording
STAT	Statute
THES	Thesis/Dissertation
UNBILL	Unenacted bill/resolution
UNPB	Unpublished work
VIDEO	Video recording

Sample References in RIS Format

Following are some example references in RIS format. Use these to see exactly how references should look before you import them into the Reference Manager database using the Import feature.

Two variations of the RIS import format are provided in the Import module: “RIS Format” and “RIS Format (Add periods).” The periodical name abbreviations in this sample have periods after them. Therefore, you would use the standard “RIS Format” to import them. If there were no periods after the periodical abbreviations, you would choose “RIS Format (Add periods)” when importing.

The sample references here are, in order, a journal reference, a patent reference, a conference proceeding reference, a report reference, a book chapter reference, and a case reference. Field information longer than one line (for example, “TI - ”) is shown here with the continuation lines indented for ease of reading only.

In practice, you can simply word wrap these lines, without the leading spaces.

```
TY - JOUR
A1 - Baldwin, S.A.
A1 - Fugaccia, I.
A1 - Brown, D.R.
A1 - Brown, L.V.
A1 - Scheff, S.W.
T1 - Blood-brain barrier breach following
    cortical contusion in the rat
JO - J.Neurosurg.
Y1 - 1996
VL - 85
SP - 476
EP - 481
RP - Not In File
KW - cortical contusion
```

KW - blood-brain barrier
KW - horseradish peroxidase
KW - head trauma
KW - hippocampus
KW - rat
N2 - Adult Fisher 344 rats were subjected to a unilateral impact to the dorsal cortex above the hippocampus at 3.5 m/sec with a 2 mm cortical depression. This caused severe cortical damage and neuronal loss in hippocampus subfields CA1, CA3 and hilus. Breakdown of the blood-brain barrier (BBB) was assessed by injecting the protein horseradish peroxidase (HRP) 5 minutes prior to or at various times following injury (5 minutes, 1, 2, 6, 12 hours, 1, 2, 5, and 10 days). Animals were killed 1 hour after HRP injection and brain sections were reacted with diaminobenzidine to visualize extravascular accumulation of the protein. Maximum staining occurred in animals injected with HRP 5 minutes prior to or 5 minutes after cortical contusion. Staining at these time points was observed in the ipsilateral hippocampus. Some modest staining occurred in the dorsal contralateral cortex near the superior sagittal sinus. Cortical HRP stain gradually decreased at increasing time intervals postinjury. By 10 days, no HRP stain was observed in any area of the brain. In the ipsilateral hippocampus, HRP stain was absent by 3 hours postinjury and remained so at the 6- and 12- hour time points. Surprisingly, HRP stain was again observed in the ipsilateral hippocampus 1 and 2 days following cortical contusion, indicating a biphasic opening of the BBB following head trauma and a possible second wave of secondary brain damage days after the contusion injury. These data indicate regions not initially destroyed by cortical impact, but evidencing BBB breach, may be accessible to neurotrophic factors administered intravenously both immediately and days after brain trauma.

ER -
 TY - PAT
 A1 - Burger, D.R.
 A1 - Goldstein, A.S.
 T1 - Method of detecting AIDS virus infection
 Y1 - 1990/2/27
 VL - 877609
 IS - 4,904,581
 RP - Not In File
 A2 - Epitope, I.
 CY - OR
 PB - 4,629,783
 KW - AIDS
 KW - virus
 KW - infection
 KW - antigens
 Y2 - 1986/6/23
 M1 - G01N 33/569 G01N 33/577
 M2 - 435/5 424/3 424/7.1 435/7 435/29
 435/32 435/70.21 435/240.27 435/172.2
 530/387 530/808 530/809 935/110
 N2 - A method is disclosed for detecting the presence of HTLV III infected cells in a medium. The method comprises contacting the medium with monoclonal antibodies against an antigen produced as a result of the infection and detecting the binding of the antibodies to the antigen. The antigen may be a gene product of the HTLV III virus or may be bound to such gene product. On the other hand the antigen may not be a viral gene product but may be produced as a result of the infection and may further be bound to a lymphocyte. The medium may be a human body fluid or a culture medium. A particular embodiment of the present method involves a method for determining the presence of a AIDS virus in a person. The method comprises combining a sample of a body fluid from the person with a monoclonal antibody that binds to an antigen produced as a result of the infection and detecting the binding of the monoclonal antibody to the antigen. The presence of the binding indicates the presence of a AIDS virus infection. Also disclosed are novel monoclonal

antibodies, noval compositions of matter,
and novel diagnostic kits

ER -
TY - CONF
A1 - Barlow,J.
T1 - An assessment of the status of harbour
porpoise populations in California
Y1 - 1990
VL - SC/42/SM6
RP - Not In File
CY - Nordwijk, Holland
KW - porpoise
KW - presentation document
Y2 - 1990
PB - Meeting of the Scientific Committee of
the International Whaling Commission

ER -
TY - RPRT
A1 - Esparza,J.
T1 - Report of a WHO workshop on the
measurement and significance of
neutralizing antibody to HIV and SIV,
London, 3-5 October 1988

Y1 - 1990
VL - 4
SP - 269
EP - 275
RP - Not In File
CY - San Francisco CA
PB - UC Berkeley
KW - HIV
KW - SIV
KW - AIDS
T3 - World Health Organisation Global
Programme on AIDS

ER -
TY - CHAP
A1 - Franks,L.M.
T1 - Preface by an AIDS Victim
Y1 - 1991
VL - 10
SP - vii
EP - viii
RP - Not In File
T2 - Cancer, HIV and AIDS.
CY - Berkeley CA
PB - Berkeley Press
KW - HIV

KW - AIDS
M1 - 1
M2 - 1
SN - 0-679-40110-5
ER -
TY - CASE
A1 - Cary, A.
A1 - Friedenrich, W.
T1 - Redman v. State of California
Y1 - 1988/10/7
VL - 201
IS - 32
SP - 220
EP - 240
RP - Not In File
CY - ATLA Law Reporter
PB - San Diego County 45th Judicial District,
California
KW - AIDS
KW - litigation
KW - AIDS litigation
KW - rape
U1 - ISSN 0456-8125
N1 - Raped inmate can press case against
officials for contracting AIDS
ER -

Reference Type Chart

Overview

The chart included in this appendix provides the names of each reference type and their associated fields. The fields within one reference type correspond, or map, to similar fields in the other reference types. Field numbers are included to help you locate a corresponding field quickly. Fields that are mandatory (these fields must contain data) are marked with an asterisk (*). The Reference Type and Reference ID fields are mandatory for all reference types.

The chart lists the fields that are included in the default database definition of Reference Manager. If desired, you can include the fields that are not listed by editing the reference type using the Field and Type Editor (described in Chapter 2). In addition, although some fields are marked as mandatory, the only fields that are required by Reference Manager are the Reference ID and Reference Type. You can change the mandatory status of a field using the Field and Type Editor.

In addition, the last column in the chart includes a list of the field names in the Generic reference type as they appeared in the default definition for Reference Manager Version 6/7.

	Generic	Abstract	Art Work
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title, Primary	Title	Title/Subject
04	Authors, Primary	Authors	Artists
05	Date, Primary	Pub Date*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page	Start Page	
10	End Page	End Page	
11	Periodical	Journal Name*	
12	Volume	Volume	Edition
13	Title, Secondary		
14	Authors, Secondary		
15	Issue	Issue	
16	Pub Place		Pub Place
17	Publisher		Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23	Title, Series		
24	Authors, Series		
25	Abstract	Abstract	Abstract
26	ISSN/ISBN		
27	Availability		Availability
28	Date, Secondary		Date
29	Misc 1		Type of Work
30	Misc 2		
31	Misc 3		
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Audiovisual Material	Bill/Resolution	Book Chapter
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Act Name	Chapter Title
04	Authors	Authors	Authors
05	Pub Date*	Date of Code*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09		Start Section	Start Page
10		End Section	End Page
11			
12	Edition	Bill/Res Number	Edition
13			Book Title
14			Editors
15	Volume		Chapter Num
16	Pub Place	Code	City
17	Publisher		Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23		History	Series Title
24			Series Editors
25	Abstract	Abstract	Abstract
26	ISBN		ISBN
27	Availability	Availability	Availability
28	Date	Date	Date
29			Num Volumes
30			Volume
31	Media Type		
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Book, Whole	Case	Catalog
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Book Title	Case Name (Full)	Title
04	Authors	Counsel	Authors
05	Pub Date*	Filed*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page	Start Page	
10	End Page	End Page	
11			
12	Edition	First Page	Edition
13		Case Name Abbrev	
14	Editors		
15	Volume	Reporter Num	Catalog Num
16	City	Reporter	Pub Place
17	Publisher	Court	Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23	Series Title	History	
24	Series Editors		
25	Abstract	Abstract	Abstract
26	ISBN		
27	Availability	Availability	Availability
28	Date	Decided	Date
29	Num Volumes		
30			
31			
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Computer Program	Conference	Data File
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Authors	Authors	Authors
05	Release Date*	Pub Date*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
9		Start Page	Start Location
10		End Page	End Location
11			
12	Edition	Volume	
13			
14		Editors	Editors/Compilers
15	Version	Edition	Version
16	Pub Place	Pub Place	Pub Place
17	Publisher	Publisher	Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23		Series Title	Series Title
24		Series Editors	
25	Abstract	Abstract	Abstract
26	ISBN		
27	Availability	Availability	Availability
28	Copyright Date	Date of Conf	Last Edited
29	Computer	Num Volumes	
30	OS Type		
31	Media Type		
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Electronic Citation	Hearing	In Press
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Authors	Authors	Authors
05	Last Update*	Hearing Date*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page		
10	End Page		
11	Source*		Journal Name*
12	Volume	Bill Number	
13			
14	Editors		
15	Edition		
16		Committee	
17	Publisher	Subcommittee	
18		User Def 1	User Def 1
19		User Def 2	User Def 2
20		User Def 3	User Def 3
21		User Def 4	User Def 4
22		User Def 5	User Def 5
23			
24			
25	Abstract	Abstract	Abstract
26			
27	Availability	Availability	Availability
28	Access Date	Date	
29	Medium		
30	Unique ID		
31			
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Internet Communication	Journal	Journal (Full)
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Subject	Title	Title
04	Sender	Authors	Authors
05	Date of Message*	Pub Date*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09		Start Page	Start Page
10		End Page	End Page
11	Source	Journal Name*	Journal*
12		Volume	Volume
13			
14	Recipient		
15		Issue	Issue
16			
17			
18		User Def 1	User Def 1
19		User Def 2	User Def 2
20		User Def 3	User Def 3
21		User Def 4	User Def 4
22		User Def 5	User Def 5
23			
24			
25	Abstract	Abstract	Abstract
26			ISSN
27	Availability	Availability	Availability
28			Date
29	Sender's Email		Registry Num
30	Recipient's Email		Unique ID
31			
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Magazine Article	Map	Motion Picture
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Authors	Cartographers	Major Contributors
05	Pub Date*	Pub Date*	Release Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page		
10	End Page		
11	Magazine Name*		
12	Volume	Edition	
13			
14			Cast
15	Issue	Map Num	
16	Pub Place	Pub Place	Pub Place
17	Publisher	Publisher	Studio
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	Distributor
23		Map Series	Series Title
24			
25	Abstract	Abstract	Abstract
26			ISBN
27	Availability	Availability	Availability
28	Date	Copyright Date	Date
29		Area	Classification
30		Type	Running Time
31			Media Type
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Music Score	Newspaper	Pamphlet
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Composers	Reporters	Authors
05	Pub Date*	Pub Date*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09		Start Page	
10		End Page	
11		Newspaper*	
12	Edition	Edition	Edition
13			
14	Editors		
15	Volume	Volume	
16	Pub Place	City	Pub Place
17	Publisher	Publisher	Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23	Series Title		
24	Series Editor		
25	Abstract	Abstract	Abstract
26	ISBN		
27	Availability	Availability	Availability
28	Copyright Date	Date	Date
29		Issue	Pamphlet Num
30		Section	
31			
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Patent	Personal Communication	Report
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Authors	Authors	Authors
05	Date Issued*	Date Sent*	Pub Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page		Start Page
10	End Page		End Page
11			
12	Application Num		Report Num
13			
14	Assignees	Recipients	Editors
15	Patent Num		
16	State/Country		Pub Place
17	References		Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23			Series Title
24			
25	Abstract	Abstract	Abstract
26			
27	Availability	Availability	Availability
28	Date Filed	Date	Date
29	Class Code - Int'l	Type	Type
30	Class Code - US		
31	Document Type		
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Serial (Book/ Monograph)	Slide	Sound Recording
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title
04	Authors	Authors	Major Contributors
05	Pub Date*	Pub Date*	Release Date*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Page		
10	End Page		
11			
12	Edition		
13			
14	Editors		Performers
15	Volume		
16	Pub Place	Slide ID	Pub Place
17	Publisher		Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23	Series Title		Series Title
24	Series Editors		
25	Abstract	Abstract	Abstract
26	ISBN		ISBN
27	Availability	Availability	Availability
28	Date	Date	Date
29	Num Volumes		Classification
30			Playing Time
31			Media Type
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Statute	Thesis/ Dissertation	Unenacted Bill/ Resolution
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Act Title	Title	Act Title
04	Authors	Authors	Authors
05	Pub Date*	Pub Date*	Date of Code*
06	Notes	Notes	Notes
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09	Start Section	Start Page	
10	End Section	End Page	
11			
12	Title/Code Num		Bill/Res Num
13			
14			
15			
16	Code		Code
17		Institution	
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23	History		History
24			
25	Abstract	Abstract	Abstract
26			
27	Availability	Availability	Availability
28	Date	Date	Date
29		Degree	
30		Type	
31			
32	Address	Address	Address
33	Web/URL	Web/URL	Web/URL

	Unpublished Work	Video Recording	Generic Ref Man V6/7
01	Ref Type*	Ref Type*	Ref Type*
02	Ref ID*	Ref ID*	Ref ID*
03	Title	Title	Title 1
04	Authors	Major Contribs	Authors 1
05	Pub Date*	Release Date*	Pub Date 1
06	Notes	Notes	Notes 1
07	Keywords	Keywords	Keywords
08	Reprint	Reprint	Reprint
09			Start Page
10			End Page
11			Periodical
12			Volume
13			Title 2
14	Editors	Cast	Authors 2
15			Issue
16		Pub Place	Pub Place
17		Publisher	Publisher
18	User Def 1	User Def 1	User Def 1
19	User Def 2	User Def 2	User Def 2
20	User Def 3	User Def 3	User Def 3
21	User Def 4	User Def 4	User Def 4
22	User Def 5	User Def 5	User Def 5
23		Series Title	Title 3
24			Authors 3
25	Abstract	Abstract	Notes 2
26		ISBN	ISSN/ISBN
27	Availability	Availability	Availability
28	Date	Date	Pub Date 2
29		Classification	Misc 1
30		Running Time	Misc 2
31		Media Type	Misc 3
32	Address	Address	Not Avail
33	Web/URL	Web/URL	Not Avail

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- Availability, 146
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- Date (other), 145
- End Page, 145
- ISSN/ISBN, 146
- Issue, 145
- Miscellaneous, 146
- Notes and Abstracts, 144
- Periodical, 145
- Publication Place, 146
- Publisher, 146
- Reference ID, 144
- Reference Type, 144
- Reprint Status, 145
- Start Page, 145
- Title, 144
- User Defined fields, 146
- Volume, 145
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