

*Reference Manager* for Windows  
Version 10  
The Bibliographic Solution



Brief Instructions for Use



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## ***Reference Manager for Windows Overview***

*Reference Manager* is an online search tool, a reference database and a bibliography maker.

*Reference Manager* is a software program that allows you to create and manage your own personal bibliographic database. Imagine having your own personal MEDLINE or CINAHL database filled with references to citations of importance to your work. This personal database would contain references related to your research or clinical interests. In addition, using bibliographic management software allows you to keep your reprints in a manageable order.

*Reference Manager* is designed to keep track of specific references in your fields of interest. You enter these references into the system, either manually or using the Capture function. Once your references are entered into *Reference Manager* you can retrieve references, generate a bibliography or generate a bibliography while writing a paper/manuscript/thesis with your word processor.

## ***Reference Manager System Requirements***

### **Hardware**

- Pentium or better
- 16 MB RAM minimum
- Monochrome or color monitor
- Hard disk with at least 25 MB available
- Keyboard and mouse
- CD ROM

### **Software**

- Microsoft Windows 95 or higher; Windows NT 4.0
- Word processing software if you plan to cite references in your manuscripts: Microsoft Word for Windows Version 97, 2000 or XP; or Corel Word Perfect Version 8, 2000, 2002
  - The word processors must be installed before *Reference Manager*.
- Web Browser; Netscape 4.0 or higher; or Internet Explorer 4.0 or higher – if you want to use the URL field

### **Installing on your hard disk**

- See the Reference Manager User's Guide

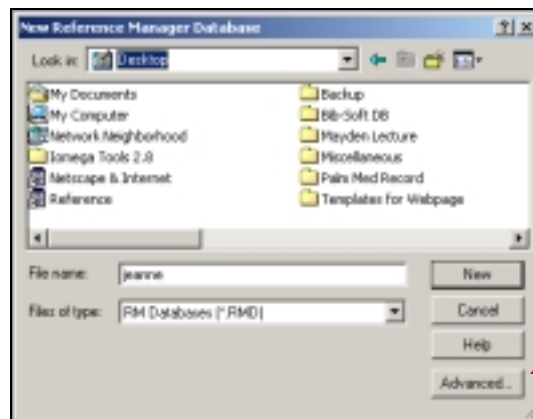
## Starting Reference Manager

- From the **Start** menu select **Programs**
- Then **Reference Manager 10**
- Then **Reference Manager**

The *Reference Manager* program will now open up. Note the file menu bar and the various buttons available for use.

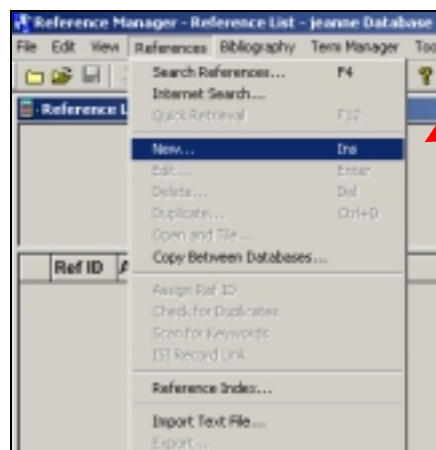
### Creating a New Database

- From the **File** menu select **New Database**. (Control-N keys will also perform this function.)
- In the New Reference Manager Database box enter the **File name** <filename>
- If you want to use the list of full and abbreviated journal titles provided by Reference Manager then do the following
  - Click on **Advanced** > **Periodical Synonyms** > **Copy From:** > **Medical**
  - This is especially helpful if you use a citation format style that requires the full name of the journal title.
- Then click on the **New** button.

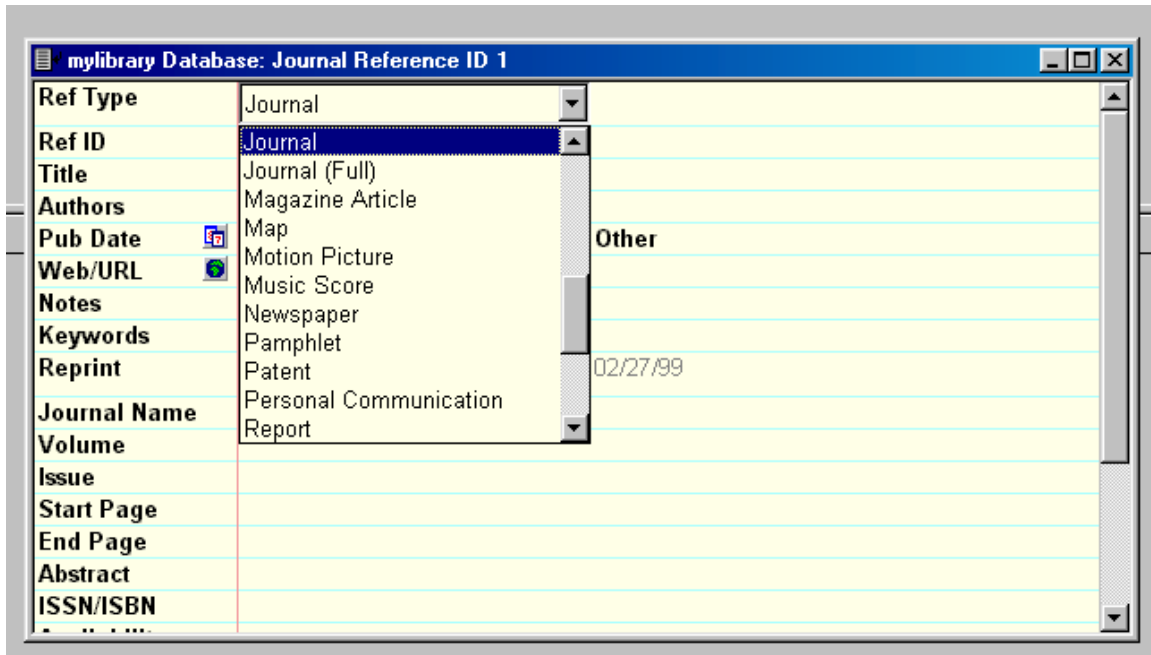


The next time you open your database, from the **File** menu select **Open Database** and highlight your database name from the Database Names list. Click **OK**.

Since this is a new database, the database is empty. **No references appear in the reference list**. An empty split screen appears. To manually input your first reference, from the **References** menu select **New**.



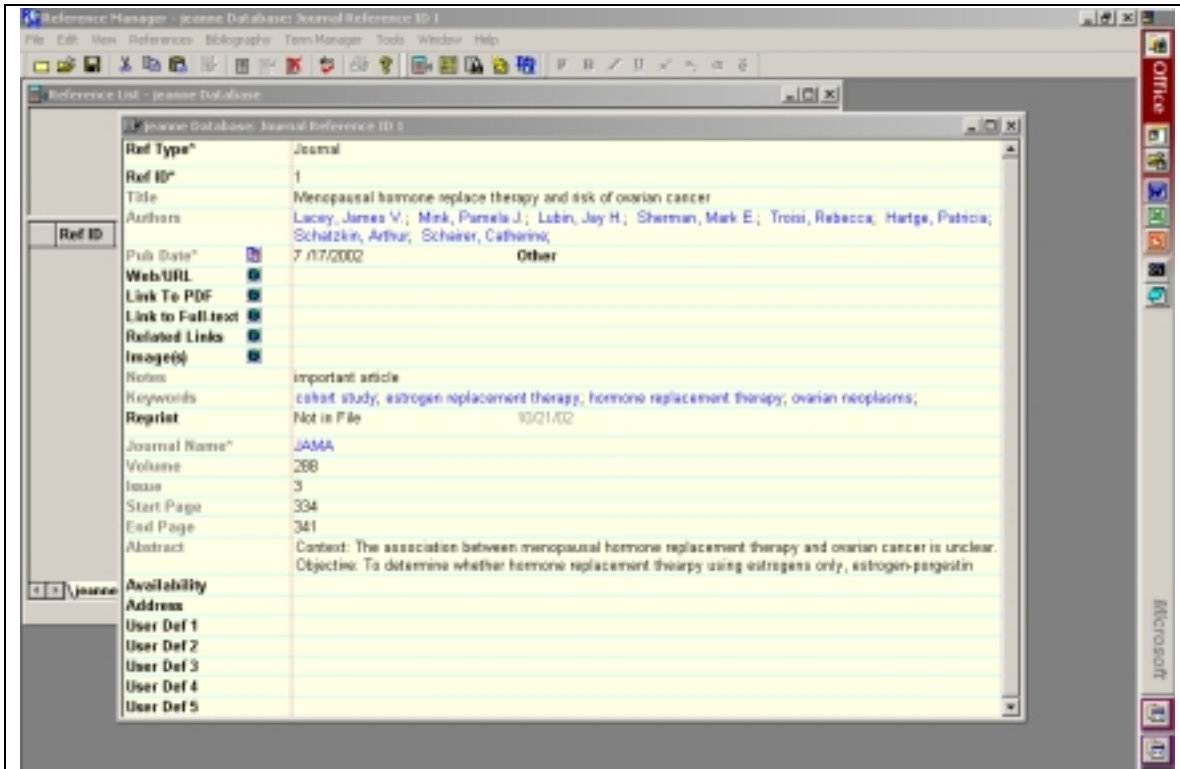
The next dialog box asks you to select the appropriate template for the reference you are typing into the program. *Reference Manager* offers 35 reference types, including **Journal**, **Book/Whole**, **Book Chapter**, and **Thesis/Dissertation**. Each of these templates requires slightly different information and so it is important to select the template appropriate for your entry.



## Using the Journal Template

**Note:** To activate the **Automatic Popup Browser**, from the **Tools** menu select **Options >General** (tab), and check the **Automatic Popup Browser**. This is recommended.

Fill in the Journal Reference template with the appropriate information. Detailed information is below.



- There are three ways to assign a reference ID to a reference:
  1. **Automatically assign reference IDs**
    - a. you cannot edit an automatically assigned reference number unless you turn off this function and edit or assign them individually
    - b. Tools > Options > Reference Edit tab > select the "Assign Reference ID" box
  2. **Use the Assign Ref ID function to assign reference IDs numerically or by Authors/Date**
    - a. Tools > Options > Reference Edit tab
    - b. In the **Automatic Settings** box, make sure Assign Reference ID is clicked off
    - c. Have a new reference on the screen with a blank ID field
    - d. From the **References** pull-down menu, select **Assign Ref ID**. The program assigns the next available ID (whether is it numeric or in the Author+Date format) for the reference.
  3. **Manually type a reference ID**
    - a. Tools > Options > Reference Edit tab
    - b. In the Automatic Settings box, make sure Assign Reference ID is cleared.
    - c. In Ref ID field, type the ID number
- Enter the **Title** of the journal article in sentence style. This would be the style appropriate for APA citation format. Press TAB to go to the next entry line.

- Authors are entered in **Author** field. Each author's name is separated by a pair of semicolons; each author can be up to 225 characters; and you can enter up to 255 different author names for each citation.

Be consistent when entering authors names. This strict form of entry provides Reference Manager with great flexibility in its various output formats.

**When entering full first name:**

last name comma first name space middle name (or initial)

example: **Smith,Raymond David**

**When entering first and middle initials**

last name comma first initial period middle initial period

example: **Smith,R.D.**

As the authors are being entered, new names are being added to the author list; new names are highlighted in blue.

- The **Pub Date** year automatically defaults to the current year. There are two forms of entry for the Pub Date; year only or month/day/year. Depending on your reference, enter the appropriate format. Use the Pub Date icon to toggle back-in-forth between the two choices.

The **Other** field of the Pub Date is used for additional information such as Quarter or Spring.

- If your journal article is available on the Web, then enter the **Web URL** address.
- **Notes** may be short reminders to yourself, or other important information.
- **Keywords** are used to help you retrieve the references in which you are interested, quickly and efficiently. You can enter the keywords manually; individual keywords are separated by a semicolon . Keywords will automatically be added to the keywords list if from the **Options** menu, **Reference Edit** (tab), you have the **Scan Titles and Notes for Keywords** checked. This is recommended.
- The **Reprint** field allows you to specify whether the reference is "In File," "Not In File," or "On Request."
- The **Journal Name** field is where you can enter either the full name, the standard abbreviation, or an abbreviation of your choice for the journal title. Put spaces only after complete words; pub periods only after abbreviated words. Up to 4 different names (synonyms) can identify each journal title. **Note:** Reference Manager will select the appropriate name or abbreviation when generating bibliographies.

**Volume** – enter the journal volume number.

**Issue** – enter the journal issue number.

**Start Page** – enter the first page of the article.

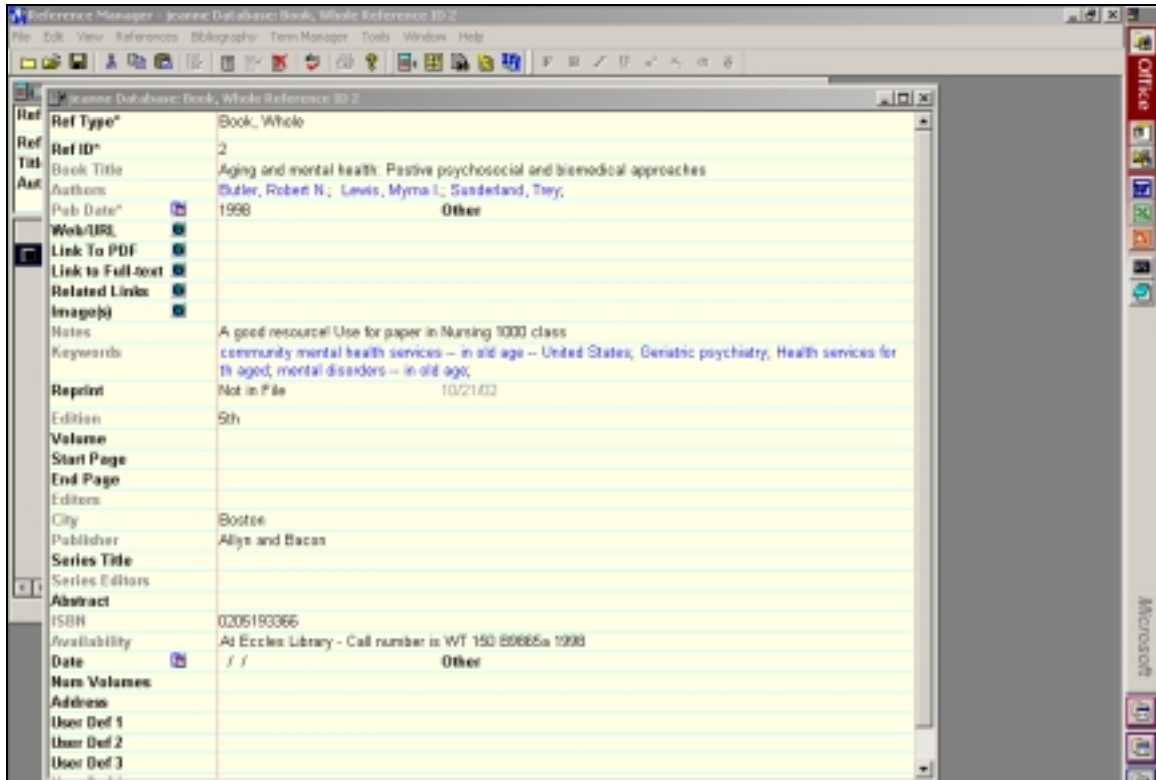
**End Page** – enter the last page of the article. If you do not know the last page you can leave it blank.

- The **Abstract** field can be any length.
- **ISSN** - the International Standard Serial Number
- **Availability** – to specify where material is located, when you are expecting a reprint or copy, or other information.
- **Address** – use to enter the full address of the author, publisher, and so on.
- **User Def 1 to Def 5** – can be used to enter any other information about the reference you desire. The name of the field can be changed using the **Field** and **Type Edit** from the **Tools** menu.

You have now entered the entire reference. Review the information entered; if you want to change information in any of the field, simply move the cursor to the location where you want to make the change. Save the reference by clicking the **Save** icon in the *Edit toolbar* or choosing **Save** from the **File** menu.

## Using the Book, Whole Template

From the **References** menu select **New**; for **Ref Type** select **Book, Whole** from the pull down menu. Enter the appropriate information, in the correct format, in the correct field. Sample entry follows ...



The screenshot shows the Reference Manager software interface. The main window displays a reference entry for a book. The entry is titled "Aging and mental health: Passive psychosocial and biomedical approaches" and is authored by Butler, Robert N.; Lewis, Myrna L.; and Sandstead, Thy. The publication date is 1998. The book is published by Allyn and Bacon in Boston. The ISBN is 0205193066. The entry is categorized as "Book, Whole" and has a Ref ID of 2. The software interface includes a menu bar (File, Edit, View, References, Bibliography, Term Manager, Tools, Window, Help) and a toolbar with various icons. The reference entry is displayed in a table-like format with fields for Ref Type, Ref ID, Book Title, Authors, Pub Date, Web/URL, Link To PDF, Link to Full-text, Related Links, Image(s), Notes, Keywords, Reprint, Edition, Volume, Start Page, End Page, Editors, City, Publisher, Series Title, Series Editors, Abstract, ISBN, Availability, Date, Num Volumes, Address, User Def 1, User Def 2, and User Def 3.

Ref Type*	Book, Whole
Ref ID*	2
Book Title	Aging and mental health: Passive psychosocial and biomedical approaches
Authors	Butler, Robert N.; Lewis, Myrna L.; Sandstead, Thy;
Pub Date*	1998 Other
Web/URL	
Link To PDF	
Link to Full-text	
Related Links	
Image(s)	
Notes	A good resource! Use for paper in Nursing 3000 class
Keywords	community mental health services -- in old age -- United States; Geriatric psychiatry; Health services for the aged; mental disorders -- in old age;
Reprint	Not in File 10/21/02
Edition	5th
Volume	
Start Page	
End Page	
Editors	
City	Boston
Publisher	Allyn and Bacon
Series Title	
Series Editors	
Abstract	
ISBN	0205193066
Availability	At Eccles Library - Call number is WT 150 B0665a 1998
Date	// Other
Num Volumes	
Address	
User Def 1	
User Def 2	
User Def 3	

Be sure to Save the reference when you are done.

## Using the Book Chapter Template

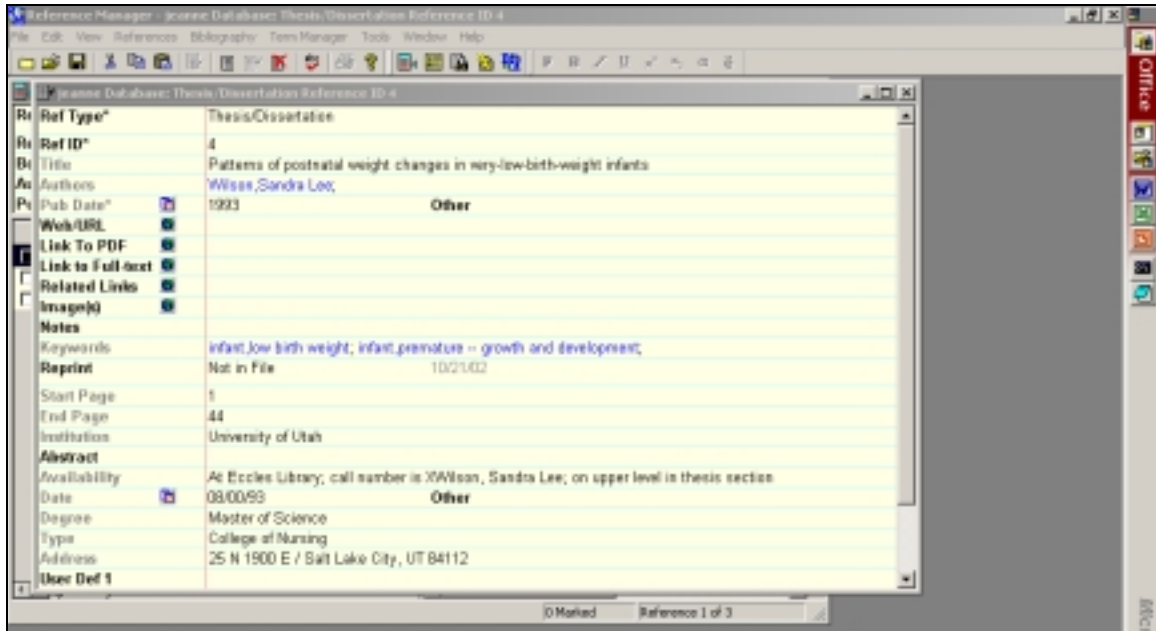
From the **References** menu select **New**; for **Ref Type** select **Book Chapter** from the pull down menu. Enter the appropriate information, in the correct format, in the correct field. Be sure to enter the Chapter Title and Authors at the start of the record. The book title and editors is entered later in the record. Sample entry follows ...

The screenshot shows a software window titled "Reference Manager - Inspec Database: Book Chapter Reference ID 3". The interface includes a menu bar (File, Edit, View, References, Bibliography, Term Manager, Tools, Window, Help) and a toolbar. The main area displays a record for a "Book Chapter" with the following details:

Ref Type*	Book Chapter
Ref ID*	3
Chapter Title	Supporting positive behaviors: The nurse's role
Authors	Tolman,Brent C.; Brown,Marisa Conci, Roth,Shirley P.;
Pub Date*	1994 <b>Other</b>
Web URL	
Link To PDF	
Link to Full-text	
Related Links	
Image(s)	
Notes	Excellent resource for Nursing 2000 project
Keywords	delivery of health care; mental retardation - nursing; mental retardation - rehabilitation; psychiatric nursing;
Reprint	Not in File 10/21/02
Edition	
Chapter Num	11
Start Page	248
End Page	260
Book Title	A life-span approach to nursing care for individuals with developmental disabilities
Editors	Roth,Shirley; Schaefer,Catherine;
City	Baltimore
Publisher	Paul H. Brookes Publishing Co.
Series Title	
Series Editors	
Abstract	
ISBN	1-55766-151-0
Availability	At Eccles Library, call number is Wy 160 L722 1994
Date	// <b>Other</b>
More Volumes	
Volume	
Address	
User Def 1	
User Def 2	

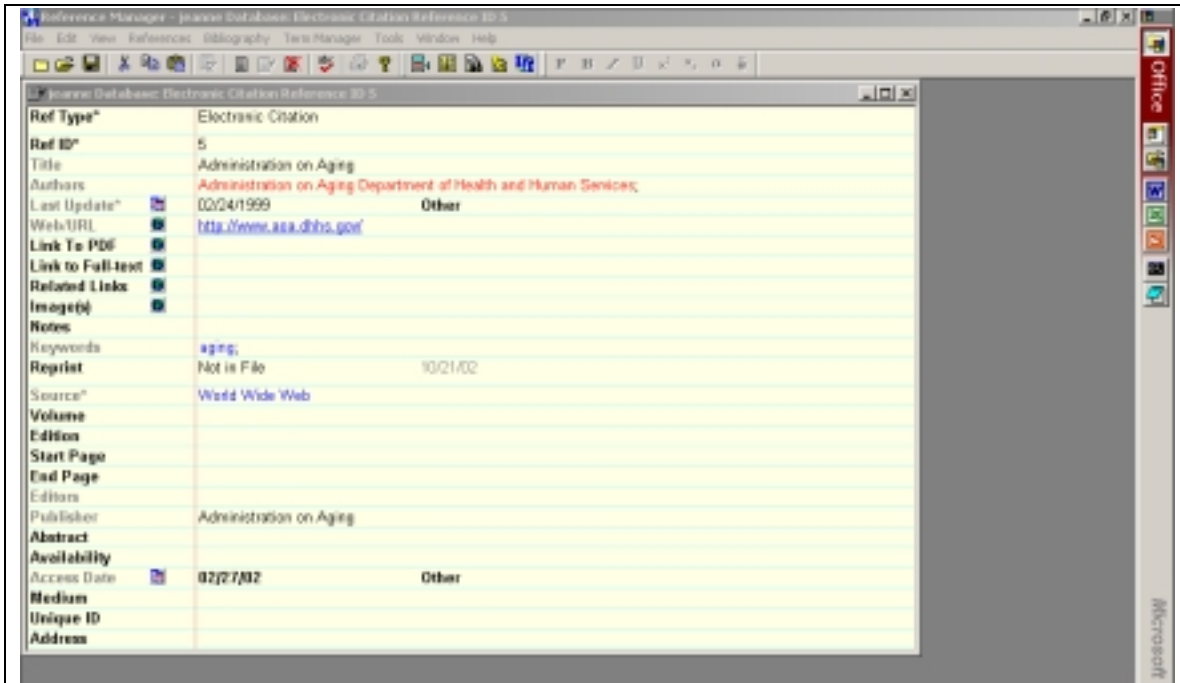
## Using the Thesis/Dissertation Template

From the **References** menu select **New**; for **Ref Type** select **Thesis/Dissertation** from the pull down menu. Enter the appropriate information, in the correct format, in the correct field. Be sure to enter Degree and Type. Sample entry follows ...



## Using the Electronic Citation Template

From the **References** menu select **New**; for **Ref Type** select **Electronic Citation** from the pull down menu. Enter the appropriate information, in the correct format, in the correct field. Be sure to enter the URL, and the date you access the site, and the source (World Wide Web, or a specific database, or an online electronic journal). Sample entry follows ...



The screenshot shows a window titled "Reference Manager - Journal Database: Electronic Citation Reference ID 5". The interface includes a menu bar (File, Edit, View, References, Bibliography, Text Manager, Tools, Window, Help) and a toolbar. The main area displays a form for an electronic citation with the following fields and values:

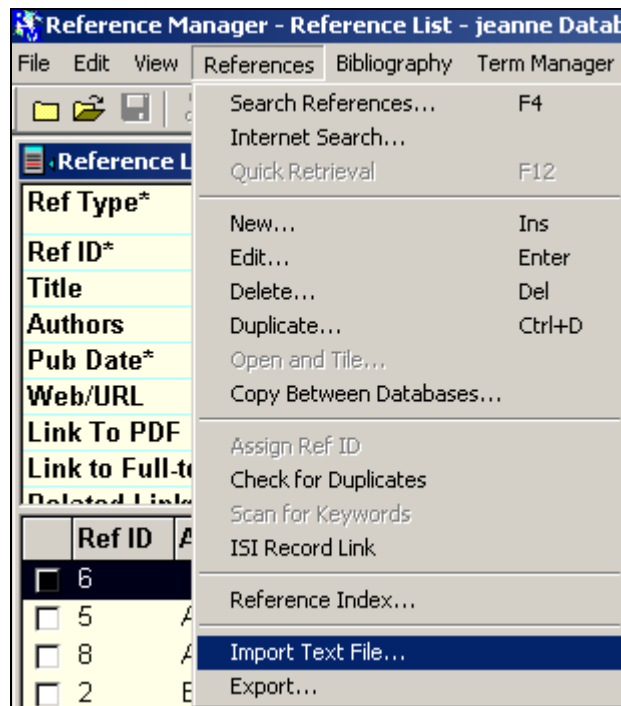
Ref Type*	Electronic Citation	
Ref ID*	5	
Title	Administration on Aging	
Author	Administration on Aging Department of Health and Human Services	
Last Update*	02/24/1999	Other
Web URL	<a href="http://www.asa.dhhs.gov/">http://www.asa.dhhs.gov/</a>	
Link To PDF		
Link to Full-text		
Related Links		
Image(s)		
Notes		
Keywords	aging;	
Reprint	Not in File	10/21/02
Source*	World Wide Web	
Volume		
Edition		
Start Page		
End Page		
Editors		
Publisher	Administration on Aging	
Abstract		
Availability		
Access Date	02/27/02	Other
Medium		
Unique ID		
Address		

## Import Text File

An easy way to build your database is to import references you have downloaded to a file from online, CD-ROM and World Wide Web services such as EBSCOhost or PubMed. The files from these services must be downloaded in a tagged format that **Import Text File** can read. That is, each part of every reference must be preceded by a delimiter, or “tag,” and each reference must be separated by a delimiter. Each search service uses a unique tagged format for its files, and the module contains a specific translator for each service it supports.

*Reference Manager* provides **Import Text File** formats for EBSCOhost databases such as CINAHL and Eric. As well, you can import MEDLINE citations from PubMed.

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



**Fill in the Capture dialog box.**

**Database:** is the location of your *Reference Manager* database (or library)

**Filter:** is the search service you used to do a search and save citations with abstracts.

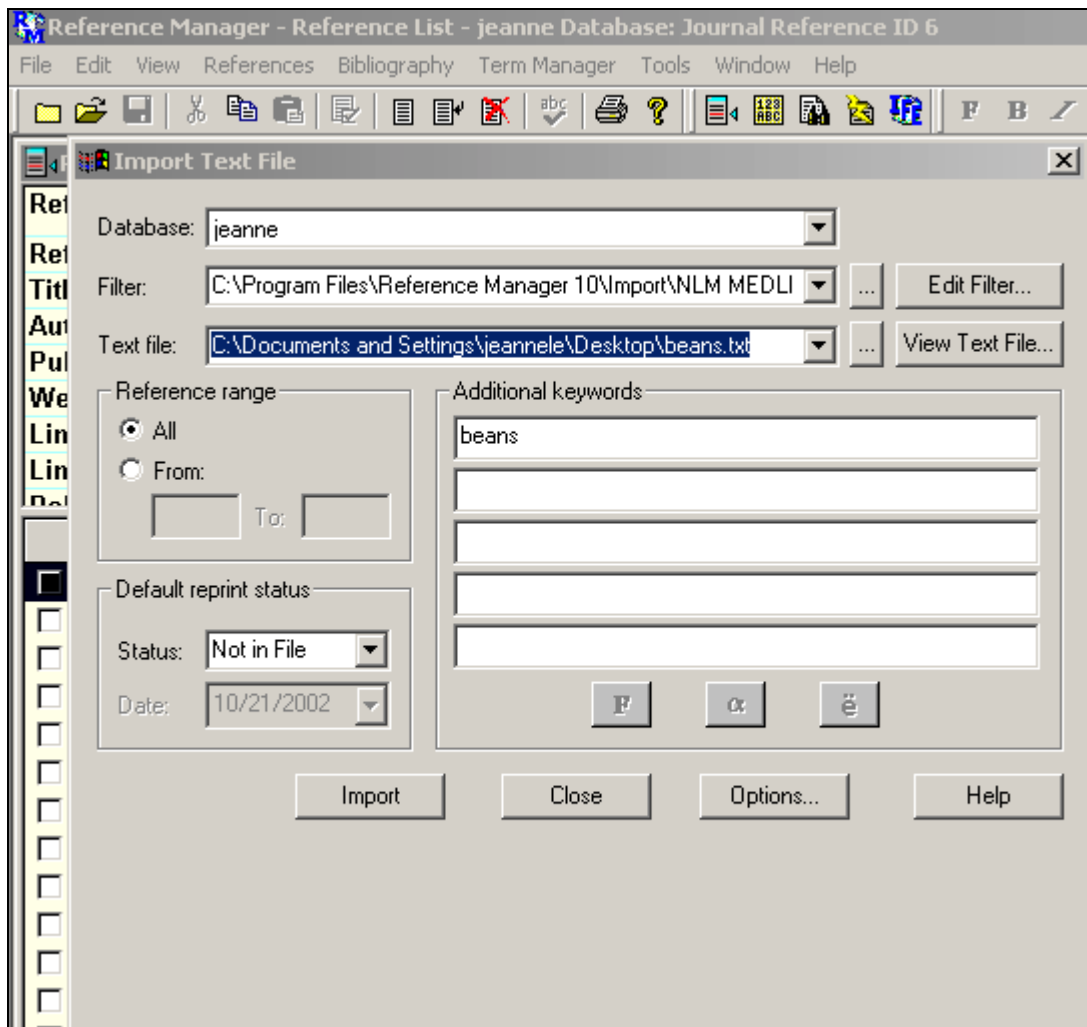
**Text file:** is the location and name of the text file in which the citations with abstracts were saved.

**Reference range:** if you want to capture all the references in the text file, click the **All** radio button.

**Default reprint status:** There are three options from the pull down menu: In File, Not on File, On Request

You do have the option to enter additional keywords for the records that are being imported. Fill in the blanks below **Additional keywords** on the lower right side of the dialog box.

When you are ready to start the import process click on the **Import** button.



When the **Import** process is complete, a message appears that says **Import successfully completed**. Click the **OK** button. You do have the options to **Close** or **Save Log...** The Log is a record of the Import process. For our purposes its OK to just **Close**.

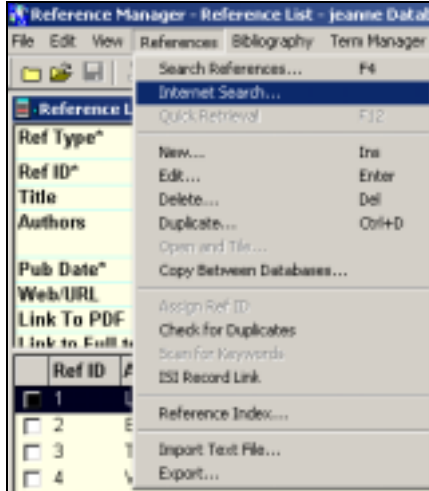
## Internet Search

Using the PubMed Internet retrieval choice, you can import references directly from the Internet.

Import options:

### Tools > Options > Internet Search

To **Automatically display the internet search results**, click the checkbox. If you do not select this option, you can choose to display results after they are retrieved.



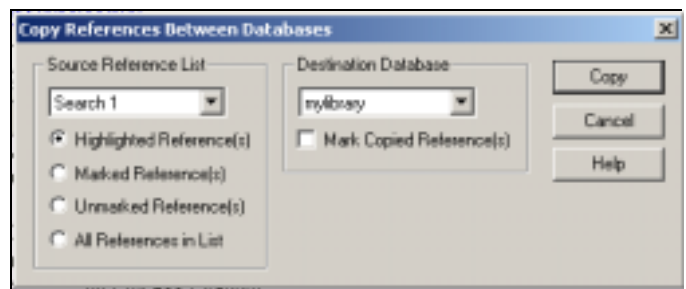
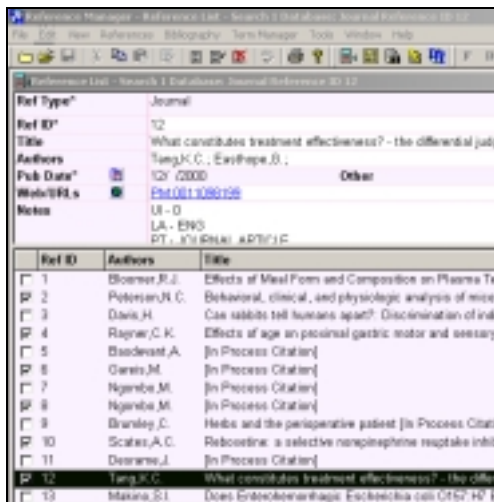
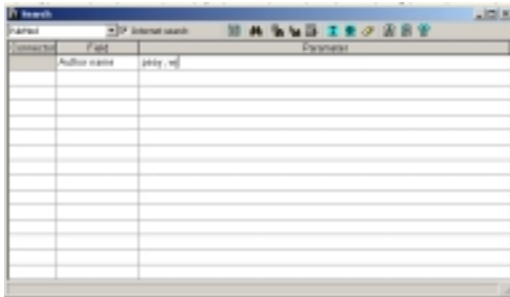
From the menu bar select  
**References > Internet Search**

Fill in the **Retrieval** window with your search parameters.  
Then press the **Start Retrieval** icon (the binoculars).

Select the citations you want to add to your database by  
clicking the box under the Ref ID

Then select  
**References > Copy Between Databases >**

Indicate the Source Reference List and the Destination  
Database and press the **Copy** button. Marked references will  
be copied into the selected database.



## Working With Synonyms – Term Manager

The **Term Manager** window is used to edit, add, replace and delete terms (authors, keywords and journal/periodical names) in your database. Other functions that you can perform include a quick retrieval based on terms highlighted in the Term Manager window. From Term Manager, you can print an alphabetical listing of terms in your database.

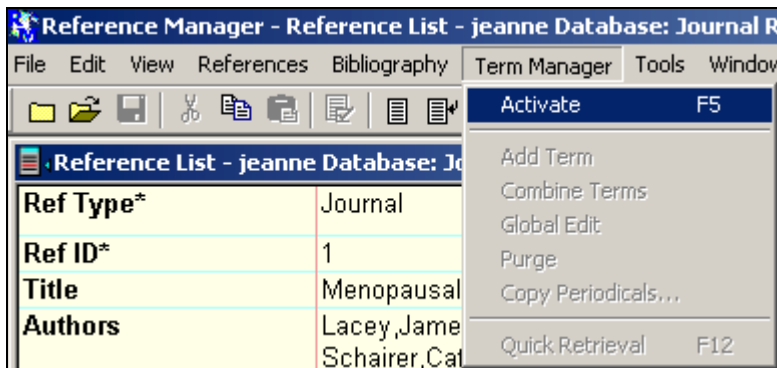
You can add new terms using the Term Manager, as well as edit and delete terms. Global editing functions, such as deleting terms and replacing one term with another, are also available from the Term Manager window. Other functions you can perform include a quick retrieval based on terms highlighted in the Term Manager window or print an alphabetical listing of your terms in your database.

The Term Manager window is used to create synonym lists for authors, keywords and periodicals. The Term Manager window is also used to perform global editing.

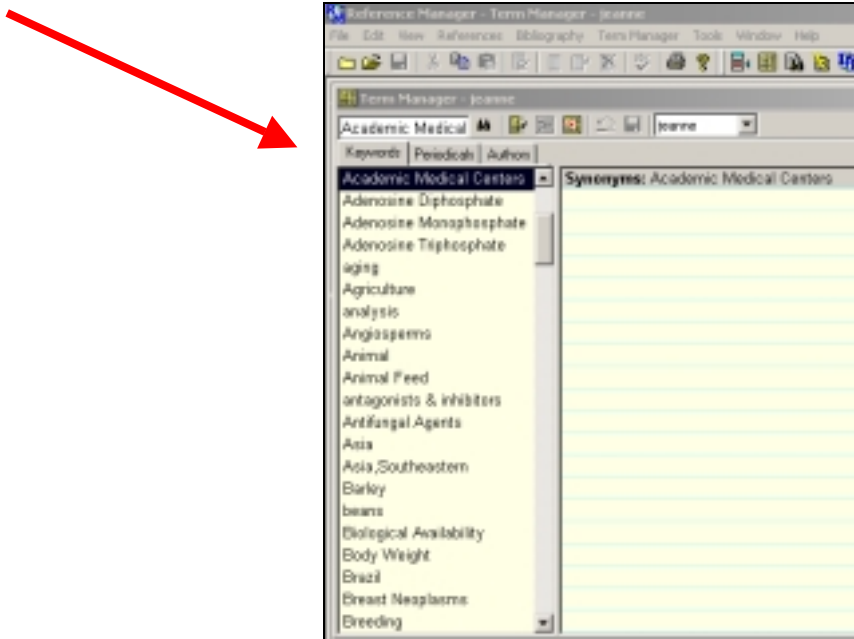
Tools in the toolbar at the top of the Term Manager window allow you to perform a quick retrieval based on the highlighted term(s), perform a global edit, combine terms, add new terms, cancel synonym editing, and save any changes you have made in the synonym list. These functions are also available from the Term Manager menu.

The functions to be covered in this class are described below:

- Adding a synonym to an existing author
- Adding a new periodical
- Combining periodical synonyms
- Combining and adding keywords

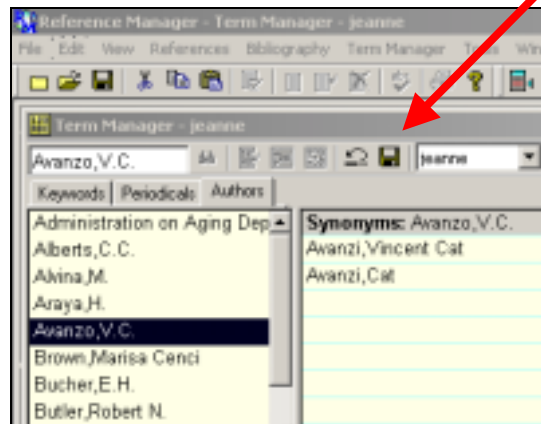


The *Reference Manager* – Term Manager – offers three functions: keywords, periodicals (journals) and authors. Click on the tab for any of these functions, to enter that function.



#### Adding a Synonym to an Existing Author

You may decide that a particular author can be referred to in a couple of different ways; or you may want to add the author's nickname. Select the **Authors** tab; select the name you want to add the synonym(s) to; type the synonyms in on the right side of the dialog box; and then click on the **Save Synonyms** icon. Example follows:



## Adding a New Periodical with Synonyms

To add a new journal title to the Periodicals Term Manager, click on the add terms icon; then enter the **Full**, **Std Abrev** (standard abbreviation), **User One** and **User Two** synonyms for the journal title.



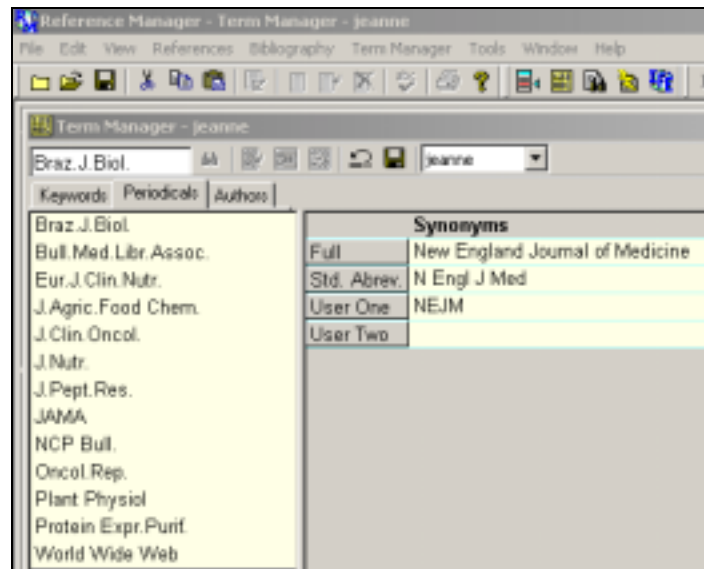
**Add Term** icon!

To save the entry, click on the Save Synonyms icon.



**Save Synonyms** icon!

Example follows:



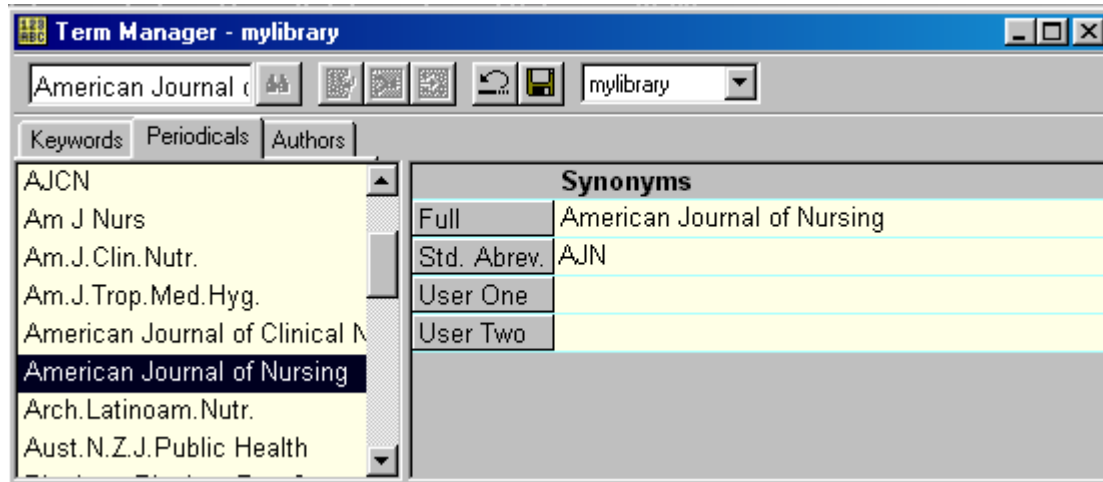
You can use any of the periodical synonyms when you enter a new reference, or when retrieving references. When you generate a bibliography or list of references, the correct periodical name will be used based on the output style you select. In addition, you do have the option of specifying which of the four periodical synonyms to use in each output style.

## Combining Periodical Synonyms

To combine periodical terms (for example, you have one periodical with a Full name and another periodical with a Standard Abbreviation, and the two are actually the same periodical) you need to perform several steps.

The example we are working with here is that **Am J Nurs** and **American Journal of Nursing** are the same title but each has its own entry. They need to be combined.

- Select American Journal of Nursing from the Periodicals list
- Add a “fake” Standard Abbreviation and click on the Save Synonyms icon.

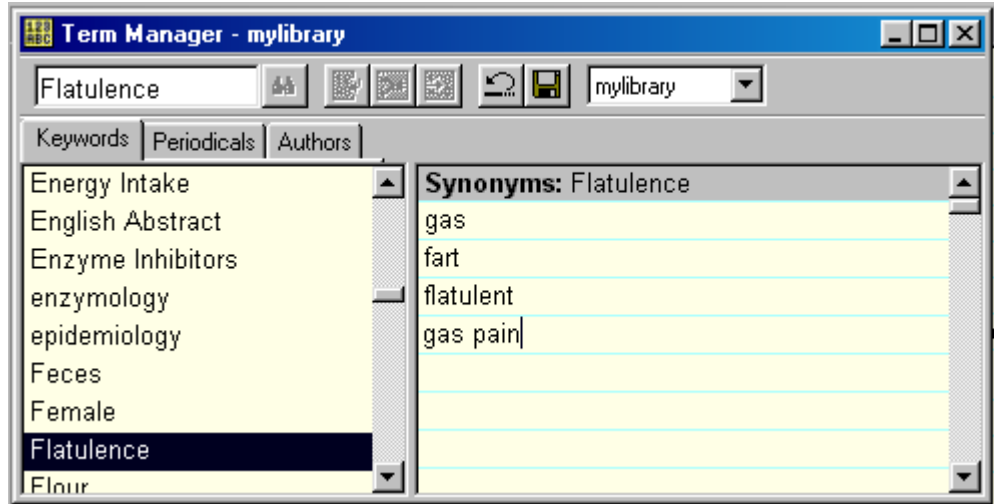


- Next select the Am J Nurs in the Terms list on the left side of the Term Manager window, and click global edit.
- The Global Edit dialog box appears with Am J Nurs in the Source Field.
- Replace Am J Nurs with the “fake” name AJN by entering AJN in the Destination field.
- Close the Global Edit dialog box and verify that the periodical name was changed to AJN in one reference.
- Finally, select AJN in the Terms list, click Global Edit and replace AJN with the real Standard Abbreviation, Am.J.Nurs.
- The temporary name AJN is removed from the database and the two periodical names, American Journal of Nursing and Am.J.Nurs. are combined into one synonym list.

## Adding Keywords

### Adding a Synonym to an Existing Keyword

You may decide that a particular keyword can be referred to in a couple of different ways. Select the **Keywords** tab; select the keyword you want to add the synonym(s) to; type the synonyms in on the right side of the dialog box; and then click on the **Save Synonyms** icon. Example follows:



### Combining Keywords

If there are two keywords in your list that are synonyms, you can combine those two terms by using the **Combine Terms** tool in the Term Manager window toolbar. Use the **[Ctrl]** key to select similar terms that are separated in the list. With the two (or more) terms highlighted, click on the Combine Terms tool.



Combine Terms tool!

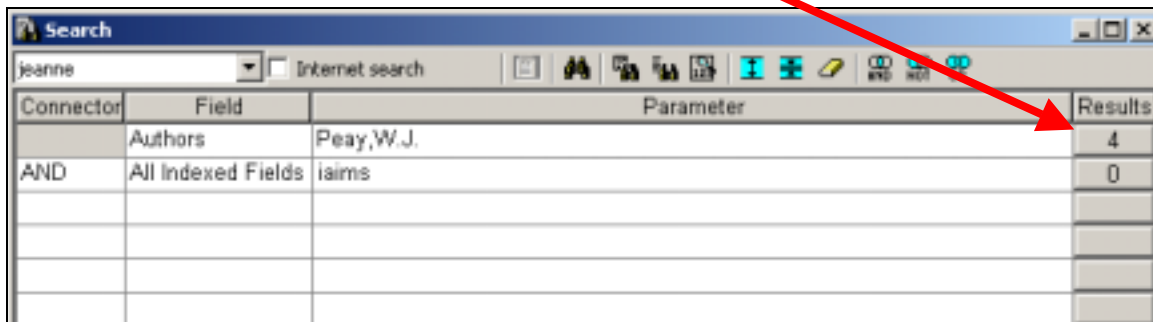
## Retrieving References

As your database gets larger, you will want to search for articles by certain authors, by a specific subject, or range of years. *Reference Manager* offers a search retrieval function.

- From the **References** menu select **Search References**
- Fill in the Search window with search parameters
- **Field** options include: authors, keywords, periodicals, year, titles, reference type, pend reprint, reprint status, ref index and reference id
- **Connector** options are AND, OR, NOT
- **Parameter** field is asking you to enter the terms of the search you want to do
  
- For example: find all articles that have the author peay **AND** have the keyword **iaims**
  
- Click on the **Start Retrieval** icon to initiate the search
- Click on the **number** in the **Results** column to see a list of the citations. In this example, there are four citations retrieved.



**Start Retrieval** icon or F12.



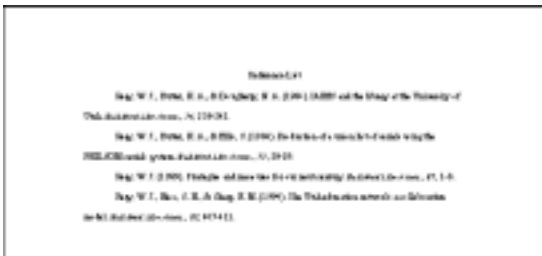
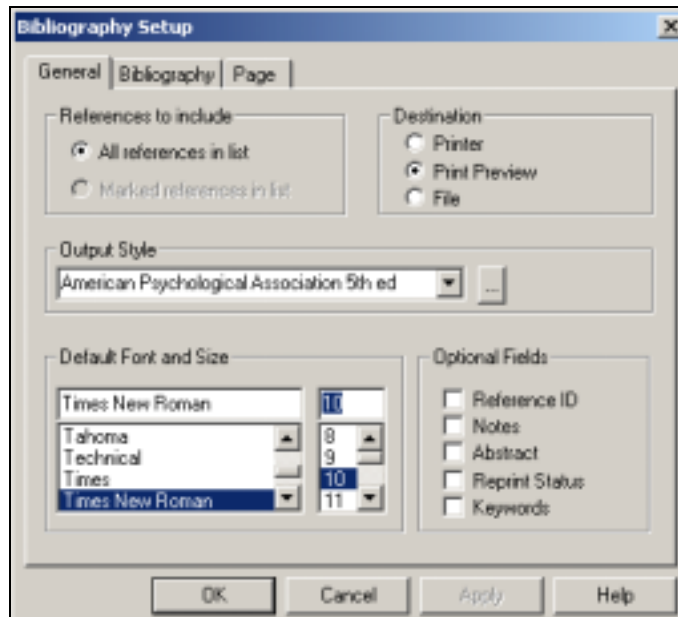
The screenshot shows a window titled 'Search' with a search bar containing 'jeanne' and an 'Internet search' checkbox. Below the search bar is a toolbar with various icons. A red arrow points from the 'Start Retrieval' icon in the toolbar to the 'Results' column of the search results table.

Connector	Field	Parameter	Results
	Authors	Peay,W.J.	4
AND	All indexed Fields	iaims	0

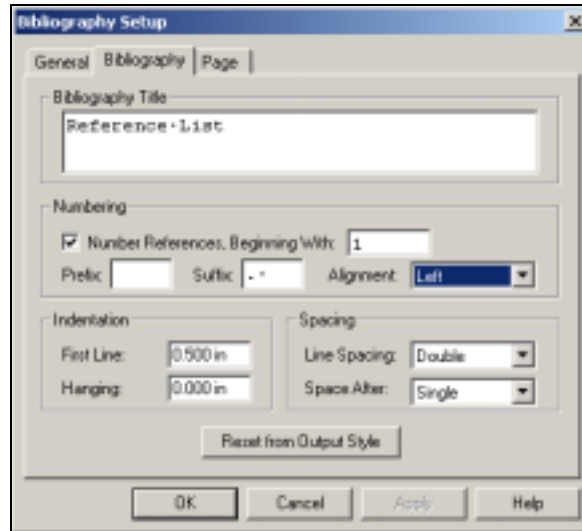
## Generating a Bibliography from a Retrieval List

It is possible to print a list of references directly from within *Reference Manager*. This allows you to print a bibliography using the **Print** option in the **File** menu. You can also print a bibliography by choosing **Generate from Reference List** in the **Bibliography** menu. Both menu options display the **Bibliography Setup** dialog box that is describe below.

1. Use **Retrieve** from the **References** menu to search for citations containing the keyword, author, year (whatever) that you are interested in.
2. The retrieved references should appear sorted by Author in the Retrieved tab (this is the default sort order as specified in the **Retrieval** tab of the **Options** dialog box under the menu item **Tools**).
3. Choose **Print** from the **File** menu. The **Bibliography Setup** dialog box appears.
4. Under the **General** tab:
  - **Reference to include** – All references in list
  - **Destination:** Printer (other options are Print Preview or File)
  - **Output Style** – select the style you want to use
  - **Select the Font and Size**
  - Select or deselect the **Optional Fields**



Click the **Bibliography** tab to specify how the references are to appear in the bibliography.  
**Bibliography Title** – Enter appropriate title <Reference List>  
**Number References beginning with** 1 (use this only if you want the references numbered)  
**Alignment** – Left  
**First line indent** – change to 0.500 and **Hanging** to 0.000  
Indicate any **Spacing** you require



Click the **Page** tab to specify **Margins**, **Page Numbers**, and **Location** and **Alignment** of **Footer** or **Header**.

Then click **OK**.

Use Print Preview under the General tab to get a look at how the document will print out, before actually doing the print. This will save you some frustration and cost for paper.

## Using Cite While You Write

**Cite While You Write** is an add-on to your word processor (MSWord 95, forward and WordPerfect 7, forward). It allows you to cite references while you are writing your manuscript. You insert 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.

### To Begin the *Cite While You Write* process:

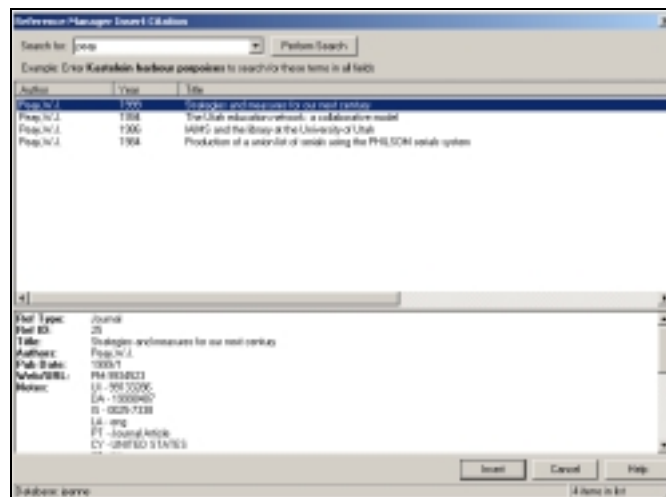
- Open MSWord. Note the Reference Manager toolbar. If the *Reference Manager* toolbar does not appear then from the **View** menu choose **Toolbars** and select **Reference Manager**.

From left to right the icons perform the following functions:

- Insert Citation
- Insert Marked Reference(s)
- Instant Formatting
- Generate Bibliography
- Edit Citation
- Insert Note
- Edit Database Reference(s)
- Revert to Original Text
- Remove Field Codes
- Cite While You Write Preferences
- Help

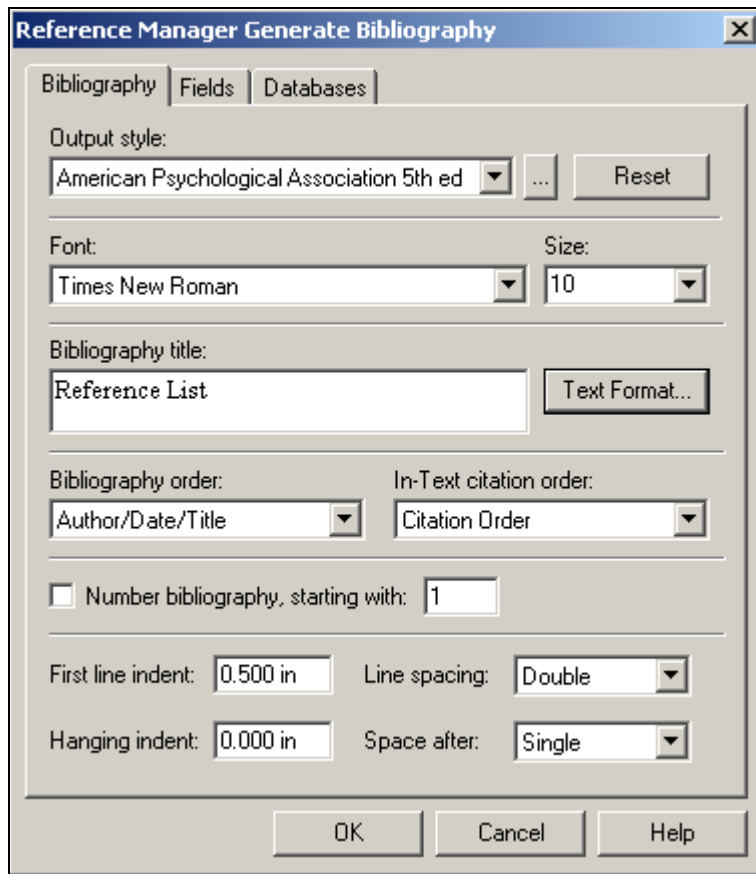


- Click on the **Insert Citation** icon and the Reference Manager Insert Citation dialog box appears. In the **Search for:** box type in an author's last name, publication years, reference ID or keywords to identify a single reference. Then, click on the Insert button. If a list of citations appears, double click on the one you want; otherwise *Reference Manager* pastes a citation marker in your word processing document. This is an unformatted citation and simply identifies the reference in your database.



- Continuing writing the paper and using the Insert Citation dialog box to add citation markers in your document.

When you are done, use the **Generate Bibliography** icon to select citation style and other features.



The bibliography appears at the end of the document and the in-text citation markers are reformatted to meet the requirements of the output style.