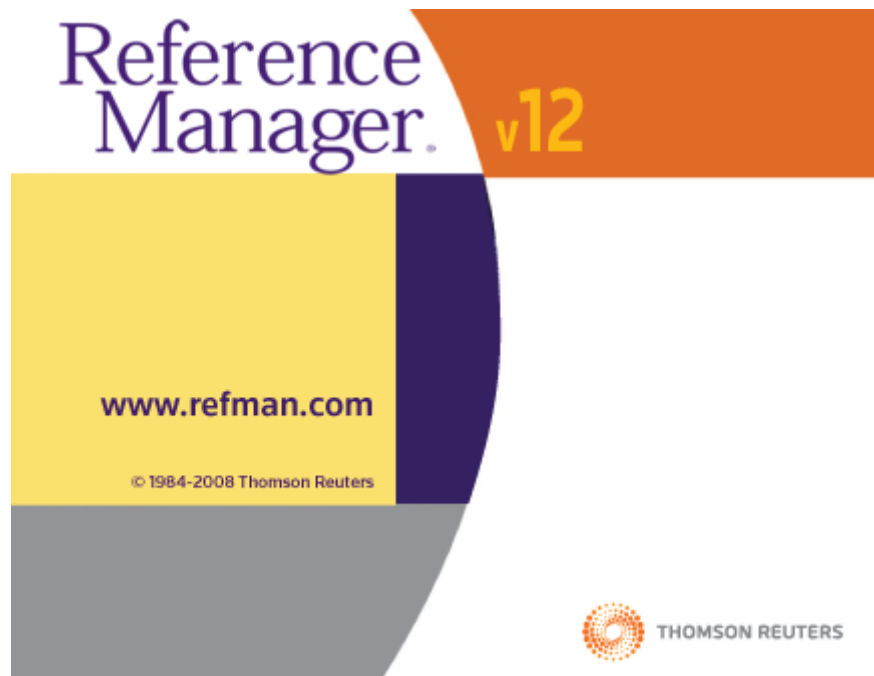


Using



Please Note: You must be running v12.0.3 or later for Reference Manager to work properly with Word 2010.

Dr Trevor Bryant
Faculty of Medicine
tnb@southampton.ac.uk

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Reference Manager is a software tool for creating a personal database of references which can be integrated with Word to insert citations into a document and create reference lists.

These notes describe how to use it but as notes describing how to use computer applications have their limitations you may find the following resources useful:

- There are some online video tutorials on how to use Reference Manager at www.refman.com/training/
- Use the Help menu of Reference Manager.
- Try the Support & Services www.refman.com/support/rmsupport.asp#updates
- Browse the Reference Manager forum at <http://forums.thomsonscientific.com/ts/?category.id=refman>

Obtaining Reference Manager

Reference Manager can be installed on any University owned computer. If you have a Windows 7 University built computer it can be installed from the Additional Software link. Alternatively it can be downloaded from www.software.soton.ac.uk.



If you wish to install it on a personally owned computer you must purchase it from the UK distributor site www.adeptscience.co.uk click the Education link. The current price is £66.55 inc VAT (August 2011)

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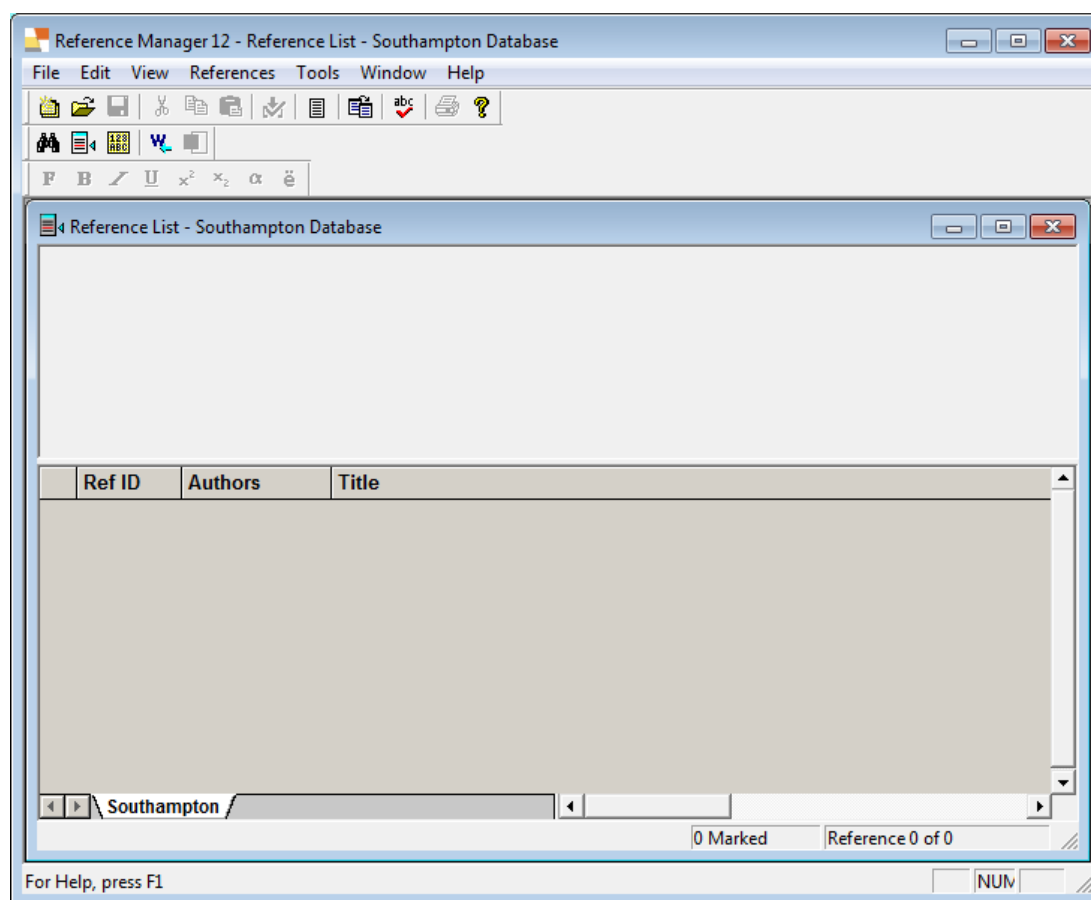
Using Reference Manager to manage references

Starting Reference Manager

On University Public workstations use **Start | Programs | Bibliographic Software | Reference Manager**

Creating a Database

We will create a new database to store the results of your literature searches. Select **File | New Database**, give it the name Southampton and click on **New**



Collecting References

There are three approaches to collecting references.

1. Perform an *Internet Search* from within Reference Manager. This is the quickest way, but not always the best approach from a bibliographic searching perspective.
2. Enter a *New Reference* manually by typing the details in. This is a last resort and is described in the Appendix (page A-5); you should rarely need to use it. It is much better to search for a reference online, even if you have the paper copy in front of you.
3. Perform a search using a bibliographic provider such as OVID, EBSCO or Faculty of 1000 to search databases and then *Import References* found. This is a better approach and is recommended by librarians because you can develop more complex searches.


Online Searching

Reference Manager offers three sources of databases to search

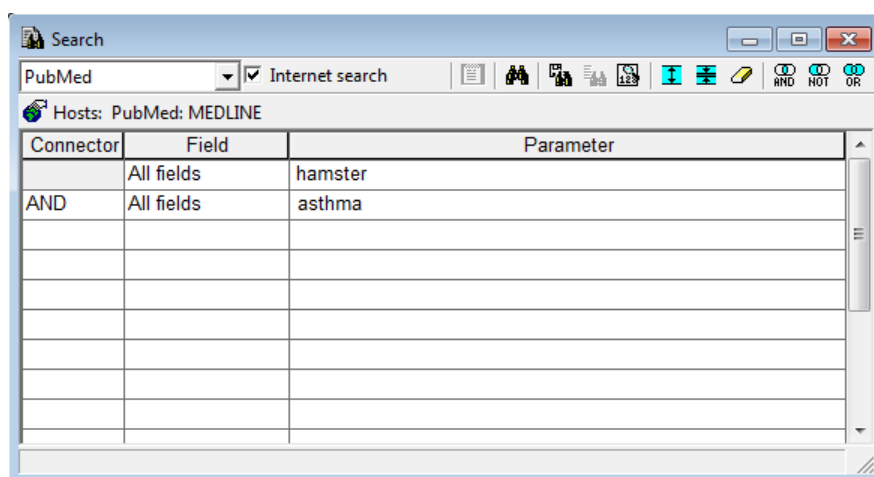
- ISI Web of Knowledge
- PubMed
- Z39.50 sites


All of these may be of interest to you.

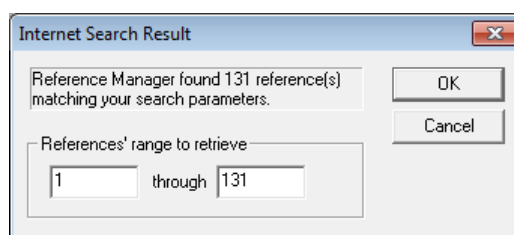
Searching PubMed

Suppose you are interested in whether there is any evidence that pet hamsters are associated with asthma. To begin the process either choose, **References | Search References** or click on the **Search** button  and check the **Internet search** box in the Search window. Change the dropdown displaying ISI Web of Knowledge to **PubMed** the National Library of Medicine's public access database.

Enter the search criteria **hamster** into the Parameter cell, press the <Tab> key or click on the Connector cell and change the dropdown to AND, press <Tab> twice to enter the word **asthma** in the next parameter cell of this grid. The completed search window is shown below.



Press the Start Search  button. A *Search of web databases* dialogue will be displayed followed by an *Internet Search Result* dialogue showing how many references can be retrieved. If there are many results to download, you could download in batches by specifying the reference range. Alternatively, you may want to refine your search and be more selective.

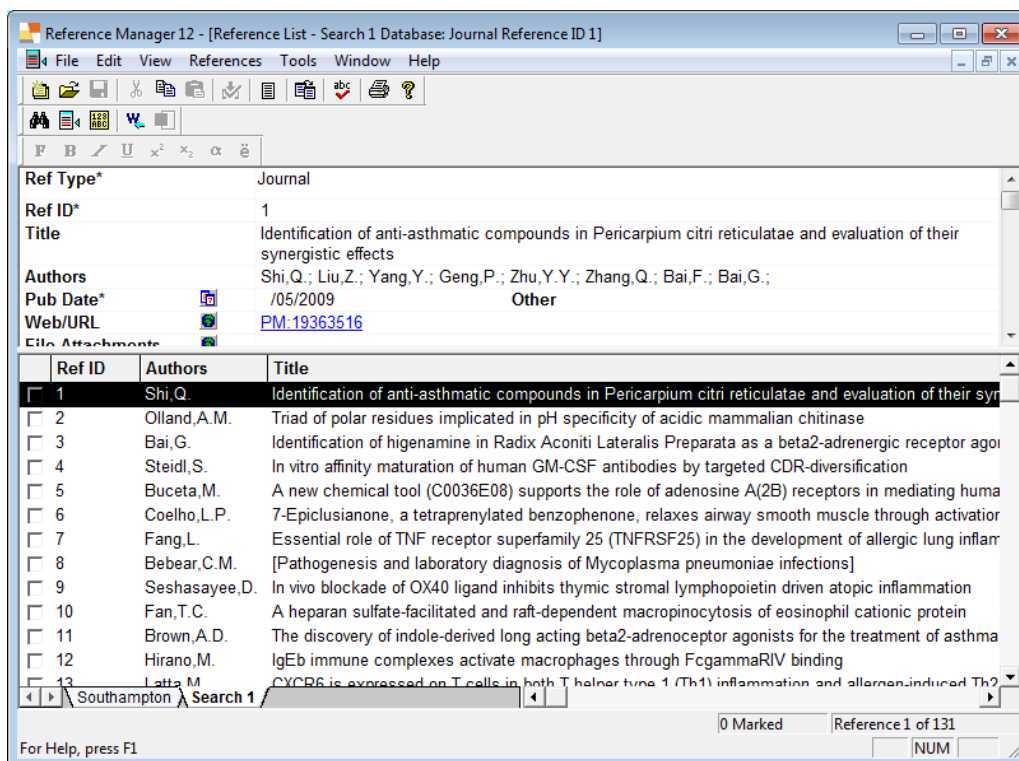


Click **OK** to retrieve the references.

The *Field* column in the Search window enables you to specify which PubMed fields you wish to search, for example Author, Keyword, MeSH heading, Journal etc. Combine multiple the search criteria by typing AND, OR, or NOT in the *Connector* field.

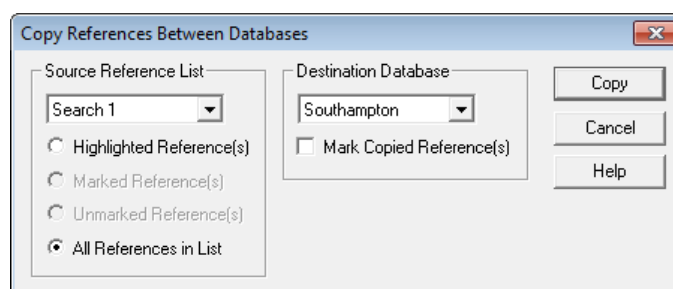
Saving the Search Results

The retrieved references are placed in a database called *Search 1* as shown below.




Note: There are two tabs, Southampton and Search 1. The Southampton tab is still empty at this point.

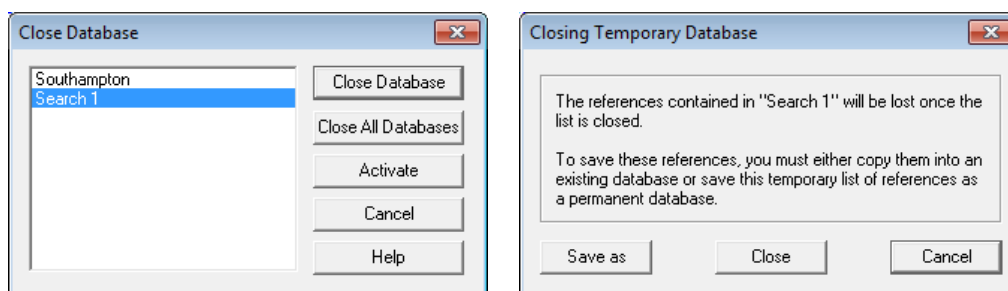
The references can be copied from *Search 1* to *Southampton* by selecting **References | Copy References Between Databases**, selecting *All References in List* or another option and clicking **Copy**.



A *Confirm Copy Reference* dialogue will be displayed; **Yes to All** is the quickest option.

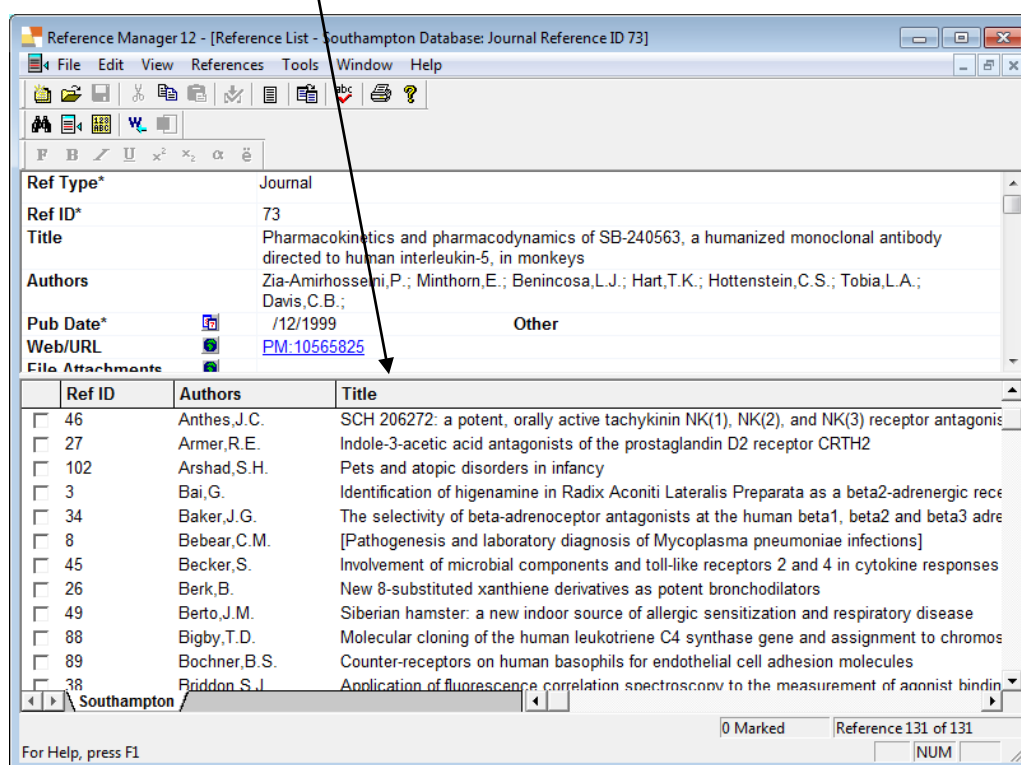
Select the *Southampton* tab; it now contains the *Search* references. You can close the *Search 1* database.

An alternative to copying is to click the  close button for *Search 1* tab or choose **File | Close Database** and save the records to a new database with a different name as shown in the figures below.



The Reference List window

The Reference Manager screen is divided into two panes. The **Reference List**, in the lower portion of the window, is a scrollable list of the references in the current database (tab). The top portion, or pane, of the window is the **Reference Display**, which contains the full text of the reference that is highlighted in the Reference List. The size of the two panes can be changed by dragging the separator bar up or down



At the very top of the application window is the **toolbar** and menu bar. The buttons allow you to access common functions available in Reference Manager. The function of each button is briefly described as a yellow highlight as you move the cursor over it.

The **status bar**, located at the bottom of the window, shows the reference ID of the currently selected reference, (Reference 131 of 131) and the number of marked references, if any.



Searching for recent PubMed entries


You can search for references added to the PubMed database in a specific time period, e.g. the last month. Select the field *Entrez Date* and enter the parameter 2011/09 to get references for a recent month.

Entering **2011/08:2011/09** would return references for August and September 2011.

One way to establish how Reference Manager should specify search parameters is to browse the PubMed site and select the **Help | FAQ** link www.ncbi.nlm.nih.gov/books/NBK3827/ which provides useful information on search parameters and how they should be entered.

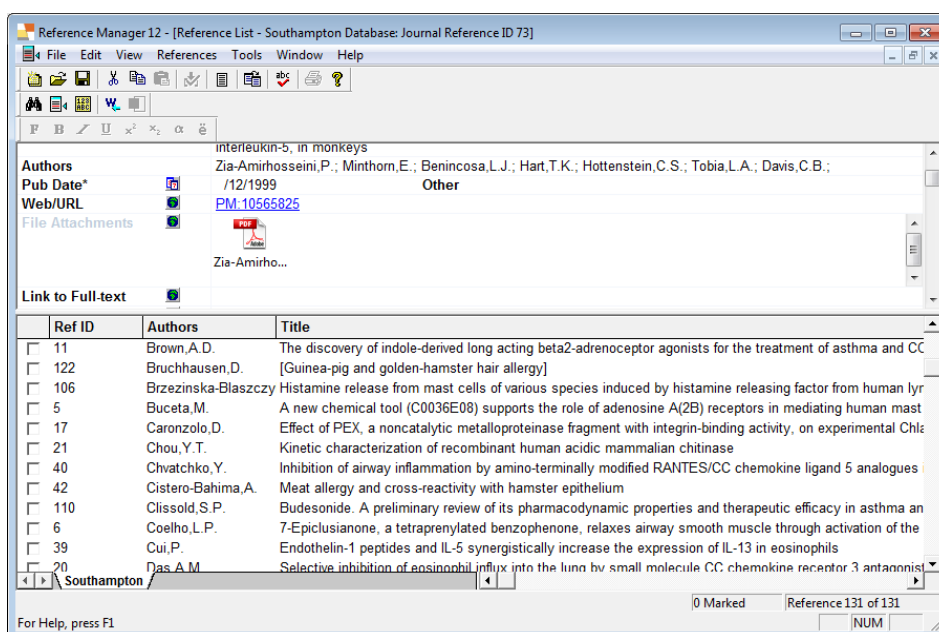
Web Links from PubMed citations

One advantage of finding articles using a PubMed search is that a hyperlink is provided in the Web/URL field of the Reference Manager database . Clicking on the  icon displays the details of the reference from the PubMed site in your web browser

The PubMed web site may link to the article on the journal publisher's site. Clicking on this link will take you to the publisher's site and, if there is free access to the article or the Library has a subscription for this journal, you can view the full article and save an Acrobat file (pdf) version of it. A suggestion would be to save all journal articles in a folder called My References. 

Making a link to saved PDF files

To link the Reference Manager database record to the PDF file. Right Click over the **File Attachments** field. Then select **File Attachments / Attach File**, use the Attach File dialogue to browse for the name of the file and click **Attach**. The figure below shows Web/URL and File Attachment PDF icon for a reference located in the PubMed database. When you navigate away from the reference that has been edited a dialogue will ask if you want to Save Changes.



Modifying the displayed Reference List

The grey *field name bar* above the reference list can be used to modify the width of each field (column) by dragging the vertical dividing line separating fields, left or right. A double-headed arrow is displayed when the cursor is in the correct location to do this.

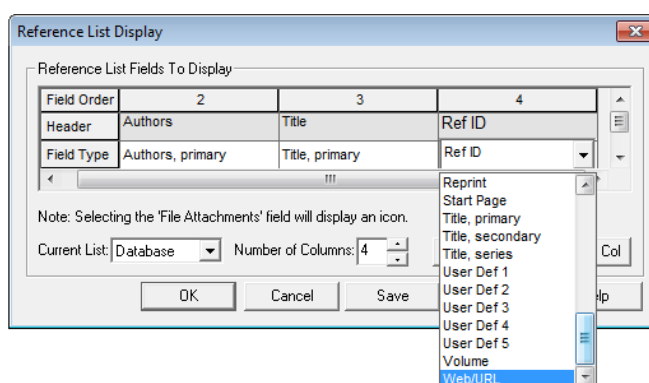
	Ref ID	Authors	Title
<input type="checkbox"/>	46	Anthes, J.C.	SCH 20627

You can sort the entire database in the Reference List window by any of these fields. Reference can be ordered by Ref ID, Authors, or Title, by clicking on the field name. For example the screen above shows the effect on clicking on Authors.

Double clicking on the same field name (e.g. Authors) reverses the sort direction (from ascending to descending and vice versa). This is equivalent to displaying files and folders in various sort orders in Windows Explorer).

The fields displayed in the Reference List section can be customised by selecting **Tools | Reference List Display**. The *Reference List Display* dialogue allows new fields to be inserted into or existing ones removed from the Reference List panel.



When a new column is added it defaults to Ref ID. Click on the *Field Type* cell to change the field to another type, e.g. Web/URL. The Header cell of this column automatically contains the name of the chosen field. The *Header* description can be changed by clicking on the cell and editing the contents.

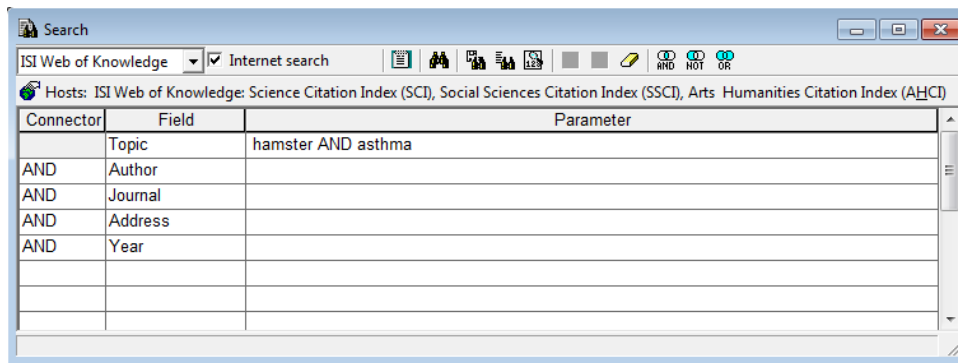


*Note: If you click on **Insert Col**, a new column is inserted to the left of the current column, but if you increase the **Number of Columns**, a new column(s) is added after the last column.*


Searching the ISI Web of Knowledge

Another useful bibliographic source is Web of Knowledge (WoK); it covers Science, Arts & Humanities and Social Science.

Suppose you wish to perform a similar search to the previous PubMed search (page 2) with **hamster** and **asthma** as search criteria. The fields offered for WoK are fixed so to search for hamster and asthma, enter **hamster AND**, or click  button, **asthma** all in the same cell (see below). Click the Start Search  button.



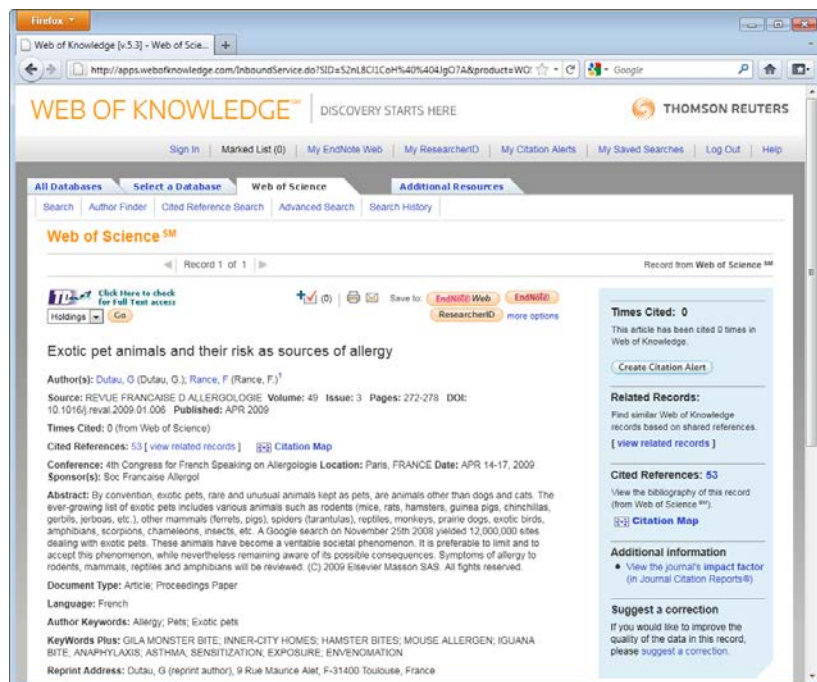
Note A different number of references will be returned compared the PubMed search carried out previously. Some references will be the identical to those from the PubMed search, others will be new. Web of Knowledge catalogues different publications but covers the major biomedical journals and includes conference proceedings.


One difference between reference details from the PubMed and Web of Knowledge search is the Web/URL. Clicking on  takes you to the WoK site as shown below.

If you click on:

Related Records, ISI WoK will search for similar publications to the one shown.

Cited References 53, ISI WoK displays the references cited by this publication.



Note The Web of Knowledge page displays a link  **Click Here to check for Full Text access**, this will link to the full text of the paper if the Library has a subscription for this journal.

The **Save to more options** link is used to push articles from WoK to Reference Manager when you search from within the Web of Knowledge.



Reference Manager, EndNote and ISI Web of Science/Knowledge are produced by the same organisation, Thompson Reuters, and are closely integrated, offering additional features that you do not get from PubMed searching. However WoS/WoK clearly favours EndNote because the Reference Manger save to button has been removed!

Capturing References from bibliographic databases

References can be ‘pushed’ to Reference Manager from bibliographic providers such as OVID, EBSCO and Faculty of 1000. These access providers deliver the content from specific databases. The Library negotiates the most economic deals for accessing content and this is why we have multiple providers.

Note: The Library provides [general guides and online information skills tutorials](#) for these resources.

OVID, EBSCO and Faculty of 1000 provide access to databases which cannot be searched directly using Reference Manager. This is any database other than PubMed/Medline or WoK. However they both provide access to PubMed/Medline.

OVID

OVID provides access to *AMED (Allied and Complementary Medicine)*, *EMBASE*, *MEDLINE*, *ealth Management Information Consortium* and other databases.

The figure opposite shows the OVID Results Manager for a search of the EMBASE database (European equivalent of MEDLINE/PubMed) for Hamster and Asthma.

Select the references to be exported to Reference Manager from the *Results* list.

Individual references can be selected by clicking the check boxes (not shown). All references by checking **All**.

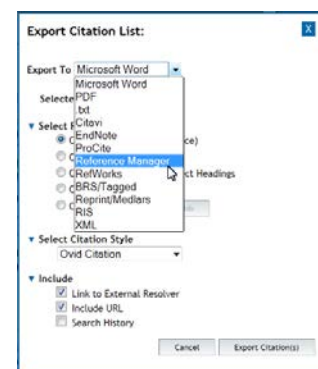
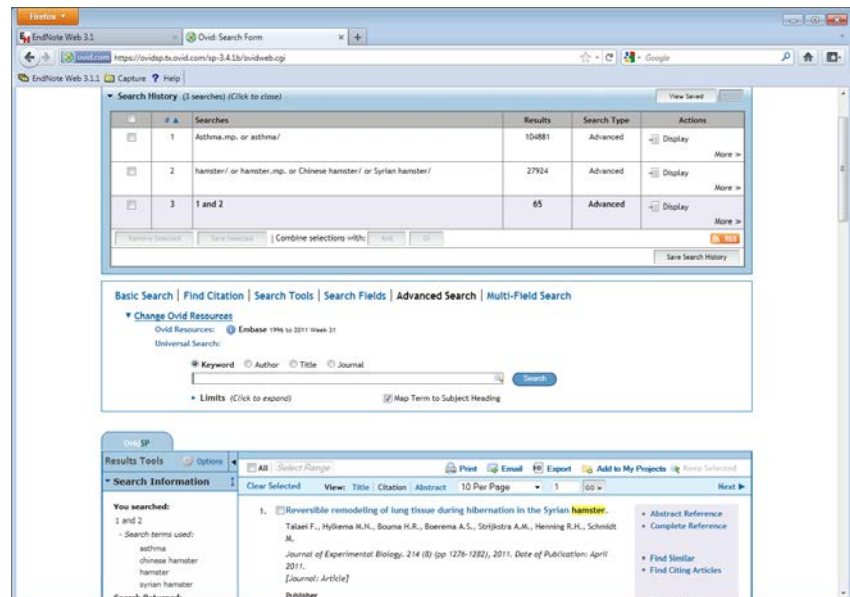
Select the  **Export** button.

The Export Citation List dialogue will be displayed
Use the *Export To* drop down to select *Reference Manager*.

Select *Complete Reference* in *Select Fields to Display*.

Click **Export Citation(s)**.

A *File Download* dialogue will be displayed. “*Asking Do you want to open or save this file?*” If you select Open you may be asked to Choose Destination (software). Navigate to the folder containing the database to receive the OVID citations, select the Reference Manger database and click **Open**. If you want to create a new database, enter a new name in the FileName text box, Reference Manger will tell you the file does not exist and ask if you want to create it.



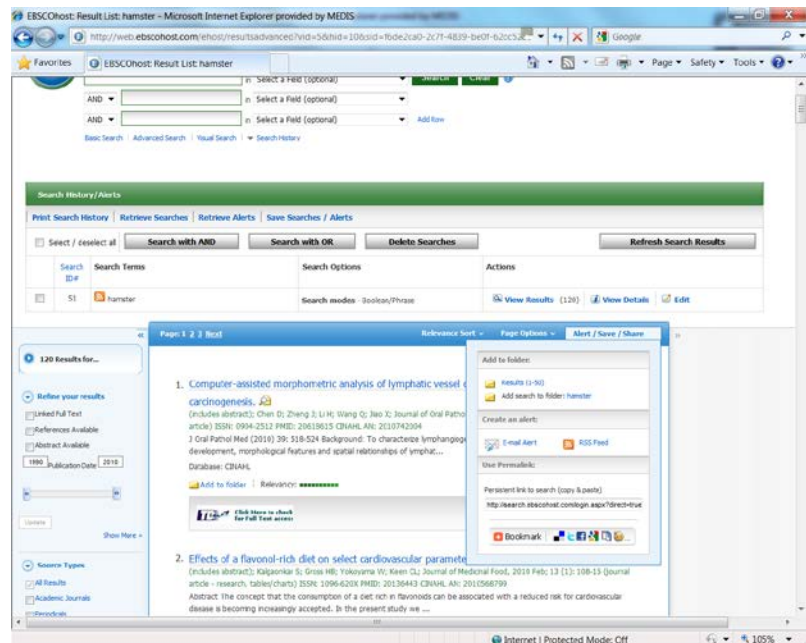
You might be asked ‘A previous import session still exists. Do you want to clear the previously imported references’ Select your preference (Clear or Append). The references will be placed in Reference Manager in an *Imported* tab as well as added to your chosen database.

OVID- EMBASE, but not OVID-PubMed, provides a Web/ URL link directly to the paper on the journal publisher’s web site if there is an institutional subscription for it.

EBSCO

EBSCO enables searching of the *CINAHL*, *PsycINFO*, *PsycARTICLES* and *Medline* health databases. The library provides handouts on how to search these resources effectively.

To save results from an EBSCO search use **Alert / Save / Share** to store them in a Folder in EBSCO.



Select the folder containing the added results by clicking on the Folder link

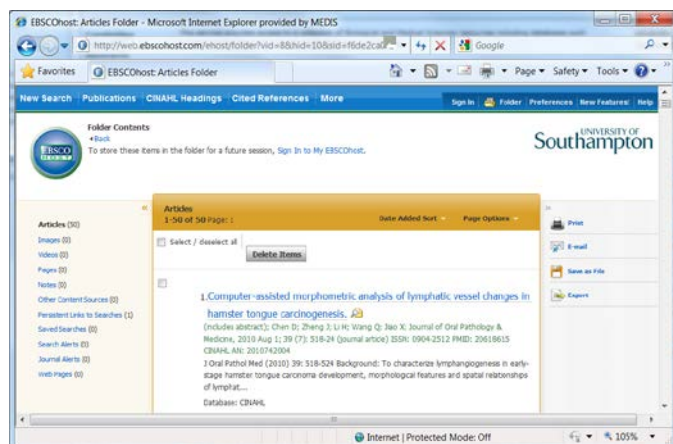
Select the references to export (Select All).

Click the export button



Select *Direct Export to EndNote*, *ProCite* or *Reference Manager*.

Click **Save**




The references are imported into Reference Manager in the same way as for OVID.

The Reference Manager Web/URL link has two links in this field. One which links to EBSCO record where there is a link to the full text of the article (library subscription permitting), the other links to the journal site.

Note: It is better to search each OVID or EBSCO database separately, for example do not search Medline and EMBASE simultaneously.

See the Appendix (page A-4) for how to import references from a text file when Direct Export to Reference Manager is not available in OVID or EBSCO.


Faculty of 1000

References can be selected and exported using the  **Export** button and selecting Ref Manager (RIS) in the *to* dropdown list on the Export dialogue window.

Searching Library Catalogues - Z39.50 sites

The Z39.50 Internet search option allows you to search library collections online. This is a useful option for capturing the details of books, although in some instances, the information retrieved may have errors.

An *Internet host* connection is provided for “*University of Southampton*” by Reference Manager. However the search facilities are strict and do not offer fuzzy matching. For example searching for “Altman Douglas”, “Altman D” or “Altman D.G.” fails to locate any books by this author. A better connection to use is “*University of Manchester*”. This is because this database includes the catalogues of many UK academic libraries, including Southampton, and the search facilities are less restrictive. Searches of “Altman Douglas”, “Altman D”, or “Altman D.G.” all find the books by this author. Note variations such as “Altman DG” or “Altman D G” do not work!



To begin the search process either choose, **References | Search References** or click on the **Search** button . The Retrieval window appears.

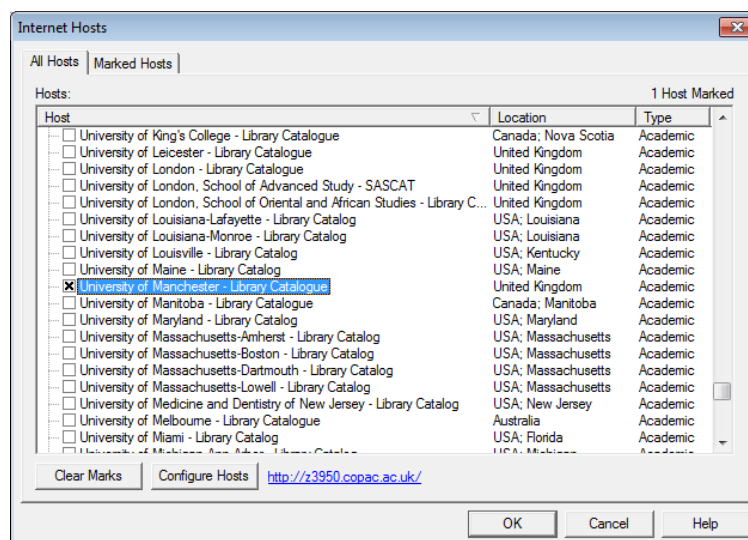
Check the *Internet Search* box.

Select *Z39.50*.



You must configure Reference Manager for the Hosts to search the first time you use it. This can be done by double clicking on the select

hosts button  and choosing a host such as the University of Manchester by checking the tick box .



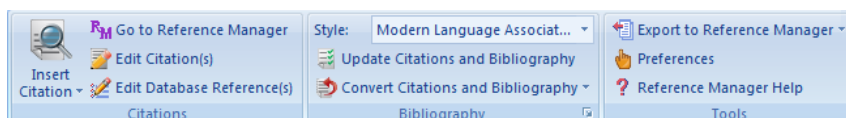
Using Cite While You Write


Cite While You Write enables you to place citations into your Word document as you create it. A Reference Manager toolbar is added to Word to facilitate the process.

Word 2003 toolbar




Word 2010 toolbar



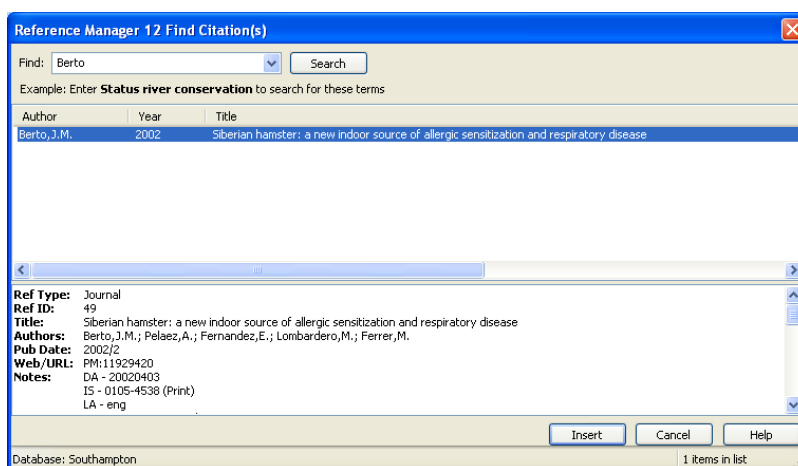
The features of all these buttons are described in Reference Manager Help . Some are described below.

Word 2003

Start writing your Word document, when you reach the point where you need to cite previously published work, click the **Insert Citation** button .

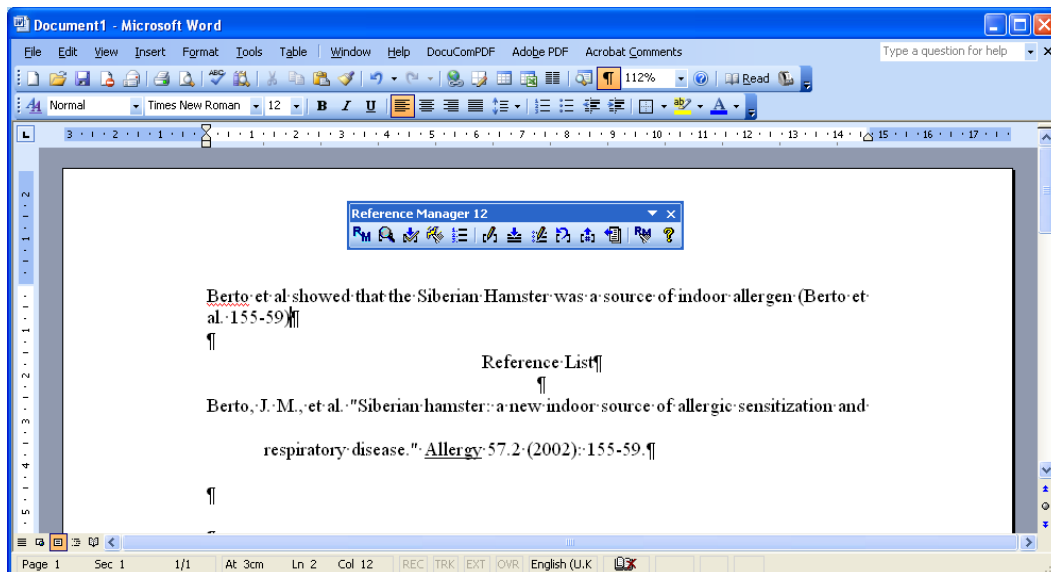
A *Reference Manager 12 Find Citation(s)* window is displayed. Enter a term in the *Search* text box. It could be an author, for example **Berto**.

Click the **Search** button.





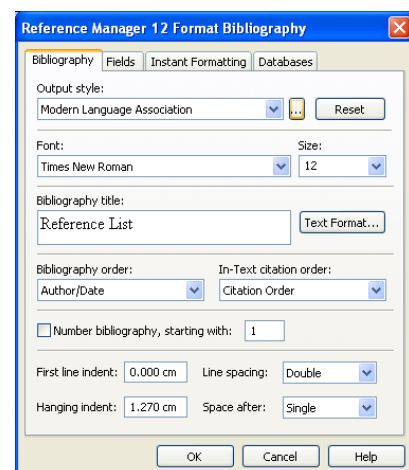
All references matching the search term are displayed, a single reference in this example. Select the reference by clicking on it. If you find several references and want to insert more than one citation, use <Ctrl Click> to select multiple references.

Click the **Insert** button. The citation is inserted into your Word document and a reference list is created at the end of the document.



The citation and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.

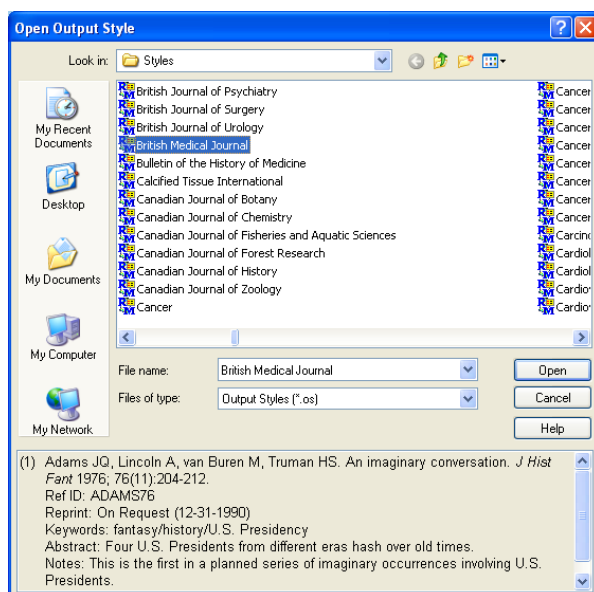
To change the reference list details, currently set to Modern Language Association, click on the Generate Bibliography button . The *Reference Manager 12 Format Bibliography* dialogue will be displayed. Click on the Browse button  to select the Output Style of your choice.




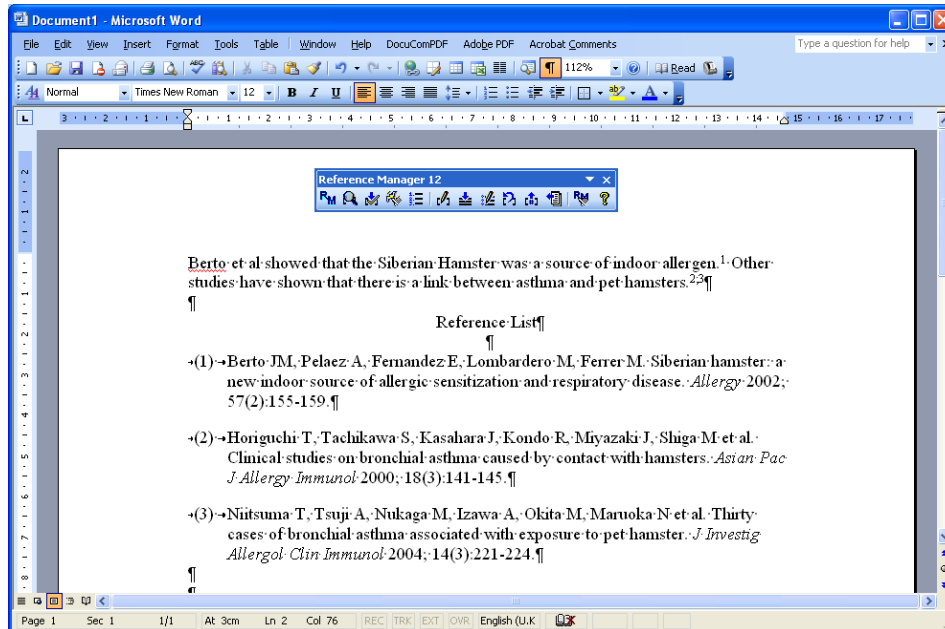
Navigate the Open Output Style dialogue window to select the journal style; the *British Medical Journal* in this case.

Click **Open**.

The style of citation and the reference list will be updated to reflect the format of the BMJ style.




Continue writing your document and when you need to cite additional papers use the **Insert Citation** button  and the *Reference Manager 12 Find Citation(s)* window to search your Reference Manager references for them. In the example below two papers were found by entering ‘**hamster asthma**’ as the search term and selecting the required references.



Tips on using CWYW




1. **Errors in Citations.** You may find errors in the reference list for the citations you have inserted. To correct this, select the citation in the text of your Word document. In the example reference 3 has been

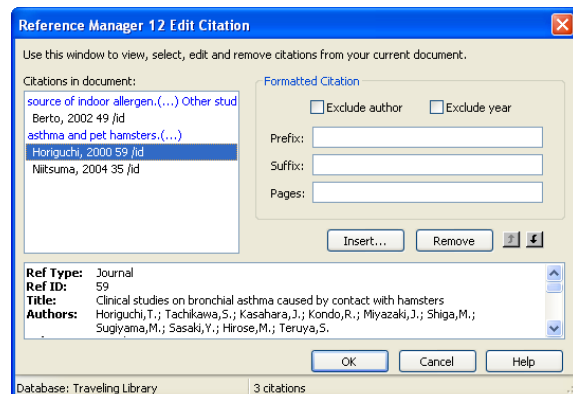
of indoor allergen¹ Other studies have shown that there is a link between asthma and pet hamsters.^{2,3}

selected by dragging across it. Click the  button. This will open up the Reference Manager Edit window for the reference as described on page A-7). Correct the error and select **File | Save**. You can return to Word by clicking the **Go to Word**

Processor button . Click on the **Generate Bibliography** button  to rebuild the document with the corrected reference.

2. **Changing the order of, inserting or deleting citations**

Click the  button to display the window opposite. Here you can move the order of citations in a list using the   buttons. Click the **Insert** button to launch the *Reference Manager 12 Find Citation(s)* window (see page 11), or the **Remove** button to delete a reference.



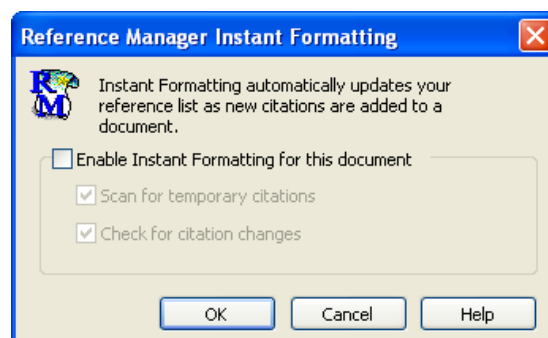
3. *Disable automatic generation of the reference list*


On large documents, containing many references, you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long.


Select the Instant Formatting button  .

A *Reference Manager Instant Formatting* dialogue is displayed. Uncheck the *Enable Instant Formatting for this document* box.

Click **OK**

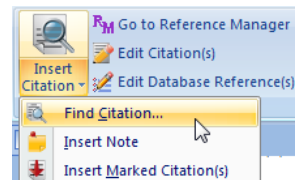


Alternatively, select Cite While You Write Preferences button  and untick the *Enable Instant Formatting on New Word documents* box. The automatic generation of the reference lists is turned off for new documents.

When you want to generate the full list of references use the **Generate Bibliography** button  .

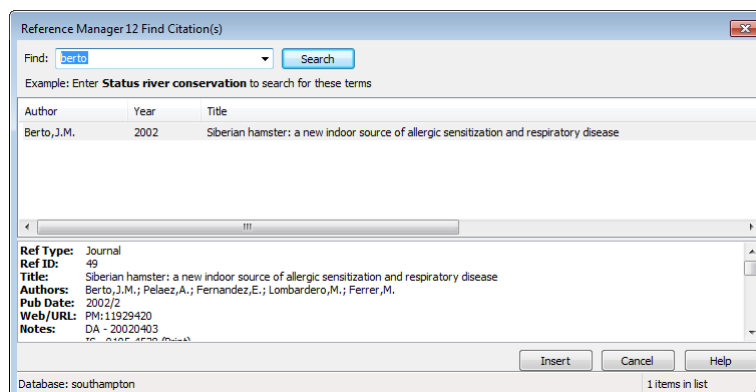
Word 2010

Start writing your Word document, when you reach the point where you need to cite previously published work, click the **Insert Citation** button ¹ and select **Find Citation**.



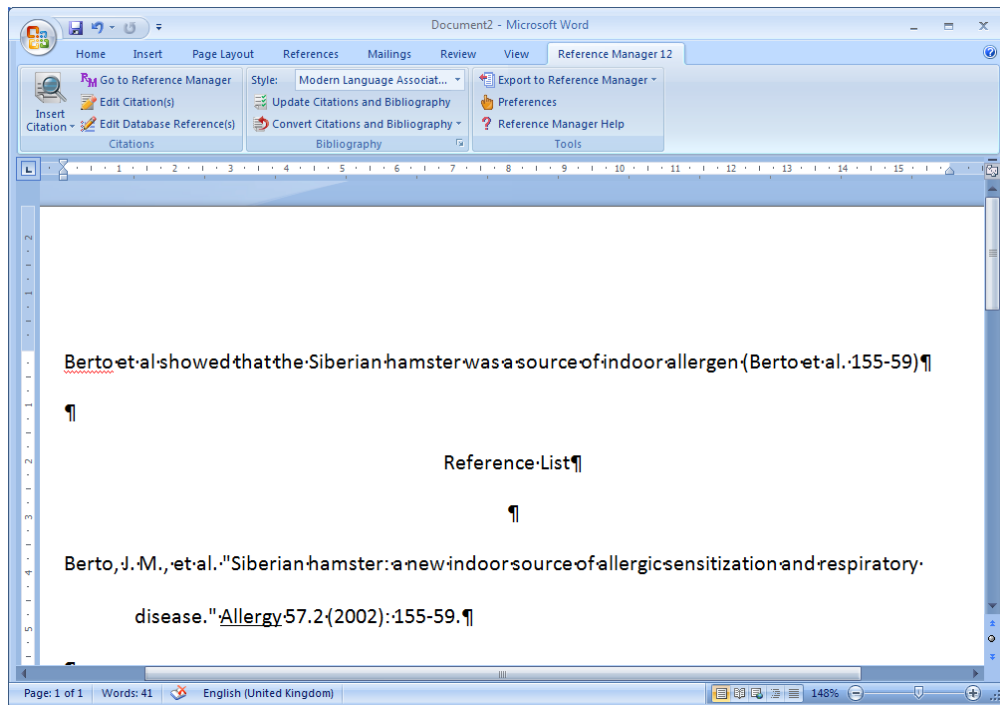
A *Reference Manager 12 Find Citation(s)* window is displayed. Enter a term in the *Search* text box. It could be an author, for example **Berto**.

Click the **Search** button.



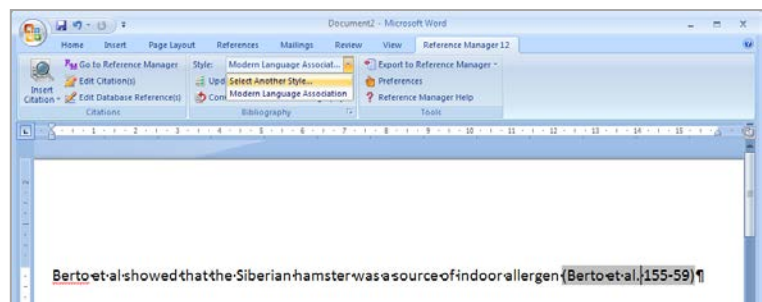
All references matching the search term are displayed, a single reference in this example. Select the reference by clicking on it. If you find several references and want to insert more than one citation, use <Ctrl Click> to select multiple references.

Click the **Insert** button. The citation is inserted into your Word document and a reference list is created at the end of the document.



The citation and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.

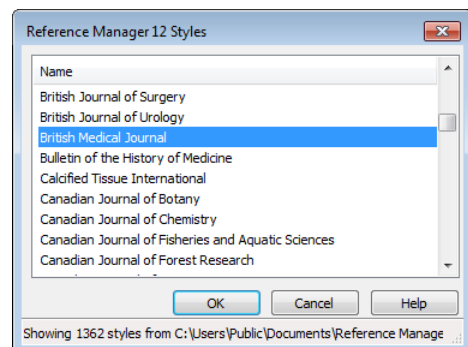
To change the reference list details, currently set to Modern Language Association, click the **Style** drop down to *Select Another Style*.




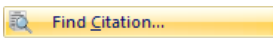
Scroll the Styles window to select the journal style; the *British Medical Journal* in this case.

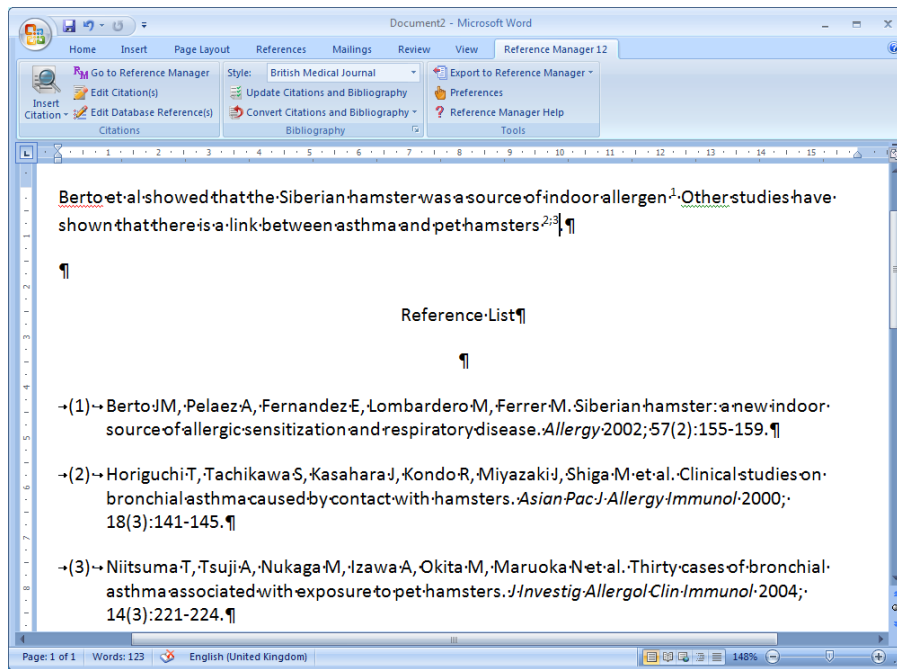
Click **OK**.

The style of citation and the reference list will be updated to reflect the format of the BMJ style.



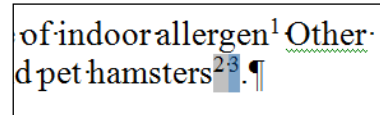
Continue writing your document and when you need to cite additional papers use the **Insert**

Citation button  and the  item to search your Reference Manager references for them. In the example below two papers were found by entering 'hamster asthma' as the search term.



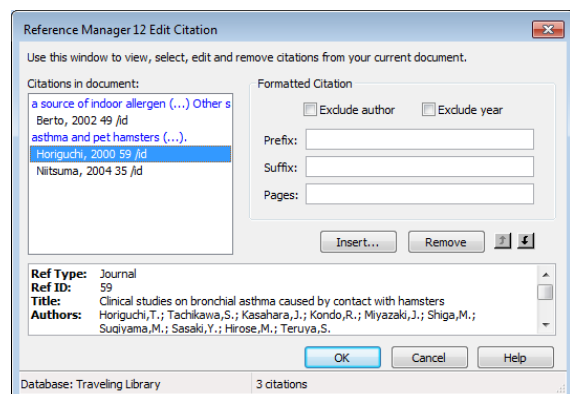
Tips on using CWYW

- Errors in Citations.** You may find errors in the reference list for the citations you have inserted. To correct this, select the citation in the text of your Word document. In the example reference 3 has been selected by dragging across it. Click the **Edit Database Reference(s)** button. This will open up the Reference Manager Edit window for the reference as described on page A-7. Correct the error and select **File | Save**. You can return to Word by clicking the **Go to Word Processor** button. Click on the **Update Citations and Bibliography** button to rebuild the document with the corrected reference.



- Changing the order of, inserting or deleting citations**

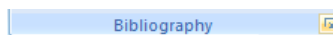
Click the **Edit Citation(s)** button to display the window opposite. Here you can move the order of citations in a list using the **up** **down** buttons. Click the **Insert** button to launch the *Reference Manager 12 Find Citation(s)* window (see page 14), or the **Remove** button to delete a reference.



- Disable automatic generation of the reference list**

On large documents, containing many references, you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long.

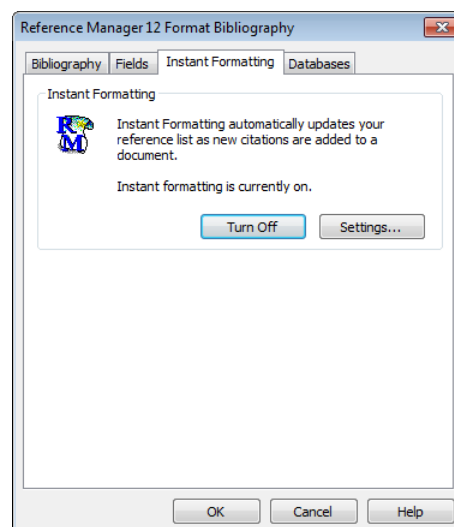
Select the arrow at the bottom of the Bibliography section.



A bibliography dialogue window is displayed. Select the *Instant Formatting* tab and click the **Turn Off** button.

Alternatively, select **Preferences** and untick the *Enable Instant Formatting on New Word documents* box. The automatic generation of the reference list is turned off, but you may need to Close and Reopen your current document for this to take effect.

When you want to generate the full list of references use the **Update Citations and Bibliography** button.



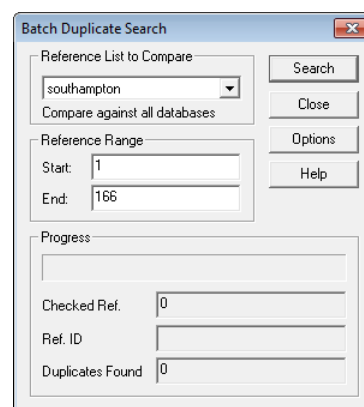
Searching for Duplicate references

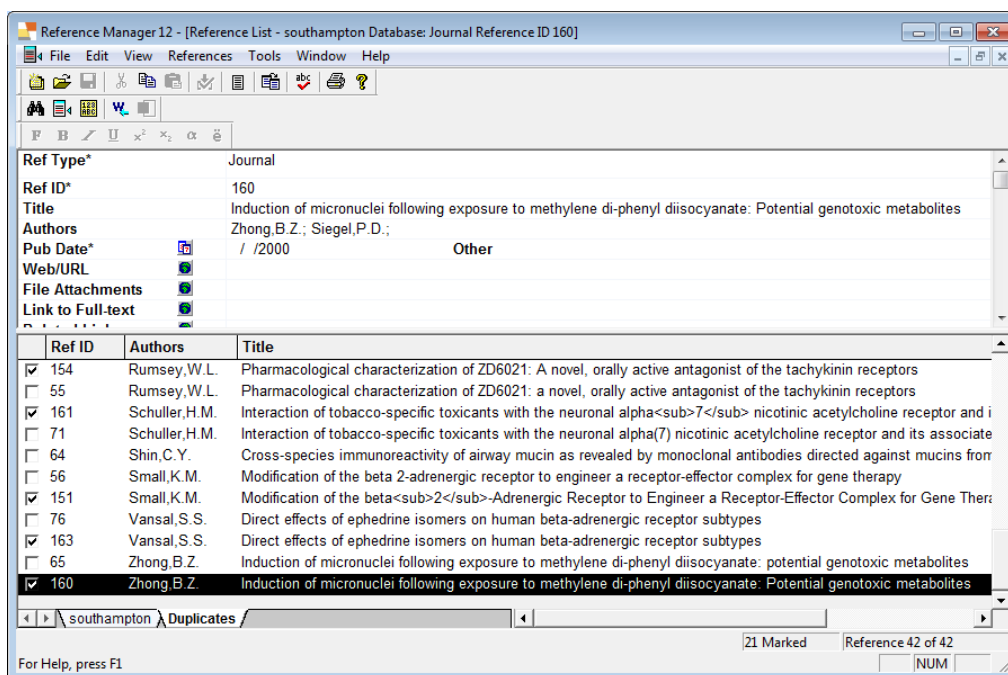
When you import references from a search, you may be adding a reference that already exists in your database(s). Reference Manager may, or may not, spot this depending on the criteria specified for duplicates detection.

If you suspect that there are duplicates in a database there are three options for finding them.

1. To check for duplicates of a single reference. Select that reference and choose **References | Check for Duplicates**.
2. For a small database list the references by author name and scan the database by eye to detect duplicates.
3. Use **Tools | Batch Operations | Duplicate Search**. If duplicates are identified a new tab, *Duplicates*, is shown with all references identified as duplicates.

You may find the default options for duplicate searching do not detect all duplicates in the database. Select **Options** and change the *Fields to Compare* to: *Date Primary, Start Page, End Page* and *Volume*. These options are often more successful.





The duplicates references can be removed by marking or highlighting (see next page for details) those not needed before deleting them.

Marking a Reference

References that are displayed in the Reference List can be marked, or "tagged". This is done by clicking on the check box to the right of the reference , or by pressing the **spacebar** or by choosing **Edit | Toggle Mark**. A repeated action removes the mark.

Highlighting a Reference

References are highlighted by clicking on them in the Reference List.

To select more references, press the **Ctrl** key and **click** on another reference.

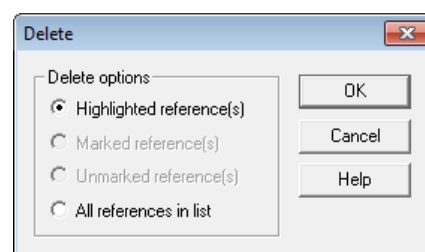
To select a sequence of references **Click** on the first one in the sequence then press the **Shift** and **click** on the last one.

Deleting References

If you want to delete a reference, or a set of marked or highlighted references:







- press the <Delete> key,
- click the **right mouse button** and select **Delete** or
- select **References | Delete**.

You can choose to delete highlighted reference(s), marked reference(s), unmarked reference(s), or all references.



Note: Be careful with "All references in list" or "All references in the currently displayed database (tab) will be deleted" options. This could be your complete database!


Other Word - Reference Manager toolbar buttons

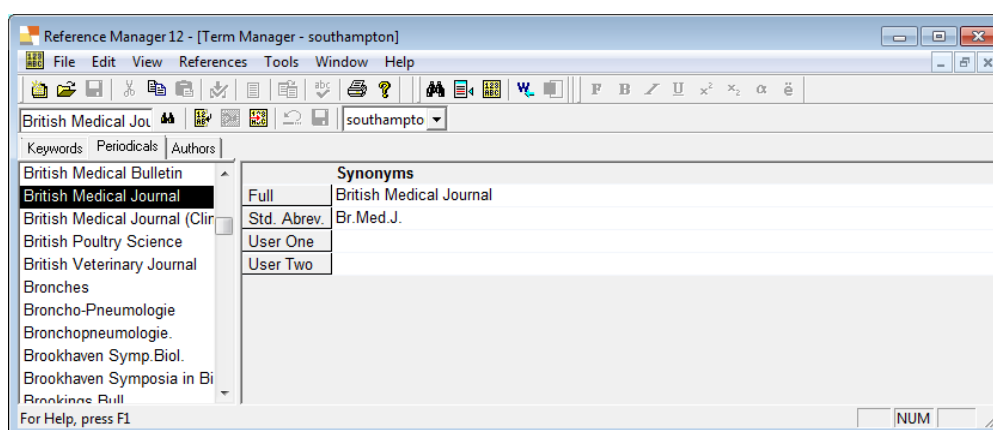
Name	Button	Function
Insert Marked Citation		If you find and mark references in Reference Manager, you can use Insert Marked Citations to insert these references into your Word document. This is an alternative to using Find Citations.
Insert Note		Type a note in the text box. When your paper is formatted by Reference Manager using a numbered style, the note text is assigned a number and listed along with the references at the end of the paper.
Revert to Original Text		Converts formatted or unformatted citations back to the original identifying text you entered. The bibliography can be regenerated from this text. This feature may be useful for resolving problems with corrupted Word documents which cannot create the bibliography correctly.
Remove Field Codes		This feature removes all of the Cite While You Write field codes and converts formatted citations and the bibliography to ordinary text. It is used to create the final document you send to a journal. However, before using this feature make sure you have a copy of the original Word document containing the Reference Manager codes.
Export Travelling Library		There may be occasions where you want to copy all of the references used in a Microsoft Word document to a Reference Manager database. This is not possible if you receive only a formatted Word document from a colleague. Alternatively, you may have a large Reference Manager database, but want to create a smaller Reference Manager database with only the subset of references used in your document.
Cite While You Write Preferences		Use the CWYW Preferences dialog box to change general Cite While You Write preferences and the Reference Manager keyboard shortcuts displayed on the Tools menu in Word.

Global Editing – Term Manager

Changes or additions to Keywords, Periodicals and Author names can be made using the Term Manager.

*Note: If you are using the networked version of Reference Manager you must open the database in Exclusive mode . To do this you must use **File | Open Database** from the menu. Select the database to open and use the **Access rights** drop down list to select **Read-Write Exclusive**.*


Select **Term Manager | Activate** from the menu or click the Term Manager button  to display the Term Manager window.

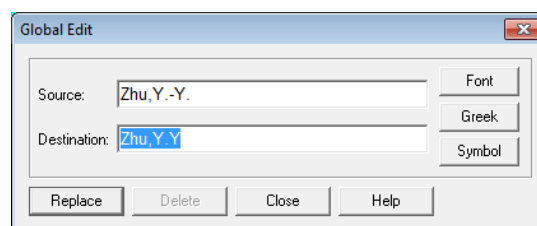


The figure above illustrates the Full and Standard abbreviations for the British Medical Journal. The use of synonyms allows either term to be used to define the journal name, but Output styles determine which version (Full or Standard) is used.

The Quick Retrieval button  can be used to select all references containing this term.

A useful feature of the Term Manager is *Global Edit*, Global Editing enables incorrectly spelt Author names (including incorrect initials), Keywords, or Periodicals name (Journals) to be corrected for all references where they occur.



For example suppose that you notice that the author entry Zhu,Y.-Y. is incorrect and should be Zhu,Y.Y. (no dash). Select the Authors tab in the Term Manager and highlight the incorrect entry. Click the right mouse button and select Global Edit, or click on the Global Edit button  .

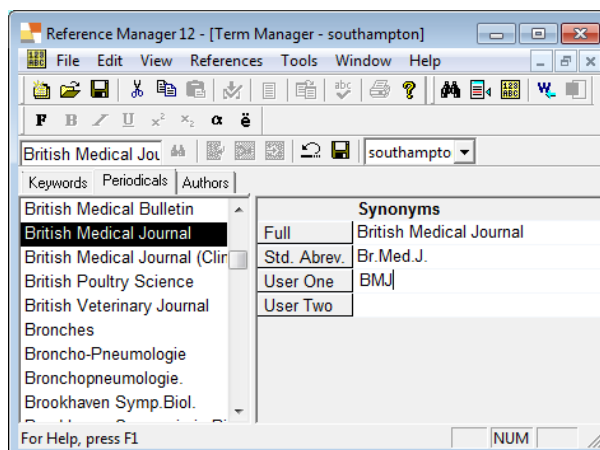


Use the Global Edit dialogue to correct the entry. Click **OK** to replace the entry and **Close** to exit the Global Edit dialogue

Note: If these items are greyed out, this is because you are using the Networked version of Reference Manager and the database was not been opened in exclusive mode.

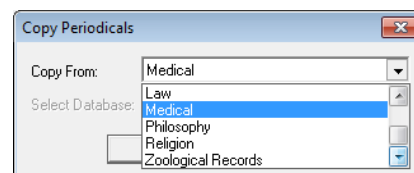
New terms can be added using the Term Manager.

For example if you wish to add a new periodical, either click the right mouse button and select Add Term, or click the Add Term button . A blank synonym form is displayed and all variations of the periodical name can be entered. Click on the Save synonyms button  to store these terms.



Reference Manager supplies various databases of full and standard synonyms including BioScience and Medical journals. These can be copied into the current.

To do this Term Manager window must be open with the Periodicals tab selected. Select **Tools | Term Manager | Copy Periodicals** from the menu and choose the *Medical* option from the *Copy From:* list.



Periodicals can also be added when a new database is created by using the **Advanced** option on the New Reference Manager Database dialogue.

Modifying Output Styles

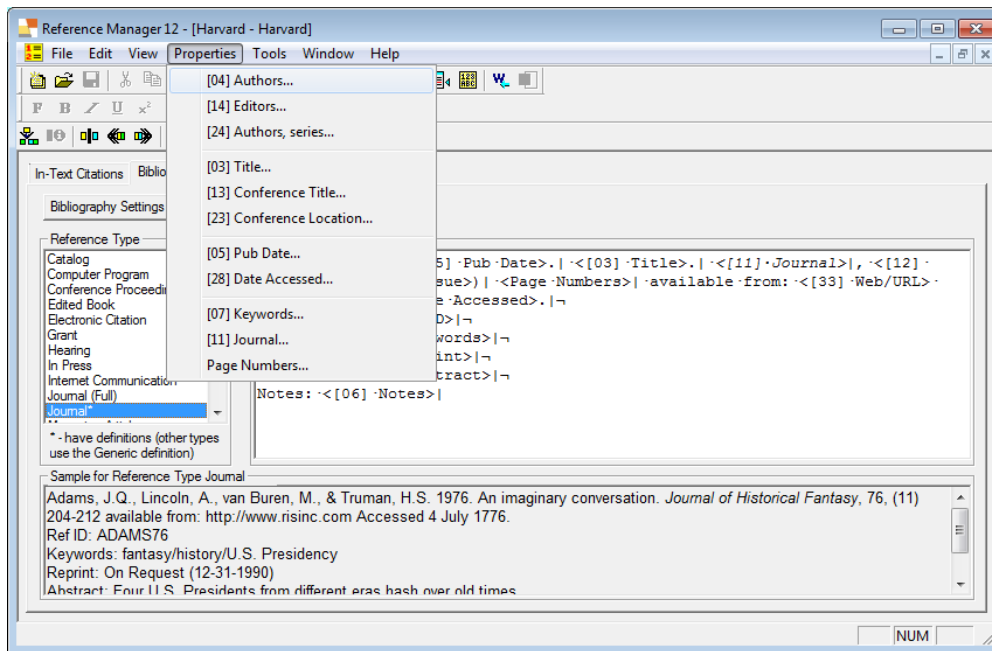
Reference Manager provides a many Output Styles for popular journals. However, you may find that the style you wish to use is not available or the style you are using needs some modification. Tools for modifying Output styles are available and can be used to change the way a citation appears in the text or how they are listed in the bibliography.

Upper Case Author Names

Suppose you wishes to change the Harvard output style so that all Author surnames appeared in capital letters. Select **Tools | Bibliography | Open Output Style**. Select the required output style (e.g. Harvard.os).

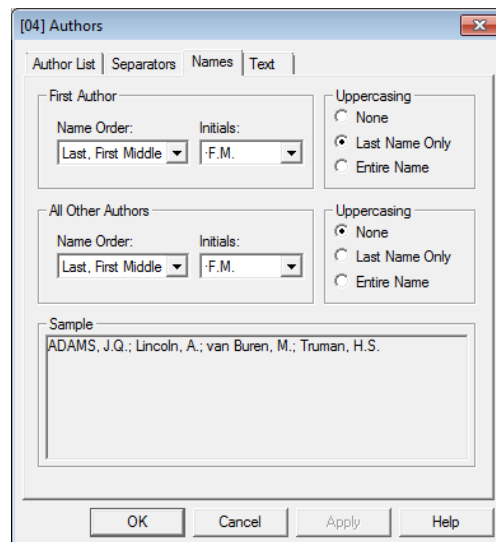
Select the *Bibliography* tab and select the *Reference Type* for example, *Journal**

Select **Properties** from the main menu and the item to be changed, for example, **[04] Authors...**



You can change various settings for Authors names in the bibliography list that is created.

In this example, the *Names* tab was selected and the **Last Name Only** option in the First Author *Uppercasing* panel was selected. The *Sample* panel shows how Author names will be printed.

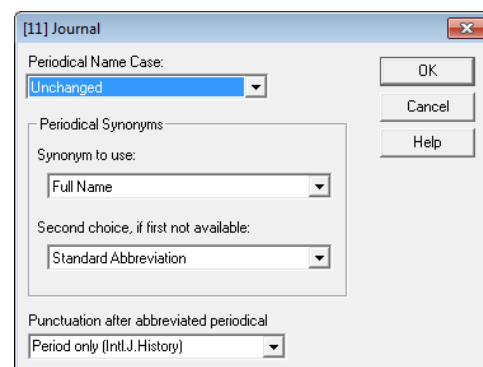


It is recommended that you use **File | Save As** to save your modified style under a new name, e.g. **MyHarvard.os** rather than replace the style provided by Reference Manager.

Note: The process of editing an Output style is somewhat tedious as you must change the settings for each citation type used in your list of references (Book, Journal, Internet page). Creating a new style is probably best done by editing a similar, existing, style. Alternatively search the Reference Manager web site for new styles contributed by other users, or use the Reference Manager discussion list to ask if any one has created the style you need to use.

Use of Journal Names – Std or Full

Journal Output styles allow the use of the Full Journal name, it's Standard Abbreviation and two alternative versions of the name. The settings can be changed by editing the Output style. Select **Properties | [11] Periodical** to do this.



Appendix

Downloading references from a Web browser PubMed search

The following describes how to download the results of searching PubMed using your web browser, as opposed to using OVID/Dialog DataStar to search Medline, or Reference Manager to directly search PubMed.

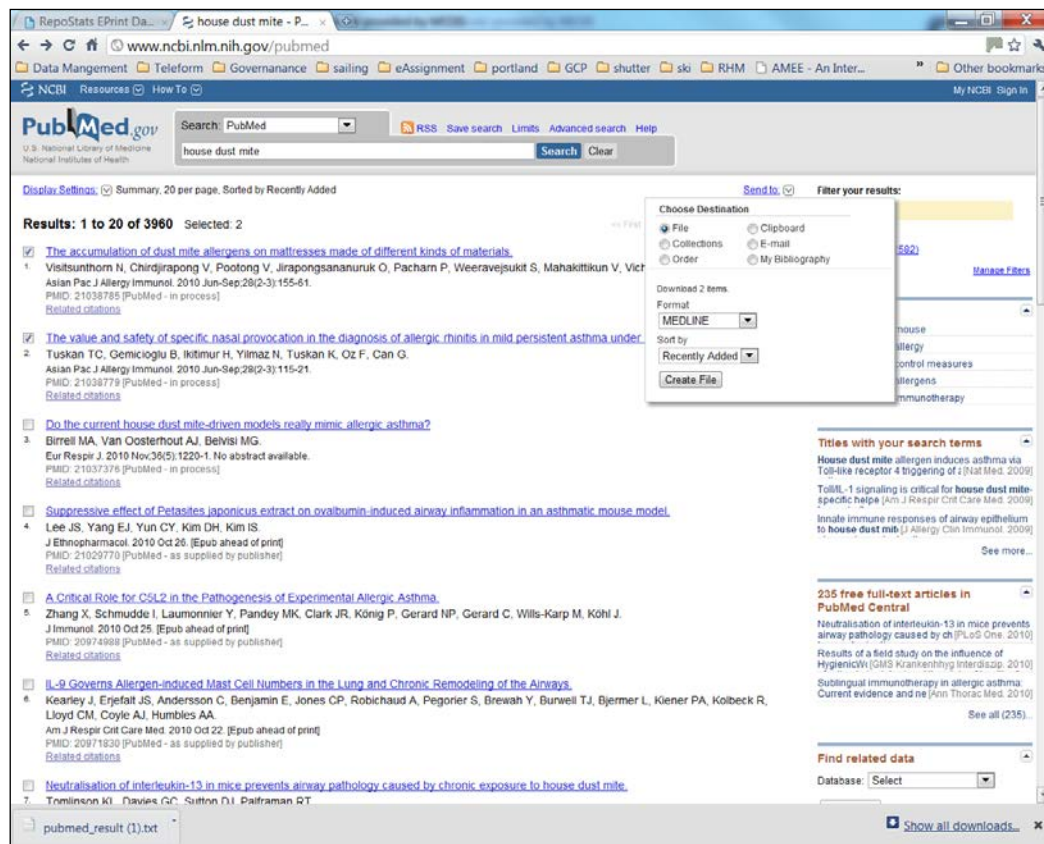
This is useful when the Reference Manager software and PubMed server decide not to talk to each other. Perform your PubMed search.

Select the References of interest.

Use the **Send To** link to choose the Destination: File

Select the Format as *MEDLINE*

Click **Create File**



A file '*pubmed_result.txt*' will be created and downloaded to your computer.

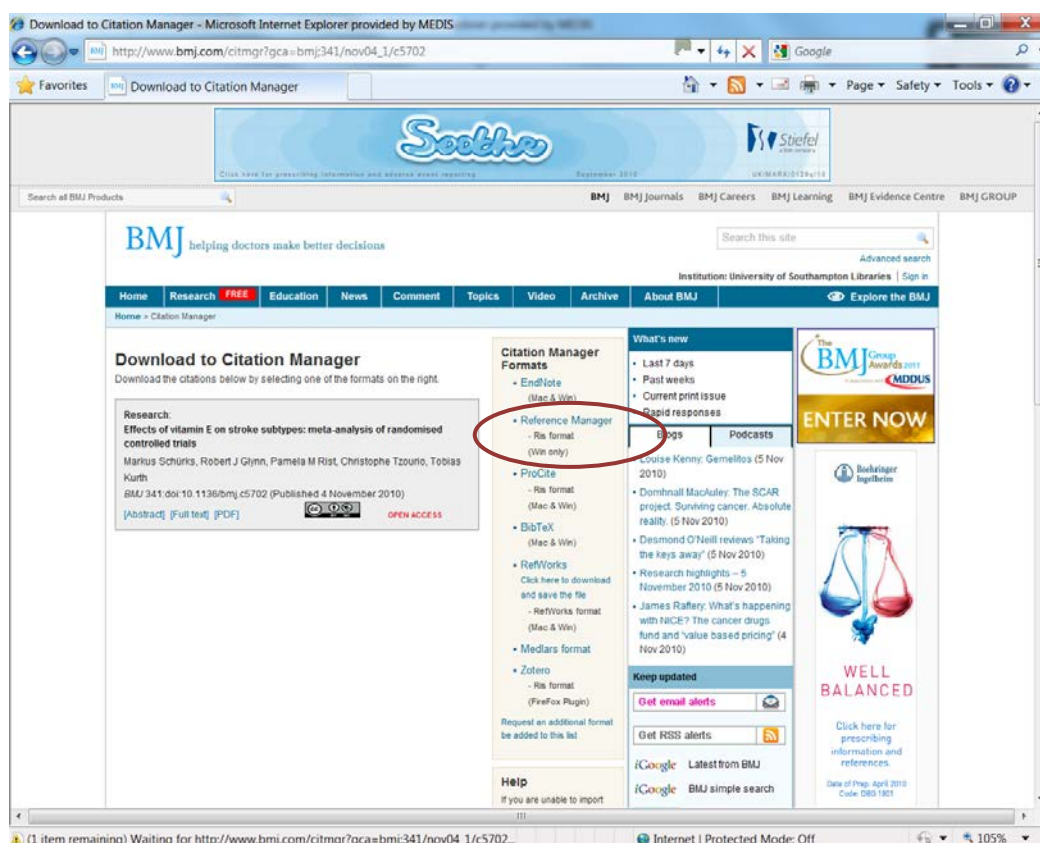
Import the file into Reference Manager using the *PubMed* import filter.

Downloading Citations from a Journal

Some journals allow you download the citation into your reference managing software. The British Medical Journal is an example. If you search www.bmj.com for article. The resulting search page will display the hits together with a box as shown.

Selecting the Download to Citation Manager link results in a page with options for various bibliographic software packages:

- Services
- Email to friend
- Alert me when this article is cited
- Alert me if a correction is posted
- Alert me when rapid responses are published
- Similar articles in this journal
- Similar articles in PubMed
- Add article to my folders
- Download to citation manager
- Request permissions



Selecting the Reference Manager link.

This will open a dialogue asking you to **Select Reference Manager Database** which where the citation will be added.

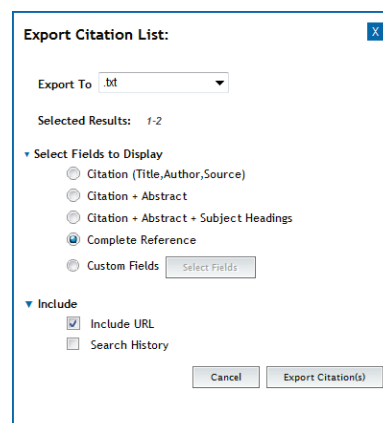
Reference Manager is left open with an imported tab displaying the reference downloaded.

Note: Reference Manager is loaded automatically; it does not have to be loaded before searching the journal

Importing a Text file saved from an OVID search


This section will describe how to import the results of an OVID search of the EMBASE database, that were previously saved to a text file rather than saving directly into Reference Manager. This approach works with references identified using any literature searching system. It is a generic approach and not specific to an information supplier or the database searched.

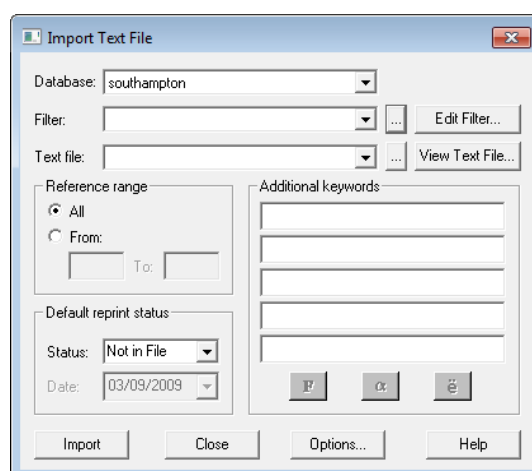
The difference from direct method described on page 8 is that the *Export To* is set to .txt so that when the **Export Citation(s)** button is clicked, a text file called *citation[1].txt* is saved to your computer.



In Reference Manager Select **File | Import Text File**.

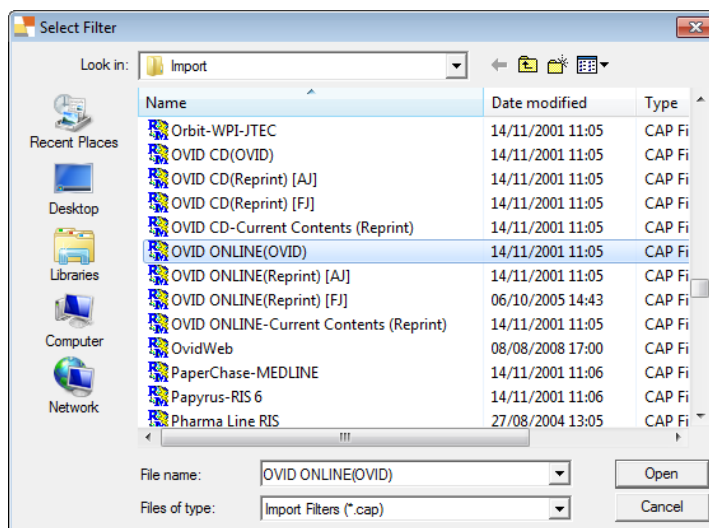
In the Import Text File dialogue:


- Leave the *Database* entry as it is (Southampton) or select another.
- Click on the browse icon to the right of the *Filter* text box 



- Scroll the list in the *Select Filter* dialogue to the entry **OVID ONLINE(OVID)** and click on **Open**.

Note A quick way to locate this filter is to click on the first item in the list and press **O**. This gets you to the start of Filter names beginning with the letter **O**. Scroll from this point.



- Click on the browse icon to the right of the *Text file* text box 
- Use the *Select Text File* dialogue to locate the folder in which the file *cites.txt* is stored.
- The **View Text File** button, used to check the contents of this file.
- Click **Import**.

Adding References from Google Scholar

Note This is not as efficient as using other searching approaches because you get less information entered into your database and it can be a slower process overall. For example Abstracts are not added and web links to the database entry are not available.

Importing one citation at a time

Customize Google Scholar by clicking on [Scholar Preferences](#) link

In Bibliographic Manager section use *Show links* to import citations into, select *RefMan*

Click Save Preferences

Search using Google Scholar as normal.

Each record displayed will have an [Import into RefMan](#) link.

This link will launch an *Opening scholar.ris* window that that allow you to open the file with Web Export Helper(default) Reference Manager. Press OK.

You will then be asked to Select Reference Manage Database in a dialogue which allows you to navigate to the file that you wish to import the citation into.

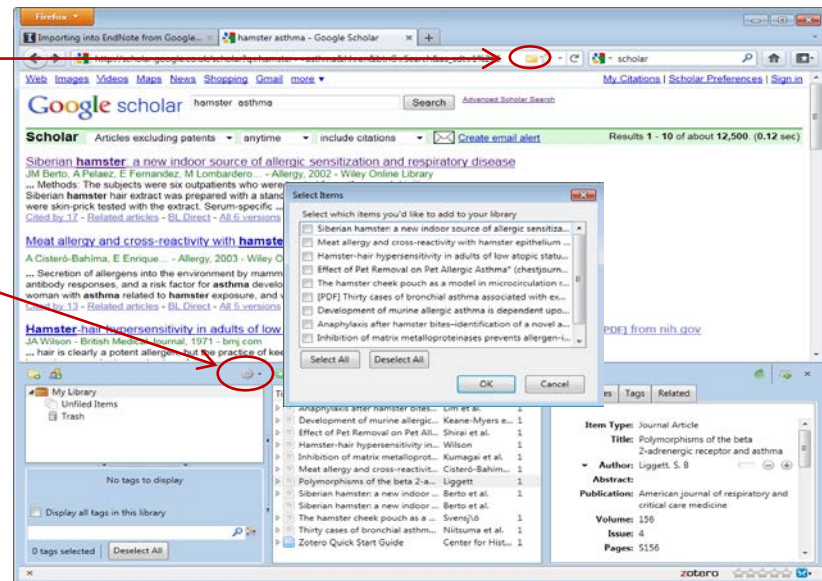
Importing several Google Scholar citations

This requires that you use FireFox and the Zotero addin for FireFox

Download and install Zetero from www.zotero.org.

Perform your search using Google Scholar.


- Click on the Zotero import icon
- Use the *Select Item* dialogue to select the citations you want to import. Click OK.
- Select Zotero Actions Choose Export Library and in the Format dropdown choose RIS.
- Save the File and Use the notes on page A-4 to import this file using the RIS.cap filter.

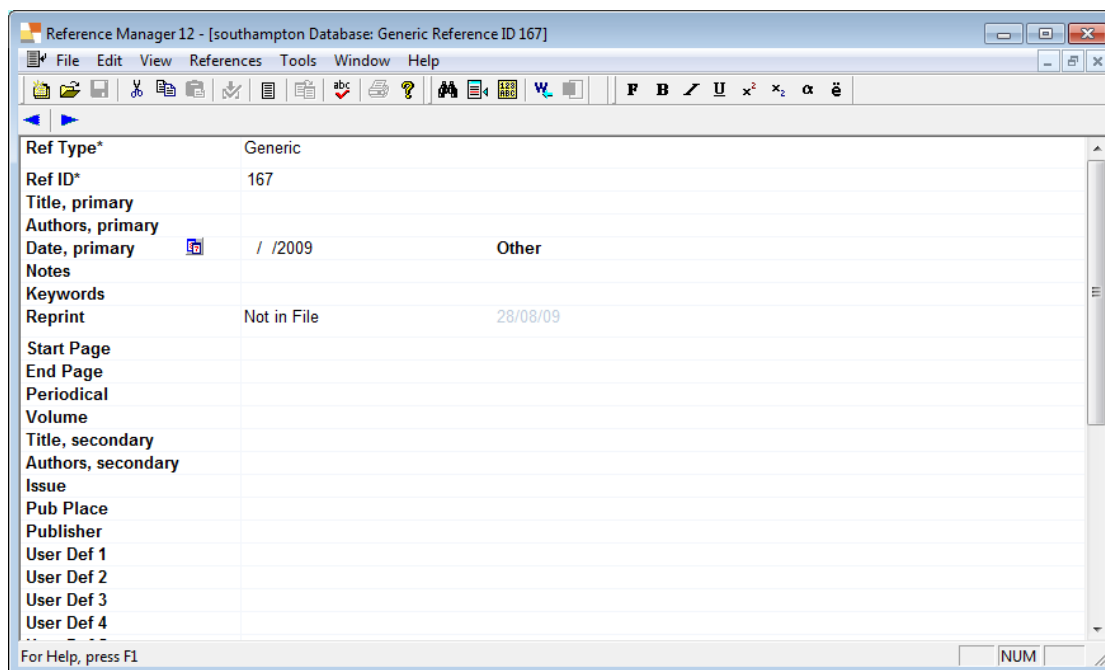


Note This information is based on notes from the University of Illinois at Urbana-Champaign www.library.illinois.edu/biotech/EndNoteGoogleScholar.html

Adding references via the Keyboard

Note This is the last resort, whenever possible try to locate the reference by electronic means, even if you have a printed version on the article in front of you.

To manually add references either, select **References | New**, press the *Insert* key or click on the New Reference icon . The following screen will appear.



The screenshot shows the Reference Manager 12 software interface. The window title is "Reference Manager 12 - [southampton Database: Generic Reference ID 167]". The menu bar includes File, Edit, View, References, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The main form has the following fields:

Ref Type*	Generic
Ref ID*	167
Title, primary	
Authors, primary	
Date, primary	/ /2009
Notes	Other
Keywords	
Reprint	Not in File 28/08/09
Start Page	
End Page	
Periodical	
Volume	
Title, secondary	
Authors, secondary	
Issue	
Pub Place	
Publisher	
User Def 1	
User Def 2	
User Def 3	
User Def 4	

At the bottom of the window, there is a status bar with the text "For Help, press F1" and a "NUM" button.

Enter information in to the fields you have data for.


*Ref Type** is typically changed from Generic to the correct reference type. This is often **Journal**. (You do not need Journal (Full)).

Note To move down from field to field press the *Tab* key, **not** the *Enter* key. The up and down arrows can also be used.

Title, primary field and enter the title but **DO NOT** put a full stop (period) at the end of the title, Reference Manager will insert the appropriate punctuation into your bibliographies using rules defined by Output styles.

Authors, primary field, It is important to always enter author's names in the same format. This strict form of entry provides Reference Manager with great flexibility for its various output formats.

- Enter the last name first, followed by a comma, then the first and middle initials (separated by periods) or full names.
- Enter a semi colon ; to complete the entry of an author and to enter another. The semicolon between each author is essential. If an authors name is displayed in red you have made a mistake, possibly no author initials, entering the authors details
- If the author is already know their name will appear normally.
- A new authors name will appear as blue text **Edwards,J**.
- When you start entering a name a pop up list of possible authors should be displayed. This does not appear to work in version 12.

Date primary, field, This is shown as the current year but can be changed. The date format can be swapped between a short or long version by clicking on the icon  in this field.

Keywords, Reference Manager automatically scans the title and notes (after they have been typed in and saved) and places any word matching an existing keyword into keywords field list. This feature can be turned off (Tools | Options - General – Scan Titles, Notes and Abstract for Keywords).

Reprint, you can specify whether the reprint is "In File," "Not In File," or "On Request."

*Journal**, *Volume*, *Issue*, *Start Page*, *End Page*, are used for the Journal details. To save the reference, click on the Close  button and saved the changes.

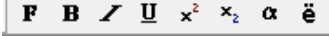
Editing references

Information for an existing reference can be changed by either typing directly into the Reference List window, by Double clicking the reference in the lower, Reference Display, window by selecting **References | Edit**.

Remember to *Save* after modifying a reference.

General Editing features in Reference Manager

Reference Manager provides common word processing functions for fields.

The toolbar provides common formatting functions  as well as key combinations

Key	Function
<Ctrl B>	Boldface
<Ctrl I>	Italics
<Ctrl U>	Underline
<Ctrl P>	Superscript
<Ctrl S>	Subscript
<Ctrl G>	Greek (e.g. <Ctrl G> a = α)

Special Function Keys functions are shown below.

Key	Effect in Text Entry
<Backspace>	Backspace, delete to left of cursor
<Delete>	Delete character under cursor
↑	Move up a line
↓	Move down a line
→	Move right a character
←	Move left a character
<Ctrl→ >	Jump to start of next work
<Ctrl← >	Jump to start of previous word
<Home>	Jump to start of line
<End>	Jump to end of line
<Ctrl Home>	Go to start of text
<Ctrl End>	Go to end of text