

# Reference Manager<sup>®</sup> 11

*Bibliographies Made Easy™  
on your desktop and the Web*

- Search Internet databases
- Organize references easily
- Watch the bibliography appear as you write!
- Publish references on the Internet

**Guided Tour**

**THOMSON**  
—★—<sup>TM</sup>  
**ISI RESEARCHSOFT**

# Reference Manager®

Demo Version 11, for Windows

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## About this Guide

This guide, supplied with each Demo version of Reference Manager, provides a basic overview of installing and using Reference Manager. It assumes that you know how to use your word processor and the Windows operating system. For help on these topics, consult your computer guide or your word processor manual.

For additional information about using Reference Manager, consult the online help. From Reference Manager's *Help* menu, select *Help Topics* to view the various topics. While using Reference Manager, press F1 to view a help topic about the current window.



# Introduction: Welcome to Reference Manager

## Introducing Reference Manager

Welcome to Reference Manager—your connection to all things reference related!

- ◆ Reference Manager is an online search tool—it provides a simple way to search online bibliographic databases and retrieve the references directly into Reference Manager. (Reference Manager can also import data files saved from a variety of online services, CD-ROMs, and library databases.)
- ◆ Reference Manager is a reference database—it specializes in storing, managing, and searching for bibliographic references in your personal reference database.
- ◆ Reference Manager is a Web Publisher—it includes a Web publishing tool and built-in Web server so you can post up to 15 databases to the Web or an intranet in seconds.
- ◆ Reference Manager is a bibliography maker—it formats citations in Microsoft® Word with the Cite While You Write™ feature and in WordPerfect with the Reference Manager Add-in feature. Watch the reference list grow as you insert citations in your manuscript.

See “What’s New in Reference Manager 11” on page 10 for a list of the most recent features added to Reference Manager.

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### About This Demo Version of Reference Manager

This is a demonstration version of Reference Manager 11. You can use the program to open a database 20 times in order to evaluate Reference Manager and all of its features. After those 20 sessions are up, the Demo version will no longer operate.

To purchase an unrestricted version of the Reference Manager program, please contact Thomson ISI ResearchSoft.

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### About the Guided Tour

This guide provides a basic overview of installing and using Reference Manager. It assumes that you know how to use your Windows operating system and your word processor. For help on these topics, consult your computer owner’s guide or your word processor manual.

Throughout this guide, menu names, menu items, and button names appear in *italic text*.

The following representations for key combinations are used:

<b><u>Instruction</u></b>	<b><u>Explanation</u></b>
CTRL+ESC	While holding down the CTRL key, press the ESC key.
CTRL+ALT+ENTER	While holding down the CTRL and ALT keys, press the ENTER key.

## Customer Services

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### Online Help

For additional information about using Reference Manager, consult the online Help file.

From Reference Manager's *Help* menu, select *Help Topics* to view the various topics.

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Contact Sales for general product information, pricing, quantity discounts and referrals to dealers. Contact Customer Service for orders and billing/shipping status.

#### Sales Information

**Mail:** Thomson ISI ResearchSoft  
2141 Palomar Airport Road, Suite 350  
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**Phone:** (760) 438-5526 (country code is 01)

**Fax:** (760) 438-5573 (country code is 01)

**Web:** <http://www.refman.com>

**Email:** [www.refman.com/rmcontact.asp](http://www.refman.com/rmcontact.asp)

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**Web:** <http://www.refman.com>

**Email:** [www.refman.com/rmcontact.asp](http://www.refman.com/rmcontact.asp)



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## Technical Support

Contact Technical Support if you encounter problems while using Reference Manager. Before contacting us, have a clear description of the problem and know the version of your operating system, Reference Manager, and your word processor. (To find the Reference Manager version, start Reference Manager and choose *About Reference Manager* from the *Help* menu.)

Our hours are Monday–Friday, 8:00 am – 5:00 pm Pacific Time.

**Mail:** Thomson ISI ResearchSoft  
800 Jones Street  
Berkeley, CA 94710 U.S.A.  
**Phone:** (408) 987-5609 (country code is 01)  
**Fax:** (510) 559-8683 (country code is 01)  
**Web:** <http://www.refman.com>  
**Email:** [www.refman.com/rmcontact.asp](http://www.refman.com/rmcontact.asp)

Technical support tips are also available on the Reference Manager Web site and through the ris-interest email forum (see below).

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## International Customer and Technical Support

For customer support or technical support outside of North America, please visit our Web site to check for a local distributor.

Go to <http://www.refman.com>, click on *Contact Us*, and then click on *International Distributors* to find a local distributor.

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## The Reference Manager-Interest Email Forum

If you wish to join an ongoing email forum of Reference Manager users like yourself, go to the Reference Manager Web site at [www.refman.com](http://www.refman.com), click on *Support and Services* and then scroll down for instructions on how to subscribe to the *Reference Manager Interest List*.

In general, Thomson ISI ResearchSoft does not answer questions posted to ris-interest, but lets users answer each other's questions. Contact ISI ResearchSoft directly for a guaranteed response from technical support staff.

# What's New in Reference Manager 11

## New Database Features

- ◆ Share reference databases with colleagues over a network and through your own Reference Manager Web Publisher intranet or Internet site.
- ◆ Import or Export a reference list in XML format.

## Bibliography Tools

- ◆ Create a subject bibliography with topic headings for easily producing *curricula vitae* and reading lists.

## Cite While You Write

- ◆ Export a traveling library from a Microsoft Word document into a Reference Manager database—share references cited by colleagues.
- ◆ Highlight text in a document and use Insert Citation to find and insert references for citing instantly.
- ◆ Preview and edit in-text citations throughout an entire document.
- ◆ Navigate easily between your manuscript and Reference Manager database.

## Connectivity

- ◆ Connect to more online resources and create bibliographies in over 900 styles.
- ◆ Locate full text faster by connecting to your institution's online resources with OpenURL Record links.
- ◆ Move references between Reference Manager and RefViz™ in one step—explore your reference collection visually.

# Chapter 1: Reference Manager Installation

## Requirements

The Reference Manager Demo is available on CD or by downloading. If you have the CD you need a CD-ROM drive to install the program.

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### System Requirements

Reference Manager runs under the following operating systems:

- ◆ Windows 2000
- ◆ Windows XP

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### Hardware Requirements

#### Hardware Requirements:

- ◆ A 133 MHz or higher Pentium-class CPU
- ◆ A minimum of 128 MB of available RAM
- ◆ A hard drive with at least 90.5 MB of free space
- ◆ In order to use Reference Manager's *Internet Search* command or to use the Web Publisher component, an Internet connection is required. To use the *Open Link* command to access a Web site, you also need a Web browser installed.

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### Word Processor Compatibility

As of March 2004, Reference Manager for Windows is compatible with:

- ◆ Microsoft Word for Windows 2000/XP (2002)/2003
- ◆ WordPerfect for Windows 9 (2000), 10 (2002) and 11 (2003)

Microsoft Word uses Cite While You Write, and WordPerfect uses the Reference Manager Add-in. These functions put a Reference Manager submenu of commands on Word or WordPerfect's *Tools* menu. They also allow Reference Manager to format citations and create a bibliography for the document that is open in Word or WordPerfect. You can format, unformat, and reformat a single document—without ever exiting your word processor.

If a supported version of Microsoft Word or WordPerfect is installed on your computer, the appropriate Cite While You Write or Add-in files are automatically installed for the current user account when you run the Reference Manager installation

from the current user account. These features can be used with a shared copy of Word or WordPerfect on a network.

In order for Cite While You Write or the Add-in to install properly:

- ◆ Microsoft Word or WordPerfect must be correctly installed on your computer *prior to* installing Reference Manager.
- ◆ During the Reference Manager installation process, your account will need administrative rights to the local machine.
- ◆ For Word, the Reference Manager installer must be able to locate the Word Startup folder. You need to have full read and write access to Word's Startup folder in order to install Reference Manager commands.

## Installing Reference Manager

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### Installing the Demo Version

#### To install Reference Manager:

1. Log in to the local machine with administration rights, and make sure no applications are running.

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**NOTE:** Make sure you are not running any anti-virus software during the installation process.

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2. Insert the Reference Manager Demo CD into your CD-ROM drive.
3. The Reference Manager Setup program will start. If you do not have Autoplay enabled, choose *Run* from the *Start* menu, type "d:\setup" (use the drive letter appropriate to the drive containing the installation CD) and press ENTER.
4. Follow the instructions on the screen to complete the installation.
  - ◆ By default, Reference Manager is installed in the C:\Program Files\Reference Manager 11 folder. You can change this folder if you wish.
  - ◆ Reference Manager can be installed to allow only you, or anyone using the computer, access to the application shortcuts on the *Start* menu. By default, the option to allow anyone using the computer access to the shortcuts is selected.
  - ◆ Read the "Readme" file for any last minute information that may not have made it into the manual.

# Checking Your Installation

To run the Demo version of Reference Manager 11, click the *Start* button, choose *All Programs* or *Program Files*, select *Reference Manager 11*, and then choose *Reference Manager 11*. To check the version number of Reference Manager, choose *About Reference Manager* from the *Help* menu.

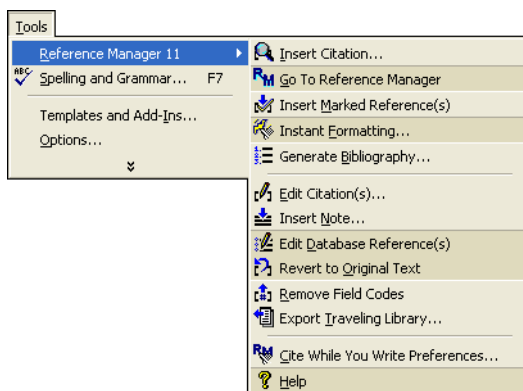
If you have trouble accessing the program, repeat the installation steps to verify that the program was correctly installed.

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## Checking Microsoft Word Support

To see if Cite While You Write is correctly installed, start Word and click on Word's *Tools* menu. In Word 2000, XP, or 2003, you should see Reference Manager commands on a *Reference Manager 11* submenu.

### Word 2000, XP, or 2003 *Tools* menu and *Reference Manager 11* submenu

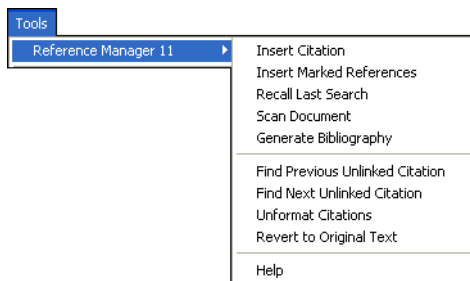


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## Checking WordPerfect Support

To see if the Reference Manager Add-in is correctly installed, start WordPerfect and click on the *Tools* menu. You should see a *Reference Manager 11* submenu with various Reference Manager commands.

### WordPerfect *Tools* menu and *Reference Manager 11* submenu



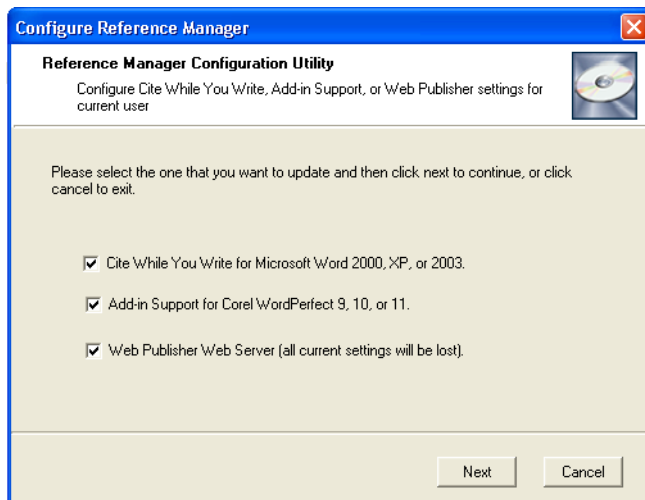
# Installing Word Processor Support Later

When you install Reference Manager, the installer program looks for Microsoft Word and WordPerfect on your computer. If it finds a compatible version, the appropriate Cite While You Write word processor files are installed for the current Windows user account. There are several instances, though, where you may need to reinstall these files after Reference Manager is installed:

- ◆ You did not install Reference Manager from your user account.
- ◆ When you installed Reference Manager, you did not have full read and write access rights for your account.
- ◆ You installed or upgraded your word processor *after* installing Reference Manager.

## To install word processor support:

1. Log in to your Windows user account with full read and write access rights.
2. Use Windows Explorer to navigate to the Program Files\Reference Manager 11 folder.
3. Double click on the RefManConfig.exe file.



4. On the dialog, select the word processor files you wish to install (Cite While You Write for Word or the Add-in for WordPerfect) and click *Next*.

# Uninstalling Reference Manager

Uninstall the Reference Manager demo program by using the “Add/Remove Programs” function in the Windows Control Panel.

## **To uninstall the Reference Manager 11 Demo program:**

1. Make sure Web Publisher is disabled.
  - a. From the *Tools* menu in Reference Manager, select *Web Publisher*.
  - b. Click on the *Configure* tab.
  - c. Select the button to “Disable Web Publisher.”
  - d. Click *OK*.
  - e. Exit Reference Manager
2. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
3. Select *Add or Remove Programs*.
4. Select the *Reference Manager 11* program.
5. Click the *Remove* button.

The *Uninstall* program removes only files, groups, and icons installed by the Reference Manager installer the *last* time it was run.

It will *not* delete your databases or any new files you have created. It will *not* delete folders if they contain files you created. You will need to manually delete those files with Windows Explorer.



# Chapter 2: Introducing the Guided Tour

This Guided Tour walks you through a series of exercises to get to know the basics of Reference Manager. It is best if you take the tour one step at a time.

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## Tour Objectives

After completing the exercises in this Guided Tour you should be able to:

- ◆ Understand the major uses of Reference Manager as a bibliographic database program
- ◆ Easily navigate references in a database with commonly used features
- ◆ Build a database by importing references and entering references manually
- ◆ Search a Reference Manager database
- ◆ Use term lists for easy global editing and creating synonyms
- ◆ Build bibliographies in Microsoft Word or WordPerfect
- ◆ Print bibliographies and subject bibliographies directly from Reference Manager
- ◆ Post Reference Manager databases on a personal Web server

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## Using the Sample Database with the Exercises

The exercises in this Guided Tour use the Sample database that is automatically installed when you install Reference Manager. You will use the Sample database to learn how to navigate a database, enter references, search a database, and build bibliographies. When you are done with the Guided Tour, you can experiment further with the Sample database.

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**NOTE:** Remember that the Reference Manager 11 Demo version is active for 20 sessions; after you open a database 20 times, the program will no longer operate.

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## Database Capacity

Depending on your system's resources, you can create an unlimited number of Reference Manager databases, each with an unlimited number of references. In Reference Manager, all text fields are variable length and can include almost any type of information. The manner in which information is entered is

directly related to producing correctly-formatted in-text citations and bibliographies.

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## Reference Types

It is possible to have many different reference types in a Reference Manager database. For example, you can store Audiovisual Material with Journal Article and Book references. Reference Manager comes with 35 predefined reference types for you to select when entering references.

While Reference Manager is designed and used for bibliographic references, you can use the program to store records of any type. You can use any of the predefined reference types or you can modify them to create a custom reference type. Each reference type can include up to a maximum of 37 fields.

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## Online Help

When using Reference Manager, many of your questions can be addressed using the online help that comes with the program. There are several ways you can access online help when using Reference Manager:

- ◆ From the *Help* menu, choose *Help Topics* to find a topic using the Contents, Index, or Find tab.
- ◆ In many Reference Manager windows, click the *Help* button to see information related to the current activity.
- ◆ Press the F1 key to display context-sensitive help.

# Chapter 3: Navigating a Database

In this section of the Guided Tour you will learn to:

- ◆ Open an Existing Database
- ◆ Customize the Reference List
- ◆ Customize the Database Sort Order
- ◆ Click Sort on Column Headings
- ◆ Drag and Drop between Databases

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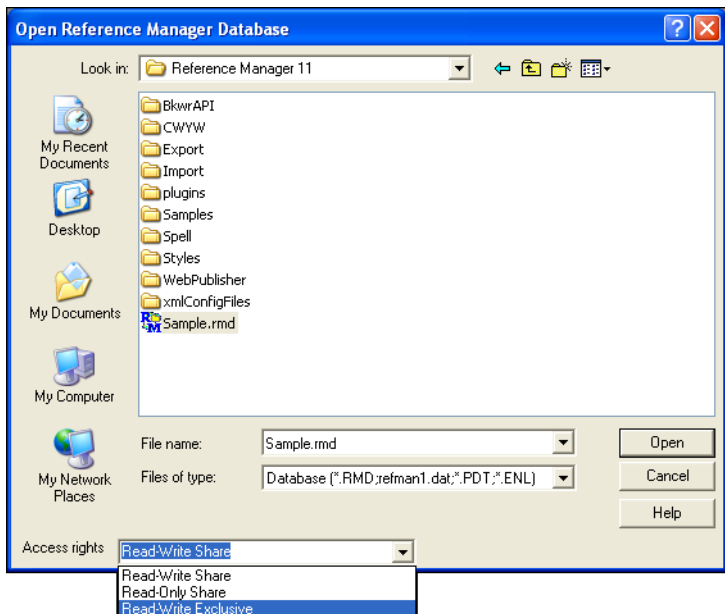
## Exercise – Opening the Sample Database

To open the Sample database:

1. From the Windows *Start* menu, locate the *Reference Manager 11* program group and choose *Reference Manager 11*.

If you have previously used Reference Manager, the last Reference Manager database used may automatically open. Check the database tab at the bottom of the screen to be sure the Sample database is open. If it is not, close the current database by going to the *File* menu and choosing *Close Database*.

From the *File* menu, choose *Open Database* to continue. The Open Reference Manager Database dialog appears.



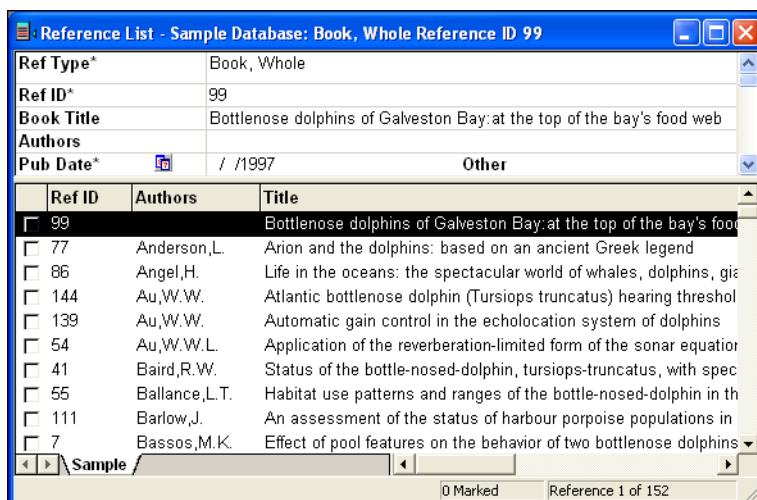
2. In the Open Database dialog:
  - a) In the “Look in” box, navigate to the Reference Manager 11 folder. The default location is C:\Program Files\Reference Manager 11.
  - b) At the bottom of the dialog, in the “Access rights” box, select *Read-Write Exclusive*.

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**NOTE:** By default, databases are opened with Read-Write Share access rights. However, to make any global changes to a database, you must open it with Read-Write Exclusive access rights.

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- c) In the Reference Manager 11 folder, locate the Sample database (Sample.rmd) and either double-click on it or highlight it and click *Open*.



Notice that the Sample Database window has two panes: the top pane is the Reference Display, and the bottom pane is the Reference List.

The Reference Display, the top pane in the Database window, details the reference highlighted in the Reference List. You can edit the highlighted reference in the Reference Display.

The default Reference List shows the Reference ID, Author, and Title fields. (Later, you will learn how to customize this view to include any field.) The Reference List provides a way to browse through single-line references, mark or unmark references, or display records in full for viewing or editing.

Next, take a closer look at how to navigate the Reference List.

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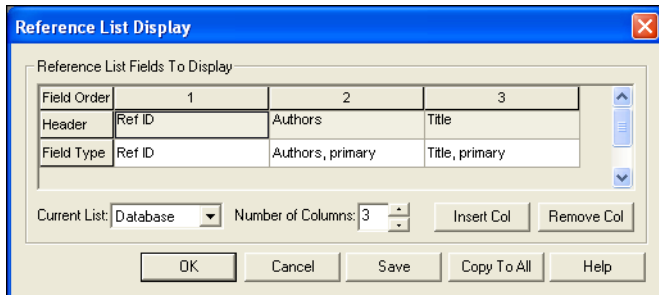
## Exercise – Customizing the Reference List

While the default Reference List shows three Reference Manager fields (Reference ID, Author, and Title), the list can be customized to display as many fields as you would like.

In the following exercise you will customize the Reference List by selecting different fields to display and then changing the column widths.

**To select the fields to display:**

1. From the *Tools* menu, choose *Reference List Display*.



Each column represents a field appearing on the Reference List.

- ◆ **Field Order**—The first row allows you to specify the order in which the fields appear.
  - ◆ **Header**—The second row allows you to modify the text appearing as a Header.
  - ◆ **Field Type**—Row three allows you to select the field you want to view.
2. Move the mouse pointer over column 3 of the Field Order row. When the cursor changes to a downward arrow, click the mouse to highlight the entire third column.

3. Click the *Insert Col* button.

A new column is inserted before the third column; the original third column moves to the right. The newly inserted column defaults to Ref ID as the Header and Field Type.

4. Click the Field Type row in the new column and select “Date, primary” from the drop-down list that appears. The list is alphabetized, so you will need to scroll up to find “Date, primary.”

The Header row automatically changes when you select a new Field Type.

5. Click the Header row in the new column and change “Date, primary” to “Date” by deleting the word primary.
6. Click *OK* to save your changes. Reference Manager displays a message asking whether you would like to copy this reference list format to all reference lists. Click *Yes*. The Date field now appears in the Reference List.

You can resize the width of the columns easily by dragging between column titles. Use the next exercise to change the width of the Date field in the Reference List.

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## **Exercise – Changing the Column Width**

You can adjust the width of the Date column to allow more room for the Title column.

### **To adjust column widths:**

1. In the Reference List, place the cursor on the vertical line separating the Date and Title column headers.  
The cursor changes to a left/right directional icon allowing you to reset the width.
2. Drag the vertical bar to the left to reduce the width of the Date field.
3. Experiment with changing other column widths.

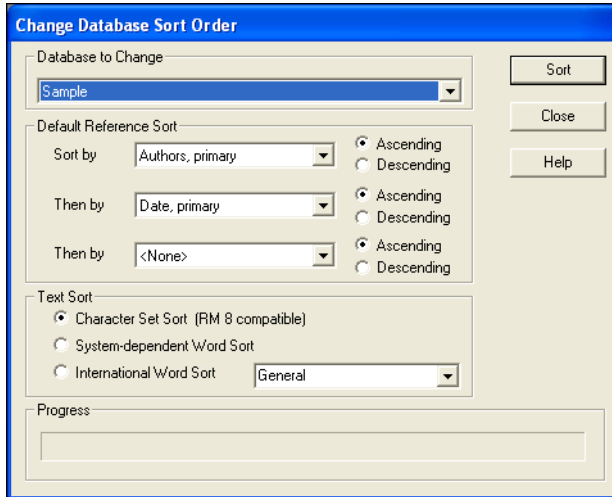
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## **Exercise – Customizing the Database Sort Order**

Several sorting options are available in Reference Manager. You can specify a custom database sort order to be applied anytime a Reference List appears, as well as a separate sort order applied to search results. You can also perform instant sorts using the column headers in the Reference List.

## To change the database sort order:

1. To change the database sort order for an existing database, go to the *Tools* menu and choose *Change Database Sort Order*.



2. In the Database to Change box, make sure the Sample database is selected.

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**NOTE:** If the Sample database does not appear as an option in the Database to Change box, you did not open the database with Read-Write Exclusive access.

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Author is already set up in the primary Sort By box. You will set up a secondary sort order for Title and Date fields.

3. Click the drop-down list in the first Then By box (the second level of the sort) and change the field to "Title, primary." Select Ascending order.
4. Click the drop-down list in the second Then By box (the third level of the sort) and change the field to "Date, primary." Select Descending order.
5. Click the *Sort* button.

Reference Manager displays the message "Resort successfully completed" when the sort is complete.

6. Click *OK* to close the dialog box, and then click *Close* to see the results of your settings.

You can also set up the database sort order when you create a new database. To see how this works, from the *File* menu, choose

*New Database* and then click the *Advanced* button. Click *Cancel* to leave without making changes.

---

## Exercise – Changing the Sort Order Instantly

Instant sorts can be performed on any column header in the Reference List when you want to adjust the sort order without making permanent modifications.

### To use the click sort method to sort by a displayed field:

1. To sort by the Date field, click the Date column header. The references are sorted by date in ascending order. Click a second time to change the sort order to descending.
2. Experiment with sorting the references by another column header such as Author and locate the name “Marten, Ken.” Use the scroll bar to the right of the Reference List; notice the scroll tip that appears to show you your location in the list.

---

## Exercise – Copying or Moving References from One Database to Another

Reference Manager makes it easy to copy or move references between databases. To copy or move references, you need to have two databases open. For this exercise, we will first create a new empty database.

### To create a new database and then copy references:

1. From the *File* menu, choose *New Database*.
2. On the file dialog, enter a new name for the database – type “Test” for this exercise – and click *New*.

You should have two Reference Manager databases open now, Test and Sample. Notice the two tabs with the database names at the bottom of the window.

3. Click the Sample database tab, and highlight a reference in the Reference List.

You can highlight multiple references by using CTRL-CLICK to select non-contiguous references or SHIFT-CLICK to select a range of references. Once you highlight more than one reference, the top Reference Display goes blank, as it can only show a single reference.

4. To copy the highlighted reference(s), hold down the CTRL key, drag them to the Test database tab, and release the mouse.

(To move references, you would use the same process, but without holding down the CTRL key.)

Reference Manager displays messages, asking you to confirm the copy or move of each reference. You can click *Yes*



for each reference or *Yes to All* if you want all the selections to copy or move automatically.

---

**NOTE:** You can also copy reference(s) between databases using the Copy Between Databases command. From the *Reference* menu, choose *Copy Between Databases*.

---

## Chapter 4: Building a Reference Manager Database

In this section of the Guided Tour you will learn to:

- ◆ Search an Online Database from Reference Manager
- ◆ Import References from Online, CD-ROM, or Web-based Services
- ◆ Enter and Edit References
- ◆ Spell Check Selected Text or an Entire Reference
- ◆ Launch Web Pages or Files from a Reference

---

### Searching an Online Database from Reference Manager

As you build your database, you may search a variety of sources. You can search an online database directly from Reference Manager, and access the ISI Web of Science, PubMed, or hundreds of Z39.50 sites (such as academic and public library catalogs, the Library of Congress, and more). The references you find using Reference Manager's Internet Search are placed in a temporary database that you can save permanently. You can move individual references to an existing database using drag and drop (or copy between databases).

You may also search other commercial and bibliographic services. Bibliographic data sources are generally available in these forms: diskette, CD-ROM, online, and Web-based services. Data tapes can also be installed on a local institutional network for controlled access.

The exercises that follow show you how to search online databases from Reference Manager and import a text file previously downloaded from PubMed.

---

### Exercise – Searching an Online Database

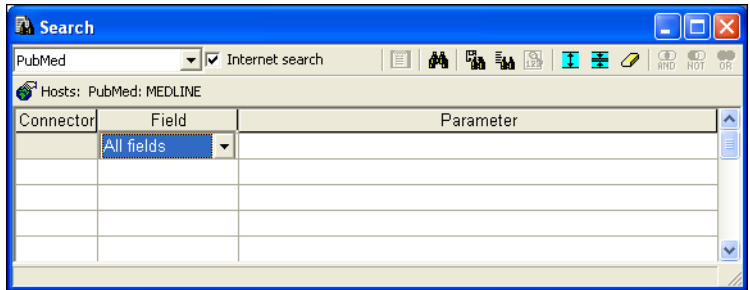
This exercise guides you through the basic steps of connecting to and searching a remote database. You must be at a computer with Internet access – with either a dial-up or direct network connection.

For this exercise, you will connect to PubMed, which is made available by the National Library of Medicine and provides access to bibliographic and full-text databases. PubMed is the online database we will search; National Library of Medicine is

the information provider. PubMed comprises the full Medline medical database, and the pre-Medline records.

### To search PubMed:

1. From the *Tools* menu, choose *Internet Search*.



2. From the drop-down list on the Search toolbar, select PubMed. The Internet Search box is already checked.

3. Now, build your search expression.

For this exercise, let's say you are interested in information about the success of corrective eye surgery, such as lasik.

- ◆ In the first box under the Field column, select All fields if it doesn't automatically display, and press ENTER. The cursor moves to the Parameter column.

- ◆ In the Parameter box, type "lasik".

4. To start the Internet search, click the *Start Search* toolbar button (the binoculars) or press F12.

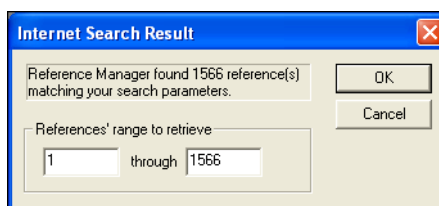
---

**NOTE:** If you haven't already established a connection, your dial-up configuration should automatically dial and connect. If the connection is not successfully established, Reference Manager alerts you with an error message and stops the search attempt.

---

As the search progresses, Reference Manager displays status messages.

In our example, over 1500 records were found. PubMed displays a dialog allowing you to select a range of references.




---

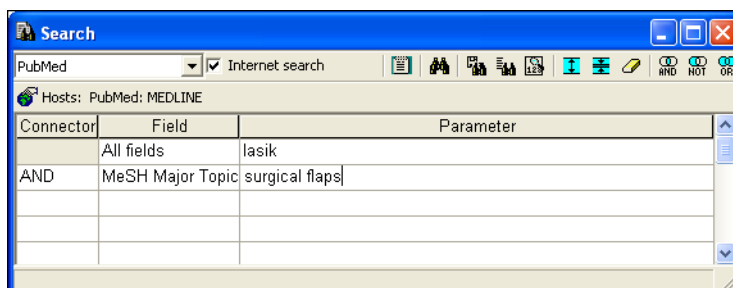
**NOTE:** PubMed is updated regularly, so you may find a different number of references than illustrated here.

---

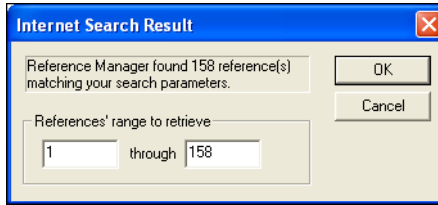
If the result set seems too big, you can always refine the search to get closer to exactly those references you want.

One technique to narrow your search is to retrieve some of the references, then open individual references to see what keywords are typically used in the online database. Then, use one of those keywords in your next search strategy.

5. In this case, click *Cancel* to stop retrieval and return to the Search window.
6. We will refine this search by looking for references that mention both lasik and surgical flaps:
  - ◆ Leave the first search line as entered.
  - ◆ In the Connector box of the second line, select AND from the list.
  - ◆ In the Field column of the second line, select MeSH Major Topic and press Tab.
  - ◆ In the Parameter column of the second line, type “surgical flaps”.



7. Click *Start Search*. This time 158 references are found.



The number of references found with the same search can change daily as online libraries are updated.

8. Click *OK*. These references appear on a Search 1 tab.

Subsequent searches would appear on a Search 2 tab, then a Search 3 tab, etc.

Browse the results or click sort your column headings to organize the reference list quickly.

#### **To save the retrieved references:**

You can save the entire set of references to a permanent database using *Save As* from the *File* menu. When you use *Save As*, do not give the new database the name of an existing database in the same folder; the old database would be replaced by the new one.

Or, for this example, identify the references you want to keep so you can drag and drop them into a permanent database.

1. Highlight two or three of the references.

You can hold down the *SHIFT* key to select adjacent references, or hold down the *CTRL* key to select references that are not next to each other.

2. Holding the mouse button down, drag the references to the Test database tab.
3. Let go of the mouse button to drop them into the Test database.
4. When a *Confirm Move Reference* dialog appears, click *Yes to All* to move each of the highlighted references.

If you do not save the references, you will be asked whether to save the database when you close either the Search tab or the Reference Manager program.

---

**NOTE:** As you copy or move references between database tabs, it is likely that you will receive a message about duplicate reference IDs. Unless a reference is already linked to a Word or WordPerfect document, it is fine to re-assign reference IDs.

---

### **To close the Search tab:**

You can execute as many Internet searches as you wish, with each search retrieved to another Search tab (up to a total of 15 database tabs). This can get confusing once you have many database tabs to scroll through!

When you have saved the references you want from a temporary Search database, you can close the tab to discard the temporary database.

1. Click on the Search tab you want to close.
2. Right click on the reference list to display a shortcut menu.
3. Select *Close Search Database*.
4. On the Closing Temporary Database dialog, click *Close* to throw away the temporary Search database.

It is not necessary to close Search tabs. When you close the Reference Manager program, you will be asked whether to save the references from any open Search tabs. As the program closes, all Search tabs are removed.

---

## **A Note about the ISI Web of Science**

The Web of Science provides seamless access to current and retrospective multidisciplinary information from approximately 8,500 of the most prestigious, high impact journals in the world. Through ISI Links, the Web of Science also offers navigation to electronic full-text journal articles, genetic information, and chemical and patent databases.

If you have a paid subscription, searching the Web of Science is essentially the same as searching other remote databases. You may copy your search results directly to a Reference Manager database. If you do not currently have prepaid access, you can go to [www.isinet.com](http://www.isinet.com) to learn more about it.

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## **Exercise – Importing References**

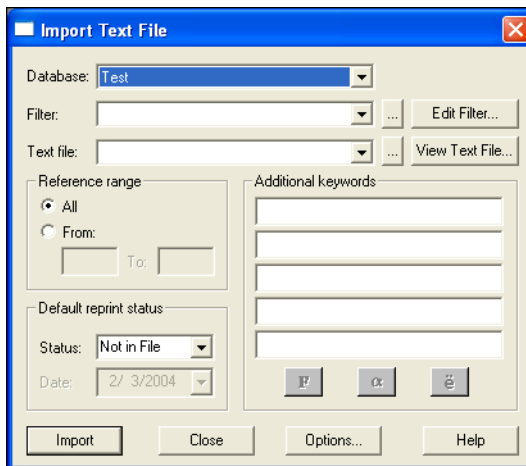
Another way to build a database without typing references is to import references. For example, you might search a resource provided by your institution (for example, Web of Science, Current Contents, Ovid, etc.). The results or selected references are downloaded into a text file, in a structured format. Reference Manager has predesigned import filters that move these references into your database with a few simple steps.

Before importing records, you must first download the records from the database service. In this example, we will use a text file that was previously downloaded from ToxLine. You will find

samples for supported services in the Reference Manager 11\Samples folder.

**To import a text file of references into Reference Manager:**

1. You should currently have two database tabs open: the Test database and the Sample database. (It is okay to also have one or more Search tabs open.)
2. From the *File* menu, choose *Import Text File*.



3. On this dialog, set these values:
  - ◆ From the Database drop-down list, select the Test database.
  - ◆ Next to the Filter drop-down list, click the Browse button [...]. Locate the Reference Manager 11\Import folder where you will find the import filters supplied with Reference Manager. Locate the TOXLINE.CAP file, highlight it, and click *Open*.
  - ◆ Next to the Text File drop-down list, click the browse button [...]. Locate the Reference Manager 11\Samples folder, where you will find sample download files. Locate the Toxline.TXT file, highlight it, and click *Open*.
  - ◆ The Reference Range setting can remain All. You can set a range if you imported a partial file and would like to pick up where you left off (for example, 50 to 124).
  - ◆ The Default Reprint Status area helps you keep track of articles you maintain in your physical collection. You can browse the drop-down list and select any of the three settings: In File, Not In File, and On Request. The On

Request option is useful to help you track the date of your reprint requests.

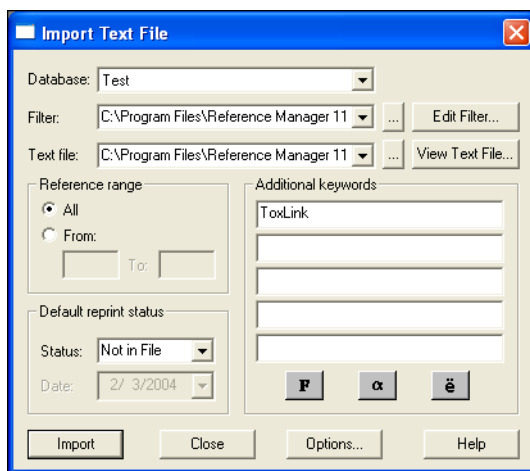
- ◆ You can use the Additional keywords box to add keywords globally to the entire set of imported references.

For this exercise, place your cursor in the first empty space and type “ToxLink.” A dynamic list of keywords associated with the target database appears and follows your keystrokes. If the term “ToxLink” is on the list and highlighted, you can press ENTER. If this term is new to the database, press Tab.

You might also find it handy to add today’s numerical date to track when the reference entered the database.

You can use the buttons at the bottom – Font, Greek, and Symbol – to change characters in the terms you are assigning.

Your dialog box should now look like this:



4. Click *Import* to import your records.

Once the import is complete, Reference Manager displays a message, telling you that the import was successful.

5. Click *OK*.

An import log dialog box appears to confirm the number of references imported, the number of duplicates detected, and other details about the import process. Click *Close* to return to the Reference List.

You will now see an additional tab at the bottom of the Reference List labeled Imported. This tab shows the newly



imported references visually separated from the Test database for easy editing. These records are already saved in the Test database; any edits made on the Imported tab are reflected in the Test database. If you delete a reference from the Imported tab, it is also deleted from the Test database.

#### **To close the Imported tab:**

When you are done working with the imported references on the Imported tab, you can close the tab to remove the temporary list.

1. Click on the Imported tab.
2. Right click on the reference list to display a shortcut menu.
3. Select *Close Imported Reference List*.

The temporary Imported reference list disappears, but the references are still in the Test database.

It is not necessary to close the Imported tab. When you close the Reference Manager program, the Imported tab is removed.

---

## **Exercise – Inserting a New Reference**

You will save time using the previous search and import methods to build your database. However, there may also be references that require keyboard entry, such as theses, dissertations, and conference proceedings. In Reference Manager, you use the same steps to both enter and edit references.

The following fields in Reference Manager work differently than regular text fields: Authors, Keywords, and Periodical. These fields provide dynamic access to names, terms, and titles that already exist in a given database, and are managed in Term Manager, which is discussed later in this tour.

#### **To enter a new reference:**

1. Click the appropriate tab to access the Sample database.

- From the *Reference* menu, choose *New*.

Sample Database: Generic Reference ID 188	
Ref Type*	Generic
Ref ID*	188
Title, primary	
Authors, primary	
Date, primary	/ /2004 Other
Notes	
Keywords	
Reprint	Not in File 02/03/04
Start Page	
End Page	
Periodical	
Volume	
Title, secondary	
Authors, secondary	
Issue	
Pub Place	
Publisher	
User Def 1	

- Click in the Reference Type field at the top of the Reference Edit window. From the drop-down list that appears, select the Journal reference type.

---

**NOTE:** The Journal reference type is used for an article within a journal, while the Journal (Full) reference type is used to identify an entire journal, rather than an article.

---

By default, a Ref ID (Reference ID) is sequentially assigned as each reference is entered in a database.

- In the Title field, type the following title, using the Font toolbar to add italics to the Latin name. Note that punctuation is not added to the title field; it is added later by the selected output style.

The behavior and feeding ecology of the  
Pacific coast bottlenose dolphin *Tursiops  
truncatus*

---

**NOTE:** Do not apply text styles to an entire field. If a bibliographic style requests italicized titles, the italics will be applied by the output style.

---

- In the Authors field, type the first author's last name, "Shell". The dynamic pop-up browser appears and follows your keystrokes. Locate and highlight "Shell, E.D." Press ENTER to insert this author's name into the new reference.

6. Add your own name as the second author using the format  
**Lastname, F.M.**

The dynamic pop-up browser appears, but you likely will not see your name on the existing author list. If you press ENTER, the highlighted name will insert. Instead, type a semi-colon (;) to leave your name and move to the next entry point. Your name turns blue to identify it as a new name in the author list.

7. Use the icon next to the Pub Date field name to switch between displaying the Year Only or the Full Date. The year automatically defaults to the system date on your machine.

For this exercise, change the field to Year Only and enter 2001 as the date of this article.

8. The Web/URLs, Link to PDF, Link to Full-text, Related Records, and Image(s) fields are used to store links to Web pages or to documents on your computer.

For example, you can create a link to the full text article if it is publicly accessible on the World Wide Web. You could also enter a link to your own research paper on your hard drive by using the *Link to* command from the *References* menu. For this exercise, create a link to the ISI ResearchSoft Web site.

In the Web/URLs field, type "www.isiresearchsoft.com". Click on another field to transform the text into a hot link. Then, click the URL to launch your Web browser and go directly to the ISI ResearchSoft Web site.

Switch back to Reference Manager to continue entering the reference.

9. Use the Notes field to store your personal annotations or anything related to this reference. For now, you can either type a note or leave the field blank.
10. Keywords are useful for instantly retrieving a related group of references in your database.

If you have the automatic setting on to scan titles, notes, and abstracts for existing keywords, you already have keywords in this new reference (you can change this setting by going to *Tools>Options>Reference Edit*).

If the automatic keyword scan is off, and the keyword field is empty, type the following keywords. Use the same steps as with the author names; type a few characters and the

dynamic pop-up browser appears. Remember to use a semi-colon when inserting new terms.

dolphin

behavior

If the keyword field already has entries, verify that these two terms are present. If not, move your cursor to the end of the keywords field and insert them.

11. Click in the Reprint field and select In File from the drop-down list.
12. In the Journal Name field, start typing Marine, and then select the journal name Marine Mammal Science from the pop-up list.
13. Press TAB to move your cursor progressively through the next few fields, entering the following information.

Volume – 3

Issue – 2

Start Page – 125

End Page – 128

14. The Abstract field is a free text field, and has no practical length limit. For this exercise, type your own short abstract, or the following:

This is a detailed article about the food  
chains existing along the Pacific coast

The User Defined fields are available for you to customize and use as you wish. For this exercise, leave the rest of the fields blank.

Your new reference should look something like this:

Sample Database: Journal Reference ID 188	
Ref Type*	Journal
Ref ID*	188
Title	The behavior and feeding ecology of the Pacific coast bottlenose dolphin <i>Tursiops truncatus</i>
Authors	Shell,E.D.; Smith,J.P;
Pub Date*	2001 Other
Web/URLs	<a href="http://www.isiresearchsoft.com">www.isiresearchsoft.com</a>
Link To PDF	
Link to Full-text	
Related Links	
Image(s)	
Notes	
Keywords	behavior; feeding; ecology; coast; bottlenose dolphin; dolphin; tursiops; tursiops truncatus; tursiops-truncatus; truncatus; food chains;
Reprint	In File 02/03/04
Journal Name*	Marine Environmental Research
Volume	3
Issue	2
Start Page	125
End Page	128
Abstract	This is a detailed article about the food chains existing along the Pacific coast
ISSN/ISBN	
Availability	
Address	
User Def 1	
User Def 2	
User Def 3	
User Def 4	
User Def 5	

15. To save the reference, choose *Save* from the *File* menu, and then close the reference window. Or, simply close the reference edit window, and save the reference when prompted. Either choice will return you to the reference list window.

When you want to edit an existing reference, you can do so in the top pane of the reference list window, or you can double-click the reference in the reference list to open a full edit window. Edit a reference following the same rules as when you entered a new reference.

---

## Exercise – Spell Checking a Reference

Reference Manager includes a spell checker to help identify incorrect words in all fields except authors and periodicals. You can also spell check a specific selection by highlighting a word or phrase.

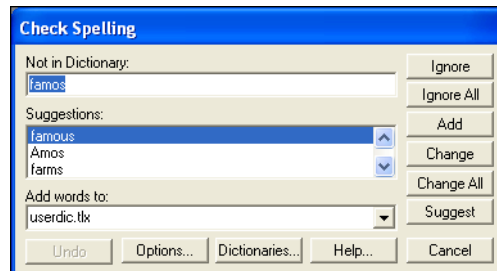
### To use the spell checker:

1. Activate the Sample database and highlight the reference by Anderson,L.
2. In the top pane, click in the Notes field of the highlighted reference and type:

This book is about a famos Greek legend.

We are asking you to misspell “famous,” so that you fix it with the spell checker.

3. Click in the field above the Note field, then, from the *Tools* menu, choose *Spell Check*.



4. The Spell Check dialog appears and the word “famos” is identified as Not in Dictionary. Under Suggestions, select “famous” and click *Change*.

Reference Manager continues to spell check the reference. You can click *Cancel* to close the spell checker.

5. Click on another reference in the reference list, and Reference Manager will advise you that changes were made to the current reference. Click *Yes* to save changes.

## Chapter 5: Retrieving References in a Database

In this section of the Guided Tour, you will learn to:

- ◆ Create a Search Strategy and Perform a Search
- ◆ Save a Search Strategy

---

### Exercise – Creating a Search Strategy

You can search your Reference Manager databases to locate specific references for editing or printing bibliographies. Once you have located specific records, you can mark, delete, edit as a group, or print the references. You can search every field in a reference or limit the search to specific fields. After you create a search strategy, it can be saved with a name and recalled for later use.

A search strategy is a description of the criteria you would like Reference Manager to use when finding references in one or multiple open databases.

A search strategy contains the following items:

- ◆ **Field**—Select a single field or groups of fields to search, such as Authors.
- ◆ **Parameter**—Enter the word or phrase you want Reference Manager to locate.
- ◆ **Connector**—Use one of the logical connectors (AND, OR, or NOT) when more than one search parameter is used.

The Results column lists the number of references found.

#### To create and use a search strategy:

1. The Sample database should be open. From the *References* menu, choose *Search References*.

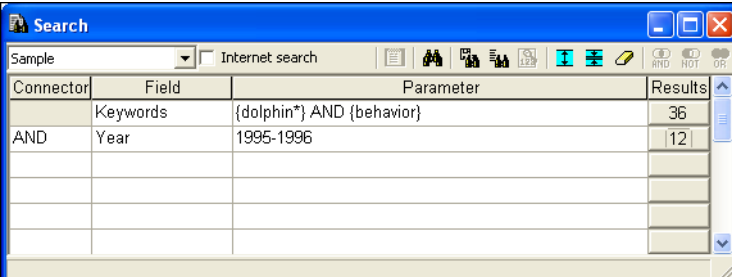
The Search window appears, and you will notice the Internet Search box is cleared.

2. From the drop-down list on the toolbar, select Sample to search the Sample database.

When you have multiple databases open, you can use this drop-down list to search across All Open Databases. If you do not see the All Open Databases option, you can review the online Help topic indexed under “Databases: sorting” for more details.

3. Click in the Field column and type “K” to add “Keywords” to the Field column.
4. Click in the Parameter column and type “dolphin”. A browser pops up, listing all of the keywords in the database. Once dolphin is highlighted, double-click on it. The term is entered into the parameter field. Add an asterisk to the term to search for variations of “dolphin” such as the plural “dolphins.”
5. Narrow the search to include references related to behavior. Click the *AND* connector toolbar button. Type “behavior” and when the term when is highlighted, double click it to insert it.
6. Press TAB to move your cursor to the second line in the Connector column and type A (for AND).
7. In the Field column, type Y (for year).
8. In the Parameter column, type 1995-1996, and close the browser list.
9. Click the *Start Search* toolbar button (the binoculars) or press F12 to begin the search.

Your search strategy, with results, should look like this:



Connector	Field	Parameter	Results
	Keywords	{dolphin*} AND {behavior}	36
AND	Year	1995-1996	12

The Results column displays the number of references that satisfy each level of the retrieval. In our example, the first line shows how many references contain both “dolphin\*” and “behavior” in the Keywords field. The second line shows how many references meet the criteria of the first line plus contain dates from 1995 to 1996.

10. To view results, click the appropriate *Results* button on any line.

A Retrieved tab appears, with the search results listed.

Similar to the Imported tab, the Retrieved tab is a visual representation of references that are stored in the open databases— it is not a database itself.



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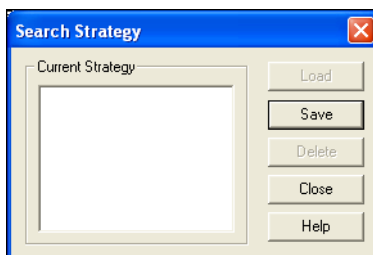
## Exercise – Saving a Search Strategy

Each time you display new search results, the Retrieved tab is updated with the new list of matching references.

It can be useful to save search strategies that you use frequently. This exercise will teach you how to save the Search Strategy created in the steps above.

### To save a search strategy:

1. To open the Search window, from the *References* menu, select *Search References*. The search you just created should remain intact.
2. Click the *Strategy Files* tool button, located to the right of the *Start Search* toolbar button. The Search Strategy dialog appears.



3. Click *Save* and give the Search Strategy a name, for example, "Dolphin."
4. Click *OK* to save your strategy.
5. For this exercise, click *Strategy Files* again on the toolbar to confirm your search is saved for future use.  
(Later, you can return to this dialog, highlight one of your saved strategies, and select *Load*.)
6. Click *Close* to return to the Search window.
7. Click one of the Results buttons again to return to the Reference List window.

### To close the Retrieved tab:

If you want to close the Retrieved tab, do it the same way you closed the Imported tab.

1. Click on the Retrieved tab to activate it.
2. Right click on the reference list to display a shortcut menu.
3. Select *Close Retrieved Reference List*.

The temporary reference list of search results disappears, but the references are still in the Sample database.

It is not necessary to close the Retrieved tab. When you close the Reference Manager program, the Retrieved tab is removed.

## Chapter 6: Managing Reference Manager Term Lists

In this section of the Guided Tour you will learn to:

- ◆ Globally Edit Term Lists
- ◆ Create Synonyms
- ◆ Copy a Periodical List
- ◆ Retrieve References using Term Lists

You may remember the pop-up browser from previous exercises, and wonder how to remove unused terms, or perhaps merge terms that are synonyms with varied spelling (variations of words such as singular versus plural, or American English versus British English). Reference Manager provides Term Manager to quickly modify, combine, populate, and even retrieve references using your term lists of keywords, periodicals, and authors.

The exercises that follow show you how to perform a global replace or delete, combine or add terms to create synonyms, populate your periodical list with full and abbreviated journal names, and use Quick Retrieval to locate references.

---

### Exercise – Globally Editing Term Lists

You can use the Global edit feature to correct misspelled terms or delete terms in Authors, Periodical, and Keywords fields throughout your database. This is especially helpful if you have a misspelled Author's name, Periodical title, or Keyword.

---

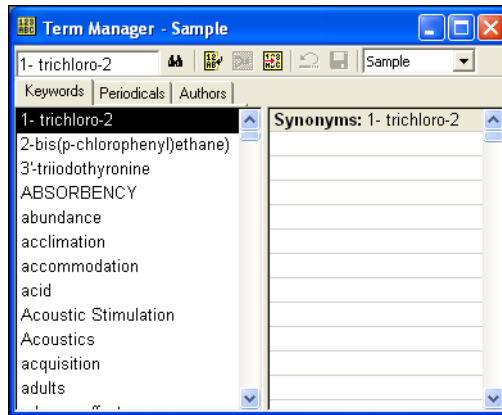
**NOTE:** You must open your database with Read-Write Exclusive access rights before you can use the Term Manager edit options. This requirement ensures you are the only one accessing the database during this process.

---

#### To globally edit a term list:

1. Activate the Sample database tab.
2. To open the Term Manager window, go to the *Tools* menu, choose the *Term Manager* submenu and then *Activate*.

The Keywords tab is typically active. Double-check that you are working on the Sample database; it appears in the drop-down list on the toolbar.



3. Click the Authors tab and highlight the first author's name that appears in all caps, ANTHONY,K.

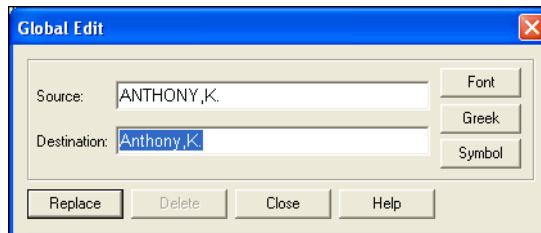
Only certain journals require uppercased author names, so it is best to store the names in mixed case and let Output Styles apply capitalization or uppercasing when formatting a final document.

4. From the *Tools>Term Manager* menu, choose *Global Edit*.

The Source text box contains "ANTHONY,K."

5. Type "Anthony,K." in the Destination text box.

The browser list appears and can be closed with the close button (x) in the top right corner.



6. Click *Replace*.

---

**NOTE:** You can delete a term on the same Global Edit dialog box by using the *Delete* button.

---

7. Click OK to confirm the change.

8. Click *Close* to close the Global Edit dialog.

The Authors list now lists “Anthony,K.” rather than “ANTHONY,K.”

---

## Exercise – Creating Synonyms

### To create synonyms:

1. Ensure that the Term Manager window is active. If it is not, from the *Tools* menu choose *Term Manager* and then *Activate*.
2. Click the Keywords tab.
3. Locate the term, “east-coast,” by starting to type the word. The highlight follows your keystrokes to help you find the term.

Notice that there are two versions on the Keywords list: “east-coast” and “east coast”. Minor differences such as this are introduced into your database as you import data from various data sources. It can be difficult to maintain a clean list. Reference Manager gives you the opportunity to combine these terms for retrieval purposes.

4. Highlight both terms using the CTRL key. Then, from the *Tools>Term Manager* menu, choose *Combine Terms*. When the edits are complete, each term includes the other as a synonym. Now you can search on one of the synonym terms to locate references with either term.

---

## Exercise – Copying a Periodical List

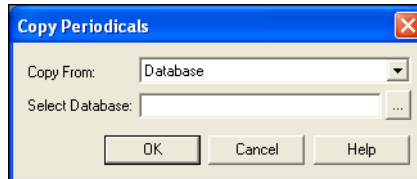
The Periodicals list works differently than the Keywords and Authors lists. Each periodical entry (including journals, magazines, and newspapers) can include up to four synonyms.

The synonym list is preset to store the full journal name and up to three abbreviations. This synonym table is essential when you are submitting to a variety of publications with different formatting requirements. The selected Reference Manager Output Style determines which form of the periodical name is used.

Building a list of periodical names can take quite some time if you enter them manually. Reference Manager provides extensive periodical lists for three disciplines: Chemistry, the Humanities, and Medicine. You can also copy a periodical list from another database. Copying one of these periodical lists automatically populates your database with both the full and abbreviated periodical name.

### To copy a periodical list:

1. Ensure that the Term Manager window is active. If it is not, from the *Tools* menu choose *Term Manager* and then *Activate*.
2. Click on the Periodicals tab.
3. From the *Tools>Term Manager* menu, choose *Copy Periodicals*. The Copy Periodical dialog box appears.



4. Use the drop-down list in the Copy From field to select the Medical list.

The Select Database line becomes inactive.

5. Click OK.

This is a large list, so it may take some time to copy it all into your database.

Once the copy process is complete, you can highlight a periodical name to view its full and abbreviated names, which are ready to use in your formatted bibliographies.

---

## Exercise – Retrieving References using Term Lists

Term lists allow you to very quickly find references by keyword, periodical name, or author name. These fields are indexed for fast retrieval.

### To retrieve references with term lists:

1. Ensure that the Term Manager window is active. If it is not, from the *Tools* menu choose *Term Manager* and then *Activate*.
2. Click on the Keywords tab.
3. Scroll down the Keywords list to locate “animal behavior” and “animal communication.” Use the CTRL key to highlight both of these terms.
4. From the *Tools>Term Manager* menu, choose *Quick Retrieval* (or use the binoculars toolbar button) to initiate the search.
5. When the quick retrieval connector dialog appears, select OR and click OK.

You are returned to the reference list window with a new Retrieved tab and the results of your quick retrieval.

# Chapter 7: Citing References in a Document

In this section of the Guided Tour you will learn to:

- ◆ Open a Word Processing Document and View the Reference Manager Commands
- ◆ Cite Reference Manager References in your Manuscript
- ◆ Generate a Reference List

Reference Manager 11 installs menu items and a toolbar in Microsoft Word for Windows 2000, XP, or 2003 and WordPerfect for Windows 9 (2000), 10 (2002), or 11 (2003). These integrated tools provide you with the ability to search your database(s) and create instant bibliographies without leaving your word processor.

The exercises that follow show you how to activate the Reference Manager toolbar, search for citations and insert citation place holders in your document, scan your document for identifying text, and create a manuscript with appropriately formatted in-text citations and a reference list.

---

## Exercise – Opening a Word Processing Document

**To open a document and activate the Reference Manager toolbar:**

1. With Reference Manager active, start Microsoft Word or WordPerfect.
2. Open a New Document.
3. Look at the *Tools* menu in your word processor.

You should find a *Reference Manager 11* submenu, with a right arrow and more selections. Each of the items on the *Tools >Reference Manager 11* menu has a corresponding button on a Reference Manager toolbar.

4. If the Reference Manager toolbar is not already visible, you can activate it.

Go to the *View* menu, select *Toolbars* and then *Reference Manager 11*. A toolbar should now appear on the screen. Place your cursor on any button for a few seconds and a tool tip will appear that describes the selected tool. You can use this toolbar for the following exercises.

As you write a manuscript, you will want to cite specific references. Once these citations are inserted into your

manuscript, you can reformat the in-text citations and reference list as many times as you want and in any style you want.

### To begin citing references:

- ◆ If you are using Microsoft Word, continue with the next exercise.
- ◆ If you are using WordPerfect, jump to the following section, titled “Exercise—Inserting and Formatting Citations (WordPerfect 9-11).”

---

## Exercise – Inserting and Formatting Citations (Word 2000, XP, or 2003)

You can search for Reference Manager references and insert them without ever leaving Microsoft Word. Citations can be inserted in an existing manuscript or as you write. As you work, Instant Formatting updates a reference list at the end of the document.

### To insert citations in Microsoft Word:

1. Open the Reference Manager database(s) that contain the references you wish to cite—in this case, the Sample database. Then, open a Word document.

If you have been following the Guided Tour, and followed the previous exercise, you are ready. The Sample database is open, and you are in a new Word document.

2. Type the following:

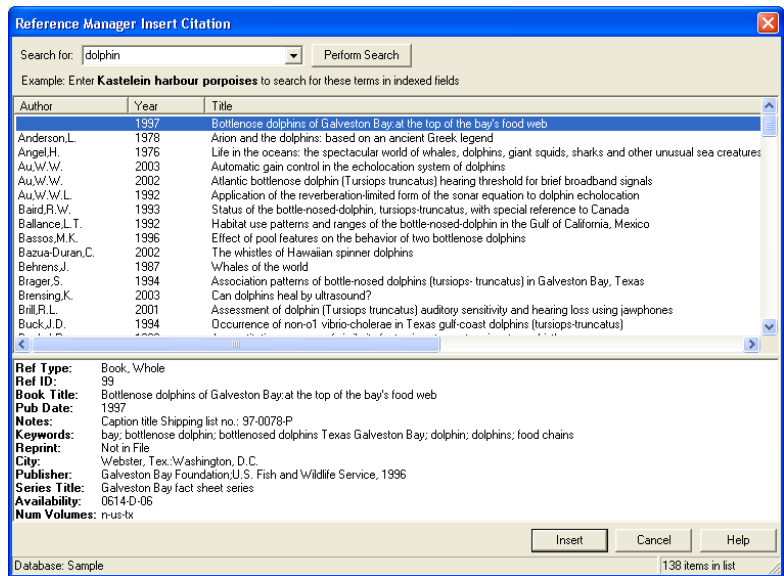
Bottlenose dolphins respond to boat traffic in various ways.

Now you are ready to insert a citation.

3. From the *Tools* menu, select *Reference Manager 11* and then *Insert Citation* to display the Reference Manager Insert Citations dialog.



4. In the Search for text box, type “dolphin”. Then click *Perform Search*.



The matching references are listed. Notice the number in the bottom right corner, which indicates the total number of references in the list. You should find over 100 references, which means you need more detailed search criteria to find the reference you want.

---

**NOTE:** Reference Manager will search the Authors, Date, Keywords, Titles, and RefID fields to locate references for you to cite. Separate each item with a space or a comma. Surround phrases with quotation marks.

---

5. Narrow the list by adding another term to the Search for box.

This time, add the year 1996, so that the search item is “dolphin 1996”. Click *Perform Search* again. Now you have less than 20 references to review.

6. Select two or more references to cite in your document, using SHIFT-CLICK to select a series of references or CTRL-CLICK to select a random group, and then click *Insert*.

Because Instant Formatting is turned on by default, the citation should format according to the current output style, and a reference list should appear at the end of the document.

If Instant Formatting is not enabled, you will see placeholders that look something like this:

```
{Connor 1996 6/id;Cunningham, 1996 122/id}
```

This unformatted citation contains two references, and shows the first author's last name, the year, and the reference ID number from Reference Manager.

7. Start a new paragraph, and type:  

The wild dolphin feeding program causes concern among experts.
8. Switch to the full Reference Manager application. You can do this by clicking the RM icon on the left side of the toolbar. Then, in the Sample database, mark one or two references by checking the box in the left column of the reference list.
9. Switch back to the Microsoft Word document. With your cursor placed after the new sentence, go to the *Tools* menu and select *Reference Manager 11*, then *Insert Marked Reference(s)*. The new citation appears in the document.

You can continue adding citations as you write the paper, using both the *Insert Citations* command and the *Insert Marked References* command.

### **To format the citations and bibliography in various styles:**

Instant Formatting works as you cite references. Reference Manager uses the currently selected style to format citations and update the bibliography. By default, Instant Formatting is enabled.

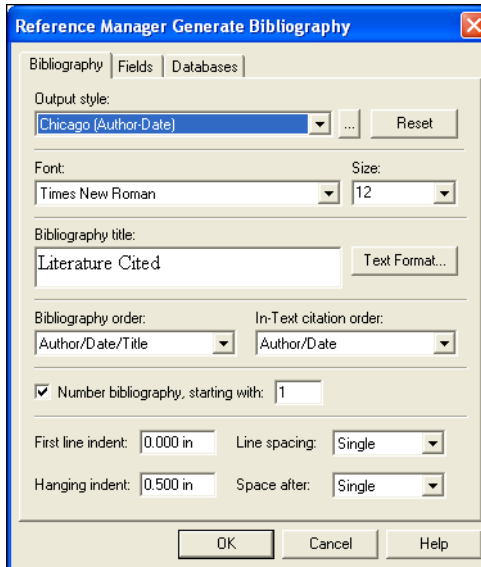
However, to change the style or layout of references, you must use the *Generate Bibliography* command. This formats your paper whether Instant Formatting is enabled or not. You can reformat as many times as you want, after adding more citations or to change the style or layout settings.

---

**NOTE:** Each time you use the *Generate Bibliography* command and select a different output style, that style becomes the default style for instant formatting.

---

1. From the *Tools* menu in Microsoft Word, select *Reference Manager 11* and then *Generate Bibliography*.



2. In the Output Style section near the top, click the drop-down list to select the output style titled American Psychological Association 5th ed.

If no output styles are listed, click the browse button [...] and select American Psychological Association 5th ed from the Reference Manager 11\Styles folder.

3. When you select an output style, the settings on this tab are updated from the style. You can change options on this screen to override the settings in the output style.

You may want to type a different Bibliography Title to print before your reference list, or select a different Bibliography order, or modify the line spacing.

4. Click *OK*.

The citations in your manuscript are automatically converted to the in-text citation format for the American

Psychological Association (APA), and the reference list is formatted in the APA style.

Bottlenose dolphins respond to boat traffic in various ways. (Connor, Richards, Smolker, & Mann, 1996; Cunningham, 1996)

The wild dolphin feeding program causes concern among experts. (Orams, Hill, & Baglioni, 1996; St Aubin, Ridgway, Wells, & Rhinehart, 1996)

#### Reference List

Connor, R. C., Richards, A. F., Smolker, R. A., & Mann, J. (1996). Patterns of female attractiveness in Indian Ocean bottlenose dolphins. *Behaviour*, 133, 37-69.

Cunningham, R. (1996). The "Dolphin-Death" bill. HR 2179. IMMP.  
Ref Type: Unenacted Bill/Resolution

Orams, M. B., Hill, G. J. E., & Baglioni, A. J. (1996). "Pushy" behavior in a wild dolphin feeding program at Tangalooma, Australia. *Marine Mammal Science*, 12, 107-117.

St Aubin, D. J., Ridgway, S. H., Wells, R. S., & Rhinehart, H. (1996). Dolphin thyroid and adrenal hormones: circulating levels in wild and semidomesticated tursiops truncatus, and influence of sex, age, and season. *Marine Mammal Science*, 12, -13.

You can go through the steps again to select a different output style. This is the same paper formatted in the numbered Nature style.

Bottlenose dolphins respond to boat traffic in various ways. <sup>1,2</sup>

The wild dolphin feeding program causes concern among experts. <sup>3,4</sup>

#### Reference List

1. Connor, R. C., Richards, A. F., Smolker, R. A. & Mann, J. Patterns of female attractiveness in Indian Ocean bottlenose dolphins. *Behaviour* 133, 37-69 (1996).

2. Cunningham, R. The "Dolphin-Death" bill. HR 2179. 1996. IMMP.  
Ref Type: Unenacted Bill/Resolution

3. Orams, M. B., Hill, G. J. E. & Baglioni, A. J. "Pushy" behavior in a wild dolphin feeding program at Tangalooma, Australia. *Marine Mammal Science* 12, 107-117 (1996).

4. St Aubin, D. J., Ridgway, S. H., Wells, R. S. & Rhinehart, H. Dolphin thyroid and adrenal hormones: circulating levels in wild and semidomesticated tursiops truncatus, and influence of sex, age, and season. *Marine Mammal Science* 12, -13 (1996).

---

## Exercise – Inserting and Formatting Citations (WordPerfect 9-11)

### To insert citations in WordPerfect:

1. Open the Reference Manager database(s) that contain the references you wish to cite—in this case, the Sample database. Then, open a WordPerfect document.

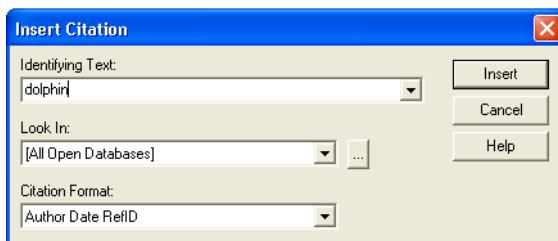
If you have been following the Guided Tour, you are ready. The Sample database is open, and you are in a new WordPerfect document.

2. Type the following:

Bottlenose dolphins respond to boat traffic in various ways.

Now you are ready to insert a citation.

3. Select the first button on the Reference Manager toolbar or, from the *Tools* menu, choose *Reference Manager 11* and then *Insert Citation*.



4. In the Identifying Text field, type “dolphin”. In the Look In area drop-down list, select the Sample database.

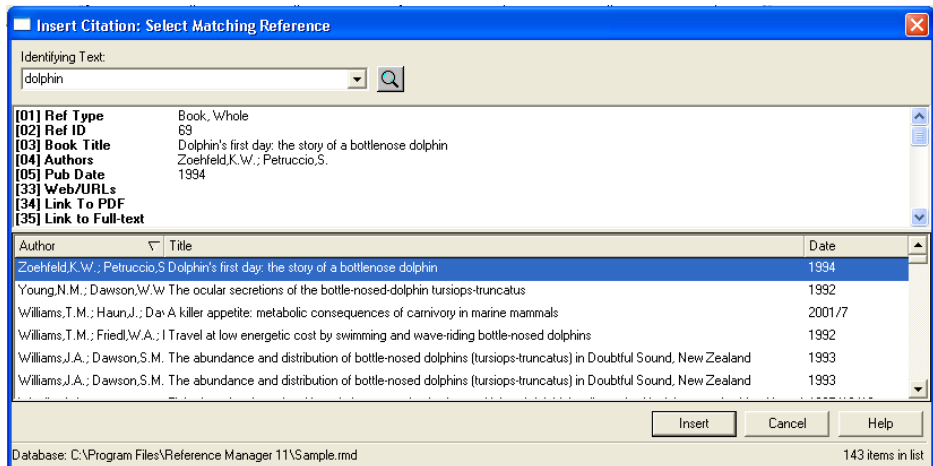
---

**NOTE:** Reference Manager will search the Authors, Date, Keywords, Titles, and RefID fields to locate references for you to cite. Separate each item with a space or a comma. Surround phrases with quotation marks.

---

5. Click *Insert*.

Reference Manager searches the database and returns a selection list if there is more than one item that meets the search criteria.



The matching references are listed. Notice the number in the bottom right corner, which indicates the total number of references in the list. You should find over 100 references, which means you need more detailed search criteria to find the reference you want.

- Narrow the list by adding another term to the Search for box.

This time, add the year 1996, so that the search item is "dolphin 1996". Click the magnifying glass to restart the search with the new parameter. Now you have less than 20 references to review.

- Select two or more references to cite in your document, using SHIFT-CLICK to select a series of references or CTRL-CLICK to select a random group, and then click *Insert*.

The placeholders can be author-date- ID or ID number and will look like this once inserted in your document:

```
{Ross & Wilson 1996 8 /id}{Horton 1996 66 /id}
```

- Start a new paragraph, and type:

The wild dolphin feeding program causes concern among experts.

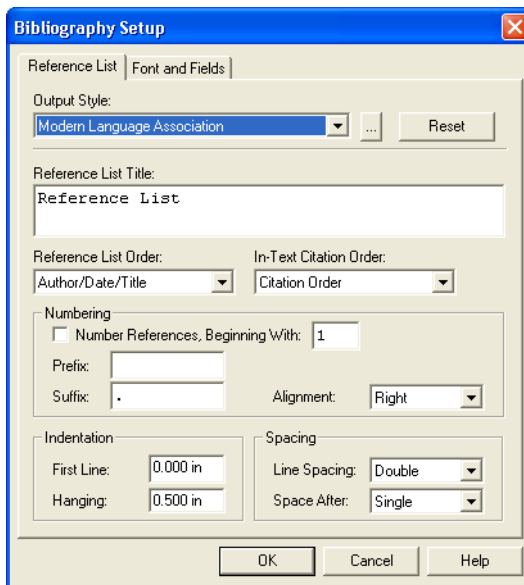
- Switch to the full Reference Manager application and mark one or more records by checking the box in the left column of the reference list.

10. Switch back to the word processing document. With your cursor placed after the new sentence, go to the *Tools* menu, select *Reference Manager 11*, and then *Insert Marked References*. The new citation appears in your document.

**To format the citations and bibliography in various styles:**

When Reference Manager placeholders are inserted, they are linked to references in a Reference Manager database. You are ready to format the citations and generate a bibliography. The format is determined by the chosen Output Style and can include text (such as the author name and year) or numeric citations.

1. From the *Tools* menu, select *Reference Manager 11* and then *Generate Bibliography*.



2. In the Output Style area, click the browse button [...] and select American Psychological Association 5th ed from the Reference Manager 11\Styles folder.
3. When you select an output style, the settings on this tab are updated from the style. You can change options on this screen to override the settings in the output style.

You may want to type a different Reference List Title to print before your reference list, or select a different Reference List order, or modify the line spacing.

4. Click OK.

The citations in your manuscript are automatically converted to the in-text citation format for the American

Psychological Association (APA), and the reference list is formatted in the APA style.

Bottlenose dolphins respond to boat traffic in various ways. (Connor, Richards, Smolker, & Mann, 1996; Cunningham, 1996)

The wild dolphin feeding program causes concern among experts. (Orams, Hill, & Baglioni, 1996; St Aubin, Ridgway, Wells, & Rhinehart, 1996)

#### Reference List

Connor, R. C., Richards, A. F., Smolker, R. A., & Mann, J. (1996). Patterns of female attractiveness in Indian Ocean bottlenose dolphins. *Behaviour*, 133, 37-69.

Cunningham, R. (1996). The "Dolphin-Death" bill. HR 2179. IMMP.  
Ref Type: Unenacted Bill/Resolution

Orams, M. B., Hill, G. J. E., & Baglioni, A. J. (1996). "Pushy" behavior in a wild dolphin feeding program at Tangalooma, Australia. *Marine Mammal Science*, 12, 107-117.

St Aubin, D. J., Ridgway, S. H., Wells, R. S., & Rhinehart, H. (1996). Dolphin thyroid and adrenal hormones: circulating levels in wild and semidomesticated tursiops truncatus, and influence of sex, age, and season. *Marine Mammal Science*, 12, -13.

5. Select the *Generate Bibliography* tool button or menu option again, set the Output Style to Journal of Clinical Investigation, and click *OK* to view a completely different style with the same document.

Bottlenose dolphins respond to boat traffic in various ways. (1;2)

The wild dolphin feeding program causes concern among experts. (3;4)

#### Reference List

1. Connor, R. C., Richards, A. F., Smolker, R. A., and Mann, J. 1996. Patterns of female attractiveness in Indian Ocean bottlenose dolphins. *Behaviour* 133:37-69.

2. Cunningham, R. 1996. The "Dolphin-Death" bill. IMMP.

3. Orams, M. B., Hill, G. J. E., and Baglioni, A. J. 1996. "Pushy" behavior in a wild dolphin feeding program at Tangalooma, Australia. *Marine Mammal Science* 12:107-117.

4. St Aubin, D. J., Ridgway, S. H., Wells, R. S., and Rhinehart, H. 1996. Dolphin thyroid and adrenal hormones: circulating levels in wild and semidomesticated tursiops truncatus, and influence of sex, age, and season. *Marine Mammal Science* 12:-13.



## Chapter 8: Printing Bibliographies from Reference Manager

In this section of the Guided Tour you will learn to:

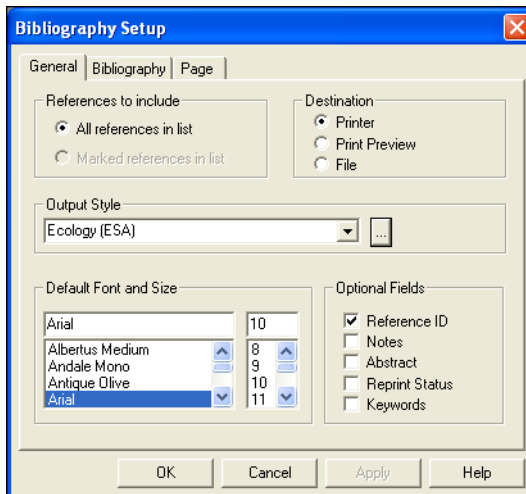
- ◆ Print a Bibliography directly from Reference Manager
- ◆ Print a Bibliography grouped by Subject

---

### Exercise – Printing References

To print a list of references directly from Reference Manager:

1. In Reference Manager, activate the Sample database tab.
2. Select a print command in one of these ways (each one brings up the same Bibliography Setup dialog):
  - ◆ From the *File* menu, select *Print* (CTRL+P).
  - ◆ From the *File* menu, select *Print Preview*.
  - ◆ From the *Tools* menu, select *Bibliography* and then *Generate from Reference List* (CTRL+L).
  - ◆ Click the *Print* toolbar button (the icon that looks like a printer).



3. For this exercise, select these items on the General tab:
  - ◆ Under References to include, select All references in list.
  - ◆ Under Destination, select Print Preview.
  - ◆ Under Output Style, select the style of your choice.

You can use the Browse button [...] to access the Styles folder and select from the complete list of available output styles.

- ◆ Under Optional Fields, clear all options.
4. Click *OK* to print a preview of the bibliography onscreen.
  5. You can use the buttons along the top of the window to move between pages, and to *Zoom In* to enlarge the page.

When you are done viewing the preview, you can click the *Print* toolbar button to print to your printer if you wish. Click *Close* to close the preview and return to the Reference List window.

---

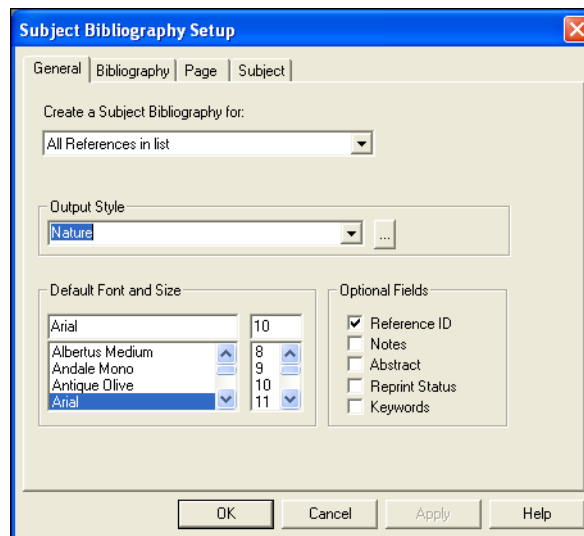
## Exercise – Printing a Subject Bibliography

A subject bibliography is made up of a series of reference listings, each appearing under a distinct heading. Despite the name, a subject bibliography can be based on any Reference Manager field or combination of fields.

This exercise walks you through creating a subject bibliography based on keywords.

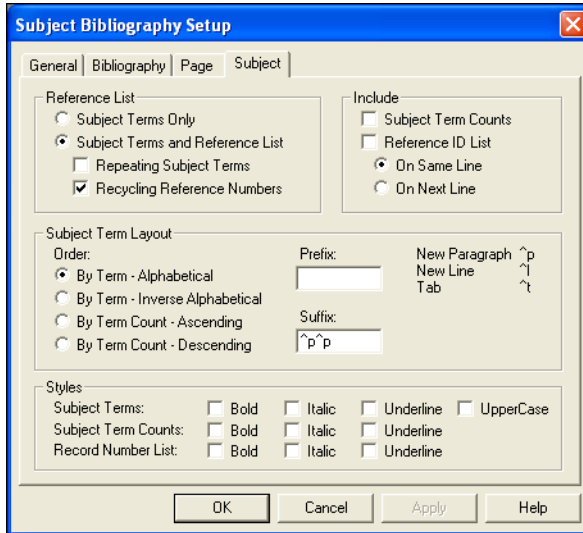
### To print a subject bibliography:

1. In Reference Manager, activate the Sample database tab.
2. From the *Tools* menu, select *Subject Bibliography* to display a Subject Bibliography Setup dialog.



3. For this exercise, select these items on the General tab:
  - ◆ Under References to include, select All references in list.
  - ◆ Under Output Style, select the style of your choice.

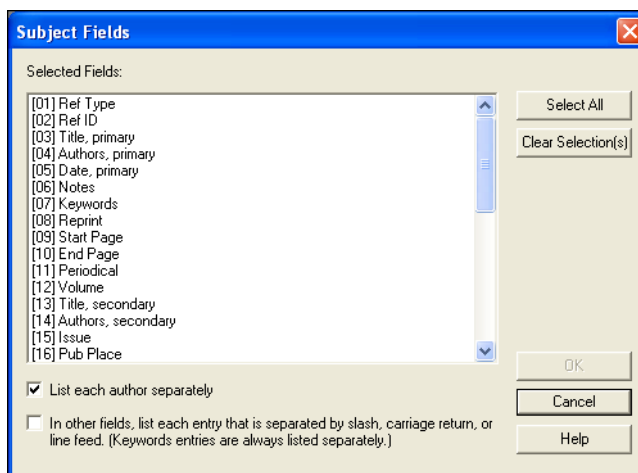
- ◆ Under Optional Fields, clear all options.
4. Click on the Subject tab.



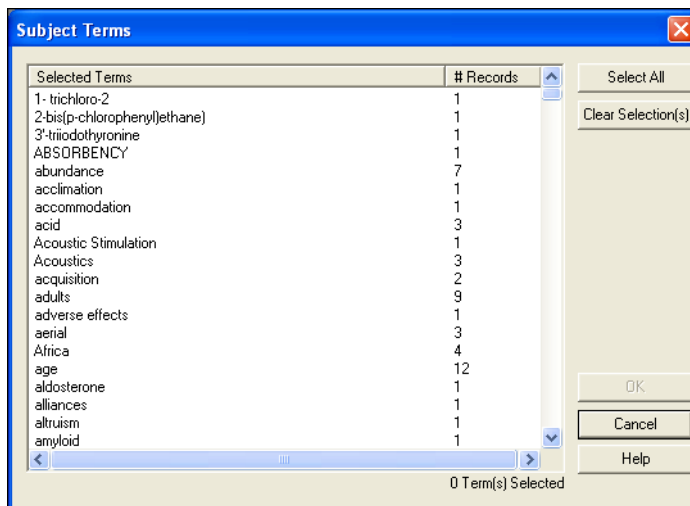
5. The Subject tab determines the layout and style of subject headings.
- ◆ For this subject bibliography (versus a simple subject list), it is important that the Reference List selection be set to Subject Terms and Reference List.
  - ◆ In the Suffix box, enter ^p^p to insert a blank line after each subject heading.
  - ◆ At the bottom of the tab, under Styles, select the Bold style for Subject Terms.

You can leave the other settings in their current state.

6. Click OK to save changes to the Subject Bibliography Setup tabs and display a list of the Reference Manager fields by default field name.



7. For this exercise, terms from the Keywords field will serve as subject headings. Highlight the Keywords field and click OK to display a list of all keywords found in the references.



8. Click *Select All* to quickly select all terms in the list. You can then click on individual terms to deselect them.

9. Click *OK* to format the subject bibliography on the screen.

---

**NOTE:** Subject headings print as they appear in your records. When you see variations in capitalization and uppercasing, it becomes clear that standardizing data entry and keywords is important.

---

10. You can try customizing your subject bibliography.
  - ◆ If you want to modify the term selections you just set, to either add or remove keywords as headings, click the *Terms* button.
  - ◆ If you want to modify options that affect the layout and style of subject headings, click the *Layout* button.
11. When you are done viewing the subject bibliography, click *Close* to return to the Reference List window.

## Chapter 9: Publishing a Database with Web Publisher

In this section of the Guided Tour you will learn to:

- ◆ Add a Database for Publishing
- ◆ Enable Web Publisher
- ◆ View the Published Database with a Web Browser

With Web Publisher, you can easily share research and bibliographic information with colleagues through a network or remote connection. Web Publisher includes features and a built-in Web server to quickly publish up to fifteen Reference Manager databases to an intranet or the World Wide Web directly from your computer. Anyone with access to your Web Publisher site can search published databases, export references, generate bibliographies, and edit references when databases are published with Read/Write access.

---

**NOTE:** In a work environment, consult with your IT department before enabling Web Publisher.

---

In this section, you will walk through adding a database and enabling Web Publisher locally. For information about making your databases accessible on the World Wide Web or on an intranet, please refer to the Web Publisher section in the full Reference Manager manual or the online Help file.

---

### Important Points about Web Publisher

Listed below are some important points about Web Publisher and published databases.

- ◆ Web Publisher is a web server, modified for use with Reference Manager 11 only, running on the computer where Reference Manager 11 is installed.
- ◆ When exposing any web site outside a controlled environment (either through an intranet or the Internet), there is an inherent security risk. In these situations, a firewall and/or other security precautions are strongly recommended for use with Reference Manager Web Publisher. Before enabling Web Publisher, consult your network administrator, your firewall or other security application's documentation, or another network professional.

- ◆ The IP address of the computer with the Reference Manager 11 installation and a port number are required to use Web Publisher.
- ◆ The computer running Reference Manager 11 and Web Publisher must be on for the Web Publisher web site to be available.
- ◆ The computer running Web Publisher must have persistent access to Internet or intranet via TCP/IP.
- ◆ When Web Publisher is enabled, at least one instance of RM11.exe and at least two instances of Apache.exe will appear in the “Processes” tab of Windows Task Manager. This is normal, and is required in order to support web access to published databases.
- ◆ You can publish up to fifteen databases with Web Publisher.
- ◆ Databases can be published with Read-Only or Read-Write Access rights.
- ◆ Each published database maintains its own unique databases definition.
- ◆ Opening published databases with Read-Write Exclusive access in Reference Manager 11 prevents access to the database from the Web Publisher web site.

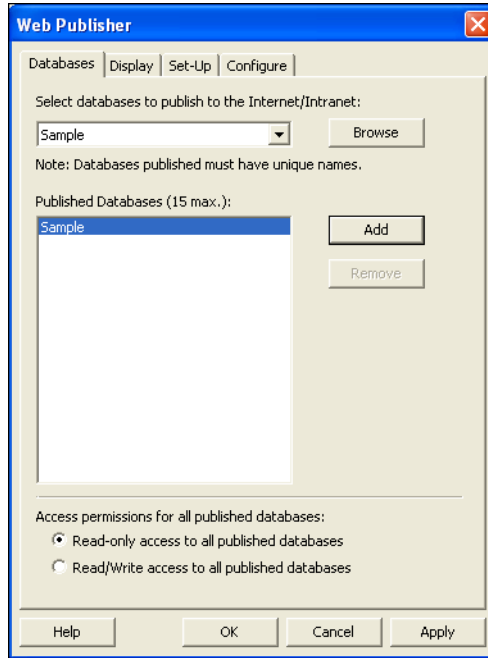
---

## Exercise – Adding a Database

### To add a Reference Manager database to Web Publisher:

1. From the *Tools* menu in Reference Manager, select *Web Publisher*.
2. On the Databases tab, select the Sample database to publish by selecting it from the database dropdown list or by browsing to it with the *Browse* button.
3. Click *Add*.

4. Click *Apply* to apply the change.



For this exercise, leave the access permissions at the bottom of the dialog set to "Read-only access to all published databases."

---

## Exercise – Enabling Web Publisher

**To enable the Web Publisher web server:**

1. Click the Configure tab.

By default, your computer's IP address should appear on the dialog.

2. In the Web Publisher status section, select "Enable Web Publisher" to enable the Web Publisher web server.



3. Click *Apply* to apply the change. In a moment, the “Reference Manager Web Publisher” line will switch from “Disabled” to “Enabled.”

**Web Publisher**

Databases | Display | Set-Up | **Configure**

Configure the Web Publisher to publish your databases to an Intranet or the Web by entering the settings and then clicking the 'Apply' button.

Computer IP Address: 10 . 224 . 20 . 160 Port #: 80

Reference Manager Web Publisher: Enabled

☒ Enable Web Publisher  
☐ Disable Web Publisher

☐ Close Web Publisher when application closes

Link to Reference Manager published databases:  
<http://10.224.20.160/rmwp>

For Internet access, redirect an external URL to this address.

Authentication Access  
☐ Enable Authentication

User Name: Password:

NOTE: Access permissions apply to all users.

Help OK Cancel Apply

4. The “Link to Reference Manager published databases” URL provided on this dialog is your Web Publisher URL. This is the URL of your Web Publisher site and can be accessed directly with a web browser.  
Make a note of this URL for the next exercise.
5. Click *OK* to leave the dialog.

---

## Exercise – Viewing the Published Database with your Browser

Web Publisher web sites are optimized for 600 x 800 screen resolution, and support:

- ◆ Microsoft® Internet Explorer 4.0 and higher
- ◆ Netscape® 4.0 and higher
- ◆ Mozilla 1.4 and higher

---

**NOTE:** Cookies and JavaScript must be enabled.

---

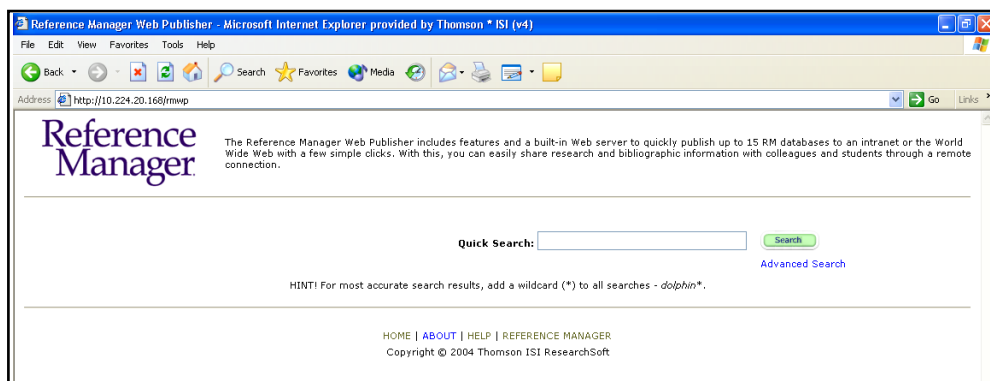
## To access and search your Web Publisher database:

1. Leaving Reference Manager open, and the Sample database open with Read-only access, start your Web browser.
2. Enter your Web Publisher URL.

---

**NOTE:** Allow a few minutes for the web site to load, since Web Publisher was just recently enabled.

---



While you could type a word or phrase in the Quick Search text box to search all indexed fields (Author, Ref ID, Periodical, and Keywords), for this exercise we will do an Advanced Search.

3. Click the *Advanced Search* link.

The Advanced Search option provides the same search functionality as searching in Reference Manager.

4. Enter an Advanced Search as shown in the picture below, to search for "dolphin" in the Keywords field and ""zoo\*" in all non-indexed text fields.

# Reference Manager

The Reference Manager Web Publisher includes features and a built-in Web server to quickly publish up to 15 RM databases to an intranet or the World Wide Web with a few simple clicks. With this, you can easily share research and bibliographic information with colleagues and students through a remote connection.

---

## Advanced Search

Limit to Database:

<input type="text" value="dolphins"/>	<input type="text" value="Keywords"/>
AND <input type="text" value="zoo*"/>	All Non-Indexed Text Fields
OR <input type="text"/>	All Indexed Fields
NOT <input type="text"/>	All Indexed Fields

[Quick Search](#)

HINT! You can use "{" and "}" to create compound searches in text fields.

HINT! Indexed fields are limited to: Author, Source, Ref ID, and Keywords.

---

[HOME](#) | [ABOUT](#) | [HELP](#) | [REFERENCE MANAGER](#)

Copyright © 2004 Thomson ISI ResearchSoft

- Click *Search* to begin the search and list the matching references.

# Reference Manager

Quick Search:

---

✓ Results: 25 records | 1 - 25 | dolphins [Keywords] AND zoo\* [All Non-Indexed Te... Sort:

<input type="checkbox"/>	<p>Ballance, L. T.</p> <p>Habitat use patterns and ranges of the bottle-nosed-dolphin in the Gulf of California, Mexico</p> <p><i>Marine Mammal Science</i> p.262-274, 1992</p>	<a href="#">View</a>
<input type="checkbox"/>	<p>Brager, S., Wursig, B., Acevedo, A., and Henningsen, T.</p> <p>Association patterns of bottle-nosed dolphins (tursiops- truncatus) in Galveston Bay, Texas</p> <p><i>Journal Of Mammalogy</i> Vol. 75p.431-437, 1994</p>	<a href="#">View</a>
<input type="checkbox"/>	<p>Connor, R. C., Richards, A. F., Smolker, R. A., and Mann, J.</p> <p>Patterns of female attractiveness in Indian Ocean bottlenose dolphins</p> <p><i>Behaviour</i> Vol. 133p.37-69, 1996</p>	<a href="#">View</a>

- You can experiment with searching, viewing, and printing references.
  - ◆ To execute a Quick Search, enter a word or phrase in the text box and click *Search*.
  - ◆ To execute another Advanced Search, click the *Advanced Search* link.

- ◆ To view full reference information, click the *View* link to the right of each reference.
- ◆ To view a bibliography, either individually select the check box to the left of each reference you wish to include, or click *Select All References*, and then click *Bibliography*.

For more information about options for configuring and using Web Publisher, see the Web Publisher section in the Help file. Or, see “Chapter 18: Publishing Databases with Web Publisher” in the full Reference Manager 11 manual. The full manual is available as a PDF file in the Reference Manager 11 folder.

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## Exercise – Disabling Web Publisher

When you are done experimenting with Web Publisher, you may want to disable it.

### To disable the Web Publisher web server:

1. If you have not already done so, close the Web Publisher site in your browser.
2. From the *Tools* menu in Reference Manager, select *Web Publisher*.
3. Click the *Configure* tab.
4. In the Web Publisher status section, select “Disable Web Publisher” to turn off the Web Publisher web server.
5. Click *Apply* to apply the change. In a moment, the “Reference Manager Web Publisher” line will switch from “Enabled” to “Disabled.”
6. Click *OK* to leave the dialog.

# Congratulations!

You have successfully completed this Guided Tour! Now you are ready to begin searching the Internet, creating your own personal reference collection, and building perfectly formatted bibliographies.



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