

# **Managing your references**

## **Reference Manager**

**Reference Manager 10**  
**University of New Brunswick Libraries, 2003**

**Adapted with permission from Imperial College Libraries, 2003**

**<http://www.lib.ic.ac.uk/bibsoft/rm.html>**

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# Managing your references

## Reference Manager

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## 1. Introduction to bibliographic software packages

### General:

- Manage bibliographic information
- Build personalized databases
- Easy and flexible searching
- Generate bibliography

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### Which package?

- EndNote
- Reference Manager
- Procite
- More

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### Can add information by Manual entry...

- Record creation:
  - Pre-defined records templates for most types of publications
  - Duplicate detection

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*Can add information by automatic import...*

- Searching commercial databases
  - Ovid, CSA, Ebsco
- Searching Internet resources
  - PubMed, WoS
- Searching library catalogues (Z39.50)
  - Quest

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*Reference Manager offers...*

- Record retrieval
  - Author
  - Title, Keyword
  - Journal
- Record output
  - Printed
  - File for word processor or web
  - Export

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*More features...*

- CWYW
  - Cite While You Write toolbar for Word, link to WordPerfect
- Output styles for manuscripts

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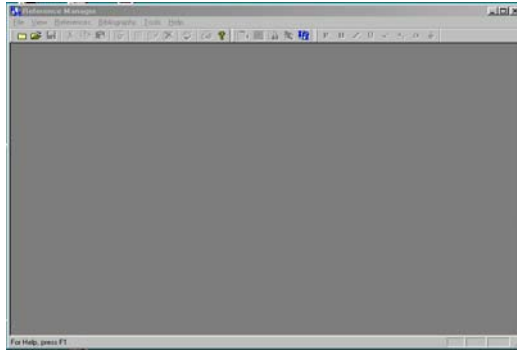
## 2. Working with databases

### 2.1 Starting Reference Manager

In Windows, from the **Start** menu select:

**Programs**  
**Reference Manager 10**  
**Reference Manager**

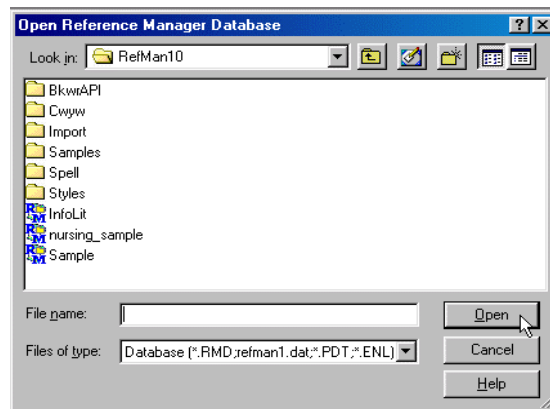
When you start Reference Manager for the first time after the installation, the screen looks like this:



### 2.2 Opening databases

You do this much the same way as you would open and close a Word document. If you exit Reference Manager without closing the database, it will open automatically when you next start Reference Manager.

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



2. Select the database you wish to open.
3. Click **Open**.

## 2.3 Reference Manager: main screen

The screenshot shows the Reference Manager main screen. The interface is divided into several sections:

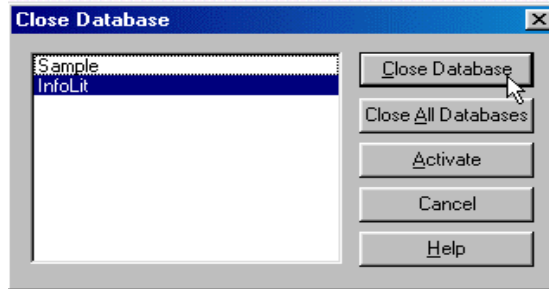
- Reference display:** Located at the top, it shows full details for a selected reference (Ref ID 61). The details include:
  - Ref Type: Journal
  - Ref ID: 61
  - Title: Incidental capture of bottle-nosed dolphins (tursiops-truncatus) in shark nets - an assessment of some possible causes
  - Authors: Cockcroft, V.G.;
  - Pub Date: 1992
  - Web/URLs, Link To PDF, Link to Full-text, and Related Links: Each has a corresponding icon.
  - Image(s): Has an icon.
  - Notes: J English Article 37 0952-8369 Oxford Univ Press United Kingdom
  - Keywords: dolphins; tursiops-truncatus; tursiops; tursiops-truncatus; truncatus; tursiops truncatus; growth; distribution; feeding; abundance; dolphin; marine; marine mammals; bottlenose dolphin; cetaceans; survey; behavior; Africa; waters; animals;
  - Reprint: Not in File 05/13/03
  - Journal Name: Journal Of Zoology
  - Volume: 226
- Column headings:** Located below the reference display, it shows a list of references with columns for Ref ID, Authors, and Title. The headings are:
 

Ref ID	Authors	Title
<input type="checkbox"/> 62	Cockcroft, V.G.	Distribution and status of bottle-nosed-dolphin tursiops truncatus on the south
<input type="checkbox"/> 53	Cockcroft, V.G.	Estimates of abundance and undercounting of bottle-nosed dolphins off northe
<input checked="" type="checkbox"/> 61	Cockcroft, V.G.	Incidental capture of bottle-nosed dolphins (tursiops-truncatus) in shark nets -
<input type="checkbox"/> 82	Coffey, D.J.	Dolphins, whales, and porpoises :an encyclopedia of sea mammals
<input type="checkbox"/> 60	Connor, R.C.	2 levels of alliance formation among male bottle-nosed dolphins (tursiops sp)
- Reference list:** This is the list of references shown in the table above.
- Database tab:** Located at the bottom left, it shows the active database name, "Sample".
- Status bar:** Located at the bottom right, it shows "0 Marked" and "Reference 26 of 138".

## 2.4 Closing databases

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

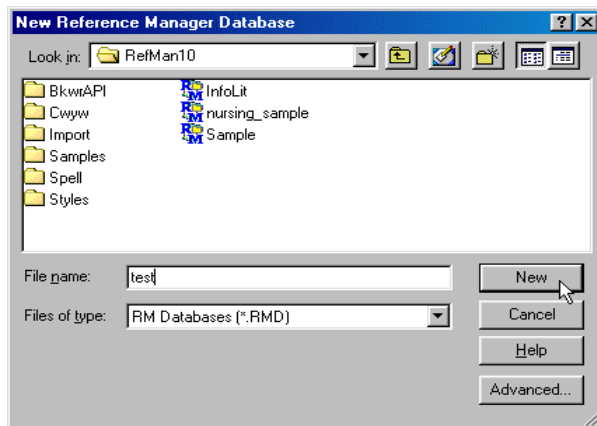
If there is more than one database open, the Close Database dialogue box appears enabling you to select a database to close.



2. Highlight a database.
3. Click **Close Database**.
4. If there are more than two databases on the list, repeat steps 3 and 4 to close more databases.
5. Click **Cancel** to close the dialogue box.
6. Click **Close All Databases**, to close all open databases.
7. Clicking **Activate** is a way of toggling between databases.

## 2.5 Creating a database

1. From the **File** menu, select **New Database**.
2. Store the database in the Reference Manager folder, which is the default folder.
3. In the **File name** field, type the name of the new database, for example the name of your subject area.



4. Click **New**.

### 3. Adding and importing references

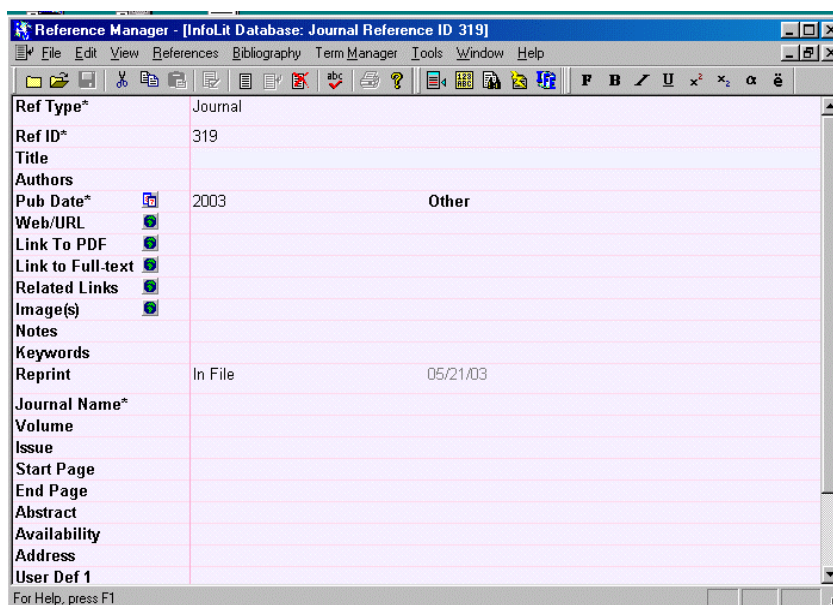
You build your database by:

- adding references manually
- importing references from a text file
- exporting references from an Internet resource, such as Web of Science, to Reference Manager
- exporting references from electronic journal websites
- searching and adding references using library catalogues or PubMed

#### 3.1 Adding references manually

To enter references manually:

- Make sure that your required database is active (selected).
- From the **References** menu, select **New**.



The screenshot shows the Reference Manager software interface. The title bar reads "Reference Manager - [InfoLit Database: Journal Reference ID 319]". The menu bar includes File, Edit, View, References, Bibliography, Term Manager, Tools, Window, and Help. The toolbar contains various icons for file operations and editing. The main window displays a form with the following fields and values:

Ref Type*	Journal
Ref ID*	319
Title	
Authors	
Pub Date*	2003
Web/URL	Other
Link To PDF	
Link to Full-text	
Related Links	
Image(s)	
Notes	
Keywords	
Reprint	In File 05/21/03
Journal Name*	
Volume	
Issue	
Start Page	
End Page	
Abstract	
Availability	
Address	
User Def 1	


At the bottom of the window, it says "For Help, press F1".

- In the **Ref Type** field, click on the field to select an appropriate reference type from the drop-down list, eg Journal.
- Enter information into each field.
- When you have finished, from the **File** menu, select **Save**.
- To add another reference, repeat the procedure.
- Click on the 'x' in the upper right corner to close the window.

A few points about entering information manually:

1. **Ref ID:** is assigned by the system
2. **Authors:** Start typing the first authors' surname. A drop down menu will appear.
  - If the author is already on the database, select the name by double clicking on the entry.
  - If the author does not appear on the list, type the name using the following format:  
**Thomas, S.**  
  
Surname followed by a comma and each initial followed by a full stop.
3. **Keywords & Journal names:** On entering these, a drop down menu will again appear containing all the existing entries in the database already.

**Tip:** *New entries in the Author, Keyword and Journal name fields will be colour-coded blue on first being entered and red if the entry is in an incorrect format.*

4. **Importing Journal titles:** You can import a list of standard full and abbreviated journal titles using **Copy Periodicals...** within **Term Manager**.  
(See *Appendix C: Term Manager, p 36*)
5. **Publication date:** By default Reference Manager displays the publication date in full numeric form, including the day and month.
  - If you wish to display only the year, click on the  icon.
  - Always enter the year as a 4-digit number.

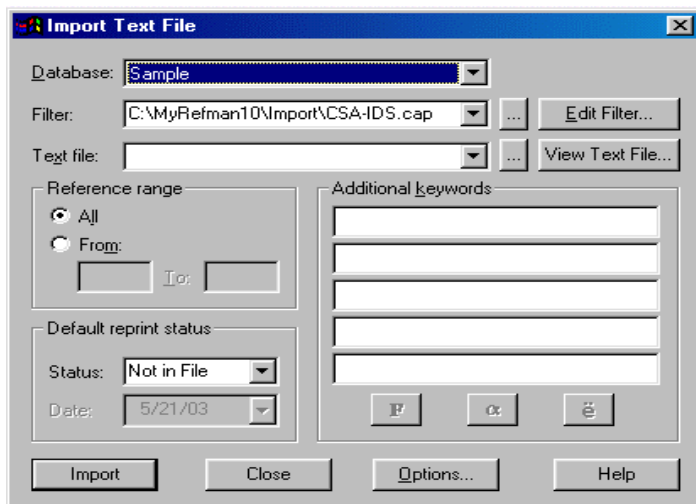
### 3.2 *Importing references from a text file*

These files are typically downloaded references from commercial databases, including Internet resources. You need to know the source of the text file.

**Important:**

*When you download references from some commercial databases, you need to make sure that you download them in a compatible format for Reference Manager.  
(See Appendix G: Which filter for which database, p 43)*

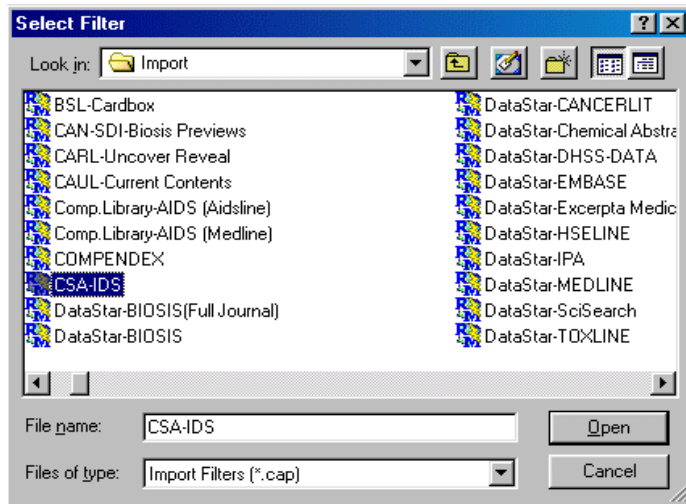
- From the **References** menu, select **Import Text File**.



- Select the following settings:
  1. **Database:** the name of the active database is normally displayed.
  2. **Filter:** you will need to select an appropriate filter for the database from which the references were downloaded. A filter is used to translate the file you wish to import into the Reference Manager format.

Click the browse button  to see a full list of filters.

*(See Appendix G: Which filter for which database, p 43)*



- Select the filter you require.
- Click **Open**.

3. **Text file:** locate the file which contains the downloaded references.

4. **Additional keywords:** You may add your own keywords to these references, eg it can be useful to enter the name of the resource from which you are importing the references, or today's date.

All other choices are optional.

- Click **Import**.
- Once the references have been imported into your database you will see the message **Import successfully completed**. Click **OK**.  
If there are any problems, **save the log** and contact the library for help.
- To exit the **Import text file dialogue** box, click **Close**.

### 3.2.1 *Imported tab*

When you import references from a text file, the references also appear in the **Imported** reference list tab. To remove it:

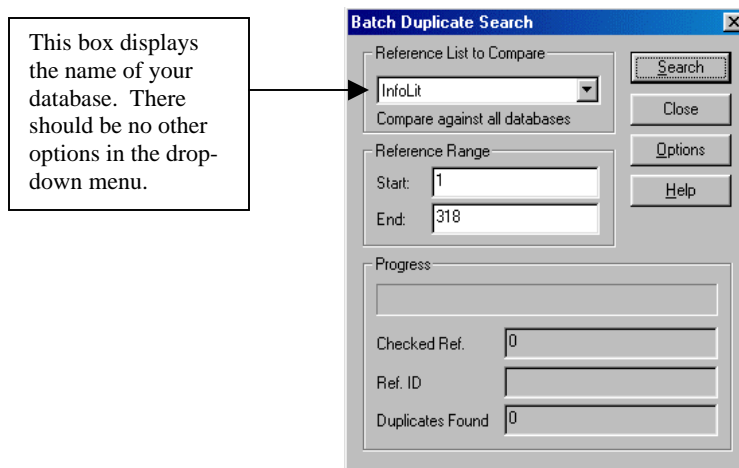
- Make sure the **Imported** tab is active (selected).
- Right-click with the mouse button on the **Reference List**.
- Select **Close Imported Reference List**.

### 3.2.2 Checking for duplicates

Reference Manager has the ability to check your database for duplicate references that may have been imported from overlapping search result sets.

To carry out a duplicate search:

- Ensure that the database you wish to search for duplicates is the only open database tab. This ensures that you search for duplicates only within your database and not between all open tabs. You may need to close your imported reference list (see 3.2.1)
- Select **Batch Operations** from the **Tools** menu
- Select **Duplicate Search...** from the sub-menu that appears. This will display the following box:




- You may make changes to the criteria used for duplicate checking via the **Options** button.
- Click on **Search** to proceed. Any duplicates found will be put in a separate tab labeled **Duplicates**. You can then deal with these accordingly.
- The **Duplicates** tab is a temporary one and will disappear when you exit from Reference Manager or start work with a different database.

It is also possible to check for duplicates of individual references via the **References** menu. This **Check for Duplicates** function will search for duplicates of the highlighted reference and again put them in a **Duplicates** tab for a decision.


**Important:**

*When you delete references from the **Duplicates** tab they are also deleted from your database.*

### 3.3 Exporting references directly from WoS\*

1. To connect to Web of Science point your web browser to the library home page: <http://www.lib.unb.ca>.
2. From e-Resources, select Indexing and Abstracting databases. Then select Web of Science. If you need help with Web of Science ask branch/liaison librarian.
3. Conduct your searches.
4. Go through all pages and mark references individually or by clicking on  to select all references on each page.

**Tip:**  
*If the retrieved references are displayed on one page only, after marking you will need to click on the **Submit** button.*

5. When you have finished marking all the retrieved references, click .
6. In the **STEP 1:** section, select appropriate boxes and the sorting order.

**STEP 1: Select sort and output fields for the entire marked list.**

Select sort option:	Select fields to include in addition to the author(s), article title and source.		
<input checked="" type="checkbox"/> Latest date	<input type="checkbox"/> cited references*	<input type="checkbox"/> addresses	<input type="checkbox"/> abstract
<input type="checkbox"/> First author	<input type="checkbox"/> language	<input type="checkbox"/> publisher information	<input type="checkbox"/> ISSN
<input type="checkbox"/> Source Title	<input type="checkbox"/> document type	<input type="checkbox"/> keywords	<input type="checkbox"/> times cited
<input type="checkbox"/> Times Cited	<small>*Selecting the cited references may cause the server to time out with large numbers of records.</small>		

7. In the **STEP 2:** section, click on the **EXPORT TO REFERENCE SOFTWARE.**

**STEP 2: Select action for output.**

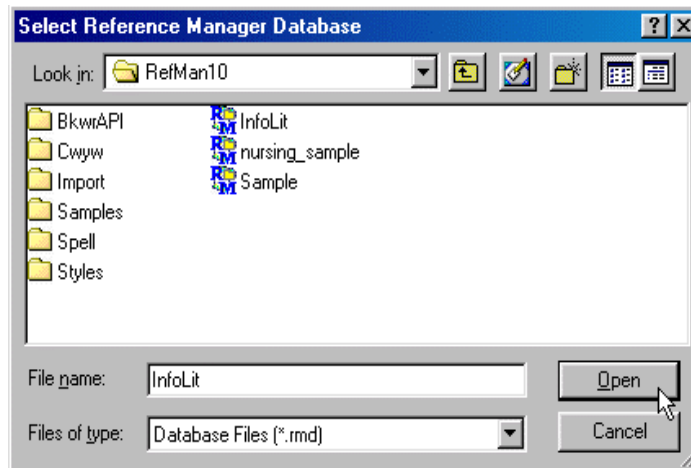
 



8. Click **OK.**

\*Web of Science can also be referred to as Web of Knowledge, or, any of its individual databases: Arts and Humanities Citation Index, Science Citation Index Expanded, and Social Sciences Index.

9. From the **Select Reference Manager database** dialogue box, select your required database.



10. Click **Open**.
11. A dialogue box displaying the progress of the Importing will appear on your screen.
12. Log off WoS.



- In Reference Manager, you will then see that the references have been imported to your database.

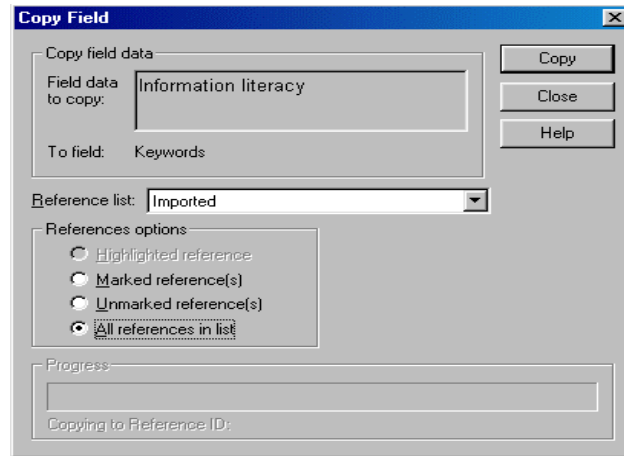
### 3.3.1 Copying a field to other references

When you directly export references into your database from Web of Science, or other Internet resources, you do not get the option to add additional keywords. You may, however, add keywords, or other data, to one reference and then copy the additional terms to all other references in your Imported tab or to marked references.

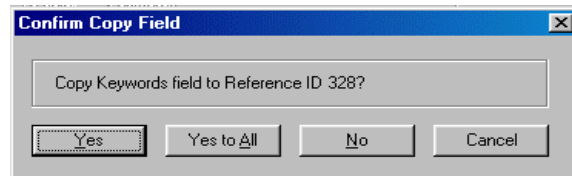
1. Mark the references to which you wish to enter additional keyword(s), or leave them all unmarked if you would like the additional keyword(s) added to every reference in your Imported tab.
2. Add keywords, or other data you wish to add, to any one of the references in your Imported tab. Separate keywords with semi-colon.
3. Highlight the term(s) to be copied.

<b>Keywords</b>	Information; <b>Information literacy</b> ; Literacy;
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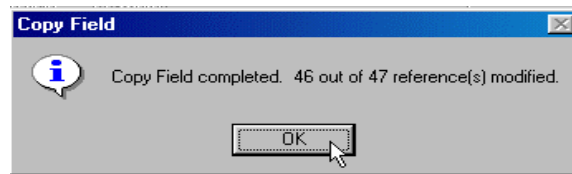
4. From the **Edit** menu, select **Copy field...**



5. The following settings should be selected:  
**Field data to copy:** the keyword(s) should automatically appear in this box.  
**Reference List:** Imported  
**Marked reference(s)** or **All references in list** (depending on whether you marked references).
6. Click **Copy**.
7. Click **Yes to all**.



8. Click **OK**.



You can now see that the additional terms have been added to all the references in your Imported tab, and therefore to these references in your database.

### 3.4 Exporting references directly from electronic journals

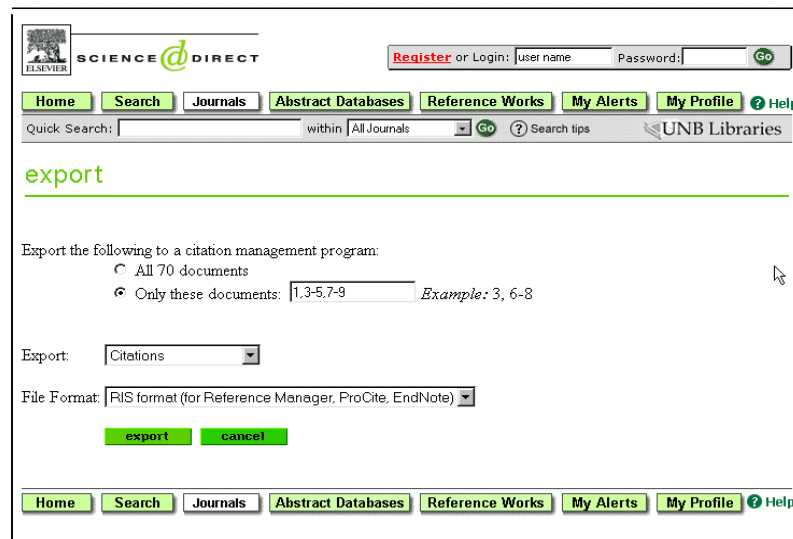
It is possible to download journal references directly from some publishers websites, eg:

- ScienceDirect
- JSTOR
- Blackwell

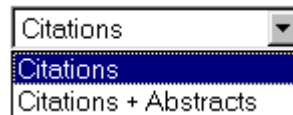
From some of these websites you must view the article in HTML or view the abstract format in order to download the reference. If you need help, please contact your branch/liaison librarian.

▪ **From ScienceDirect journals:**

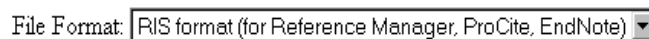
1. Click on [Export Citations](#)
2. You can select all or one or a range of articles in the issue.



3. Select to export just the citation, or the citation and abstract

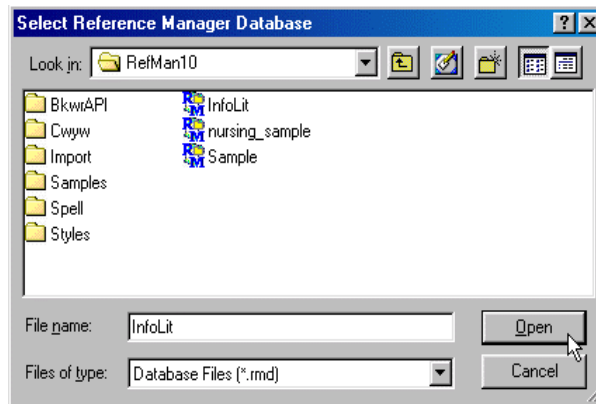


4. Ensure the **File format** is **RIS format**

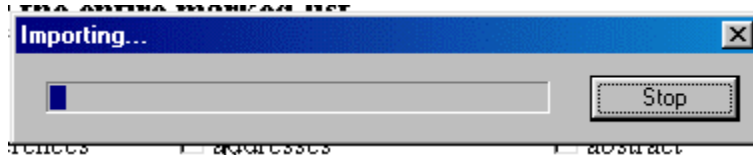


5. Click on **export**

6. Select the appropriate database and click on **Open**.



7. A dialogue box displaying the progress of your Importing will appear on your screen.

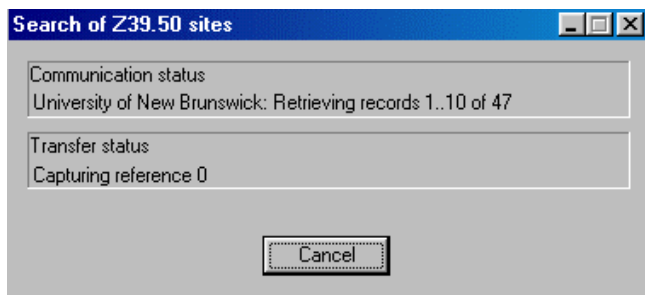


- In Reference Manager, you will then see that the reference has been imported to your database.
- You may now choose to add additional keywords to your reference. (See 3.3.1, **Copying a field to other references**).

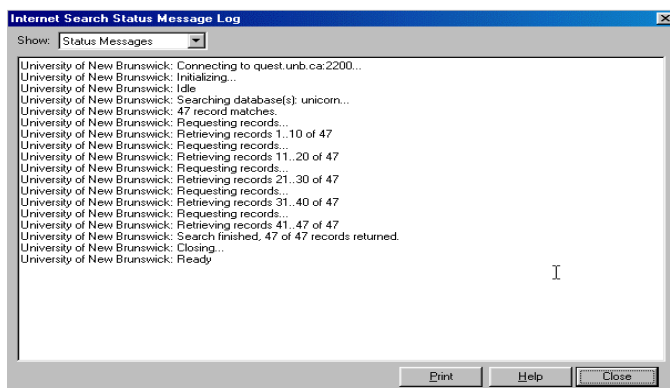


5. Click the **Start Retrieval**  button on the toolbar.

6. You will see a progress dialogue box.



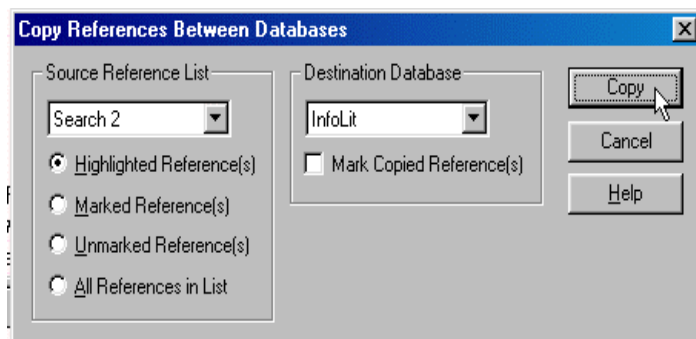
7. If you are searching **Quest**, once references have been retrieved, an **Internet search status message log** dialogue box appears. Click **Close**.



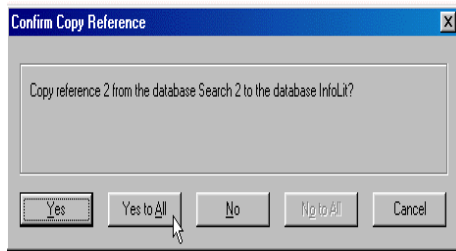
## Step 2

The retrieved references from your Internet search will be stored in a temporary database, normally called **Search** followed by a number. You will need to copy all or any relevant references to your database by taking the following steps:

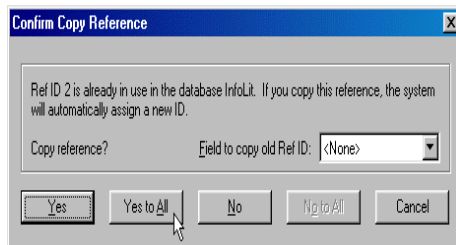
1. Mark references you wish to copy across. You may also copy all references in the list.
2. From the **References** menu, select **Copy Between Databases**.



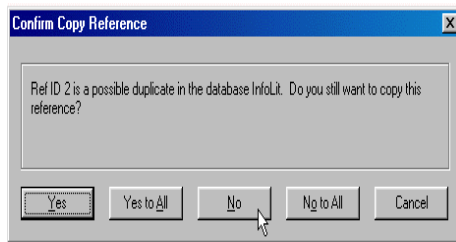
3. Select **Source** and **Destination** databases.
4. Select one of the options, for example, **Marked Reference(s)** or **All References in List** if you have not marked any references.
5. Click **Copy**.
6. Click **Yes to All**.



7. Click **Yes to All**.



8. **Duplicates**



Be aware of duplicates, sometimes you will see a dialogue box alerting you to possible duplicates. You will need to examine duplicate references individually. (*See Checking for duplicates, p. 10*).

## 4. Editing and deleting references

### 4.1 Editing references

1. Do one of the following:
  - In the Reference List (bottom portion of screen), highlight the reference to edit. The reference now appears in the Reference Display (top portion of screen).
  - In the Reference List, double click the reference. The reference appears in a separate Reference Edit window.
2. Click in the field you wish to change and add, delete or edit text.
3. When you have finished, from the **File** menu, select **Save**.
4. If you were editing in the Reference Edit screen, click the 'x' in the upper right corner to close the window.

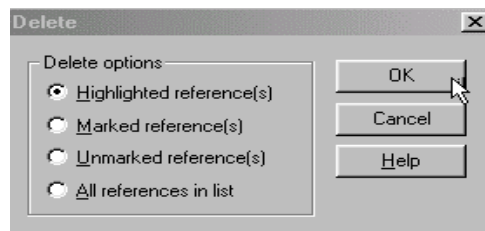
### 4.2 Deleting references

There are two methods you can use to delete references:

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

#### 4.2.1 Deleting a reference from the Reference List

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



3. In the **Delete Options** box, select the reference(s) to delete.
4. Click **OK**.
5. Click **Yes** or **Yes to All** (if deleting more than one).


#### 4.2.2 Deleting a reference from the Reference Edit window.

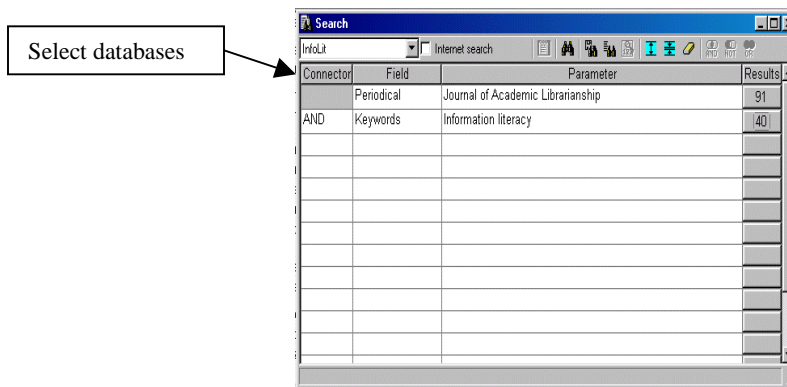
In the Reference List, double click the reference. The reference appears in a separate Reference Edit window.


1. From the **References** menu, select **Delete**.
2. Click **Yes**.

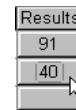
## 5. Searching databases

### 5.1 Searching Reference Manager databases

1. From the **References** menu, select **Search References**, or click on... .
2. Make sure that your required database is selected in the **Select databases** field.
3. In the **Field** column, click to see a drop-down menu and select the field to search in.
4. In the **Parameter** column, type or select from the drop-down menu, the terms you wish to search for.
5. You can add further lines to your search and either broaden or narrow the results by selecting the connectors AND, NOT, OR from the drop-down menu.



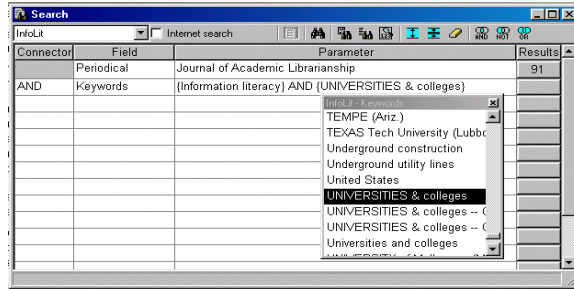
6. Click the **Start Retrieval** icon on the toolbar .
7. If your search has more than one line, you will need to click the number in the **Results** column to view the results. Otherwise, the results will be displayed automatically in the **Retrieved** references database. The **Retrieved** references database will be overwritten when you perform a new search and will be removed when you exit Reference Manager.



8. You can also add more than one search statement in one line. You will need to connect them by selecting AND, OR or NOT button on the toolbar.



9. Reference Manager will automatically put the terms in { } delimiters.



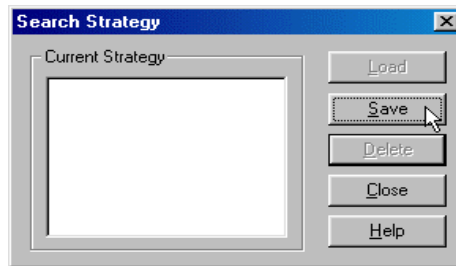
- Click on the small “x” to close the browse menu.

## 5.2 Saving a search strategy

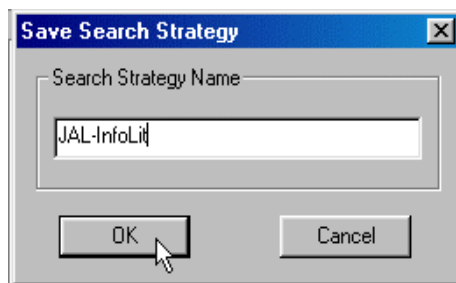
If you have a specific search strategy you are using frequently, you can save it and load it later to perform the same retrieval.

- Make sure that the strategy is up on the screen.

- Click the **Strategy Files** button on the toolbar.



- Click **Save**.




- Type a name for the strategy.
- Click **OK**.

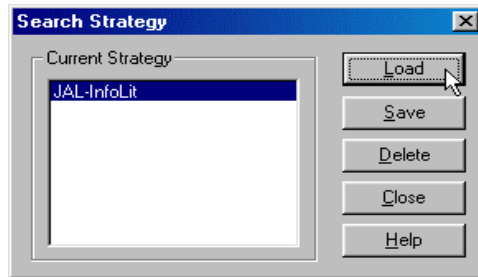
The strategy name will appear in the Search Strategy list next time you open it.


**Note:**

*You may use these steps with Internet and other database search strategies.*

### 5.3 Loading a search strategy

1. From the **References** menu, select **Search References...**
2. Click on the **Strategy Files** button on the toolbar 



3. Highlight the strategy files.
4. Click **Load**.
5. Click  to perform searches.

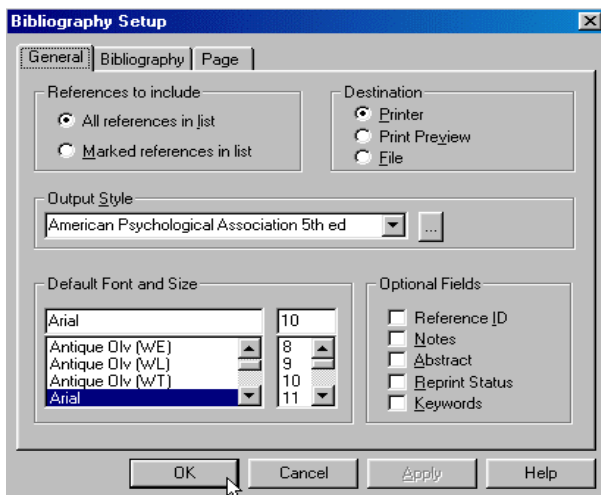
**Note:**

*You may use these steps with Internet and other database search strategies.*

## 6. Printing and saving the results

### 6.1 Printing search results


1. From the **File** menu, choose **Print**, or from the **Bibliography** menu, choose **Generate** from **Reference List**.



2. From the **Bibliography Setup** dialog box, select the following settings from the **General** tab:

**References to include:** All references in list or Marked references in list

**Destination:** Printer

**Output Style:** Click on the browse button , to choose an output style.

**Default font and size:** Select the font style and size of your choice.

**Optional fields:** You may wish to uncheck all.

3. The **Bibliography** and **Page** tabs offer additional settings choices for page or citation formatting.
4. When you are finished with selecting settings, click **OK**.

### 6.2 Saving the results to a file

1. Repeat steps 1-3 in section '6.1 – Printing search results'. In the **Bibliography Setup** dialog box, select the same **General** settings with the exception of **Destination:** File.
2. Click **OK**.
3. In the **Save as** box, select the following settings.

**Save in:** select a folder where you would like to save your file.

**File name:** give a name to the file.

**Save as type:** Microsoft Word (Rich Text Format)

WordPerfect (Rich Text Format)

HTML

Text Only

depending upon what you would like to do with the file.

## 7. CWYW (Cite While You Write)

Reference Manager allows you to locate and insert citations in your document without leaving your word processor. You can use the **References Manager 10 toolbar** for this feature.



### 7.1 Reference Manager 10 toolbar






To activate the Reference Manager 10 toolbar:







In **Word**:

- From the **View** menu, select **Toolbars**, then **Reference Manager 10**.

**Important:**

*If you do not find the toolbar, you will need to install it on your computer. (See Appendix A: Installing CWYW for Word, p 34).*

Icon	Description
	<b>Insert citation</b> Allows you to enter identifying text to locate, match and cite one or more references in all of your open databases.
	<b>Insert marked references</b> Inserts marked references in the active database into your Word document
	<b>Instant Formatting</b> Allows you to disable/enable Instant Formatting for an individual document, if the global Instant Formatting is disabled. (See <i>Cite While You Write Preferences</i> )
	<b>Generate Bibliography</b> Allows you to change your output style, font or layout.  If <i>Instant Formatting</i> is disabled, <i>Generate Bibliography</i> formats your citations and produces a list of references at the end of your document according to the rules of the selected style.
	<b>Edit citations</b> Place your cursor within a formatted citation and click on the icon to edit individual or multiple citations. You may: <ul style="list-style-type: none"> <li>Omit the author and/or the year from citations. Use if you have included the author or date in the text and do not wish to repeat it in the citation, eg '...as Hall recommends (1998)'. If you want to include a reference in your bibliography but it is not cited in the text, omit both author and date in a citation. (This only works if you use an author-date output style).</li> <li>Add prefix or suffix text to appear within your citation, eg (Recommended by Hall, 1998)</li> <li>Add page numbers to citations. Page numbers will only appear in your citations if you are using an output style that uses them. These are mainly Humanities journal styles.</li> <li>Remove or add citations. Delete citations in this way to ensure the full citation is deleted from your document.</li> <li>Change the order in which citations appear within a multiple citation.</li> </ul>

	<p><b>Insert Note</b> Some journal styles, eg <i>Science</i>, require you to include notes along with the list of works cited at the end of the document. Notes are numbered just like citations, so this feature only works with numeric styles. With author-date styles, the note appears as text in the body of your document. There is no limit on the amount of text you can include in a Note.</p>
	<p><b>Edit database reference(s)</b> Place your cursor on a formatted in-text citation and click on this icon to link to that reference in Reference Manager. Any alterations you make to the reference will only appear in your Word document if you reformat the document with your database <b>open</b>. Alternatively, delete the old citation and then re-insert it.  <i>NB If the database is not open when you reformat your document, no changes will be made as the data will be taken from the field codes for that reference (see below).</i></p>
	<p><b>Revert to original text</b> Unformats citations and turns off instant formatting. If you wish to unformat only one citation, or citations within a particular piece of text, first highlight that citation or piece of text.</p>
	<p><b>Remove field codes</b> This feature saves a copy of your document without field codes, so the <i>Traveling Library</i> is lost. Most publishers require that you remove field codes before submitting your paper in electronic format.</p>
	<p><b>Cite While Your Write Preferences</b> Enables you to alter preferences for:</p> <ul style="list-style-type: none"> <li>• opening and closing Reference Manager when you open and close Word</li> <li>• returning to your Word document after inserting citations</li> <li>• enabling or disabling Instant formatting for new documents in Word</li> <li>• changing the format of temporary citations or delimiters and to set short-cut keys</li> </ul>
	<p><b>Help</b> Displays help specific to inserting citations and bibliographies in Word</p>

**Note:** *The CWYW feature also works with WordPerfect. (See Appendix B: Installing CWYW for WordPerfect p 35).*

## 7.2 Inserting citations in your document

In order to insert citations in your document you **must** open your Reference Manager database. If you would like to insert citations from one database only, it is best to ensure that any other databases are not open.



1. You may insert citations into your document by using the **Insert Citation** feature:

Reference Manager Insert Citation

Search for: collaboration Perform Search

Example: Enter **Kastelein harbour porpoises** to search for these terms in all fields

Author	Year	Title
Bernard, Deborah F.	2002	The committee that worked
Black, Christine	2001	Building a successful information literacy infrastructure on the foundation of librarian/faculty collaboration
Bowden, Teresa S.	2002	Information literacy in a biology laboratory session
Crest, Sarah	2001	Building a successful information literacy infrastructure on the foundation of librarian/faculty collaboration
Hope, Charly B.		The Sum Is Greater Than the Parts: Cross-Institutional Collaboration for Information Literacy in Academic Libraries
Lipman, Cynthia		Innovation and collaboration brings forth a new approach to bibliographic instruction-teach the.
Walter, Scott		Engelond: A Model for Faculty-Librarian Collaboration in the Information Age

Ref Type: Journal  
Ref ID: 115  
Title: The committee that worked  
Authors: Bernard, Deborah F.; Jacobson, Trudi E.  
Pub Date: 2002  
Link to Full-text: /cgi-bin/sciserv.pl?collection=journals&journal=07343310&issue=v180002&article=133\_tctw  
Notes: Article  
2nd quarter, 2002  
07343310  
Keywords: collaboration; Credit course;; Education; Information; Information literacy; LIBRARIANS; Literacy; literacy;  
Reprint: Not in File  
Journal Name: Research Strategies

Database: InfoLit 7 items in list

Name of the database which contains the highlighted reference

- Enter a search term, such as a keyword, an author's last name or a Ref ID, in the **Search for...** box.
- Click on **Perform Search**.

Reference Manager automatically searches for your term in all references in every open database. The results are displayed below. When a reference is highlighted, the name of the database in which it is contained is displayed at the left of the status bar.

### Tip:

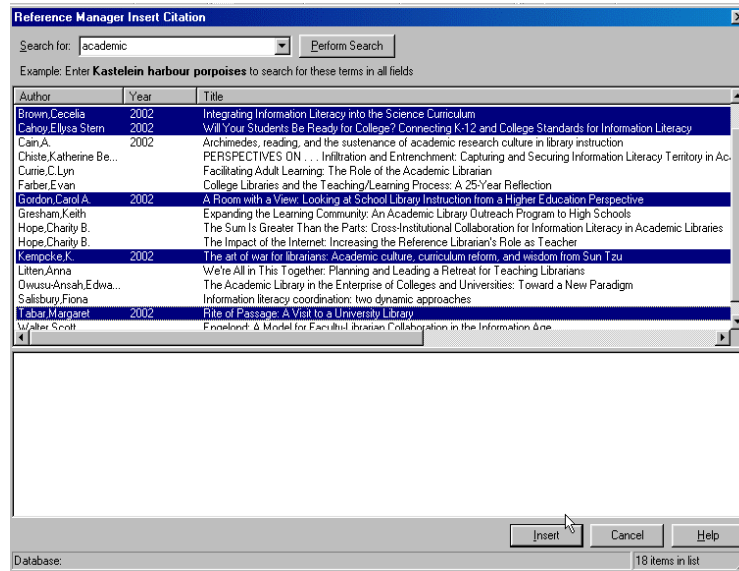
*When inserting citations, make sure that the cursor is placed where you would like to inset citations.*

### To select one citation at a time:

- Click on the appropriate reference in the list to highlight it.
- Click **Insert**.

**To select more than one citation at a time:**

- Click on the first appropriate reference in the list to highlight it.
- Hold the **Ctrl** key down.
- Highlight a second matching citation.
- Release the **Ctrl** key.
- Click **Insert**.



2. You can also insert citations using the **Insert Marked References** feature:

- In Reference Manager, mark the references you wish to insert and make sure that the database from which you wish to insert references is active.

EITHER

- In Reference Manager, from the **Edit** menu select **Insert Marked Refs**.

OR

- In Word, click on the **Insert Marked References** icon.

**Tip:**

*Using **Insert Marked References** is the most popular and safest way of inserting citations. However, if you are inserting marked references, make sure you unmark previously marked references:*


- *From the **Edit** menu select **Clear All Marks**.*

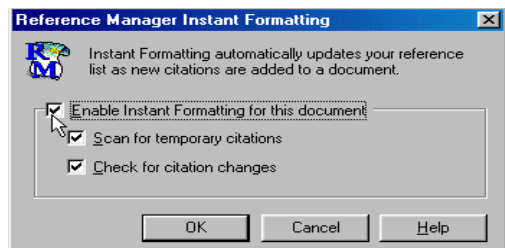
### 7.3 *Instant formatting*

Reference Manager 10 instantly formats the citations inserted in your document in the selected style and automatically produces a reference list at the end of your document. The references list is automatically updated as you insert more citations.

You may disable *Instant Formatting*:


1. To disable *Instant Formatting* for your current document:

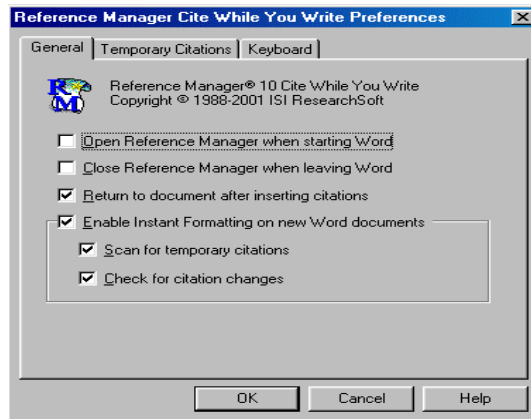
- Click on the **Instant formatting** icon 
- Uncheck the **Enable Instant Formatting for this document** box.



- Click **OK**

2. To disable *Instant Formatting* for all new documents:

- Click on the **Cite While You Write Preferences** icon. 
- Uncheck the **Enable Instant Formatting on new Word documents** box.



- Click on **OK**.


**Tip:**

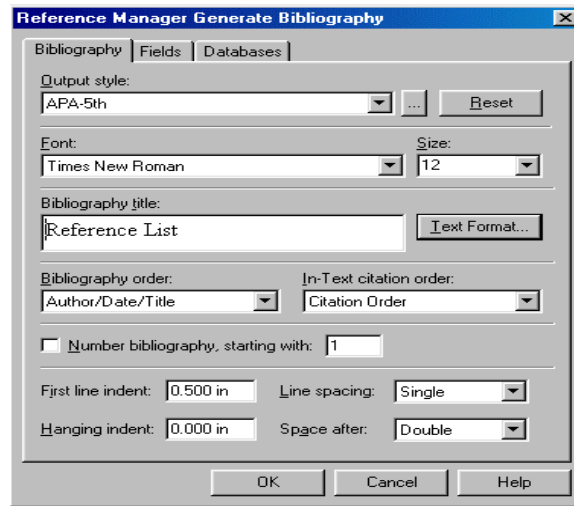
*If you start inserting citations with **Instant formatting** disabled and then enable it, you must use **Generate Bibliography** (see next page) to format any existing citations.*

## 7.4 Generating a bibliography

Use the **Generate Bibliography** icon to change your output style, font or layout.

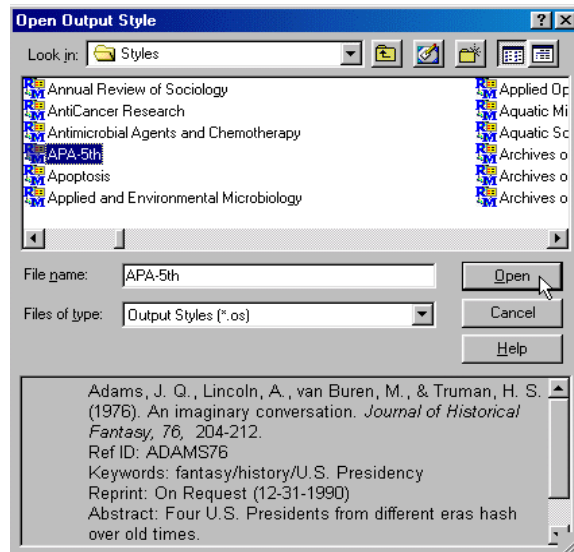
If *Instant Formatting* is disabled, *Generate Bibliography* formats your unformatted citations and produces a list of references at the end of your document according to the rules of the selected style.

- Click on the **Generate Bibliography** icon .



In the **Bibliography** tab:

- **Output Style:** click on the browse button  to select an output style, then click **Open**.



- **Bibliography Title:** type in your preferred title
- **Font:** if you wish, change the font style or size
- Leave the rest as default.

In the **Fields** tab:

- **Optional fields:** check required boxes.
- Leave these boxes unchecked, unless you are required to include any of these fields.

The **Databases** tab shows which of your databases have been used to insert citations in your document.

- Click **OK**.

## 7.5 *APA style*

### Generated bibliography

#### Reference List

Bernnard, D. F. & Jacobson, T. E. (2002). The committee that worked. *Research Strategies, 18*, 133-142. I

Bowden, T. S. & DiBenedetto, A. (2002). Information literacy in a biology laboratory session. *Research Strategies, 18*, 143-149.

Brown, C. & Krumholz, L. R. (2002). Integrating Information Literacy into the Science Curriculum. *College & Research Libraries, 63*, 111-123.

## 7.6 *MLA style*

### Generated bibliography

#### Reference List

Bernnard, Deborah F. and Trudi E. Jacobson. "The committee that worked." *Research Strategies* 18 (2002): 133-42.

Bowden, Teresa S. and Angela DiBenedetto. "Information literacy in a biology laboratory session." *Research Strategies* 18 (2002): 143-49.

Brown, Cecelia and Lee R. Krumholz. "Integrating Information Literacy into the Science Curriculum." *College & Research Libraries* 63.2 (2002): 111-23.

## 7.7 Using the Traveling Library

Every formatted citation in your document is automatically saved with a hidden, *Traveling Library*. The *Traveling Library* contains *field codes* which embed reference data in the document. This data includes the name and location of the database and all fields in the reference, other than notes and abstract.

1. **Sharing documents with colleagues:** When you first format a reference it finds the data from the open database. If you reformat with the database closed, it will use the *Traveling Library* to produce the bibliography. This means that you can reformat a document on a computer that doesn't contain a copy of your database, and you can collaborate with other authors on a paper without having to share a database.
2. **Reformatting shared documents:** When you unformat a document, the *Traveling Library* is lost. To reformat your document you must therefore open the database which contains your cited references. If you are collaborating with colleagues on a paper, and you do not have a copy of the database, you may reformat citations but do **not** unformat them.
3. **Removing field codes:** Most publishers require that papers submitted in electronic format do not have field codes.

- Click on the **Remove field codes** icon 

Reference Manager will open a copy of your document without field codes.

**Tip:**

*The Traveling Library significantly increases the size of Word files. If you save a copy of your document without field codes its size is greatly reduced but you cannot then alter your inserted references.*

4. **Deleting cited references:** If you delete a reference from your database, but do not delete the formatted citation from your Word document, when you reformat your Word document it will take the information for that reference from the *Traveling Library*. If the citation is unformatted, however, Word will not be able to format it.

**Important:**

*The Traveling Library will only work if the document is always opened in the same version of Word. If you wish to convert your document to use in a previous version of Word, you should either unformat it first, or remove the field codes.*

## 8. Backing up databases

You should back up your database(s) whenever you have made changes or additions and it is a good idea to back up the entire Reference Manager directory on occasions.

Your database consists of two files:

**Database.RMD**

**Database.RMX**

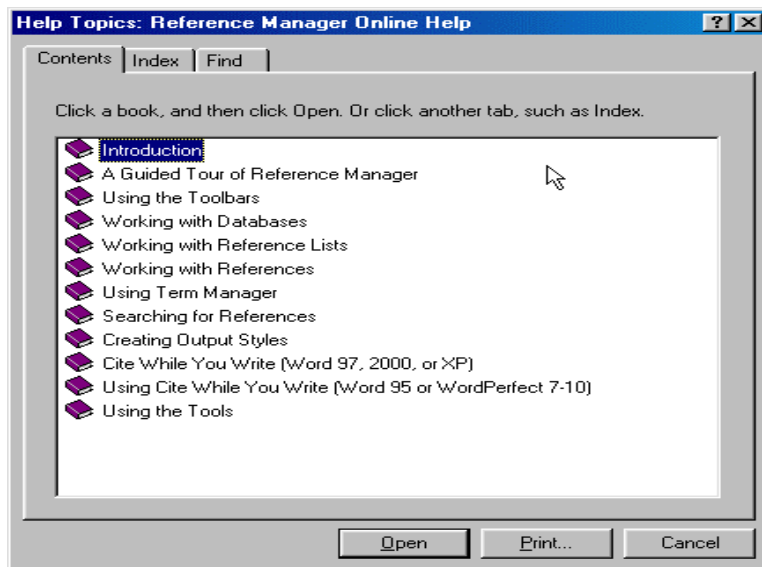
When you backup or move a database from one directory/folder to another, make sure you copy **both** of these database files.

In **Windows Explorer**, copy both of these files to a back up directory on a network drive, or to wherever you keep back up copies of your other files, so that you can restore the database even if your computer crashes.

**Important:** *When backing up your database files, make sure that Reference Manager is closed.*

## 9. Getting help

- From the **Help** menu, select **Help Topics**.



### 9.1 Useful sites

- For general information about the site licence, downloading extra filters or output styles, training sessions and supporting documents, look at:

<http://www.lib.unb.ca/instruction/refman.pdf>  
<http://www.lib.unb.ca/engineering/refman.html>

- Reference Manager website, useful for joining discussion lists and viewing FAQs:

<http://www.refman.com>

- For reporting problems with using Reference Manager email:

[scilib@unb.ca](mailto:scilib@unb.ca)  
[englib@unb.ca](mailto:englib@unb.ca)  
[hilref@unb.ca](mailto:hilref@unb.ca)

## 10. Exiting program

- From the **File** menu, select **Exit**.

**Note:**

If you exit Reference Manager without closing the database, it will open automatically when you next start Reference Manager.

## Appendix A: Installing CWYW in Word

1. Make sure that Word is **NOT** open.
2. In **Windows Explorer**, make sure that there is a **Startup** folder in:  
**C:\Program Files \ Microsoft Office \ Office\**
  - If it does not exist, create one.
  - If the system doesn't allow you to do it, ask your level one support.
3. In **Windows Explorer**, go to the **Program Files** folder.
4. In **Reference Manager** folder, double click on **Cwyw Setup** and follow instructions.
5. If the above steps didn't work, go to:  
**C:\Program Files \ Reference Manager 10\ CWYW\**  
and copy:  

<b>RM10Cwyw.wll</b>	<b>(Microsoft Word Addin)</b>
<b>RM10Cwyw.dot</b>	<b>(Microsoft Word Template)</b>

to the **Startup** folder that you have just created.
6. Now, start Word and check the toolbar.

## **Appendix B: Installing CWYW for WordPerfect**

If Reference Manager has been installed AFTER WordPerfect, you should find Reference Manager options available under WordPerfect Tools from the top menu bar.

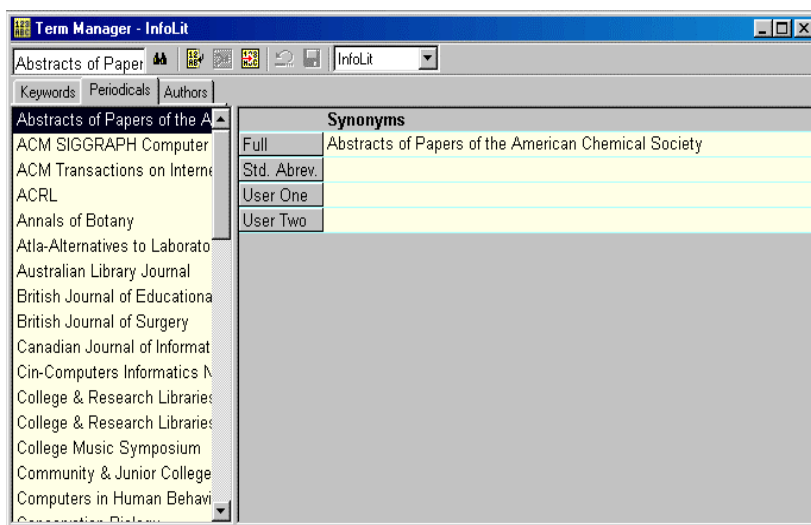
If Reference has been installed BEFORE WordPerfect, you will need to run the cite while you write CWYW setup.exe located in the Reference Manager program folder.

## Appendix C: Term Manager

The **Term Manager** in Reference Manager is the authority list of terms used in fields where some form of control and standardization of the content is useful. The fields covered by it are: **Authors**, **Keywords**, and **Periodicals**.

The most common view of the **Term Manager** is when new references are being typed in or when searches of the database are being carried out. Lists of terms automatically pop up when terms are being selected or entered into these three fields. These lists can also be called up by using the <F3> key.

The terms in the **Term Manager** can, however, also be edited and added to directly. To activate the **Term Manager**, select **Activate** from the **Term Manager** menu. This opens up a new window within Reference Manager as below.



In the top menu bar you can specify which database to work with. This defaults to the current database when the **Term Manager** was activated.

When you click on one of the three tabs, **Keywords**, **Periodicals** or **Authors**, the left-hand column displays the contents of that field in the current database and the right-hand column displays the contents of the highlighted entry.

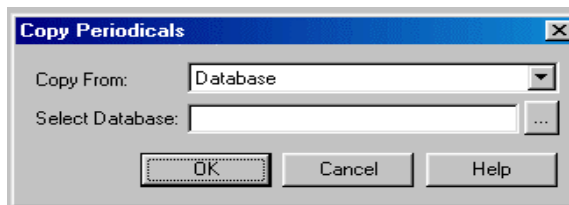
Each list gives the single term, plus any synonyms that may be in use. Synonyms can be used when searching for references.

In addition, synonyms and abbreviated/long versions of periodical titles are very important and should be maintained for best results when exporting to a bibliography.

## *The Term Manager menu*

Add Term	Can be used to add extra terms directly to each of the lists. Synonyms can also be entered, which generate their own entries in the left-hand column list once saved (via the <b>File</b> menu).
Combine Terms	Automatically links terms together as synonyms. To do this, first highlight the first term, then hold the <Ctrl> key down and highlight the second and other terms you wish to link. Release the <Ctrl> key once all the terms have been chosen and then select <b>Combine Terms</b> from the menu.
Global Edit	Allows any term to be edited to another value everywhere it occurs in the database in that field. <i>Use with caution!</i>
Purge	Can be used to delete the highlighted term from a list. The <Del> key can also be used. If references referring to a term are deleted, the terms will stay on the list until the Purge option is used to remove them from here as well.
Copy Periodicals...	For periodicals, the synonyms permitted are limited to a full title, an abbreviated title and two user-defined ones. When exporting references to a bibliography, export styles look in the Term Manager to try and export either the full title or the abbreviated title according to the style. <b>Copy periodicals...</b> can be used to import a list of standard full and abbreviated entries so that the correct entry can be used when exporting. <b>It is advised that you do this before exporting any references.</b>

On choosing this option, you will see the following window:



Select the appropriate list from the drop-down menu of the **Copy From:** box and then click on **OK**.

Synonyms can be entered at any time by highlighting a term and simply clicking on the first blank line underneath the entry in the right-hand column. Use **Save** from the **File** menu to save any changes/additions made.

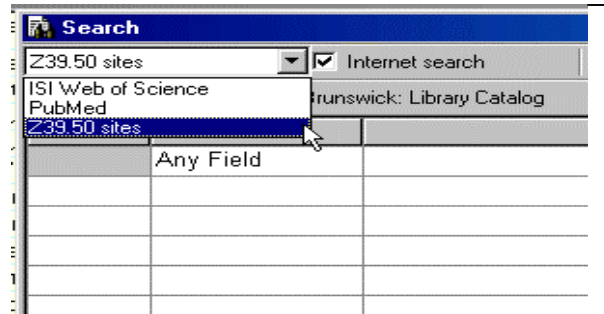
## Appendix D: Reference Manager and EndNote


Feature	EndNote	Reference Manager
Version	5	10
Search the Internet	Yes	Yes
Organize references	Yes	Yes
Format bibliographies	Yes	Yes
Operating System	Mac & Win	Win
Max # of References	32,000	Unlimited
Max # of fields	38	37
Max # of Reference Types	25	39
Subject Bibliography	No	No
Spell Check	Yes	Yes
True Network Capabilities	No	Yes
Create a list of "favorite" styles	Yes	No
Reference grouping	No	No
Advance searching capabilities	No	No
Search across multiple databases	No	Yes
# of output styles	650+	650+
Reference size	64K character Max	Unlimited

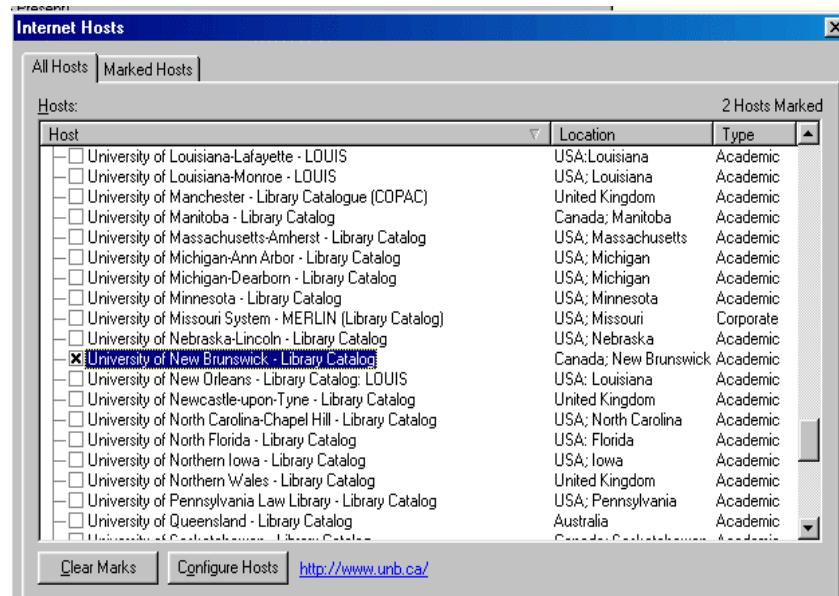
## Appendix E: Connecting to Quest - the library WebCat

You can search and download references from the library catalogue and add them to your database.

1. Start Reference Manager
2. Open a database
3. Select **Internet Search** from the **References** menu
4. Click on the arrow next to PubMed in the box

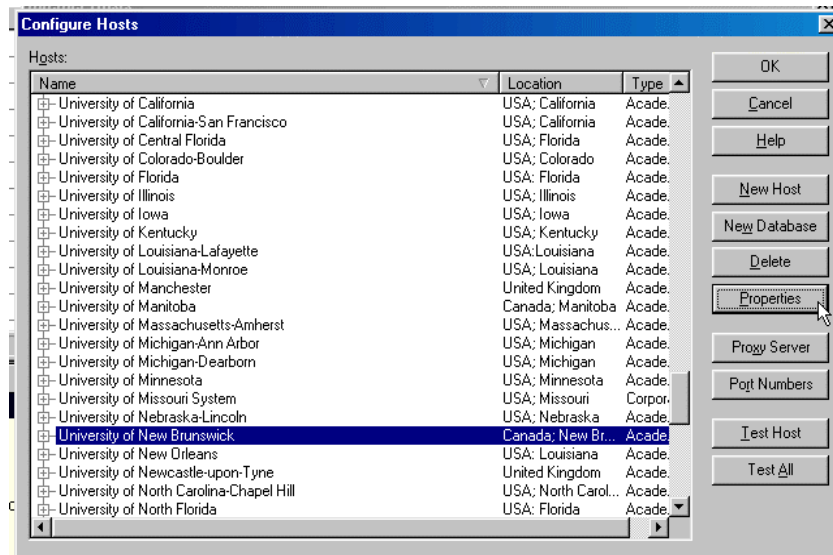


5. Select **Z39.50 sites** from the list
6. Click on the **Hosts** icon to see a list of hosts 
7. Click on the **All Hosts** button– you should find University of New Brunswick in the list

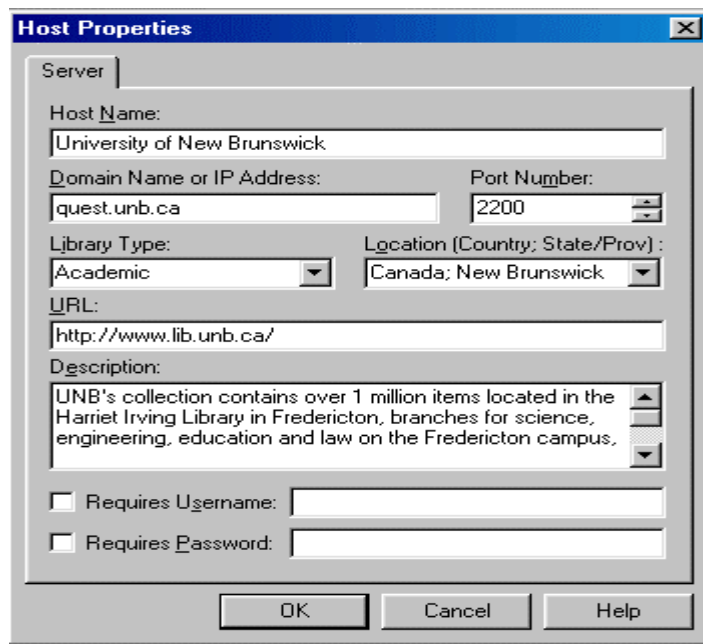


8. Highlight UNB and click on the **Configure Hosts** button.

- From the **Configure Hosts** screen, click on the **Properties** button

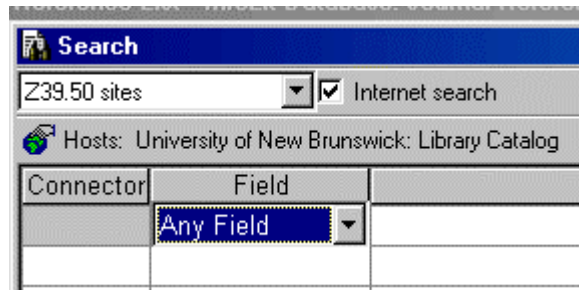


- From the **Host Properties** window ensure that the settings match the screen below



- Click **OK** to return to the list of hosts.
- Mark UNB by clicking in the box next to it.
- Click **OK**.

14. You should now see UNB host displayed in the retrieval screen




15. You can now search Quest.

## Appendix F: Creating a bibliography from multiple documents

Sometimes it is more convenient when working on a large text to split it into separate documents, for example, one document for each chapter. You then need to produce one bibliography to include all the chapters.

You can use Word's *Master Document* feature to generate a single bibliography from multiple documents but it is easier to combine all your completed documents into one, final document.

### To create a single document from multiple documents:

1. In each of your documents, or chapters, insert your citations to link them to references in a Reference Manager database. You may leave *Instant Formatting* activated.
2. Go to the document which you want to appear first in your final document.
3. Place your cursor between the text and the bibliography and create a page break:
  - **Insert** menu / **Break...**,
  - Select **Page break**, **OK**
4. Ensure your cursor is placed after the text for the first document. You now need to insert the second document:
  - **Insert** menu / **File...**
  - Locate the file which you wish to appear second in your final document
  - Click on **Insert**
5. Your document now has 2 bibliographies which you need to combine:.
  - Click on the **Generate Bibliography** icon  on the Reference Manager toolbar
  - Select the style of your choice on **OK**
6. Your document will still have two separate bibliographies but now the second bibliography also incorporates the first.
  - Highlight the first, incomplete, bibliography and press the delete key
7. You may now repeat steps 3 – 6 for each additional document.

## Appendix G: Which Filter for which Database/Publisher

This is a partial listing. For a more complete listing check UNB Libraries Reference Manager page:

<http://www.lib.unb.ca/instruction/RefManager/>

Resource Database	Export/Save File	Import Filter (*.cap)	Notes
Academic Search Elite	Under Save, from the Bibliographic Manage <sup>1</sup> Direct Export to Bibliographic software.		Does not handle multiple authors properly
	Save citations as a text file	UNBEBCSOhost Edited for UNB	Select Academic Search from list
Aquatic Sciences & Fisheries Abstracts	Save citations as a text file	CSA-IDS	May need some minor editing
Biological Abstracts	Accept the default *.dat file save type	Webspirs – Biological Abst.	Usually very clean import
CINAHL	From the Citation Manager use Direct Export		May need some editing
	From the Citation Manager save file as Ovid	OVID ONLINE (OVID)	Some fields not mapped, some keywords omitted
	From the Citation Manager save file as BRS/Tagged	OVID (BRS-COLLEAGUE) – NURSING	Some fields not mapped, brings in more keywords than Ovid Online
	From the Citation Manager save file as Reprint/Medlars	OVID (BRS-COLLEAGUE) – MEDLINE	All fields map, inserts leading dashes in title, journal name abstract fields
Compendex	From download, choose RIS format		

<sup>1</sup>You must have Reference Manager installed on the computer you are using for searching.

<b>Resource Database</b>	<b>Export/Save File</b>	<b>Import Filter</b>	<b>Notes</b>
ERIC – EBSCO	Under Save, from the Bibliographic Manager, Direct Export to Bibliographic Software		Does not handle multiple authors properly
	Save citations as a text file	UNBEBSCOhost, select ERIC from list	Needs some editing
Forestsience.info	Accept the default *.dat file save type	Webspirs-CAB	Need to select a year range, some editing
	Accept the default *.dat file save type	SilverPlatter-CAB Abst.	
PsycInfo	Under Save, from the Bibliographic Manager Direct Export to Bibliographic Software		Does not handle multiple authors properly, does include URL
	Save citations as a text file	UNBEBSCOhost, select PsycInfo from list	Does not handle volume, issue information properly
Sociological Abstracts	Save citations as a text file	CSA-IDS	Does not transfer all issue, pagination information
SportDiscus	Under Save, from the Bibliographic Manager, Direct Export to Bibliographic Software		Does not handle multiple authors properly, repeats title
	Under Save, from the Bibliographic Manager, Direct Export to Bibliographic Software	UNBEBSCOhost, select SportDiscus from list	Journal name, pagination not handled properly
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