



CLEVELAND HEALTH SCIENCES LIBRARY

REFERENCE MANAGER 10

Reference Manager is a personal reference bibliographic management system. It is designed to keep track of specific references in your field of interest.

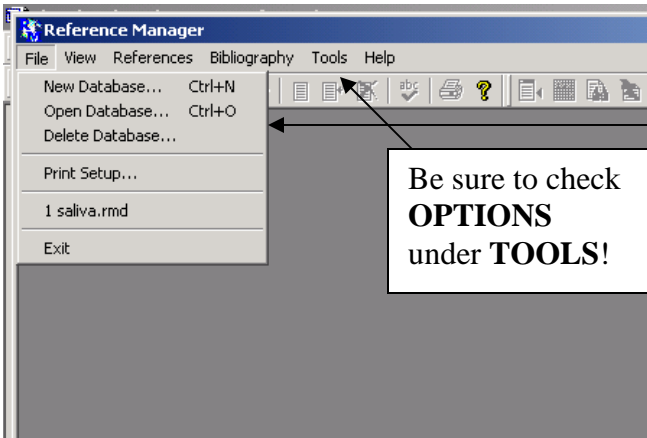
This brief class will attempt to cover Reference Manager 10 as it is used with Word 2000.

At the end of the class, you should be able to do the following:

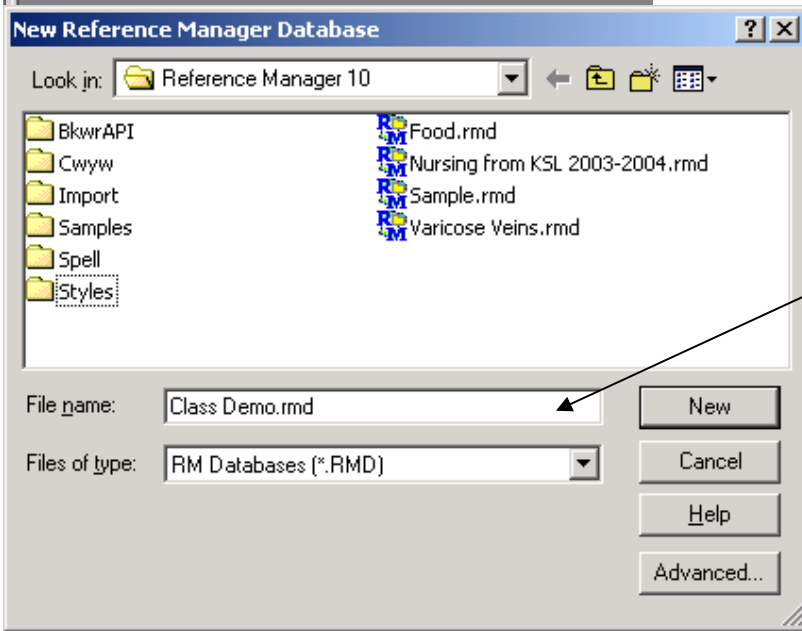
- Work with a Reference Manager database
 - Create a new one, open an old one, etc.
 - Add references
 - Edit references
 - Activate term manager
 - Search References
- Create a bibliography
- Use Reference Manager with a word processor
 - Insert citations, scan the document, generate a bibliography, cite while you write

Should you need further assistance, please contact me.

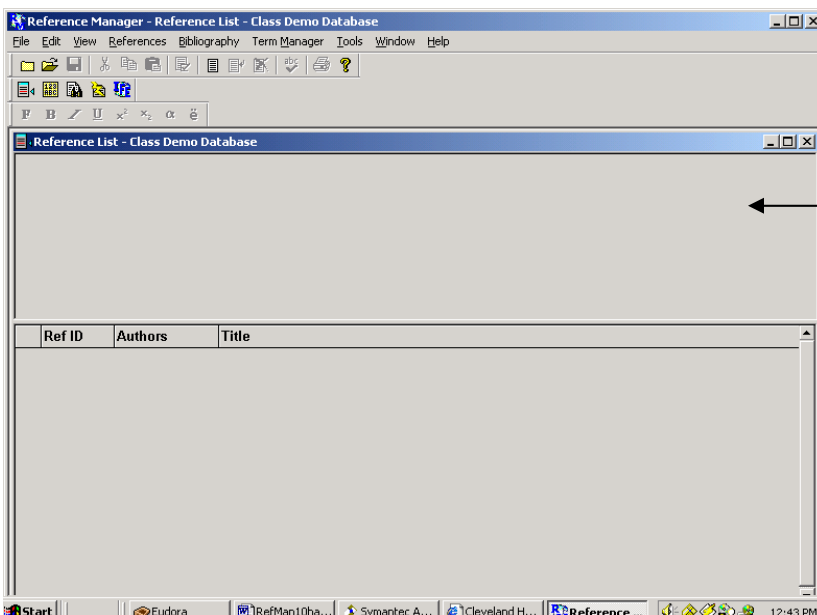
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This is the opening screen of **Ref Mgr 10**, clicking on **FILE**. If you have not yet created a database which can be **opened**, you must make a **new** database.



This is a new database called **CLASS DEMO**



This is the database **CLASS DEMO** awaiting citations

PUTTING REFERENCES INTO REFERENCE MANAGER

There are several ways of getting references from a catalog or a database into Reference Manager. You can import a text file of tagged citations from a source you have searched. Some databases will let you export citations directly from the database to the software program. You can enter references manually. You can use the retrieval/search method built into the program.

When you search a **database** and have a set of citations you want to transfer to Reference Manager, you must remember several important items:

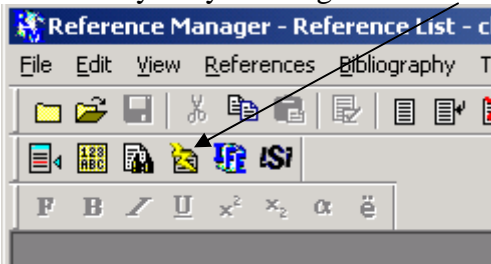
- ❖ Use tagged fields or an output style of a bibliographic citation manager
- ❖ Save the file as .txt
- ❖ Remember the name and location of the saved file

When you import the references into Reference Manager, you must have the database open, select the import filter that matches the database or output style you used, and lastly the name of the file. You can import all the citations, or only what you specify. You can add specific keywords to all of the citations. You can make notations about your reprint file.

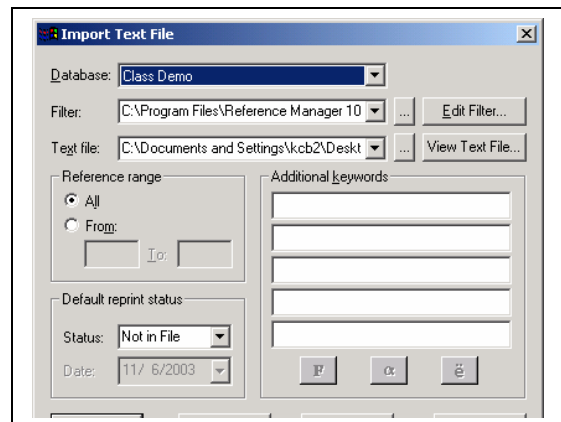
You can add references manually by going to **REFERENCES** on the **MENU BAR** and then to **NEW**. Fill in the blanks. Be careful typing! You may also copy and paste from an online catalog for books. This works very well with EuclidPLUS.

You can search using Reference Manager to import citations automatically. The catalogs or databases you search must be Z39.50 compliant. Z39.50 refers to a standard for searching and retrieving information from a remote database. Searching using Reference Manager 10 will not be covered at this time. Please refer to the manual and online help for assistance.

Once you have searched a database and saved tagged citations in a text file, you need to **import** them into Reference Manager. There are two ways to do this. From the menu bar, you can go to **REFERENCES** and then to **IMPORT TEXT FILE**. The second way is by clicking on the icon:



Then this screen appears:



When importing text files, there are three very important parts to remember:

- ❖ Keep the Reference Manager database open
- ❖ The Import Filter
- ❖ The text file of citations

There are some other options. These include adding keywords, searching for duplicates, double-checking the journal title or abbreviation, etc. Try them for yourself!

If you have done a search in a database produced by ISI, such as the Web of Science or Current Contents, you can export directly from these databases into Reference Manager.

For more support, consult the website for Reference Manager:

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

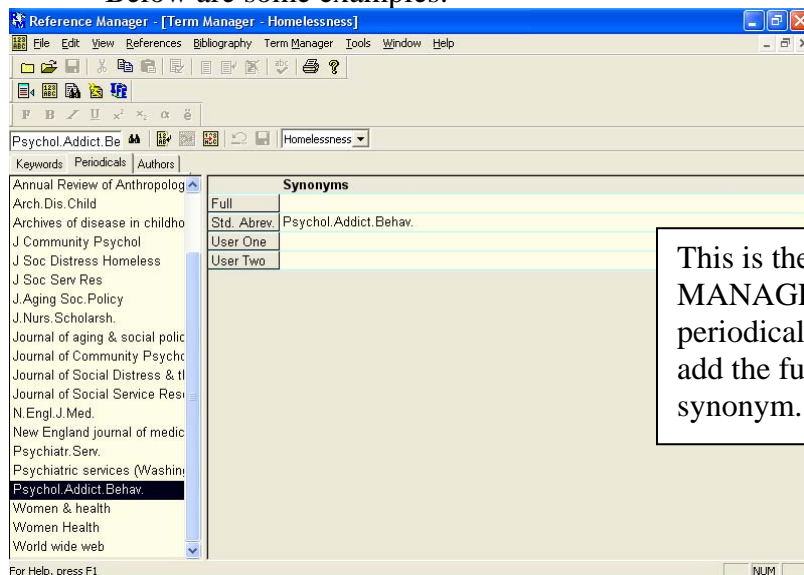
TERM MANAGER

Term Manager allows you to easily work with terms in your database. You can edit authors, keywords, and periodical names. You must open the database as READ/WRITE EXCLUSIVE to access the Term Manager global editing functions.

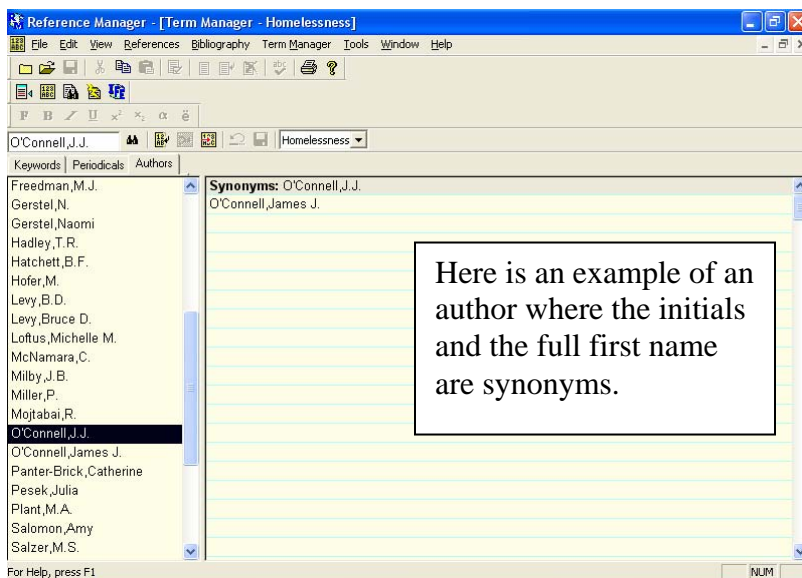
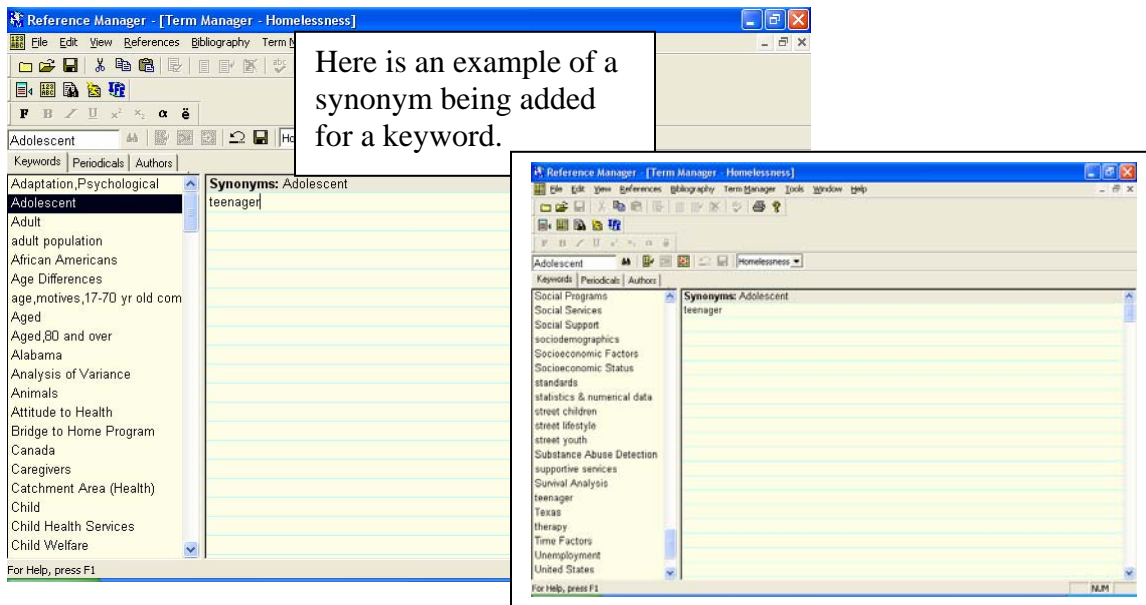
If you want to add synonyms, add them and remember to save your work.

Term Manager is important not only for the ability to add your own keywords, but also to add synonyms for variations on an author's name – such as initials or full name. With periodicals, it is important to have both the full journal title as well as the standard abbreviation. Different output styles require different forms of an author's name as well as different forms of the periodical title.

Below are some examples.



This is the TERM MANAGER with a periodical shown. You may add the full journal title as a synonym.



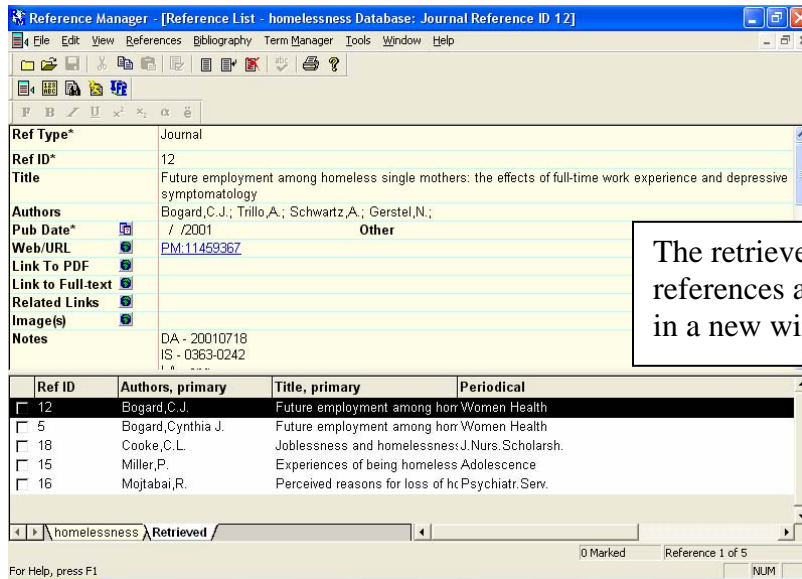
REFERENCE SEARCH

There are two ways to find references:

- Quick Retrieval
- Search References

Quick Retrieval is from the Term Manager. With TERM Manager activated, highlight a term from keywords, periodicals or authors. Under TERM MANAGER, choose QUICK RETRIEVAL.

To search for references in a database, from the Reference menu, select Search References to display the Search Window. In the Select database(s) field, select the database to search. You can search a single database, or All Databases. In the Field column, type or select the name of the field to search. In the Parameter column, type or select the text you want to locate in the field.



WORKING WITH REFERENCES

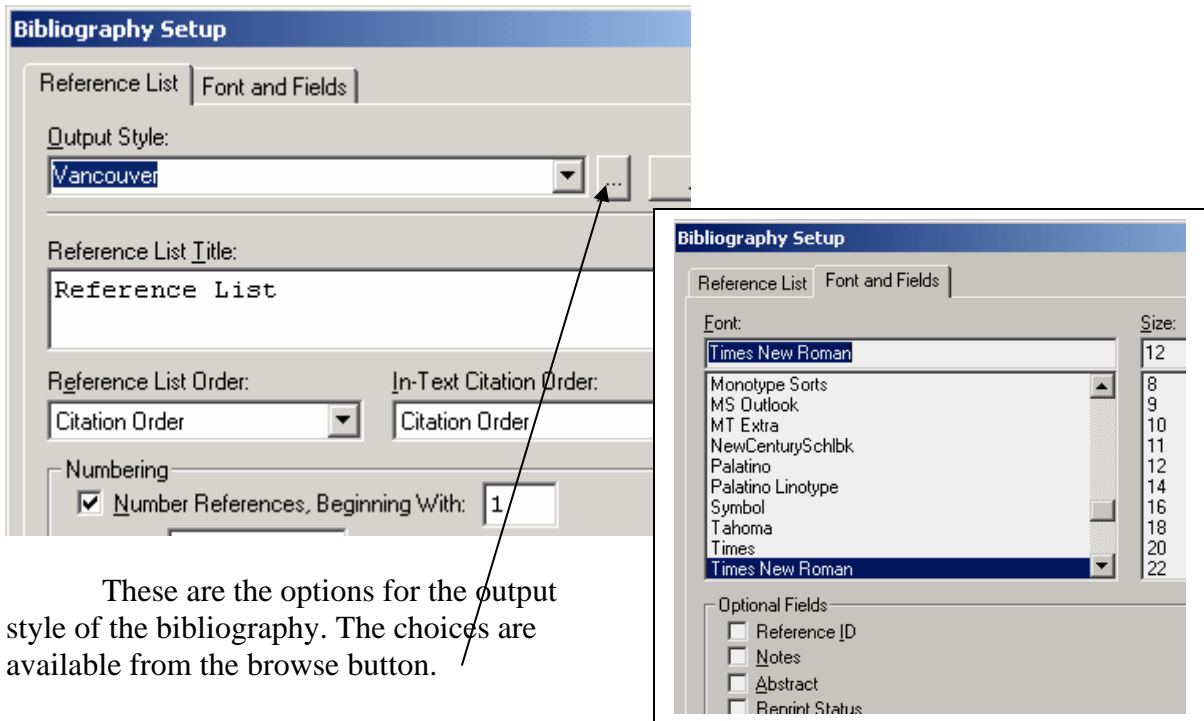
There are many possibilities for customizing references once you have them in Reference Manager. From **TOOLS**, you can select **REFERENCE LIST DISPLAY**. From **REFERENCES**, you can **RETRIEVE, EDIT, DELETE**, etc. Please try it. You can also generate a **BIBLIOGRAPHY**, without using a word processor.

One of the more important features of Reference Manager is its ability to work with a word processor and create citations and bibliographies without typing all the details. **Cite while you write** is an add-on to the word processor. You can cite references while you write your paper, insert the citations and generate a bibliography. Remember to mark the identifying information about the reference in delimiters:

{ }

If you use insert or scan, the program inserts unformatted citations into your manuscript. When you generate a bibliography, the unformatted citations are converted to formatted ones according to the specifications of the chosen output style.

With Reference Manager 10, you are able format the bibliography as you **Cite while you write**. Check the Instant Formatting option under Tools.



You can export references to a text file for importing to other applications. Some of these applications are other bibliographic management software, spreadsheets, etc.

The web site for Reference Manager has many faq's and other helpful hints. You will also find patches and add-ons. You can also request additional help from this site. Again it is:

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