



## CLEVELAND HEALTH SCIENCES LIBRARY

### REFERENCE MANAGER 11

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

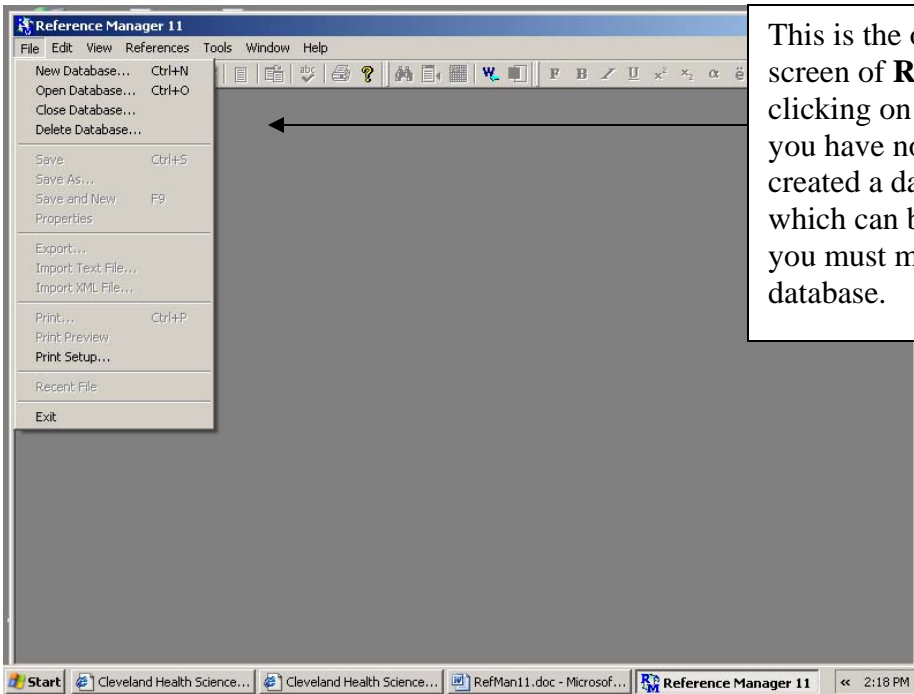
This brief class will attempt to cover Reference Manager 11 as it is used with Word 2003.

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

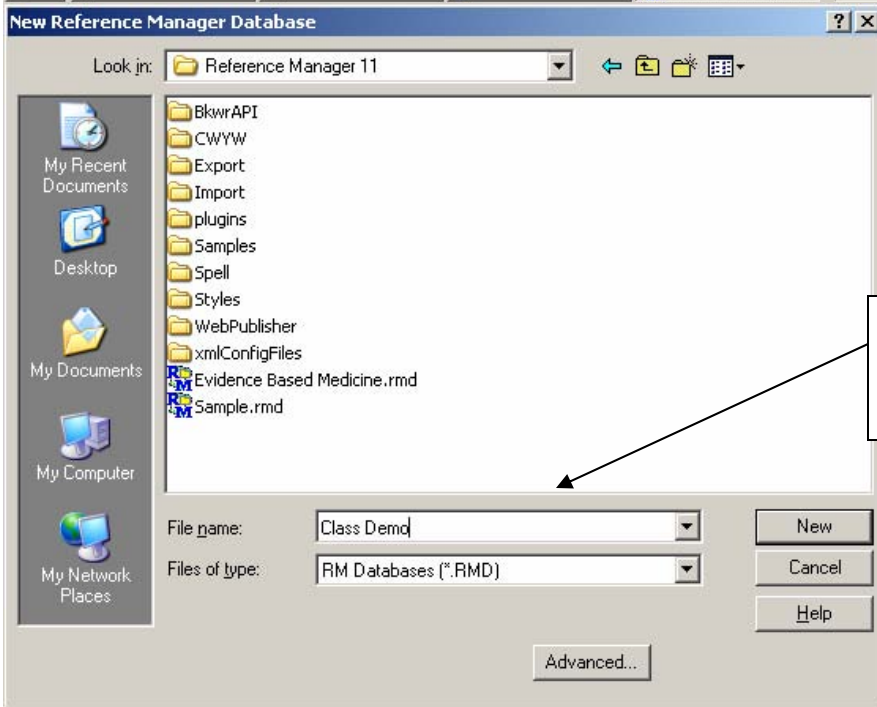
- Work with a Reference Manager database
  - Create a new one, open an old one, etc.
  - Add references
  - Edit references
- Create a bibliography
- Use Reference Manager with a word processor
  - Insert citations, scan the document, generate a bibliography, cite while you write

Should you need further assistance, please contact me.

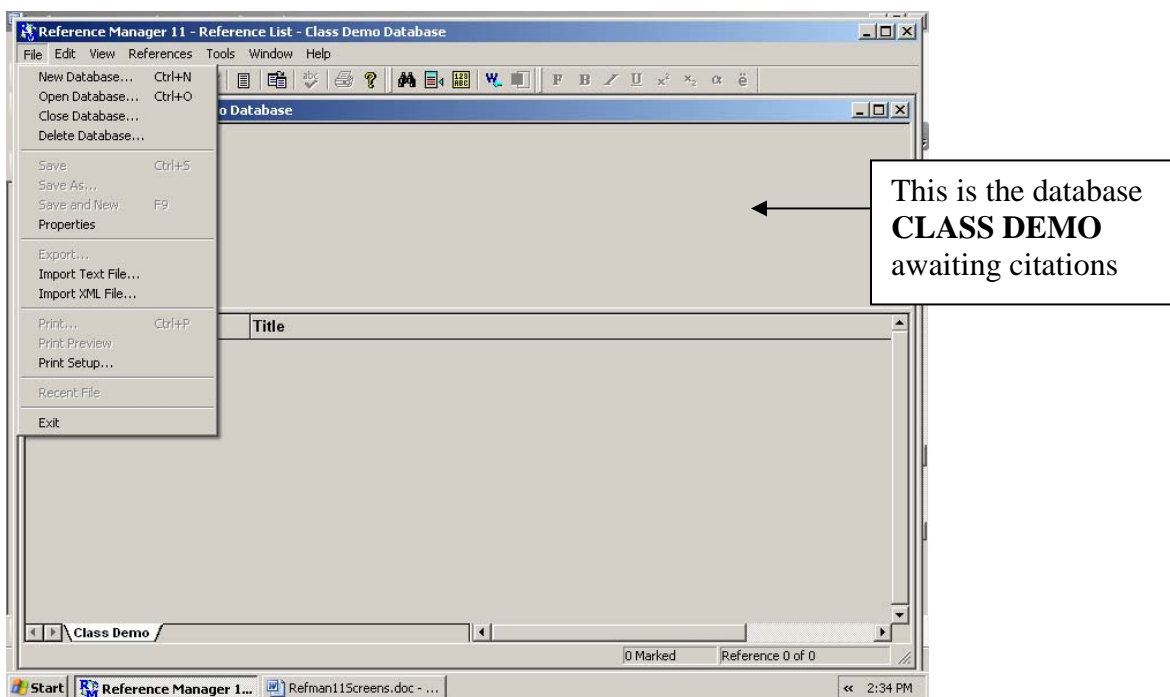
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This is the opening screen of **Ref Mgr 11**, clicking on **FILE**. If you have not yet created a database which can be **opened**, you must make a **new** database.



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



## 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! If at all possible, find an electronic citation. You may also copy and paste from an online catalog for books. This works very well with EuclidPLUS. If you have access to WorldCat, you can mark

records and export to a .txt file which can be saved and imported into Reference Manager.

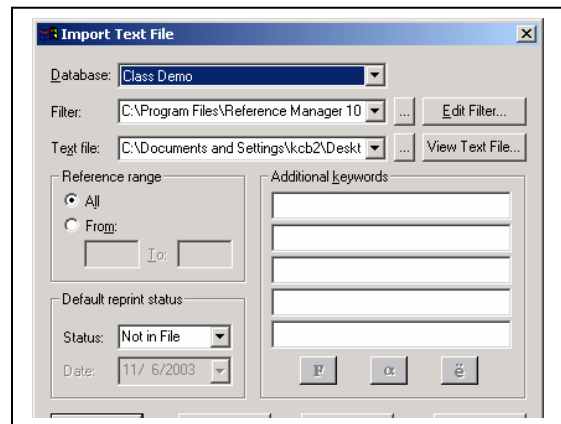
You can search using Reference Manager to import citations automatically. The catalogs or databases you search must be Z39.50 compliant to which you have a subscription. Z39.50 refers to a standard for searching and retrieving information from a remote database. Searching using Reference Manager 11 will 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. From the menu bar, you go to **FILE** and then to **IMPORT TEXT FILE**.

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!

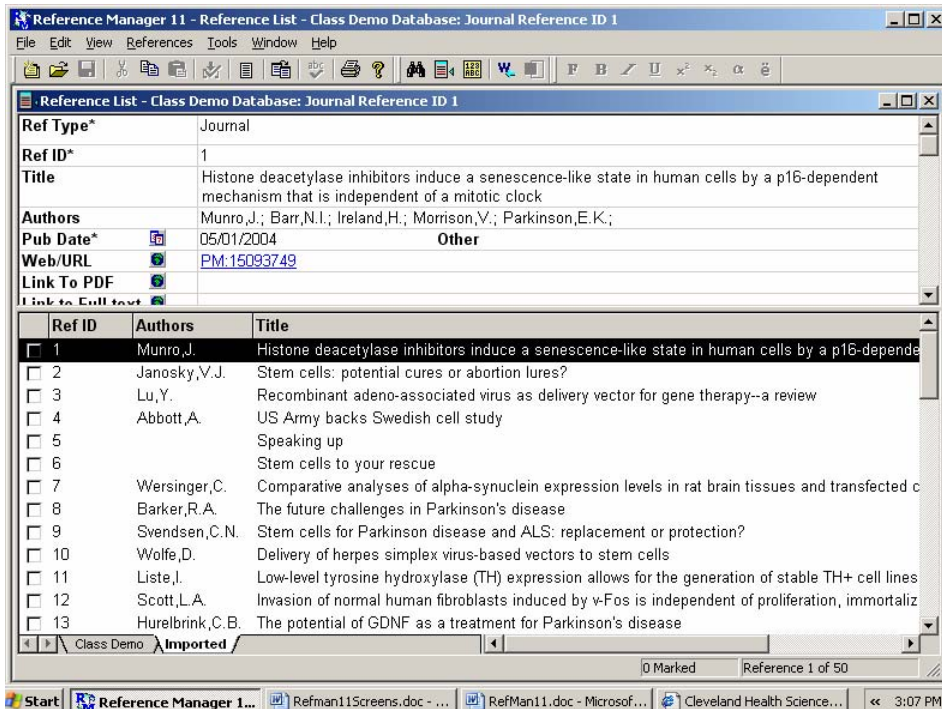
If you have done a search in a database produced by ISI, such as the Web of Science or Current Contents, you can export directly from these databases into Reference Manager.

For more support, consult the website for **Reference Manager**:

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

You should check the website on a regular basis in search of patches for the program and updates for styles and filters. Go to the **support & services** section:

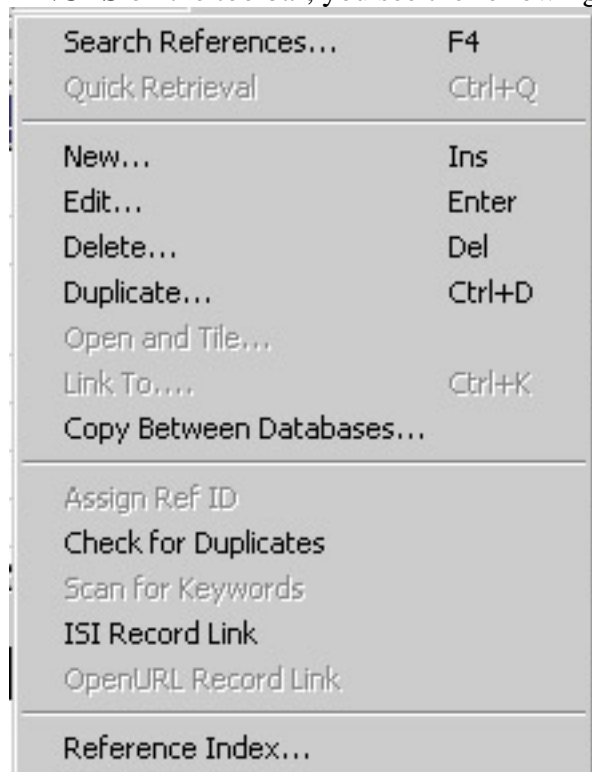
<http://www.refman.com/support/rmsupport.asp>



Here is CLASS DEMO with citations imported from PubMed.

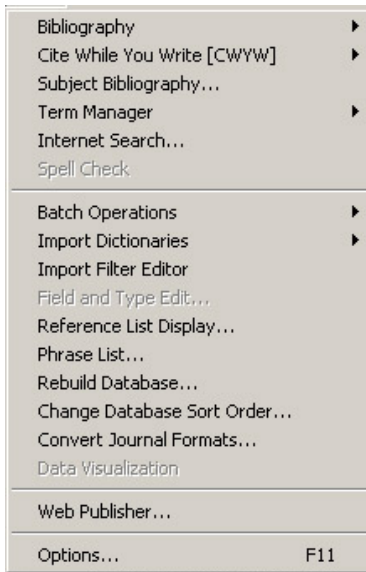
## WORKING WITH REFERENCES

From **REFERENCES** on the toolbar, you see the following:



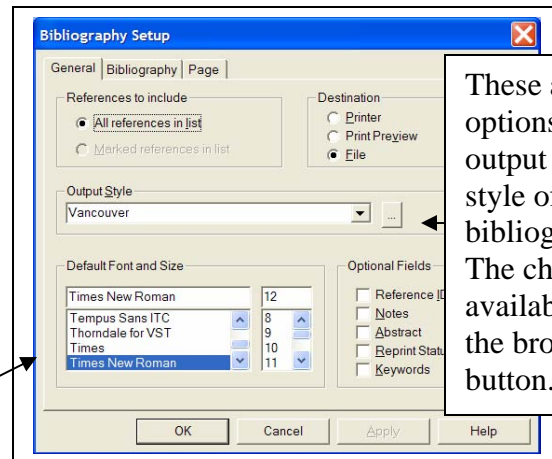
You may search for references, add new ones, delete undesired ones or duplicate a reference within a database, create an index for locating references that are difficult to retrieve through other means, and other features as listed. You can add the URL or web address. Try them all and use the manual or help screens.

## Tools

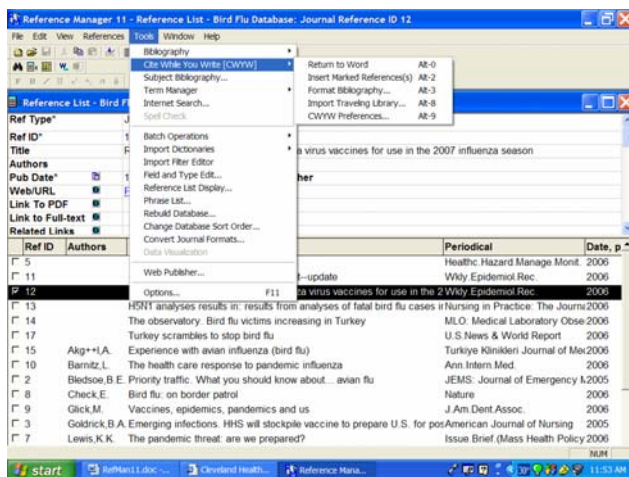


Some of the more important features of **TOOLS** are **BIBLIOGRAPHY, CITE WHILE YOU WRITE, REFERENCE LIST DISPLAY** and **OPTIONS**.

You can create a bibliography as an .rtf file and work in Word with the results.



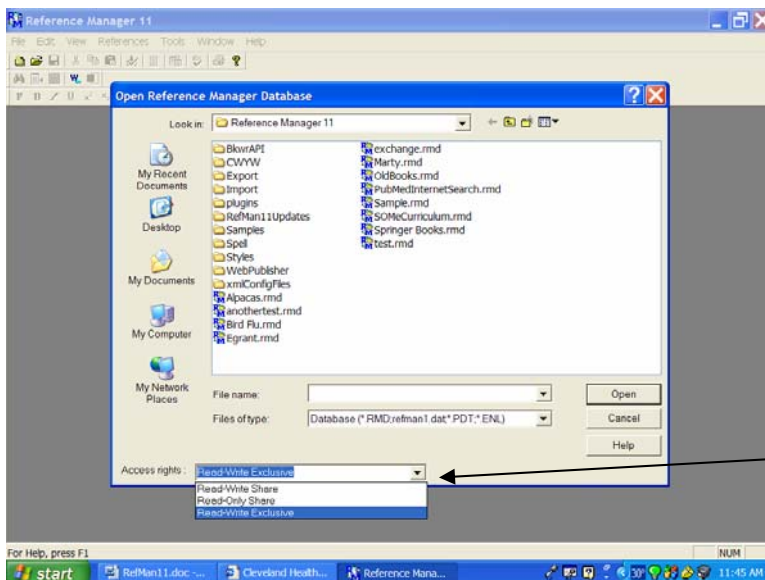
These are the options for the output style of the bibliography. The choices are available from the browse button.



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. This version of Reference Manager lets you also insert into the word processor citations that are marked in the Reference Manager database which is open. With Instant Formatting enabled, the references appear as they should according to the selected Output Style.



## Term Manager



When you create a new Reference Manager database, there are three empty term lists already set up and ready for you to use: Keywords, Periodicals, and Authors. Term lists are specific to a database. You can only edit the periodicals when a database is opened in **Read-Write Exclusive**.

If you work with different output styles, be careful to include both journal full title as well as journal title abbreviations in the term lists.

## Using Word

If you open Reference Manager first, open a database and then Word, there should be no problems using the two software programs together. Occasionally there is a problem that occurs during the installation and you must manually copy and paste some files. The information is available from the online site:














<http://www.refman.com/support/rmcwyw.asp>

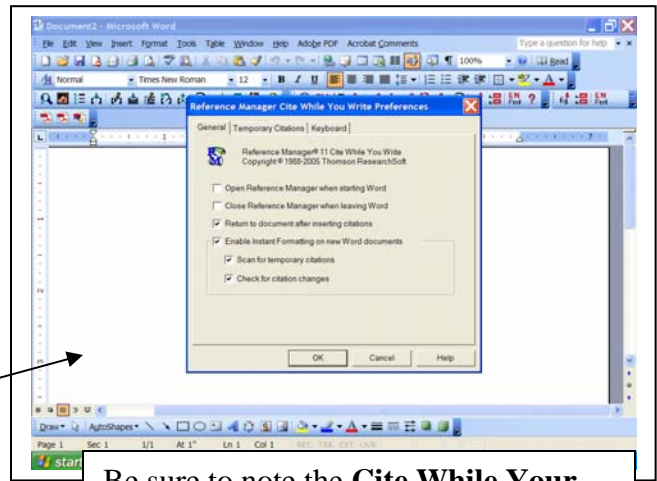
If you see the toolbar for Reference Manager:



The two programs are communicating with each other.

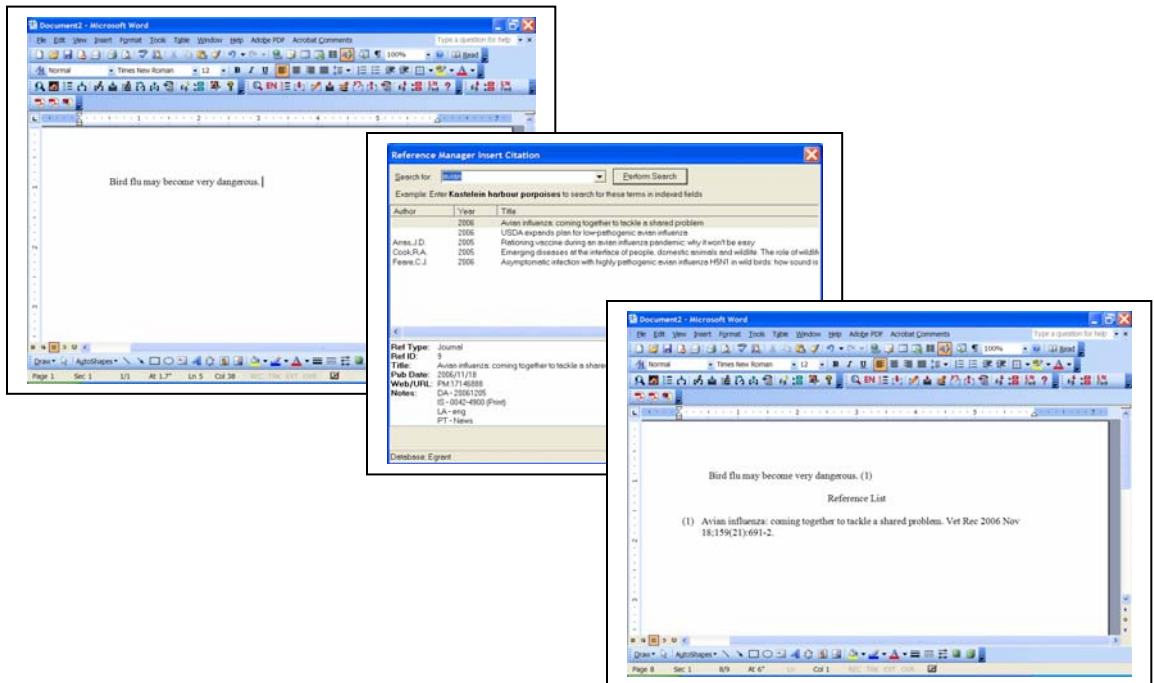
There is also a text list for the icons listed under **Tools**:

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



Be sure to note the **Cite While Your Write (CWYW)** preferences and be sure the have Enable instant formatting ... checked.

You are ready to enter text into your Word document.

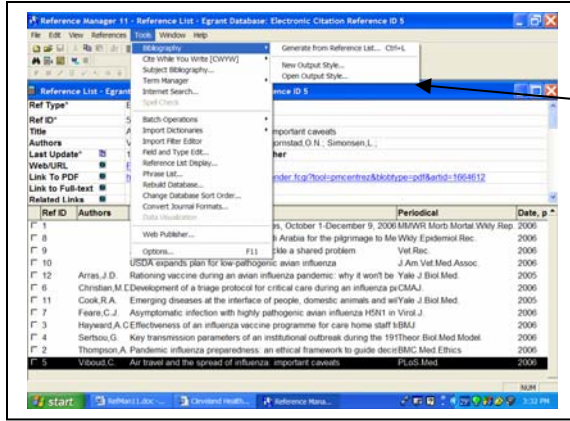


Start by typing a little, click on Insert Citations, find the citations and the default format is the last one you used. This particular one is Vancouver.

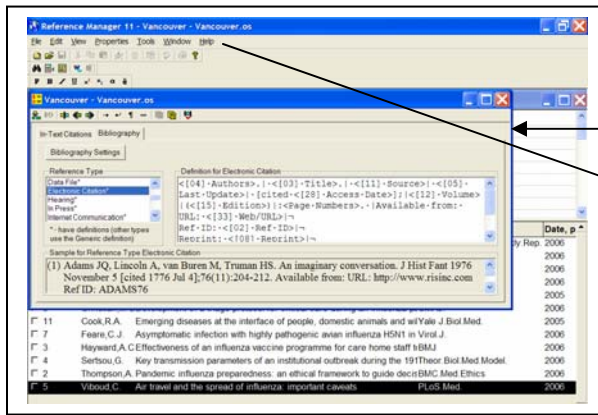


You may change the style by clicking on Generate Bibliography.

## Output Styles



By clicking on Open Output Style ... , you can modify an output style to meet other requirements.



If a style that you need is not included with Reference Manager, modify a style that is similar to what you need. Check the Help that comes with the software.

## Other Applications

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

Be sure to consult the Help files. If you have technical difficulties, you can always email a technician at **Reference Manager**:

<http://www.refman.com/support/rmtechform.asp>