

## Reference Manager 12 with Word 2007

Reference Manager 12 is a personal reference bibliographic management system. It is compatible with Windows XP, SP 2 or later, and with Windows Vista. Cite While You Write (CWYW) is compatible with Word 2003 and 2007. Reference Manager can search [ISI Web of Science](#), [PubMed](#) and Z39.50 compliant library internet sites. Some databases can export directly into Reference Manager. Most databases allow you to save citations in a text file of tagged fields which can be imported into Reference Manager.

This brief class will attempt to cover Reference Manager 12 as it is used with Word 2007. At the end of the class, you should be able to do the following:

- Work with a Reference Manager database
  - Create a new one
  - Add references
  - Edit references
- Create a bibliography
- Use Reference Manager with Word 2007
  - Insert citations
  - Insert marked references
  - Generate a bibliography
  - Cite While You Write

You can always check for online help at <http://refman.com/>. You can contact [CHSL Reference Service](#) or <http://www.case.edu/chsl/library/ref.html>, by email to [hclref@case.edu](mailto:hclref@case.edu) or by phone to 216-368-3218.

## Reference Manager

- Installation
  - Word must be installed first, with full read and write access to Word's Startup Folder
  - Reference Manager installs to Programs and there are shared folders which default to installation in shared documents because of restrictions in Windows Vista
  - You must Configure Reference Manager after it is installed
  - There is online help available at <http://refman.com/support/faqs/cwyw/faq28.asp>
- Updates
  - Be sure you have the latest updates from the [Reference Manager Support & Services](http://refman.com/support/RMsupport.asp) or <http://refman.com/support/RMsupport.asp>
- Open Reference Manager before opening Word
- Create a library
- Open a library in Read-Write Exclusive
  - Activate Term Manager
  - Add Term Lists for Periodicals
- Export/Import
- Tools
  - Bibliography
  - Cite While You Write (CWYW)
  - Internet search
  - Term manager
  - Reference List Display
  - Options

- Searching databases & saving files
  - PubMed
  - ISI Web of Science
  - CINAHL/EBSCOHost databases
  - BIOSIS Previews/OhioLINK databases
  - WorldCat
- Direct Export
  - Follow the directions

## **Word 2007**

- Word options
- Trust Center
- Add-Ins/Reference Manager tab
- Cite While You Write preferences
  - Insert citation by looking for a keyword or author
  - Insert a marked record
  - Use brackets – { } and generate the bibliography

## **PubMed**

- Display – MEDLINE
- Send to – File
- Save as .txt
- Import filter is PubMed or PubMedpmc

## **ISI Web of Science**

- Check records and add to marked list
- From Marked list, with Fields tagged, Save directly to Reference Manager, OR, Save to File and save list as .txt
- Import filter is ISI-CE

## **CINAHL/EBSCOHost**

- Add to folder
- From Folder, Select All
- Export and Direct Export, OR,
- Generic Bibliographic
- Save
- File...Save as...
- Three drop-down windows:
  - *Name.txt*
  - Text file (.txt)
  - Western European (Windows)
- Save
- Import filter is EBSCO Host, then CINAHL (Or whichever )

## **OhioLINK Databases – BIOSIS Previews**

- Stored records
- Export
- Use REFER
- Download

Reference Manager, Cleveland Health Sciences Library/CWRU

- Export Now
- Save
  - *NameREFER.txt*
- Import is EndNote-Refer

## **WorldCat**

- Marked records
- Export...Export to...Text File
- Export
- Save
- Import is OCLC WorldCat

## **Searching with Reference Manager**

Reference Manager will search Z39.50 compliant databases to which you have a subscription, or library online public catalogs.

Since PubMed is free to the world and Z39.50 compliant, you can search it. However, it does not default to Case Western Reserve University's URL and you will not get CWRU holdings. You can "trick" the program into giving you CWRU holdings by first logging into PubMed from CHSL therefore setting a cookie to which Reference Manager will default. PubMed will work remotely without VPN, but the electronic journals will not. You will not be able to determine free full-text.

The ISI Web of Science is searchable since CWRU subscribes to it and it is produced by the same company as Reference Manager. Again, log in to ISI from CHSL's site to set the cookie for the holdings before using the online search feature. If you are accessing this database remotely, you must be using VPN or OhioLINK remote authentication.

## **Pulling Everything Together**

Be sure to open a Reference Manager database before opening Word. Do not have either program automatically open the other one. Whenever possible, always import an electronic citation into Reference Manager – there sometimes are problems with citations that have been entered manually displaying properly within Word, especially subsequent use of a previously cited reference. Word documents can be shared. If you reformat a shared document, you must have the corresponding database from Reference Manager open. Be sure to check what version of a journal title is in Reference Manager and what version is required by your output style. PubMed has a journals database where you can find full journal titles as well as journal title abbreviations. If you are citing an electronic resource, be sure to note the day you accessed the file and record it in Reference Manager in the appropriate field. If you link a.pdf file you have saved, it should be on the same computer drive as the Reference Manager program.

Good luck and remember to read instructions, help screens and if all else fails, please contact me.

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