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ABOUT REFERENCE MANGER

Reference Manger is a citation management software product. It allows you to create and maintain databases related to your research and also use this database to create bibliographies as you type your publications. The Reference Manger software (and trial product) can be downloaded from:

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

GETTING STARTED

Creating a New Reference Manager Database:

Before you can use Reference Manager (i.e. import citations) you need to create a database. You can create individual databases for each of your different research needs and/or interests.

To Create a New Reference Manager Database:

Go to File, and click on "**New Database**".
Enter the Name you wish to call the File.
Ensure the file will be saved in the folder you desire.
Click on "**New**"

Opening an existing Reference Manager Database:

Go to File, and click on "**Open Database**".
Click on the folder/drive where the file was saved.
Click on the name of the file to be opened.
Click on "**Open**"

ADDING REFERENCES TO YOUR DATABASE

There are three ways to put references into your Reference Manager database:

- **Auto Export**, also called **Direct Export** (some UIC databases allow you to auto-export).
- **Manual Import**. Save and **Import** citations from a text file that you temporarily save to a disk or your computer (some UIC databases require you to save your reference to a file before you can import it into Reference Manager)
- **Manual Entry** - type in each element of a new reference

Manually Adding Citations to a Reference Manager Database:

Go to References on the tool bar, and click on "New." A new window will open within your database to enter your information.

Next to "Ref Type", click on the Pull Down menu to select the type of resource you are entering into the database (book, book chapter, journal article). This is important, as it will determine what other fields are available to enter information.

Fill in all the fields you wish or are able.

The author fields, keyword field, and periodical fields are all indexed fields. This means that if an author or keywords have already been added to your database, they will appear when you begin to type in this field. You may scroll through and select the appropriate term. Double click the author, keyword, or periodical to add it to your record. If you are adding a term, author, or periodical for the first time, this term will become available in the index.

When you are done, click on the X for the window you were working in. You will be asked if you want to save the changes. Click Yes.

To add a new reference, repeat the above process.

Manually Editing Citations in a Reference Manager Database:

Double click on the citation you wish to edit. Make changes as necessary. When you are done, click on the X for the window you were working in. You will be asked if you want to save the changes. Click Yes.

Exporting Citations from CSA Illumina (Manual Import)

Downloading from CSA:

Search the CSA Database as usual. Once you have selected the citations you wish to import, click on the "save/print/email records". You will be taken to a new screen - click on "Save" (to Pc, Mac, Unix).

When the **File Download** window appears:

Click **Save** and select the drive/folder you want your file saved in.

In the **File name** box type the name of the file (or use the default).

Click **Save**.

In Reference Manager:

Click on **FILE** and scroll to **Import Text File**. A box will appear.

Databases: choose name of Database you want your citations to go in.

Filter: Select the CSA-IDS filter



Text File: Here you need to select the file that you saved in while in CSA.

Click **Import**.

A status of your imported results will appear.

Click **OK**.

Exporting Citations from Ebsco (Automatic Export)

Downloading from Ebsco:

Search the Ebsco Database as usual. Select the citations you wish to import by clicking on "Add" next to the citations you want. Next click on "Add" found at the top of the screen next to a display of your search strategy. Near the top right corner of the screen, an open folder with "Folder has items" should appear. Click this. In the box that appears displaying selected citations, click on "Save to Disk" A "Save Manger" Box will appear. Select the tab on this box labeled "Bibliographic Manager"

A box will appear, asking that you choose the select the Reference Manager Database you want the results to be imported into. When you select the specific database you want, click **Open**. Your citations should appear in RM.

Exporting Citations from FirstSearch (OCLC) (Manual Import)

Downloading from FirstSearch:

Search the FirstSearch Database as usual. Once you have selected the citations you wish to import, click on the "Export" icon found at the bottom of the screen.

Next to "Export" select if you want all citations exported or only the ones you have selected.

Next to "Export to" select "Text file" and next click **Export**

When the **File Download** window appears:

Click **Save** and select the drive/folder you want your file saved in.

In the **File name** box type the name of the file (or use the default).

Click **Save**.

In Reference Manager:

Click on **FILE** and scroll to **Import Text File**. A box will appear.

Databases: choose name of Database you want your citations to go in.

Filter: Select the First Search Databases you were using as the filter (i.e. OCLC ABI Inform, OCLC Article First; pick OCLC ABI Inform if you don't see the specific database you were searching)

Filter: C:\Program Files\Reference Manager 11 ... ← Click to browse filters.

Text File: Here you need to select the file that you saved in while in First Search.

Click **Import**.

A status of your imported results will appear.

Click **OK**.

Importing Citations from Google Scholar (Automatic Direct Export)

In Google Scholar:

- First you need to turn on the feature that will allow you to export directly into Reference Manager
- Next to the Search button in Google Scholar, click on the link called "Scholar Preferences"
- Go down to Bibliographic Manager and click the dial button before "show links to import citations into" and from the pull-down menu, select "**RefMan**"
- Click on "Save Preferences"
- Perform your search as usual in Google Scholar
- For each individual citation you want exported into Reference Manager, click on "Import into Reference Manager" found beneath each individual search result
- In Reference Manager, select the Library you want the references in and they should automatically be imported.

Exporting Citations from Web of Knowledge (Automatic Export)

Before importing citations from the Web of Knowledge - you may need to download software - - click on RIS Export Plug-In for Windows.

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

Search Web of Science or Current Contents as usual. Once you have selected the citations you wish to import - go to **Marked Records**. This will appear at the top of your screen once citations have been selected. If you have multiple pages of results, on the last page of results that you selected citations, click on "Submit Marks" prior to clicking on **Marked Results**.

Select the fields you want to export into your RM database (abstract, keywords). Click **Export to Reference Software** under Step 2 to import citations in RM.

A box will appear, asking that you choose the select the Reference Manager Database you want the results to be imported into. When you select the specific database you want, click **Open**. Your citations should appear in RM.

Exporting Citations from Ovid (Automatic Export)

Perform search in Ovid.

Select citations for downloading (if do not want to download all citations).

Scroll to the **Results Manager** at bottom of screen.

Under **Results** select the desired options

Under **Fields** select the desired options

Under **Result Format** select Direct Export

Under **Actions** select **Save**

On the screen that appears, select "Export results to Endnote, Procite, or Reference Manager," and click continue.

A box will appear, asking that you choose the select the Reference Manager Database you want the results to be imported into. (You might need to select the specific folder first your database is in using the "Look In" feature.) When you select the specific database you want, click **Open**. Your citations should appear in RM.

(You will need to do a manual import if you can not do an Automatic Export)

Importing Citations from Proquest Databases (Automatic Export)

Search the Proquest Database as usual.

Once you have selected the desired citations, click on **My Research** (green tab at top of webpage).

Click **Export Citations** and next click **Export directly to ProCite, EndNote or Reference Manager**.

A box will appear, asking that you choose the select the Reference Manager Database you want the results to be imported into. (You might need to select the specific folder first your database is in using the "Look In" feature.) When you select the specific database you want, click **Open**. Your citations should appear in RM.

Exporting Citations from PubMed (Manual Import)

Downloading from PubMed:

Perform search.

Next, select the citation you wish to Export to RM.

In the Pull Down Menu next to the **Display** box: select **MEDLINE**. Your selected results will be displayed in MEDLINE format.

Next, in the **Send To** pull down menu, select: File.

When the **File Download** window appears: Click Save and select the drive/folder you want your file saved in. In the **File name** box type the name of the file (or use the default).
Click **Save**.

In Reference Manager:

Click on **FILE** and scroll to **Import Text File**. A box will appear.

Databases: choose name of Database you want your citations to go in.

Filter: you will need to select the corresponding filter associated with the PubMed. Select **NLM MEDLINE** or **PubMed** as the filter .

Filter: C:\Program Files\Reference Manager 11 ... ← Click to browse filters.

Text File: Here you need to select the file that you saved in while in PubMed.

Click **Import**.

A status of your imported results will appear.

Click **OK**.

Importing Citations from ScienceDirect (Automatic Export)

Search ScienceDirect as usual.

Select references and click on the **Export Citation** tab at the top of results list

Select to export either **Citations** or **Citations + Abstracts**.

Select RIS format (for Reference Manager, ProCite, EndNote)

Click on the **Export** button at the bottom.

A box will appear, asking that you choose the select the Reference Manager Database you want the results to be imported into. (You might need to select the specific folder first your database is in using the "Look In" feature.) When you select the specific database you want, click **Open**. Your citations should appear in RM.

Exporting Citations from SciFinder Scholar (Manual Import)

Downloading from SciFinder Scholar:

Search SciFinder as usual. Once you have selected the citations you wish to import, click on "**Save As**" found at the top of the search screen.

Select the folder you wish to save the file. Enter in the name you wish the file to be called.

Under "**Save As**" type, select "**Tagged Format**". Click on Save.

In Reference Manager:

Click on **FILE** and scroll to **Import Text File**. A box will appear.

Databases: choose name of Database you want your citations to go in.

Filter: Select SciFinder Version 4-Scholar as the filter .

Filter: C:\Program Files\Reference Manager 11 ... ← Click to browse filters.

Text File: Here you need to select the file that you saved in while in SciFinder.

Click **Import**.

A status of your imported results will appear.

Click **OK**.

Deleting References From Your Reference Manager Database

- Select the citation(s) that you want deleted (check box to left of citation)
- Click on References on the RM Taskbar and slide down to delete
- Click "Marked References" and click OK

Searching Your Reference Manager Database.

- Under Reference, select **Search References**.
- Select the database you wish to search from the pull-down menu in the upper left corner - you can only search databases that are open.
- Place your cursor in the first box under **Field** and select the field you wish to search by selecting it from the pull-down menu. Place your cursor in the empty box under Parameter. If you selected an indexed field (author, keyword, periodical, year) a list of possible terms should appear as you type. Double click the term needed. If it is not an indexed field, type in the word you wish to search for.
- If you wish to add another term to the search, place your cursor in the first available box under Connector. Select your connector term (and, or, not). Repeat the steps above until your search terms have been entered.
- Click on F12 to begin retrieval or click on the binoculars.

Generating a Reference List from RM in Word processing Software

Under Bibliography - click Generate from Reference List.

In the **General Folder**:

References to include

→Select "All References in List" or
"Marked References"

Destination

→Click File

Output Style

Select Journal format - click on box next to pull down menu for options

- once you have selected one - click OPEN.

Optional Fields - click what fields you want - (abstract, keywords).

Click OK.

Save in: box appears - indicate folder to be saved in.

File name: give file a name.

Save as type: Microsoft Word OR WordPerfect - use pull down menu to select.

Open the file and insert any touch-ups you want to the document.

Printing a Reference List in RM

Under **Tools** select **Bibliography** and next select **Generate from Reference List**.

In the **General Folder**:

References to include

→Select "All References in List" or
"Marked References"

Destination

→Click Print or Print Preview

Output Style

Select Journal format - click on box next to pull down menu for options
- once you have selected one - click OPEN.

Optional Fields - click what fields you want - (abstract, keywords).

Click OK. Click OK to print.

Creating Bibliographies while You Type

Assuming that you have already searched the databases for your references and they have been imported into reference manager - creating bibliographies as you type your article is simple. There are 2 ways to add references to the body of your article. A tool bar will appear in Word or WordPerfect that you may use to assist with creating bibliographies. If the tool bar does not appear, Click on Tools in your Word Processing Software and Scroll to Reference Manager.

1. Insert Marked References (option 1 to add references to articles)

Place your cursor in the Word document where you want to reference the source of the information. Go to Reference Manager and examine your database that contains your citations. Mark the necessary citation(s). (To mark citations -click on the box to the left of the reference ID). Return to Word. Click on the third option on the reference manager tool bar - "Insert Marked References". Information corresponding with the marked citations should appear.



Continue to do this as you write your article. BE SURE TO UNMARK ANY MARKED CITATIONS BEFORE YOU MOVE ON TO INSERT YOUR NEXT CITATIONS.

2. Insert Citation (option 2 to add references to articles)

Place your cursor in the Word document where you want to reference the source of the information. Click on Insert Citation. This feature allows you to search from Word the needed citation. In "Search For": type the name of the author or an important key work. If Reference manager locates only one matching citation - the corresponding information will automatically appear in the text of your article. If RM locates more than one matching citation - a list will appear for you to select the correct citation from. Double click on the citation you wish to appear in your document.

Generate Bibliography In Word or Word Perfect

Once you have completed your article - click on "Generate Bibliography" in order to change your article and references into the appropriate format.



Under output style - indicate the name of the journal format needed. Click on the pull-down menu under "output style" to select the correct journal format. Click OK - and the proper format should appear.

Look over the results because some editing may be required in reference manager - (missing dates and page numbers).

Journal formats can easily be changed from one format to another.

Creating a Subject Bibliography

In Reference Manager, you can generate a list of all citations in your databases by items such as author, journal, keyword, ect. In other words, you can create an index of your database.

Keyword Index List (all citations indexed with each keyword in your databases will be listed under each keyword)

To generate a keyword index, go to Tools and select "Subject Bibliography"

In the General Folder:

Create a Subject Bibliography for:

Select if you want all references in list, marked reference, or highlighted reference.

Output Style

Select Journal format - click on box next to pull down menu for options

- once you have selected one - click OPEN.

Optional Fields - click what fields you want - (abstract, keywords). Click OK.

In the Subject Fields box - Select the Field you want to create your index with. For a

Keyword Index list - select "Keywords." Click **OK**

In the Subject Terms box - Click "Select All". Click **OK**.

Save or print it.

Author Index List (all citations indexed with each author (primary or secondary) in your databases will be listed under each author)

Repeat the steps for Keyword Index List but in the **Subject Fields** box - Select **Author primary** and Author secondary (optional). This should include all the authors entered in the main author field.

Turning on UIC Options (link-outs to full-text)

On Reference Manager 11 - go to tools and down to options. Click on Internet Search. Click on enable URL - and enter in this path -

<http://hz9pj6fe4t.search.serialssolutions.com/>

Arguments are fine as they are.

Click on Apply to save this. (You won't need to do this step again.)

To Access the Linkouts – click on the citation in Reference Manager that you would like to see if it is available full-text.

Next – click on "References" at the top of Reference Manager and click on "Open URL Record Link". This should open up an Internet Window for UIC options.