

THE FRIENDS OF THE CHILDREN OF GREAT ORMOND STREET LIBRARY

Brief guide to Reference Manager

This guide will enable you to create a Reference Manager database and to use the basic facilities of the software to collect and manage your references and generate a bibliography in a variety of styles.

Creating a new database

Note that you need to create a new database before you can start inputting or importing references.

- Open Reference Manager
- Choose **File > New Database...**
- Enter a database name and select a place to save it
- Click **New** to create the database.

***Tip:** Each database is made up of **two files** (.rmd &..rmx), You need both of these files, and they must be saved in the same folder, to use the database so **DO NOT** be tempted delete either of them.*

Adding references

There are **three** ways to add references to your database. You can:

- (1) simply type in the data manually
- (2) perform an Internet search from within Reference Manager
- (3) import a set of results from a text file (e.g. from *PubMed*). Each method is described below.
- (4)

Note: Reference Manager can look for duplicates in your database so that you do not have the same reference listed twice. Go to **Tools > Batch operations** and select **Duplicate search**.

***Tip:** use the **Web/URL** field to store links to web pages or to documents stored on your computer.*

***Tip:** some fields are marked with an asterisk to indicate that they are mandatory. If you forget to complete a mandatory field, Reference Manager will not let you save the reference.*

Adding references manually

- Open Reference Manager and choose **File > Open database** to open an existing database, or **File > New database** to make a new one
- From the References menu, select "New" and a blank reference form is opened
- From the drop-down menu next to the Reference Type field select the relevant type for the new reference you are entering (e.g. Journal, Book Chapter, etc.)
- Enter information into each field as appropriate, using the tab key to move to the next field.
- Choose **File > Save** to save the new reference.

Importing references

- The procedure will vary depending on which database you are importing from. Some databases have a built-in export option while others databases require you to save the references into a text file for importing to Reference Manager.
- For a detailed guide to importing references from different sources, please see the accompanying ICH Library leaflet entitled **Downloading references from electronic databases to Reference Manager**.

Tip: also see the Search section below for information about searching internet sources from within Reference Manager.

Working with duplicate references

If you often import references from a number of different sources, duplicates may be introduced into your Reference Manager database. There are three options available to deal with this.

1. Checking for duplicate records in a database

- Choose **Tools > Batch Operations > Duplicate Search**.
- Choose the database to search for duplicates (it is possible to search all open databases, the retrieved tag or the imported tag) and click **Search**.
- If any duplicates are found these are displayed in a tab called Duplicates. This tab is temporary and will disappear when the database is closed.
- It is then possible to check if references are duplicates, if so one of the references can be deleted.

2. Checking for duplicate records as references are added manually

Reference Manager can check for duplicates as you type in details of references.

- Choose **Tools > Options > Reference Edit tab** and tick the **Check for duplicate references** option.
- Choose whether to check for duplicates across the selected database (the database you are entering the reference into) or all open databases.
- When you save a reference, the system will notify you if it thinks there is a duplicate.

3. Checking for duplicate records as references are imported

The easiest way to deal with duplicate records is to find them as they are imported into your database.

- Choose **Tools > Options** and choose the **Import tag**. The Duplicate Records section gives three options:
 - Import duplicates
 - Discard duplicates
 - Put duplicates in another duplicates database
- If you choose to put duplicates in a duplicates database, enter the database name in the box below. Click **Ok**.

Searching within your Reference Manager database

You can search Reference Manager database to locate specific references for editing, or for printing bibliographies. Once you have located specific records you can mark, delete, edit or print the references. You can search every field in a reference or limit the search to specific fields.

Reference Manager can also search for duplicates so that you do not enter the same reference twice. Go to **Tools > Options** and select the Duplicate search tab.

Creating a search strategy

- Choose **References > Search References**.
- Place your cursor in the first column labelled "Field" and select the name of the field you would like to search from the drop-down menu.
- In the "Parameter" column, type in the word you want to search for
- You can build up a search on the rows below, selecting **AND**, **OR** or **NOT** from the first column and clicking the binocular icon to run the search.

Saving a search strategy

Searches can be saved if you want to use them again later, useful if they are used frequently.

- Choose **References > Search References** and create a search strategy as described above.
- Click the "Strategy Files" icon (binoculars with a disk) & the "Retrieval Strategy" dialog box appears. Click the "Save" button, give the search strategy a name and click OK.
- Select the Strategy Files once more to confirm your search is saved for future use. You can return to this screen, highlight one of your saved strategies and select "Load" to re-run it.
- Click on "Close" to return to the Retrieval window.

Generating a bibliography

There are two methods of creating a bibliography: manually create a static bibliography from within Reference Manager, or use the "Cite While You Write" feature to create a bibliography dynamically as you compose a document in Word (see below).

To manually create a bibliography

- First search your database for the references you require
- Select **Bibliography > Generate from reference list**
- Choose to send the bibliography directly to the printer or to a file
- Select the output style you wish to use
- If you choose to save to a file you should use the dialog box to give the file a name and say where you want to save it then click "OK"

AND finds records that contain both
OR finds records that contain either or both
NOT finds records that contain the first word but not the second

Tip: output styles for most of the major journals are automatically installed in Reference Manager. If the one you require is not included, you can create new ones.

Using Cite While You Write

The Reference Manager toolbar in Word will allow you to search your Reference Manager database directly from your Word document, to insert citations, and to build up the bibliography at the end of your document. To add citations into the body of your Word document make sure that Reference Manager is open.

Insert in-text citation

- Begin to type and when you want to refer to a particular article, click the **Insert Citation** button on the Reference Manager toolbar (the first icon on the left)
- A search box appears where you can search for an author or keyword within your Reference Manager database. (You may need to specify which Reference Manager database to use from the drop-down list of the **Look In** box).
- When you have identified the reference you want, click the **Insert** button to insert a 'place-holder' in the appropriate place within your Word document.

Insert marked references

- This is a helpful option if you want to insert a number of references in the same place in your Word document
- First mark the items you want within your Reference Manager database
- Go back to the Word document and select "Insert Marked References" from the Reference Manager menu to add in-text citations for all the references you marked

Generate the bibliography

- As you enter citations, a bibliography (or 'Reference List') is automatically generated at the bottom of the Word document. At the same time the in-text citations are formatted.
- If the bibliography is not generated automatically, click the "Generate Bibliography" icon on the Reference Manager toolbar (the icon with 1,2,3 written on it)
- Select the Output style you wish to use. The output style determines the format of the in-text citations, as well as the format of the bibliography.

Note: To change the output style, click the "Generate Bibliography" icon again and choose a different style from the drop-down list. If you wish to edit an output style or create a new one, please contact the Library for help.

Getting help

Reference Manager comes with online help. This can be accessed in three ways:

1. Choose **Help > Help Topics** to find a topic using the Contents, Index or Find facilities.
2. Many Reference Manager windows have a **Help** button to view help related to the current activity.
3. Press the **F1** key to view context-sensitive help.

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Tip: When the Reference Manager software is installed, a toolbar is automatically added to Word. If the toolbar does not appear when you open Word, you can activate it from **View > Toolbars > Reference Manager toolbar**.

Cite-While-You-Write is designed to work with Word versions 2000, XP and 2003. If you open your document in another version of Word, the formatting will be lost and you will be unable to reformat the document.

Tip: the format of the in-text citations changes depending on which output style you are using. To change the output style, click the "Generate Bibliography" icon and choose a different style from the drop-down list