



Manual Reference Manager 12

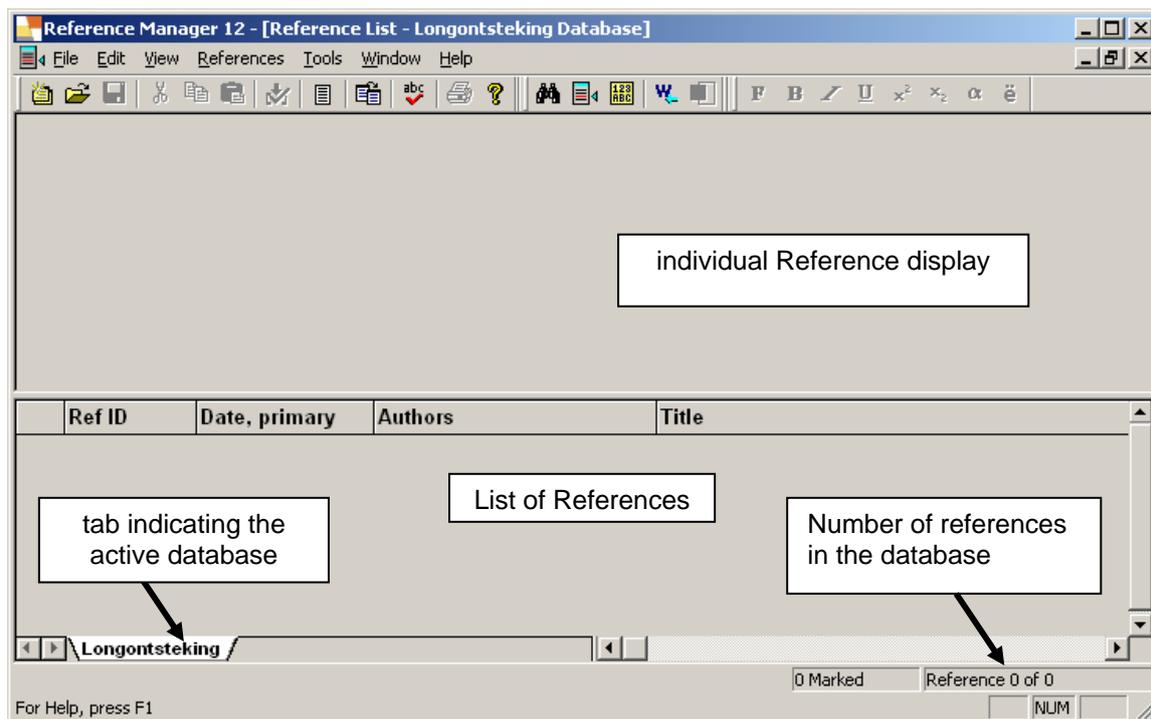
1. Creating a new database

Start the program. Select *File > New database*

In the *New Reference Manager Database* dialog screen, give the name and select the location of your new database. Click *New*

Note: When creating a database, 2 files will be generated an *RMD* (for Data) and an *RMX* file (for Index) Both are necessary to run the program.

After creating the new empty database, the window as shown below will appear:



2. Importing PubMed results into Reference Manager

Save your PubMed results in a file:

Click the arrow in *Send to:* > *Choose destination > File*

Select the download format *MEDLINE* (this is necessary for correctly transferring to Reference Manager)

Click *Create File*, a dialog appears; select *Save*

In Reference Manager, select *File > Import Text File*.

Insert in the boxes of the dialog window:

- Database: the destination of your import session

- Filter: select **PubMed.cap**. You may use the browse button

The import filter or capture file (extension *.cap*) transfers all elements of the original references to the corresponding Reference Manager fields.

Text File: select your PubMed text file with the browse button

Select *All* for Reference Range and click *Import*.

Confirm *Import successfully completed > OK > Close*

A new temporary tab *Imported* appears at the bottom. The imported references are also present in the database. This tab will disappear on closing the database or the program.



3. Direct exporting from Web of Science into Reference Manager

Results from a Web of Science can be exported directly into Reference Manager. In the results list, scroll down. In Step 1, select your preference.

The screenshot shows the 'Output Records' section of a Web of Science search results page. It is divided into three steps:

- Step 1:** Selection options: Selected Records on page, All records on page, Records 1 to 89.
- Step 2:** Record format options: Authors, Title, Source, plus Abstract, Full Record, plus Cited References.
- Step 3:** Export options: Save to: EndNote Web, EndNote, RefWorks, ResearcherID. A dropdown menu shows 'Save to other Reference Software' with a 'Save' button below it.

In Step 2: Select *Full Record*.

In Step 3: Click Save to *EndNote* (this includes also Reference Manager)

Processing Records

The screenshot shows a 'Please wait while your request is processed' message. Below it, the 'Product' is 'Web of Science' and the 'Selected action' is 'Export to Reference Software'. It indicates 'Processing 89 records: 10... 20... 30... 40... 50... 60... 70... 80... 89... Done.' There are 'Export' and 'Back to Results' buttons. A 'Choose Destination' dialog box is open, showing 'Export to:' with 'EndNote' and 'Reference Manager' listed. 'Reference Manager' is selected. 'OK' and 'Cancel' buttons are visible.

In the screen *Choose Destination*, select Reference Manager and your destination database. The import process will start now.

When finished, in Reference Manager the WoS references are presented under the temporary tab *Imported* and they are present in your database.

4. Check for duplicate references

Checking for duplicates in the Reference Manager database may be done during importing or after an import session.

- **Deduplicating during importing** is activated with *Tools > Options > Import > Duplicate References > Do not import*. This will slow down the process, but it might be preferred if you expect large numbers of duplicates.

Select the criteria to check for with *Tools > Batch Operations > Duplicate Search > Options > Fields to compare*

Tip : Duplicate references may seem unique because of different representations of the Periodical and Authors' names. For this reason it is advised to unmark *Periodical* and *Author*. You may mark *Title primary*, *Date primary* and *Start Page* as fields to check.

Deduplicating within a database:

Mark the criteria to compare with *Tools > Batch Operations > Duplicate Search > Options > Fields to compare*.

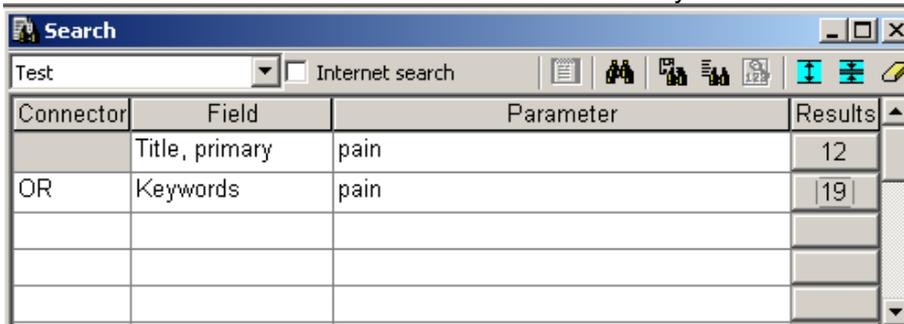
Complete the duplicate search with *Tools > Batch Operations > Duplicate Search > Search*.



Duplicate references are now shown as a subset in the *Duplicates* tab. To view couples of duplicates, sort them by Authors' name by clicking in the grey column header. Determine which of the variants you want to keep or delete. Delete the unwanted variants with *References > Delete > Marked or Unmarked References > OK*. The references are removed from the *Duplicates* tab and also from the entire database.

5. Retrieving references within the database

It is possible to perform a search within the Reference Manager database. Click *References > Search References* or Click , fill out the preferred fields and parameters and click . The screen below shows a search for title word / keyword Pain within the database Test.

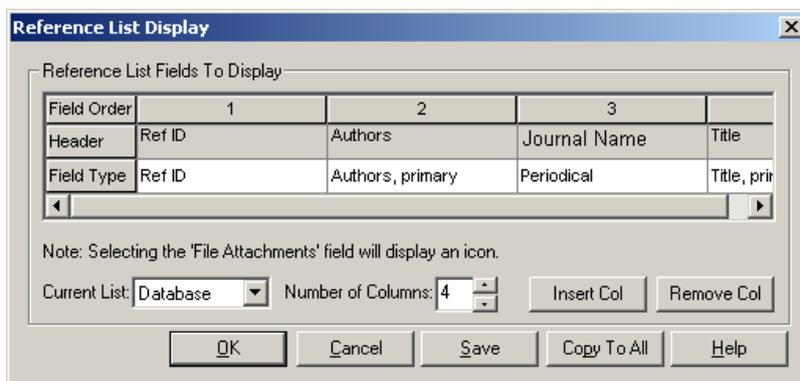


The resulting number of references is shown under *Results*. Clicking this number shows the set as a temporary tab *Retrieved*

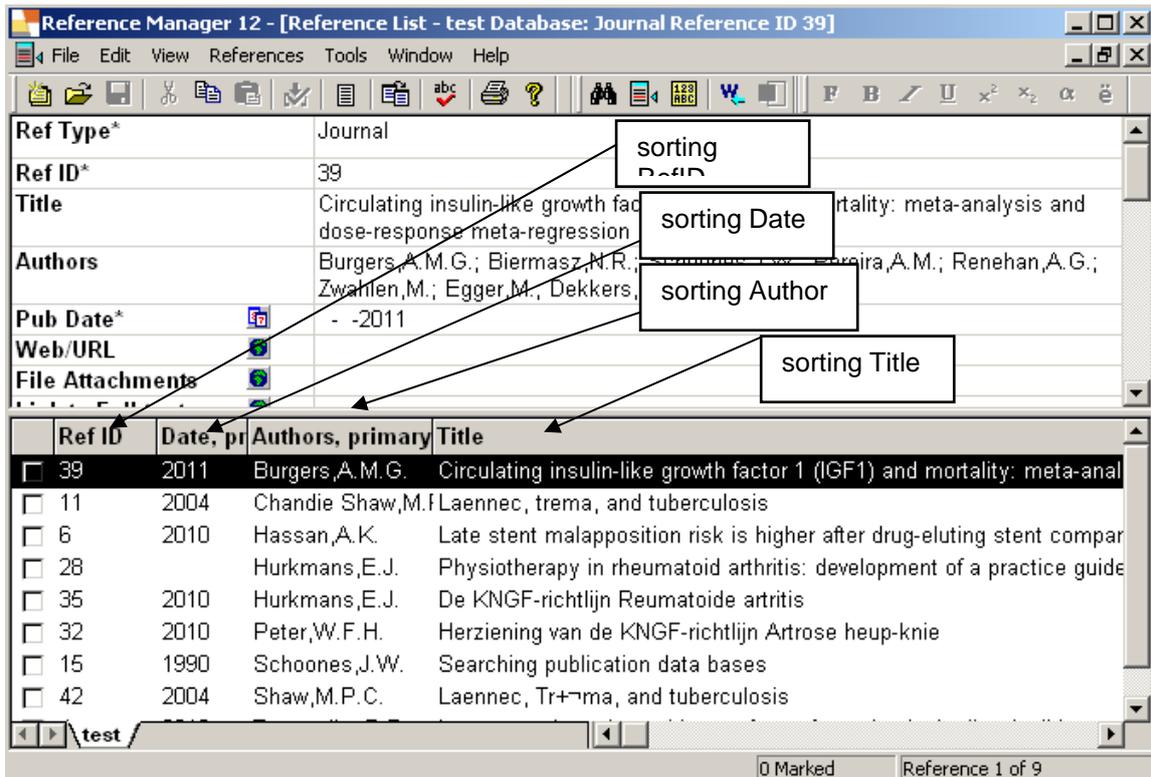
Tip: The Automatic Pop Up Browser for keywords is switched on or off with *Tools > Options > General*

6. Adding a column, sorting within columns

The default *List of References* displays three columns: *Ref ID*, *Authors* and *Title*. It is possible to add columns on display, e.g. to sort references by another feature. Select *Tools > Reference List Display*. Highlight the column for which you want to add one and Click *Insert Col*. An extra column with header *Ref ID* has been inserted. RefID is already present. Change the field type of the new column, e.g. select *Periodical*. The grey column header can get any title you prefer, e.g. *Journal Name*.



The *List of References* now shows an extra column with the journal titles



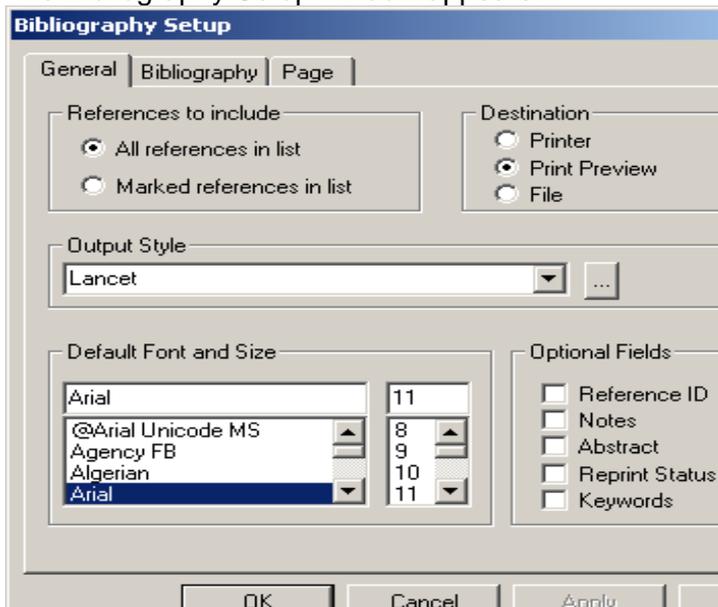
Click on the grey column header to sort it alphabetically or by number.

7. Creating a bibliography

The format of a bibliography is defined by the chosen Output Style. You may use all references of the database or a selection to generate the reference list. Sort the database to your preference and mark a selection of references if so desired.

Select *Tools > Bibliography > Generate from Reference list*

The Bibliography Setup window appears.



Check your preferences for References to include, Destination and Output Style and click OK. The layout of the list may be changed by selecting another Output Style.



To remove marks from the database, use the right mouse button > *Clear All Marks*

8. Inserting citations in Word (*Cite While You Write, CWYW*)

Cite While You Write enables you to insert and handle citations from your Reference Manager database in a text without leaving your wordprocessor.

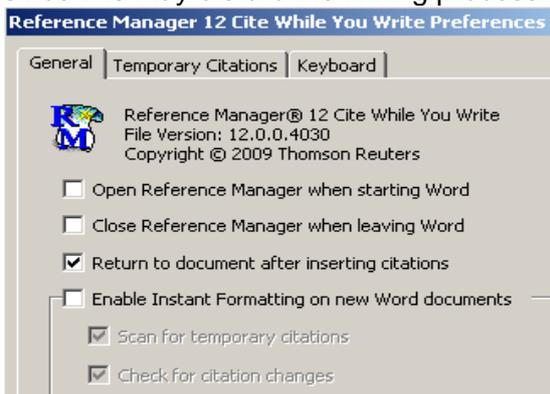
A bibliography according to your preferred format can be generated at any moment in the writing process.

In the Word taskbar select *View > Toolbars > Reference manager 12*. The Reference Manager toolbar is now activated. This toolbar links references from Reference Manager to positions in the text.



These options are available:

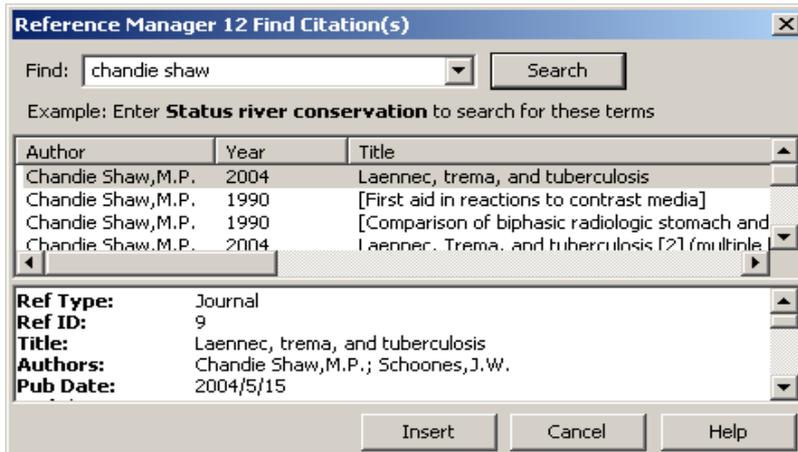
It is advised to switch off Enable Instant Formatting, since this may disturb the linking process.



Click the icon *Cite While You Write Preferences*  and deselect *Enable Instant Formatting on new Word documents*. With the icon *Instant Formatting*  you may deselect this option on another level.

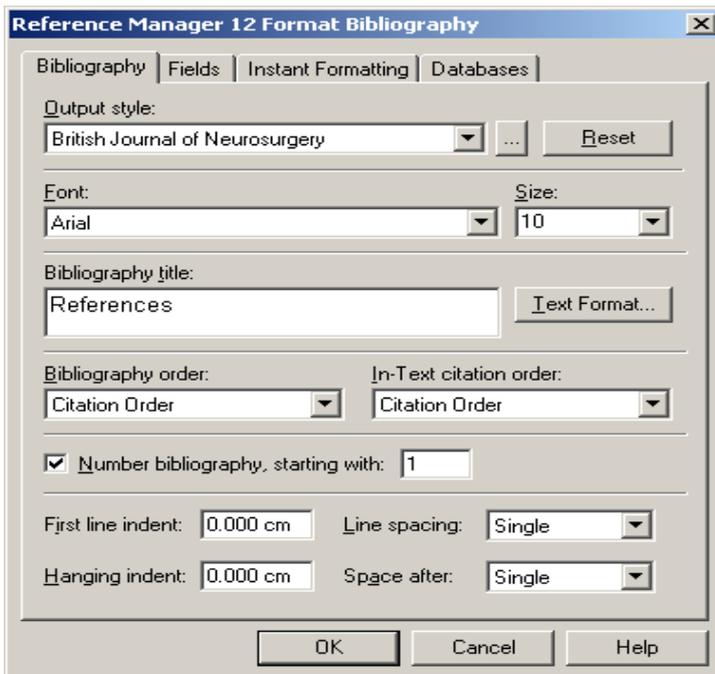
In your sample text, place the cursor in the position where a citation is needed and click the icon *Insert Citation*  in the Reference Manager toolbar.

In the *Find* box, type a discriminating feature of the desired reference, like author name or title word, and click *Search*.



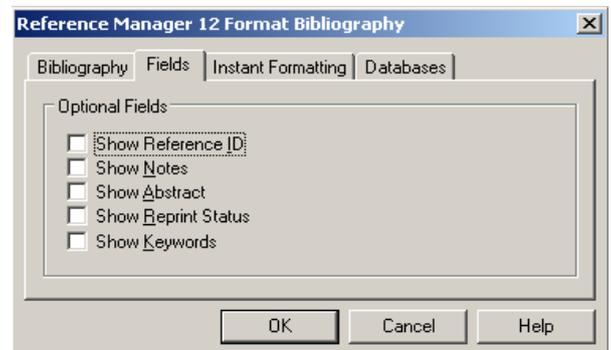
One or more references that match the criterium are presented. Select your choice and click *Insert*. The temporary citation like {Chandie Shaw 2004, 9 /id;McKinley, 2004 52 /id} is added. It is also possible to mark references beforehand in your Reference Manager database for inserting them in the Word document. Use the icon *Insert Marked Reference(s)*  to place them in the text.

Formatting in final layout is done with the icon *Generate Bibliography* 



Select the preferred *Output Style* with the browse button , customize Font and Size as preferred

With the tab *Fields*, more preferences may be added



The citations in the text are formatted and the corresponding bibliography is added at the bottom of the document. To change or correct inserted citations, select *Revert to Original Text*  in the Reference Manager toolbar. All citations will be replaced by unformatted references and the bibliography is deleted. This allows you to remove or replace citations. Click  and references and bibliography are renumbered.

Tip: Citations shaded grey makes them easily spotted in the text. To activate this *Field Shading* in Word, select *Tools > Options > View > Field Shading > Always*.

Tip : Deleting references is also possible via *Edit Citation(s)*  in the toolbar



Use the icon *Generate Bibliography*  whenever you want to apply another style.

Tip: When exchanging a document for reviewing, text changes may damage the active links to Reference Manager. To avoid this, turn your text to a plain text copy for commenting, by removing field codes with . Keep your own copy with active links.

10. Creating a tailor made Output Style

A set of Output Styles is included in the program software. They are tagged with the extension .os. A style that turns out to be incorrect or missing, can be tailor made.

NB: A citation in Word consists of two parts: the *In-Text Citation* and the corresponding *Bibliography* at the bottom. Both have their own definitions in the Output Style.

For example:

Journal X is not in the list of Output Styles. The *Instructions for Authors* of this journal prescribe:

- Citations in the text are in superscript e.g. not reference(1) but reference¹
- Number ranges are written in full e.g. not ^{1-3, 5-7}, but ^{1,2,3,5,6,7}
- In the List of References, journal titles are in bold. With more than two authors, list only the first 2, followed by *et al.*

Take the general style *Uniform* to adapt it to your preferences with *Tools > Bibliography > Open Output Style > Uniform*

Define the settings for the In-Text Citations with the In-Text Citations tab. In the *Definition* field, highlight *<Citation Number>* and in the Toolbar, click the  icon. The *Sample* at the bottom shows your change. The brackets need to be removed. Click the button *In-Text Citation Settings* and adjust the definitions for Delimiters, Separators and Number Ranges. The *Sample* at the bottom shows your changes.

The adapted Output Style must be saved with the new name Journal X in an appropriate folder.

Define the settings for the bibliography with the tab *Bibliography*. Select as *Reference Type: Journal**. The righthand window shows the *Definition for Journal* and a *Sample* is shown at the bottom. In the *Definition* window, click *<[11] · Journal>* to highlight this field and click the  icon in the toolbar, to change it to Bold type.

To change authors' presentations, double click *<[04] · Authors>*. The tab *Author List* shows options for Abbreviated Author list. The *Sample* shows the adaptations.

Click  to save the changes.

With *Generate Bibliography* , select *Journal X* using the browse button  to apply this style.

Important : When backing-up a database, make sure to copy both the .rmd and the .rmx file to another folder.

Useful URL's :

The *Bibliographic Software Board* of the Dutch Reference Manager dealer:

<http://www.researchsoftware.nl/>

The *Support and Services* Department of Reference Manager's producer:

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