
UPDATING FILTERS

For updates to output styles: <http://www.refman.com/support/rmstyles.asp>

For updates to import filters: <http://www.refman.com/support/rmfilters.asp>

University of Calgary Health Sciences Library filters:
<http://www.ucalgary.ca/lib-old/medical/HSL2003/filters.html>



Life Sciences Library

Reference Manager 11 for the Life Sciences

MORE INFORMATION

The Reference Manager® website has some information, including sections on product information and support and services:
<http://www.refman.com/>

Frequently Asked Questions
<http://www.refman.com/support/faqs/index.asp>

For more information about all of the features available in Reference Manager 11®, consult the manual:
<http://www.referencemanager.com/support/docs/ReferenceManager11.pdf>


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NOTES

Removing Field Codes

Use the *Remove Field Codes*  command/button to create a second copy of the document with all RefMan coding removed. It is used for sending documents to a publisher or if you would like to edit the document without using RefMan.

Commonly Used Citation Style in the Life Sciences

- American Psychological Association, 5th edition
- Vancouver Style (Uniform Requirements for Scientific Manuscripts Submitted to Biomedical Journals)

ADDITIONAL TROUBLESHOOTING

Snag-It, MacroMedia FlashPaper, Copernic Agent, EZPhoto

CWYW will not work if the following add-ins are installed in Word: Snag It, MacroMedia FlashPaper, Copernic Agent, and EZPhoto.

See the CWYW FAQ for the solution:

<http://www.refman.com/support/faqs/CWYW/faq3.asp>

Track Changes

CWYW conflicts with the 'Track Changes' feature in Word. This may cause problems in the document formatting or may result in an 'Unknown Error'.

See the CWYW FAQ for the solution:

<http://www.refman.com/support/faqs/CWYW/faq5.asp>

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What is Reference Manager?

Reference Manager® is a bibliographic management software program created by Thomson ISI ResearchSoft that allows users to create databases of references of articles, books, conference proceedings and other information sources by:

- Creating the records manually;
- Bringing in records from databases.

The databases can then be used to:

- Store and retrieve references;
- Create bibliographies in numerous journal and citation styles, including Vancouver and APA;
- Insert citations and create bibliographies for Word or WordPerfect documents in numerous journal and citation styles (Cite While You Write).

Life Sciences Library Website

McGill's Life Sciences Library's website has a page on bibliographic management software with links to useful guides from other websites: <http://www.health.library.mcgill.ca/research/infoskills/bms.cfm>

Downloading the Software

The latest versions of EndNote, Reference Manager and ProCite are available on the McGill University's central software distribution site <http://elms04.e-academy.com/mcgill/> (ELMS). The ELMS site is restricted to the McGill community and authentication is required to access the site to download the software.

System Requirements

Windows 2000 or XP and 90.5 MB of free space on your computer. Does not run on a Macintosh.

Inserting a Citation


Click on the Insert Citation icon  where you want the citation to appear.

The *Reference Manager Insert Citation* window will open. Enter term/s in the *Search For* box (more than one term can be search by putting a comma or space between words). Phrases can be searched by putting quotation marks around them. Click *Perform search*.

From the list of retrieved sources, double click on the desired one to insert it in the Word document. More than one reference can be selected by pressing on the control key of your keyboard (**Ctrl**) and clicking on the references. Press **Insert**.

Note: if you want to search more than one database, open them all in Reference Manager.


Generating a Bibliography in Word

To generate your bibliography when you have finished writing your paper, click on .

Click *Reset* to change the default bibliographic format to your preferred format.


Always generate your bibliography one last time when you have finished your manuscript, to remove any deleted citations from the bibliography.

To Remove or Edit a Citation

Click on  OR highlight citation, right-click with mouse, and select *Edit Citation* to make changes inside a citation, such as adding page numbers or removing author names from author-date citations. [e.g. Harrison (2004) concluded...]. This is also the only way to remove a citation and its accompanying reference from the reference list completely.

BIBLIOGRAPHY

Creating Reading Lists

To create a reading list or bibliography in a Word document from a Reference Manager database, select the references you wish to include by marking them off, or by conducting a search within the database. Then click on *Tools > Bibliography > Generate from Reference List* and select *Marked References*. From here you can choose which fields to include, and what output format (citation style) you would like for the bibliography by clicking on the *Output Style browse* button . Select *File* and save the document to your PC. This bibliography can then be edited or cut and pasted into another document.

CITE WHILE YOU WRITE (CWYW)

CWYW Toolbar in MS Word



Once installed, the Reference Manager toolbar will usually be automatically added to MS Word.

Viewing or Hiding the Toolbar

To view or hide the Reference Manager toolbar, go to *View* (in the Menu bar) > *Toolbars > Reference Manager 11*

Troubleshooting

If you install Word AFTER installing Reference Manager, you will have to install the toolbar program separately, go to *C:\Program Files\Reference Manager\RefManConfig.exe* Only check off *Cite While You Write for Microsoft Word* and click on *Next*.

CREATING A NEW DATABASE

Naming and Saving a Database

Open Reference Manager and select *File* from the menu, then select *New Database*.

A *New Reference Database* dialog box will appear.

Name the database. Select a folder in which to save your database. Make sure you are saving the file in a folder OUTSIDE the Reference Manager program. This will help ensure that your database won't be lost if you uninstall or upgrade Reference Manager at a later time. If you move your database to a different folder, it is important to move both files, or else your database will not open.

Adding Periodical Synonyms for Medical Journals

Click on the *Advanced* button. This opens up the *New Database Advanced Options*. Beneath *Periodical Synonyms*, select *Medical*. This list will download the information the database needs to generate journal titles or their abbreviation in the appropriate citation style. Click *OK*.

Then click *New* to actually create your new database. It will take Reference Manager a couple of minutes to load the journal synonyms into the database.

File Management

Each Reference Manager database consists of two files; a *.RMD file (the data) and a *.RMX file (the index).

For example, if your database is called "Data" you will have a "Data.rmd" file and a "Data.rmx" file in the folder where the database resides.

Both files are needed in order for the program to be able to open the database, so do not delete either file.

ENTERING RECORDS MANUALLY

Click on *References*, then *New*. This opens a blank reference screen.

Ref Type

There are thirty-five types of records to choose from, such as Journal or Electronic Citation, Book Chapter or Book, Whole and many others.

Note: Use *Journal (Full)* for citing an entire issue of a journal. When creating a new reference for lecture notes, select *personal communication* as the Ref Type.

Journals Synonyms List

Reference Manager has the ability to substitute one version of a journal's name for another in the formatted bibliography. For example, it can substitute the full version of a journal's name for the abbreviation and vice versa. It will not change your original database records. In order to use this function it is necessary to select a synonyms list for the journal names in the database and edit the style to enable journal substitution. As previously noted, it is best to set up the synonym list during database creation. When creating a new database, remember to select the *Advanced* button, then *Medical* from the *Periodical Synonyms List*.

For more information: See the 'Entering References or Terms' FAQ to add periodical synonyms to an already existing database:
<http://www.refman.com/support/faqs/Terms/faq1.asp>

Author

Enter the author surname followed by initials or full first and middle names, if known. For corporate names, force Reference Manager to use exactly as shown (without inverting after comma) by preceding name with = sign. [e.g. =National Cancer Institute, National Institute of Health].

FINDING AN ITEM AT MCGILL UNIVERSITY LIBRARY

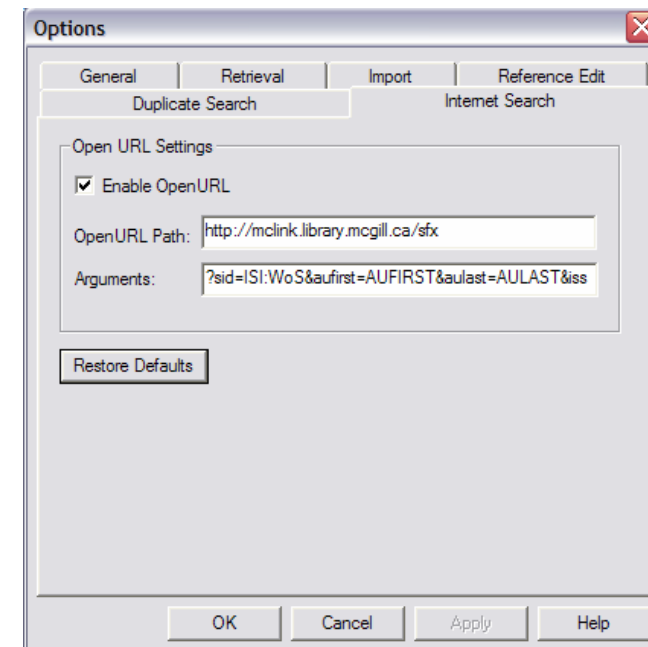
OpenURL Linking

From the *Tools* menu, select *Options*, then the *Internet Search* tab. Select "Enable OpenURL" and enter the following URL into the box for the OpenURL path:
<http://mclink.library.mcgill.ca/sfx>

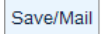
Leave the text entered in the "Arguments" box as is. Click on *OK*.

When you would like to verify the availability of a reference at McGill, connect to McGill via VPN, then select a record from a Reference Manager database. From the *References* menu, select "OpenURL Record Link". A browser window will appear with a menu displaying McGill Library's access option for the selected reference.

Always check the McGill Library catalogue for the most current holdings.



IMPORT RECORDS FROM THE MCGILL LIBRARY CATALOGUE

Use the  button to create a file of all your selected catalogue records.

From the *Save/Mail* screen, for *Record Format*, select *Reference Manager (RIS)* and click on *Save/Mail* at the bottom of the screen. The button *Save Records on Your Computer* will appear. You must click this button to actually save the record(s).

Your computer will prompt you to open or save the file. It is recommended that you SAVE the file in a folder you will remember.

Open Reference Manager, from the *File* menu, select *Import Text File*. Choose the database you would like to import the record(s) into from the *Database* drop-down menu. From the *Filter* menu, choose *RIS.cap*. For the *Text File* menu, locate the saved file on your computer. Click on the *Import* button to import the saved record(s) from the Library catalogue.

Remember to delete the RIS file when you have finished importing.

VIEWING RECORDS

Quick Scan/Search

Click on the column you wish to search on to sort the records. As you drag the scroll bar, it displays first text of the field you've sorted by. [e.g. sort by author a-z, then scroll down to find article by author Henderson].

Pub Date

To change from English (US) to Canada if you prefer dd/mm/yyyy (Canada) to the default mm/dd/yyyy, click on the *Start* button in Windows XP, highlight *Settings > Control Panel > Regional and Language Options*. Enter date related information in the *Other* portion of the field [e.g. Spring/Summer]

Link to PDF

Use this field to link to the PDF on the web (using the URL) or on your hard drive. To link to a file on your hard drive, right click in the field, then select *Insert file* from the menu. You will be presented with a Windows dialog box where you can locate and select the file you want to link to. It is recommended to save all documents in the C: drive to keep the pathway intact should you move Reference Manager to a new PC.

Issue

For Vancouver Style, exclude the issue number from the field if you know the journal is continuously paginated through the entire volume.

User Defined (User Def 1..) Fields

You can edit these 5 empty "User-defined fields" to suit your filing needs. [e.g. To keep track of articles that cite your articles, used for a particular course] To do so, when opening a database, select Access Rights: *Read-Write Exclusive*. Then go to *Tools > Field and Type Edit*. After labeling one or more of the fields, click on *Update for All Types* to apply the new label(s) to all types of references.

DIRECT EXPORT FROM OVID ONLINE

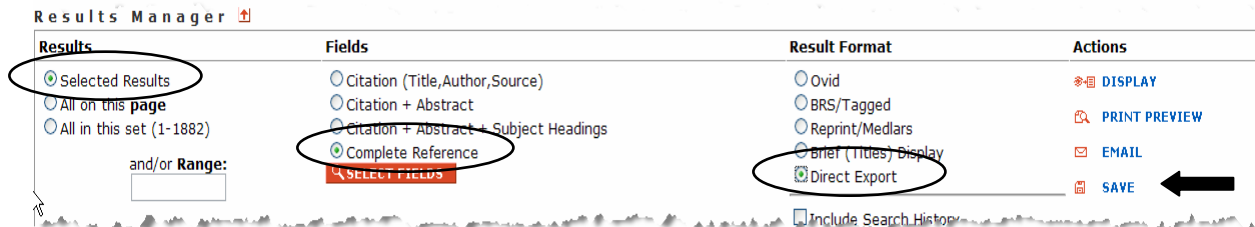
Ovid Online and Reference Manager

You must have Reference Manager installed on the same computer from which you are performing a Direct Export. Please note that Direct Export may not work with all Ovid databases or all Reference Types. It can be used for EMBASE, MEDLINE, PsycINFO and possibly others.

To see a list of databases that support Direct Exporting, see <http://www.refman.com/support/webcap.asp>

How to Export from Ovid Online

Select *Complete Reference* under *Fields*. *Direct Export* under *Result Format* and click on *Save*. Reference Manager should open automatically.

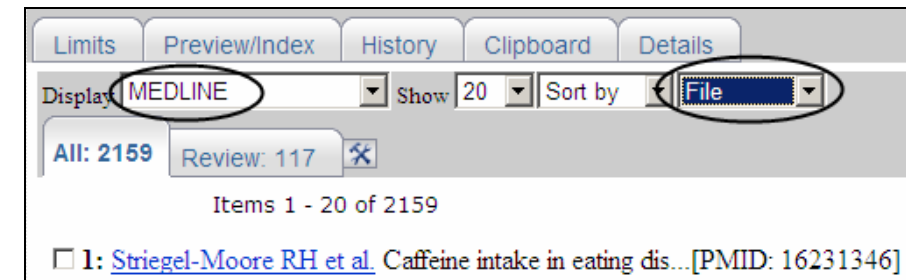


Note: Direct Export does not break down (or parse) the Source information (Journal Name, Volume, Issue, Pages) but “dumps” all the information into the *Journal Name* field. Download the University of Calgary’s filter to resolve this problem:

Rename the OvidWeb.cap file in *C:\Program Files\Reference Manager\Import* (e.g. rename it OvidWebDefault.cap),

Click on the OvidWeb.cap link at <http://www.ucalgary.ca/lib-old/medical/HSL2003/filters.html>
Save this file to *C:\Program Files\Reference Manager\Import*

IMPORT TEXT FILES FROM PUBMED



Save the file on your computer following instructions in figure above.

Open your Reference Manager database. From the Reference Manager Menu bar, go to *File > Import Text File...*

Select the PubMed.cap filter by clicking on . Select the file containing your PubMed citations by clicking on .

Remember to delete the .txt file created by PubMed after finishing the import.

For a list of how to create and import text files from various databases, see <http://www.ucalgary.ca/lib-old/medical/HSL2003/filters.html>