

Reference Manager Tips

Note: This example is based on a research project on Diabetes.

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Your screen

Your screen should look like the screen below. You should see 3 fields named: Inc/Exc TiAb; Inc/Exc Full Text; Future Research. If you do not see these fields check Ref Type to ensure it says JOURNAL; if changing Ref Type to Journal does not change the look of your screen, see [Customizing the Reference List](#).

Abstract displays below these three fields.

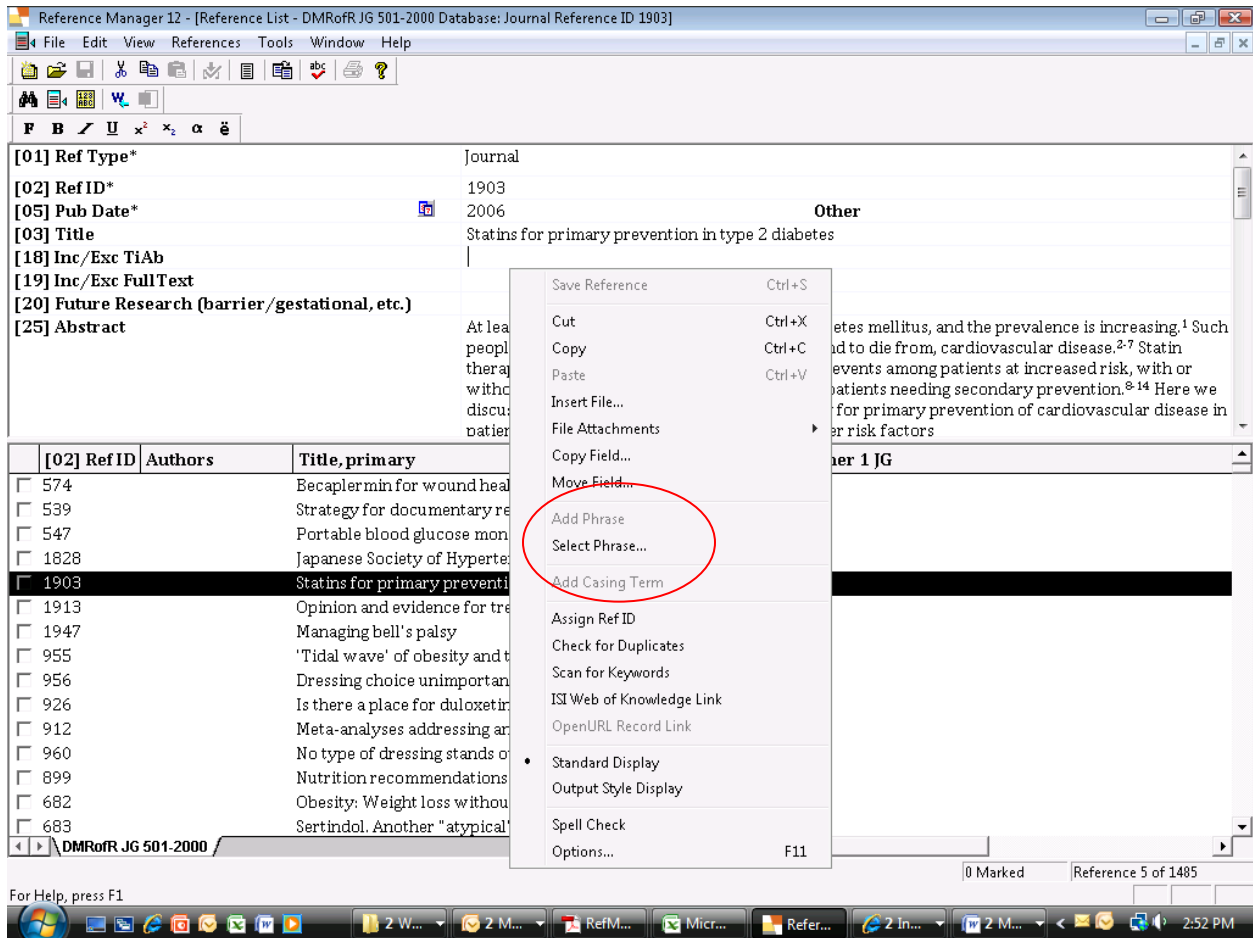
The screenshot shows the Reference Manager 12 interface. At the top, a menu bar includes File, Edit, View, References, Tools, Window, and Help. Below the menu is a toolbar with various icons. The main window is divided into two panes. The top pane shows a detailed view of a reference with the following fields: [01] Ref Type* (Journal), [02] Ref ID* (1903), [05] Pub Date* (2006), [03] Title (Statins f...), [18] Inc/Exc TiAb, [19] Inc/Exc Full Text, [20] Future Research (barrier/gestational, etc.), and [25] Abstract (At le... people... therapy... without dr... discuss whe... patients with...). A callout box points to the 'Journal' value in the Ref Type field, stating 'REF TYPE = JOURNAL'. Another callout box points to the Inc/Exc fields, stating '3 fields for your decisions. Inc/Exc TiAb = decision made based on title and abstract; Inc/Exc Full Text = Decision based on full text screening. Future Research: This field was part of a project but you can change the name and purpose of this field to suit your project.' A third callout box points to the Inc/Exc fields, stating 'After entering Exc or Inc you may add comments to Fields 18 or 19. E.g. Exc—outcomes; Exc-population, etc.' The bottom pane shows a list of references with columns for [02] Ref ID, Authors, Title, primary, Job, and Screener 1 JG. The reference with ID 1903 is selected and highlighted. A callout box points to the bottom pane, stating 'The Database window has two panes: the top pane is the Reference Display, and the bottom pane is the Reference List.' The status bar at the bottom shows '0 Marked' and 'Reference 5 of 1485'. The Windows taskbar at the very bottom shows the time as 2:42 PM.

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Phrase Lists

You can type text into any field in Ref Man and you can also use Phrase lists to avoid spelling errors/variations.

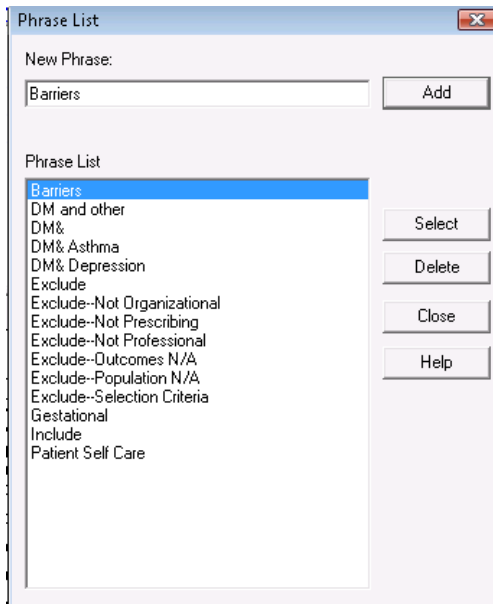
To use or create a Phrase List, right click when your cursor is in the field where you want to add text. You will see the following. Choose Select Phrase. If you do not see words, review info on following page.



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You should now see a phrase list. To insert a phrase into a field simply highlight it in the list then click Select. You can select only one phrase at a time, but multiple phrases may be added to a single field. If your phrase list is empty, create your own list by typing a word or words and clicking the Add button. Delete info in the New Phrase box and type another term, click Add, and so on. The terms you add will appear in the Phrase List box.

Suggested words and phrases below.



Criteria to note for future research

Any type of EPOC-appropriate Intervention related to:

1. Barriers to DM care [**CODE : Barrier**]
2. DM and co-morbidities
2a. [**CODE: DM& or DM& Condition**]
Examples:
DM&
DM& Asthma
DM& depression
DM&Hypertension
3. Patient self-care
[**CODE: SelfCare**]
4. Gestational diabetes
[**CODE: Gestational**]

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Opening, Closing, Saving, and Deleting References

Selecting References

To open a reference (or a group of references) in a database, you must first highlight it. The simplest way to highlight a reference is to click on it in the reference list.

To highlight multiple references:

- Hold down the CTRL key while clicking on individual references. Press the CTRL key and click on a highlighted reference to deselect that reference and retain the rest of the selection.
- Highlight a range of references by clicking on the first reference, then press the SHIFT key and click on the last reference of the range. Many operations in Reference Manager work on your choice of the highlighted references, the marked references, the unmarked references, or all references. For more information about selecting reference, see “Selecting References” on page 213.

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Opening References

Highlight the reference(s) you want to open, and then do one of the following:

- Double-click the selected reference(s).
- Press ENTER.

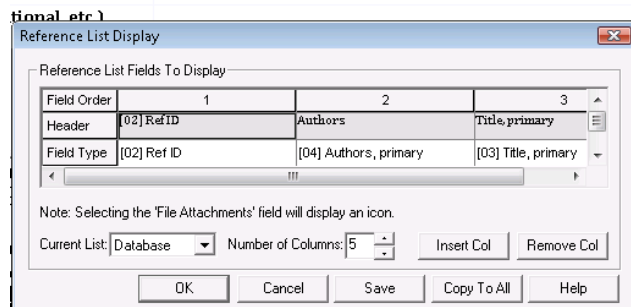
Customizing the Reference List

While the default Reference List shows three Reference Manager fields (Reference ID, Author, and Title), the list can be customized to display up to 31 fields.

In the following exercise you will customize the Reference List by selecting different fields to display and then changing the column widths.

To select the fields to display:

1. From the *Tools* menu, choose *Reference List Display*. Each column represents a field appearing in the Reference List.



- Field Order—The first row allows you to specify the order in which the fields appear.
- Header—The second row allows you to modify the text appearing as a Header.
- Field Type—Row three allows you to select the field you want to view.

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2. Move the mouse pointer over the number 3 in the Field Order row. When the cursor changes to a downward arrow, click the mouse to highlight the entire third column.
3. Click the *Insert Col* button. A new column is inserted before the third column; the original third column moves to the right. The newly inserted column defaults to Ref ID as the Header and Field Type. The Header row automatically changes when you select a new Field Type.
5. Click the Header row in the new column and change “Date, primary” to Date by deleting the word “primary.”
6. Click *OK* to save your changes. Reference Manager displays a message asking whether you would like to copy this reference list format to all reference lists. Click *Yes*. The Date field now appears in the Reference List.
7. Resizing: You can resize the width of the columns easily by dragging between column titles. Use the next exercise to change the width of the Date field in the Reference List.

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