



ProCite[®]

Version 5

Windows 2000/98/95/NT
and
Power Macintosh

ISI ResearchSoft

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Introduction and Installation

Overview

ProCite 5 is designed for ease of use. The lessons in this Getting Started Guide use the Sample Database provided to describe common operations you may perform with ProCite. See the ProCite User's Guide for full details about the ProCite program.

Lessons Included in This Manual

Complete these lessons with the Sample Database provided to learn how to create and effectively use your own ProCite database.

- Getting Started
- Navigating a ProCite Database
- Entering Records
- Searching and Sorting a Database
- Generating Bibliographies
- Preparing a Manuscript and Bibliography
- Creating an Output Style

After the lessons we include these chapters:

- Cross-Platform Compatibility
- The ProCite Toolbars
- Keyboard Commands

Using This Manual

This Getting Started Guide walks you through the basic features of ProCite. If you are using a network version of ProCite, your network administrator received a complete ProCite User's Guide.

This manual describes ProCite for Windows *and* ProCite for the Macintosh. While the screen examples show ProCite for Windows, everything is essentially the same on both platforms — including menu items and dialog boxes.

When a command, file, or folder name differs between the two platforms, both are included. For example:

To start the installation program, double-click on **Setup** (Windows) or **Install ProCite 5** (Macintosh).

Use the table of contents at the front of the manual to locate information. A glossary is included in the online help.

Throughout this manual:

- Menu names, menu items, and buttons are in a bold typeface.
- ProCite field names and workforms are in italics.
- Examples are in the sans serif Helvetica font.

Many menu items in ProCite have a corresponding keyboard equivalent and/or a toolbar icon. The keyboard equivalent appears on the menu next to the associated command. You can turn toolbars on or off from the **View** menu, and hold the cursor over a toolbar icon to find out the corresponding command. Keyboard equivalents and toolbar icons are listed at the back of this manual, and you can use them at any time.

A right-click (Windows) or control-click (Macintosh) in the program displays a context-sensitive menu. Although this manual does not mention the context-sensitive menus, you can use them at any time.

Hardware and Software Requirements

To install and run ProCite, your computer and system software must meet the following minimum requirements under Windows or on a Macintosh:

Windows

- 486 or later (Pentium recommended) personal computer or compatible
 - Microsoft® Windows® 95/98 (or later) or Windows NT 4 (or later)
 - 16 megabytes available memory (32 recommended)
 - 30 megabytes available disk space for the full installation of ProCite
 - CD-ROM drive for installation
(please contact ISI ResearchSoft if you require 3.5 inch disks)
 - Microsoft Word 7.x, 97, or 2000, or WordPerfect 7.x, 8.x, or 9 to *cite while you write* (optional)
 - Internet connection for online database searching (optional)
-

Macintosh

- Power Macintosh or compatible (120 MHz recommended)
 - Apple Macintosh System 7.5 or later (7.5.5 or later recommended)
 - 16 megabytes available memory (32 recommended)
 - 30 megabytes available disk space for the full installation of ProCite
 - monitor with minimum 16 grays or 256 colors, 640 x 480 or larger
 - CD-ROM drive for installation
(please contact ISI ResearchSoft if you require 3.5 inch disks)
 - Microsoft Word 6 or 98 to *cite while you write* (optional)
 - Internet connection for online database searching (optional)
-

Installing ProCite

Before you begin, quit from any open applications, screen savers, etc. to prevent conflicts and give the installer room to work.

Note: Make sure you have your ProCite 5 serial number available. You will be asked to enter this number during the installation process. Look on the registration card, on the CD envelope, inside the front cover of the manual, or on the bottom of the ProCite box.

To install, you need the ProCite installation CD. Insert the installation CD. The installation program may start automatically. If it doesn't, run Setup (Windows) or Install ProCite 5 (Macintosh). Follow the instructions on your screen. The amount of time it takes will depend upon the speed of your computer.

By default, the installer places ProCite in the folder "Program Files\ProCite5" (Windows) or "ProCite 5 Folder" (Macintosh) so as not to interfere with earlier versions.

For more detailed installation instructions, read one of the next two sections: *Single User Installation* or *Network (Multi-User) Installation*.

Single User Installation

Before you begin, quit from any open applications and find your ProCite 5 serial number.

To install the single user version of ProCite:

1. Insert the ProCite CD into your CD-ROM drive.
2. Under Windows, the installation program should start automatically. If the installation program doesn't start automatically, double-click on Setup (Windows) or Install ProCite 5 (Macintosh).
3. Follow the instructions on your screen.

Before installing files, the installation program displays:

- A Readme file that may contain late-breaking news about the installation process or the ProCite program itself
- A license agreement which details terms of use
- A form requesting that you enter your ProCite 5 serial number.

When done, the installation program closes and returns you to the desktop.

Start ProCite by double clicking the ProCite 5 icon. Under Windows, you can go to the **Start** menu, select **Programs**, then **ProCite 5**, and then the **ProCite** icon.

Network (Multi-User) Installation

The multi-user version of ProCite is licensed for a particular number of users. You can install ProCite on a shared network for simultaneous use, or you can install ProCite locally for each of the licensed users.

Note: Accessing ProCite from a network server can be quite slow for Macintosh users. We recommend that Macintosh users install locally.

A network administrator should first install the ProCite program on the network. The installation includes program files, workforms, journal title lists, output styles, configuration files, and sample databases. Then the administrator, or each user, must install system files and word processor files on each local machine.

Network Program Installation

To install ProCite on a server or other networked drive:

1. Put the ProCite CD in your CD-ROM drive.
2. Under Windows, the installation program should start automatically. If the installation program doesn't start automatically, double-click on Setup (Windows) or Install ProCite 5 (Macintosh).
3. Follow the instructions on your screen.

Before installing files, the installation program displays:

- A Readme file that may contain late-breaking news about the installation process or the ProCite program itself
 - A license agreement which details terms of use
 - A form requesting that you enter your ProCite 5 serial number.
4. When asked, indicate the network drive and folder where you wish to install ProCite. The default folder is ProCite5 (Windows) or ProCite 5 Folder (Macintosh). If the folder you specify does not exist, ProCite creates it.

All ProCite files install on the network in the folders defined by the installation program. You will need to install certain system files and word processor files on individual user machines as described in the next section.

Network User Installation

Note: You need full access (read and write privileges) to Microsoft Word's Startup folder in order to install *cite while you write* support for Word.

To install required system files and optional word processor files on individual user machines:

1. From the local machine, go to the ProCite program folder on the network drive.
2. Double-click to start the Netsetup program found in the ProCite folder. Follow the onscreen directions.

The Netsetup program installs the required system files, word processor files for Microsoft Word if it is installed, word processor files for WordPerfect if it is installed, and ProCite icons for your desktop.

If you install Word or WordPerfect at a later date, you can manually install word processor support as described later in this chapter.

If any of the required system files are absent from the System folder, ProCite will either not start up at all or will display an error message during startup. If this happens, run the ProCite installation program from that particular machine. The ProCite installation program checks the System folder for required files, and adds those that are missing.

Keeping Local Copies of Lists, Styles and Databases

You may want to copy journal title lists, output styles, and the Sample Database to your local machine. Copy the files from the network installation of ProCite to your machine.

You will need to indicate the appropriate file folders the first time you run ProCite if you have changed the installation folders from the default settings or when you want to use local files. In ProCite, select **Options** from the **Tools** menu and click on the **File Locations** tab. Select the appropriate drive and folder for each product component and click **OK**. ProCite will remember the new settings for your machine unless you change them again. If you do not set preferences, ProCite will look for files only in the default ProCite folders.

Sharing Databases

When sharing databases on a network, you can run into several multi-user situations:

- Any number of users can open the same database with read-only access. You may want to place the database in a read-only folder to make sure the database is always available to multiple users.
- One user at a time can open a database with read-write access. If a user already has a database open with read-write access, ProCite will tell other users that the database is already in use. The database is not available to others until the user with read-write access closes it.
- When a database is in use by someone, with either read-write or read-only access, you will not be able to open the database with read-write access.
- When you want to share a ProCite for the Macintosh database with a ProCite for Windows user, add the extension .PDT to the primary database file name. ProCite for the Macintosh can directly open a ProCite for Windows database.

Installing "Cite While You Write" Support

Cite while you write support for your word processor is added automatically during ProCite's installation. However, if you installed your word processor *after* installing ProCite, or the ProCite 5 commands do not appear on your word processor's **Tools** menu, you can install the *cite while you write* files.

Under Windows, you can run one of these files to install support:

Single User: In the ProCite program folder, run Cwyw Setup.exe.

Network User: In the ProCite program folder, run NetSetup.exe.

If these setup programs do not install *cite while you write* support correctly, you need to manually install support. See one of the following sections:

- Word for Windows
- WordPerfect for Windows
- Word for the Macintosh

Word for Windows

To manually install support for Word, copy the appropriate files (listed below) from ProCite's CWYW folder to Word's Startup folder (for each copy of Word). The Word startup folder is typically:

C:\Program Files\Microsoft Office\Startup\

This folder can also be specified in Microsoft Word's "Tools:Options:File Locations" dialog. Check the folder location before copying any files.

Note: You need full access (read and write privileges) to Word's startup folder in order to install *cite while you write* support.

Microsoft Word 7.x

Word 7 is installed with Microsoft Office 95. Copy these files from ProCite's CWYW folder to the Microsoft Word 7.x Startup folder:

- Pc5wd32.wll
- Pc5wd7.dot

Microsoft Word 97 or Microsoft Word 2000

Copy these files from ProCite's CWYW folder to the Microsoft Word 97 or Microsoft Word 2000 Startup folder:

- Pc5wd32.wll
- Pc5wd8.dot

After installing the required files, exit and restart any copies of Word that are currently running. When you start Word, ProCite 5 commands appear on the **Tools** menu.

WordPerfect for Windows

The required WordPerfect files are located in ProCite's CWYW folder. You need to tell WordPerfect where to find the files.

Caution! These steps guide you through changing your Windows registry. Do not change any settings other than those indicated here!

To add *cite while you write* support manually for WordPerfect 7.x, 8.x, or 9:

1. Run Regedit.exe, which should be located in the Windows folder.
2. Navigate to:

For WordPerfect 7.x:

HKEY_CURRENT_USER\Software\Perfect Office\WordPerfect\7\Third Party

For WordPerfect 8.x:

HKEY_CURRENT_USER\Software\Core\WordPerfect\8\Third Party\

For WordPerfect 9:

HKEY_CURRENT_USER\Software\Core\WordPerfect\9\Third Party\

3. Insert a new string value named DLL#, where # is a number from 1 to 16. Set the new string value's data to:

For WordPerfect 7.x:

C:\Procite5\CWYW\PC5WP7.dll

For WordPerfect 8.x:

C:\Procite5\CWYW\PC5WP8.dll

For WordPerfect 9:

C:\Procite5\CWYW\PC5WP9.dll

Make sure you identify the correct path if you installed ProCite in a folder other than the default.

4. Exit Regedit.
5. Restart WordPerfect. The *cite while you write* commands should now be available from the **Tools** menu, under a **ProCite** submenu.

Word for the Macintosh

ProCite's installation program looks for the default Word startup folders to automatically install *cite while you write* support. However, if you installed Word in a folder other than the default, installed Word after installing ProCite, or find that ProCite 5 commands do not appear on Word's **Tools** menu, you must manually install *cite while you write* files.

Note: You need full access (read and write privileges) to Word's startup folder to install *cite while you write* support.

Microsoft Word 6

Copy these files from ProCite's CWYW folder to the Word 6 Startup folder:

- ProCite 5 Word Add-in
- ProCite 5 Word 6 Add-in.dot

The Word 6 Startup folder is typically:

- System Folder/Preferences/Word Startup Folder(6)

Microsoft Word 98

Copy these files from ProCite's CWYW folder to the Word 98 Startup folder:

- ProCite 5 Word Add-in
- ProCite 5 Word 98 Add-in.dot

The Word 98 Startup folder is typically:

- Microsoft Office 98/Office/Startup/Word

After installing word processor support, you need to exit and restart any copies of Word that are currently running. When you start Word, ProCite commands appear on the **Tools** menu.

Technical Support

Technical support is available to all registered users, Monday through Friday from 8:00 A.M. to 5:00 P.M. Pacific Time. When calling for technical support, please use a phone near your computer and have your serial number available. Look for your serial number on the CD envelope or inside the front cover of the manual.

To contact technical support:

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Phone: +44 1895-270016

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Getting Started

Online Help

When using ProCite, many of your questions can be answered by using the online help that comes with the program. There are several ways to access online help when using ProCite:

- Select **Help** from the **Menu** bar to find a topic.
- Many ProCite dialogs include a **Help** button so you can see information related to the current activity.
- Display context-sensitive help by pressing the F1 key (Windows) or the help key (Macintosh). If no context-sensitive help is available, choose from the list of topics displayed.

Opening an Existing Database

The exercises in this Getting Started Guide use the Sample Database that installs with ProCite. This database is used to demonstrate navigating a database, entering references, searching and sorting references, and creating bibliographies.

Exercise - Opening the Sample Database

In this exercise you will open the Sample database. If you already started ProCite, go to the **File** menu and choose **Open**, then continue with step 3.

To open the Sample database:

1. Start ProCite:
 - **Windows:** From the **Start** menu, choose **Programs**, locate the **ProCite 5** program group, and choose **ProCite**.
 - **Macintosh:** Open the ProCite 5 Folder and double click the ProCite program.
2. A file **Open** dialog displays for you to locate and open a database. If not, go to the **File** menu and choose **Open**.

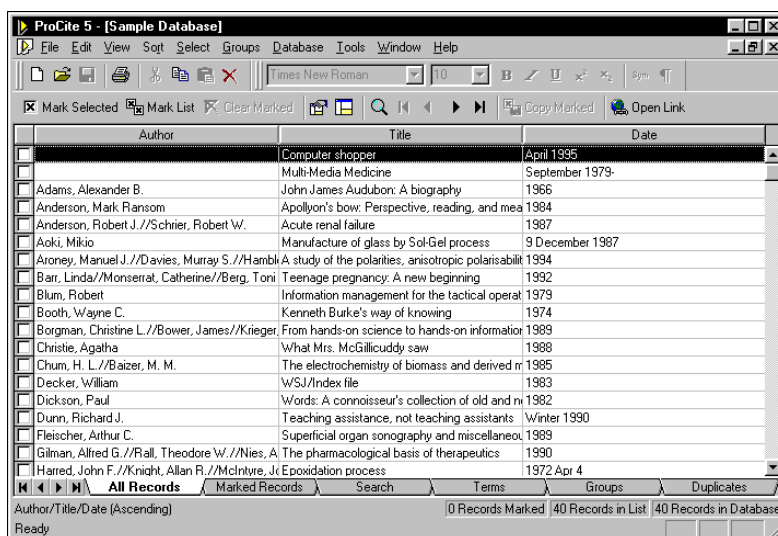
Note: If ProCite has already been used on this machine, it may automatically open the last ProCite file used (this could be a database, list, output style, or workflow). Check the title bar to confirm the Sample database is open. If not, close the file, and from the **File** menu select **Open**. Then continue with step 3.

3. In the file **Open** dialog, locate and double-click on the Database folder located in the ProCite 5 folder.

Note: Make sure the **Open as read-only** (Windows) or **Read-Only** (Macintosh) box is not selected. If it is checked, you cannot make any changes to the database.

4. Locate and double-click on Sample Database (under Windows it includes the extension .PDT). ProCite opens the sample database.

The database window displays a record list of abbreviated records. By default the first Author field, Title field and Date field are shown from each record.



A Status line at the bottom of the window indicates the sort order (Author/Title/Date in Ascending order by default), the number of records marked, the number of records displayed in the current list and the total number of records in this database. The Sample database contains 40 references using different types of workflows.

In the abbreviated record list you can browse through single-line records, mark or unmark records, or display records in full for viewing or editing. Records can also be formatted for previewing the bibliographic style at this window.

Note: Many ProCite menu items have a corresponding keyboard equivalent and/or toolbar icon. The keyboard equivalents appear on the menus next to the associated commands.

Use the next section of this guided tour to learn ways to navigate records in a ProCite database.

Navigating a ProCite Database

Overview

In this section of the Getting Started Guide you will learn to:

- Customize the record list to display specific fields
 - Click sort by column heading
 - Use the Preview Pane to view a reference in more detail
 - Use the GoTo tool
 - Drag and drop between databases
-

Customizing the Record List to Display Fields

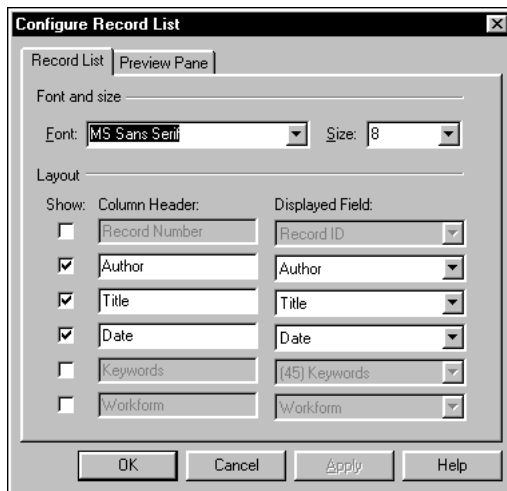
While the default record list display shows only three ProCite fields from each record (*Author*, *Title* and *Date*), the list can be customized to display up to six fields for each record.

In this exercise you will customize the abbreviated list by selecting four fields to display and changing the column widths.

Exercise – Customizing the Display

To customize the record list display:

1. From the **View** menu, choose **Configure Record List** to display the Configure Record List dialog:

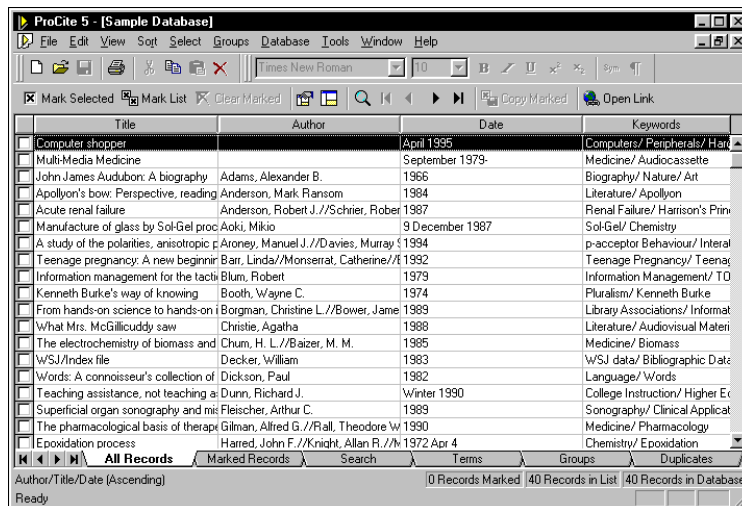


On the Record List tab, the **Layout** box contains three columns of options:

- The **Show** column of check boxes is used to show which of the six fields are displayed.
 - The **Column Header** text boxes allow you to enter header text to be displayed above each field in the record list.
 - The **Displayed Field** column is where you select the fields to display in the order you want them to appear.
2. To rearrange the order in which the fields are displayed, first click on the **Show** check box for **Title** to remove this field from those shown. Next click on the first field (currently **Record ID**) to select this field for the display. Use the next step to change this field to display the *Title* field first in the record list.
 3. From the **Displayed Field** column, click on the arrow to the right of **Record ID** to select the *Title* field as the first field to display. Choose **Title** from near the top of the field list.

Note: The field list includes all 45 ProCite fields plus five “special” fields at the top of the list. The special fields shown are **Author**, **Title**, **Date**, **Workform** and **Record Number**. These fields include all related fields respectively. For example, Author includes both the *Author, Analytic* (01) and *Author, Monographic* (07) fields from the various workforms. Use the special fields when you want to include all authors, titles and dates from a variety of workforms used in the database.

4. The Column Header needs to be changed to reflect header text appropriate for the title field. Click the first field’s **Column Header** text box and type **Title** as the descriptive text for this field.
5. Click the **Show** check box for Keywords to display the *Keywords* field as the fourth field for each record.
6. Click **OK** in the Configure Record List dialog to save the changes and return to the record list. ProCite displays the fields in the order you selected:



You can easily change the width of the columns by dragging between column titles. Use the next exercise to change the width of the *Date* field in the record list window.

Exercise – Changing the Column Width

To change column widths:

1. To see more of the *Keywords* field, move the pointer to the column heading divider between **Date** and **Keywords**. The pointer changes to a horizontal arrow.
2. Drag the vertical bar to the left to reduce the width of the *Date* field.
3. Experiment changing other column widths.

Click Sorting on a Column Heading

Although the *Author* field, or in this case the *Title* field, may be the first field displayed from each record, the records are not automatically sorted by that field. Use the following steps to sort by a displayed field using the click sort method.

Exercise – Changing the Sort Order Instantly

To quickly change the sort order of the record list:

1. To sort by the *Date* field, click on that field's column header. The records are sorted by date in ascending order. Click a second time to change the sort to descending.
2. Experiment sorting the records by the *Author* and/or *Title* fields.

Using the Preview Pane to View a Reference

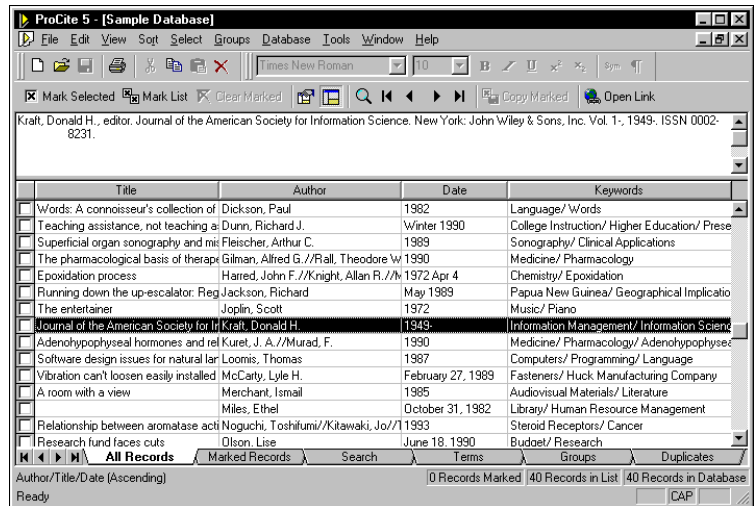
The Preview Pane displays a highlighted record formatted with an output style. You may find this useful when browsing a record list to compare data or to preview records formatted with various output styles.

Exercise – Previewing a Formatted Reference

To preview formatted references:

1. From the **View** menu, choose **Preview Pane**.
2. Highlight the record by author Kraft, Donald H. ProCite formats the highlighted record using an output style (ANSI is the default style) and displays it in the preview pane.

Note: You can move the horizontal divider to allow the preview pane more or less space.



- To switch to a different output style (bibliographic format) for the preview pane, go to the **View** menu, choose **Configure Record List** and click the **Preview Pane** tab.
- Click the **Output Style** arrow and select a style from the list. Use the **Optional Fields** check boxes to view additional information in your Preview. Click **OK** to view the formatted reference.
- When you no longer want to view formatted references, deselect **Preview Pane** from the **View** menu or use the corresponding toolbar icon.

Using “Go To” Commands to Find References

You can move through the Sample database simply by browsing with the scroll bar. However, this is not practical when using a large database. To locate records in a large database, use the **Go to Record** commands.

Exercise - Using the “Go To” Commands

To use the Go To commands:

1. Use the **Go To** commands from **View** menu or the toolbar. You can go to a specific record, go to the first record, go to the previous record, go to the next record, or go to the last record in the list.



2. To find a record based on the sorted order of a database, use the **Go to Record** command (the first button on the Go To toolbar).
3. To locate the record by Helen Schwartz, type the first few characters of the author’s last name in the first text box in the **Go To Record** dialog.
4. If the sort order is not currently **Author/Title/Date**, select that order by using the arrow to the right of the text box.
5. Click **OK** to complete the search. ProCite searches from the top of the record list and highlights the record that most closely matches the text.
6. Experiment using the other Go To commands to move between records in the Sample database.

Drag and Drop Between Databases

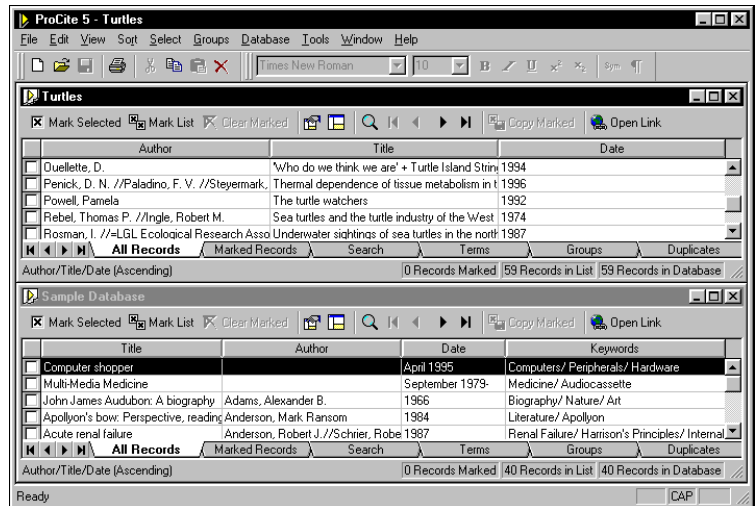
You can copy full records between ProCite databases. To copy records between databases, you need to have both databases open. Use the following exercise to copy a record from the Sample database to another database named Turtles.

Exercise – Copying a Record from One Database to Another

To copy a record from one database to another:

1. Open the ProCite database named Turtles (Under Windows it will include the extension .PDT). From the **File** menu, choose **Open**. The Turtles database is located in the Database folder located in the ProCite 5 folder.

- From the **Window** menu, select **Tile** to display both the Sample database and the Turtles database on the screen:



- In the Sample Database, highlight the record by **Toth, Tibor** and drag it to the Turtles database. This places a copy of the record in the Turtles database.
- Close the Turtles database. The new record is saved and marked.
- Maximize the Sample Database window to continue working with the file.

Entering Records

Overview

In this section you will learn to:

- Import tagged references from online, CD-ROM and Web-based services
- Capture Web page information using Netscape (Windows only)
- Enter and edit references manually
- Configure duplicate checking

Use the following exercises to gain experience importing, entering and editing references in ProCite.

Importing Records from a Saved Text File

Before importing files downloaded from an information service it is important to determine from which service the records were retrieved. Each service saves the same information in a slightly different format. The format is significant to the configuration file used in ProCite.

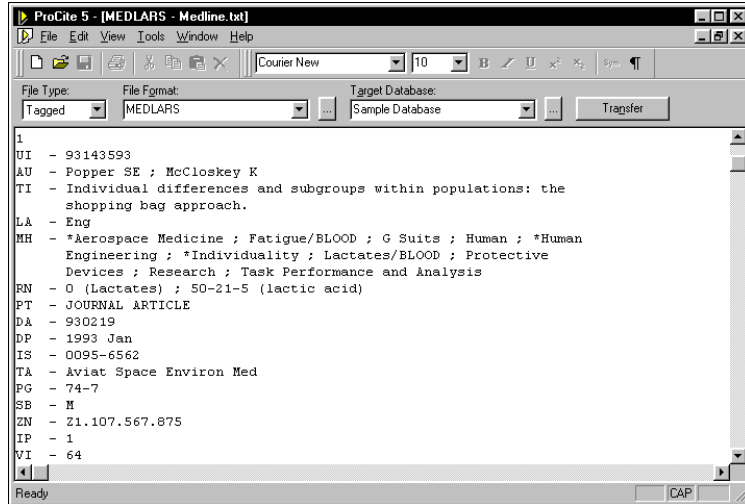
Configuration files are used to tell ProCite how a file of imported records is organized. Refer to *Appendix C: Configuration Files* in the Biblio-Link II Manual for a list of configuration files supplied with ProCite and the specific databases from which you can import data. The Biblio-Link II Manual is a PDF file found on your ProCite CD. If a configuration file is not available for a service you use, you can modify an existing file using the Biblio-Link II program installed along with ProCite.

Exercise – Importing Records

To import a file of records retrieved from the National Library of Medicine’s Medline database and saved to a tagged text file:

1. Go to the **Tools** menu and choose **Import Text File**.

- In the Open Import File dialog, locate the ProCite5\Download\ folder and choose the file MEDLARS – Medline.txt. ProCite displays the tagged text file:



- In the **File Type** drop-down list, choose **Tagged**.
- In the **File Format** drop-down list, choose the service from which you retrieved the tagged records. For this file transfer, choose **MEDLARS**.
- In the **Target Database** drop-down list, choose the Sample Database to receive the records.

Note: You can import records to an existing database or specify a new one by clicking the Browse button (...) and assigning a name to the new database.

- Click **Transfer** to begin importing records.
- When the transfer is complete, ProCite tells you how many records were imported. Click **OK** to continue.
- Close the Import Text File window and return to the record list.
- The imported records are marked. Click the **Marked Records** tab at the bottom of the window to display only the records you just transferred.
- Click the **All Records** tab to return to the full list of records.

Searching and Importing Records Directly from an Online Database

The following exercise guides you through the basic steps of connecting to a remote database, searching the database, and saving the references that you want to keep. In order to follow this lesson, you must be at a computer with Internet access — with either a dial-up or direct network connection.

For this guided tour, you will connect to a Medline practice database made available by Ovid Technologies, Inc., a company that provides access to bibliographic and full-text databases. Medline Practice Demo is the online database we will search; Ovid is the information provider. The Medline Practice Demo is a subset of the full Medline medical database, and is limited to records from 1993. Access to the full Medline database, and many other online databases, is available with ProCite.

Dial-up Internet Connections

If you use a modem and phone line to connect to the Internet, as opposed to a direct network connection, please note this connection information.

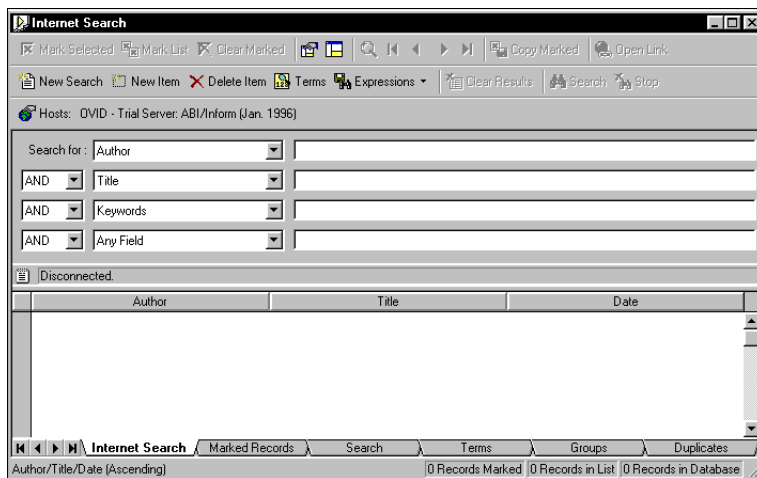
Connecting: Most dial-up connection settings are configured to automatically dial and connect to the Internet when you use an application that requests an online connection (such as ProCite's Internet Search feature). However, some Internet providers, such as America Online, require that you establish an online connection (sign on) before attempting an Internet Search with ProCite.

Disconnecting: ProCite does not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using ProCite's Internet Search feature.

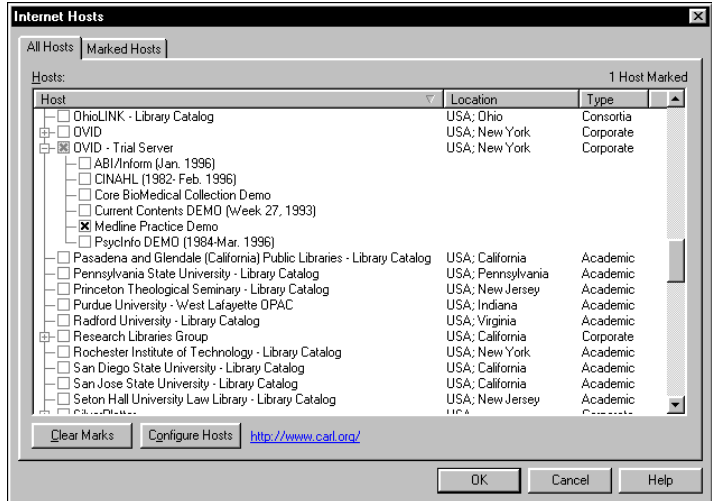
Exercise — Internet Searching

To search and import records from an online database:

1. From the **Tools** menu, select **Internet Search** to open a temporary Internet Search database.



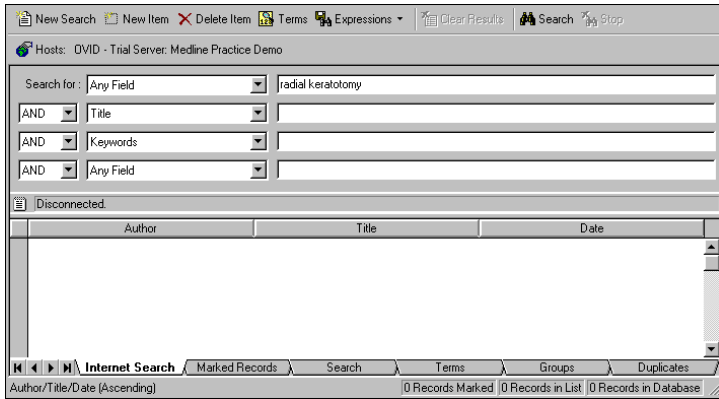
2. Select the Internet database(s) you want to search.
 - a. Click the **Hosts** button.
 - b. Click **Clear Marks** to deselect any selected databases.
 - c. Scroll to **Ovid - Trial Server**.
 - d. From the databases listed under **Ovid - Trial Server**, select the check box next to **Medline Practice Demo**.



- e. Click the **Marked Host** tab to verify that the only database marked for searching is **Ovid - Trial Server - Medline Practice Demo**. You could have marked multiple databases for searching.
 - f. Click **OK** to save the setting and return to the Internet Search tab. Notice the database name next to the **Hosts** button.
3. Build your search expression.

Let's say you are interested in information about the success of corrective eye surgery, such as radial keratotomy.

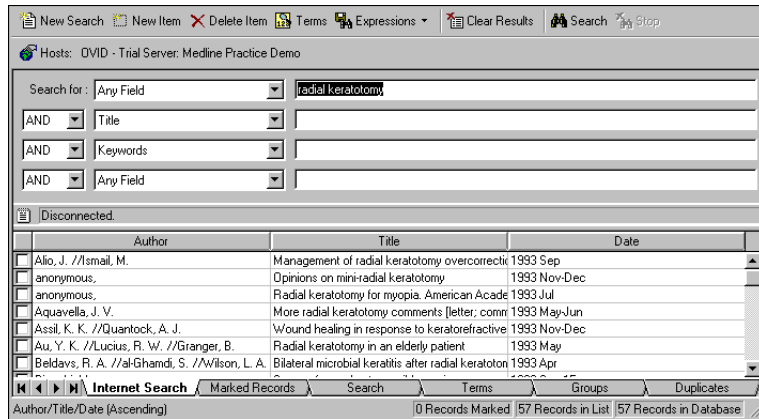
- a. Next to **Search For**, use the drop-down box to select **Any Field**.
- b. In the text box next to it, type radial keratotomy.



4. To connect and search, click **Search**.

Note: If you haven't already established a connection, your dial-up configuration should automatically dial and connect. If the connection is not successfully established, ProCite alerts you with an error message and stops the search attempt.

ProCite sends the search request to the online database, which in this case is Medline Practice Demo. The status line between the search strategy and the record list keeps track of how many records are found and imported. When done, the search results display in ProCite's record list:



In this case, 57 records were found.

Note: If too many records are found, and you find yourself waiting for hundreds or thousands of records to download, you can cancel the retrieval by clicking the **Stop** button.

5. If the search was too broad, finding too many records, you can refine the search to get closer to exactly those references you want. We will refine this search by looking for just the follow-up studies about radial keratotomy:
 - a. Click **Clear Results** to delete the previous search results. When asked to verify the deletion, click **Yes**.
 - b. Leave the first search line as entered. Click in the text box of the third search line, next to **Keywords**, and type follow-up studies.

Note: ProCite ignores the previous line, since no text is found in the text box. Notice that each line is connected by the word AND, which requires that each line of search criteria be met.

Search for:	Any Field	radial keratotomy
AND	Title	
AND	Keywords	follow-up studies
AND	Any Field	

6. Click **Search**.

This time only 17 references are found. The references are imported and appear on the Internet Search tab.

7. Save results.

At this point you can peruse the retrieved records to see which ones you want to keep. All database functions are available, so you can edit, search, or perform other operations. You save records by transferring them into a new or existing ProCite database.

You can copy highlighted records to an open database using drag-and-drop or the **Copy** and **Paste** commands. You can also copy records directly to an open database, a closed database, or a new database with the **Copy Marked Records** command, as described next.

For this example, you will save some of the imported records to a new database called OvidTest.

- a. Select a subset of the records by selecting the check box next to individual records.
 - b. On the toolbar, click the **Copy Marked** icon on the toolbar.
 - c. In the file dialog that appears, locate ProCite's Database folder, type a new name of OvidTest in the text box, and click **Open**. ProCite asks whether to create the new file. Click **Yes** and the marked records are copied to the new ProCite database.
8. Close the temporary Internet Search database.
- a. Click the database close box or choose **Close** from the **File** menu.
 - b. ProCite asks whether to save your Internet search results. Since you already saved the records you wanted, click **Discard** to close the temporary database.

Note: ProCite doesn't not disconnect your Internet connection. When you are finished searching online databases, remember to disconnect.

Because you did not close the Sample Database, it should appear when you close the temporary Internet Search database.

You can open the OvidTest database to look at the records saved from Internet searching. When you are done, close it and return to the Sample Database.

Capturing Web Page Information (Windows Only)

You can create ProCite records from individual Web pages displayed with Netscape or Internet Explorer. The Title and URL are automatically copied to a new record in the database. You can then change the ProCite workform and/or copy and paste additional Web page text to the record using an automated clipboard feature.

Exercise – Copying Web Page Information to a ProCite Record

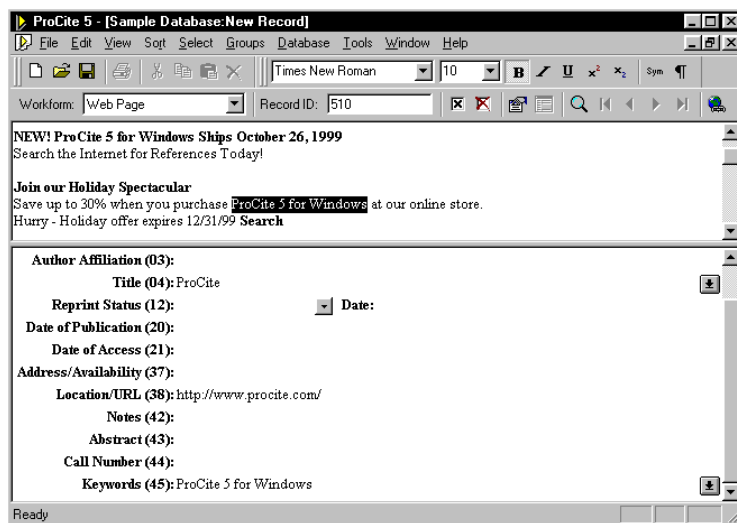
To copy web page information to a ProCite record:

1. Start Netscape or Internet Explorer and go to: <http://www.procite.com>. The ProCite home page appears.
2. Switch to the open Sample Database in ProCite.
3. From the ProCite **Tools** menu, choose **Import Web Page**. A split screen displays the text of the Web page at the top of the screen, and a new ProCite record at the bottom. The ProCite record contains the Title and URL from the Web page.

Notes: The ProCite workform displayed is the one last used for insertion. The Title is transferred to *Title, Analytic (04)* or *Title, Monographic (09)* and the URL is transferred to *Location/URL (38)*.

4. Change the workform by using the **Workform** pull-down list at the top of the ProCite window. Choose the **Web Page** workform.

5. You can move text and/or copy information from the Web page text to the ProCite record. To copy text to the Keywords field, use the mouse to highlight the text **ProCite**, then click on the *Keywords (45)* field label. The term is copied to the Keywords field in the ProCite record.



6. Practice copying highlighted information to other fields in the record.
7. When done transferring text to the ProCite record, go to the **Database** menu and choose **Save Record** or click the corresponding diskette icon in the toolbar.
8. To close the record, go to the **File** menu and choose **Close** or click the window close button.
9. Before continuing with ProCite, you may want to switch to the Web page and exit Netscape or Internet Explorer.


Linking a Reference to a Web Page or File

You can add a URL or a path and filename to a ProCite record and later launch the attached URL or file. In the case of a URL, ProCite launches your default browser and directs it to the Internet location. In the case of a path and filename, ProCite launches the file as though you had double-clicked the file icon.

Use the following exercise to launch an attached URL to a Web Page on the Internet.

Exercise – Launching a URL from a ProCite Record

To launch a URL found in ProCite’s Location/URL field:

1. Go to the record by Rieger, Steve. Double-click to display the full record.
2. Notice the URL entered in the *Location/URL (38)* field.
3. From the **Tools** menu, choose **Open File/URL** or click the toolbar icon: 

ProCite launches your browser and directs it to the Internet location.

4. When done using the Web Page, exit the browser and close the ProCite record.

Note: You are not required to display the full record. You can launch a URL from a record list by highlighting the record and using the Open File/URL toolbar icon.

Entering and Editing ProCite References

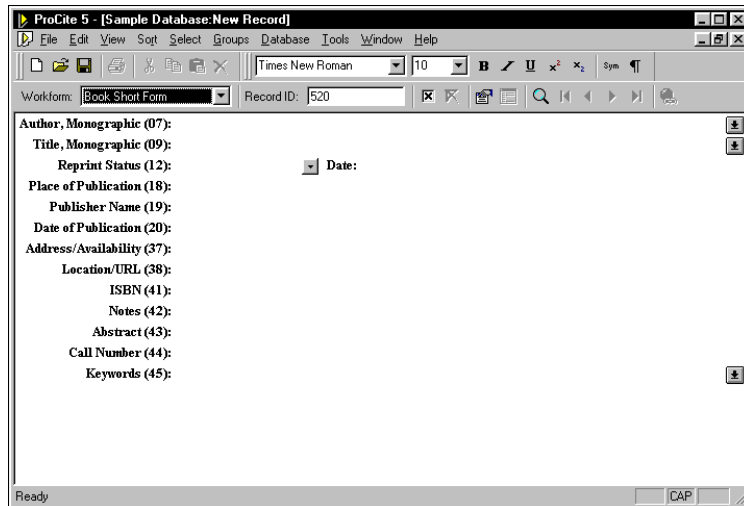
You can add or edit records at any time. Each record can hold up to 100K of text. The following exercises will give you experience with the basic operations of entering and editing text in ProCite records.

Exercise – Inserting a New Record

To insert a new ProCite record:

1. From the **Database** menu, choose **New Record**. The New Record window appears.

2. Click the **Workform** box at the top left of the New Record window. Choose *Book Short Form* from the drop-down list.



3. Start by clicking in the *Author, Monographic (07)* field and enter: **Barrett, Daniel J.**

Notes: Always enter author names in this order: **lastname, firstname middle**. While you can enter author names in any ProCite field, it is recommended that you enter names only in the following fields: *Author, Analytic (01)*, *Author, Monographic (07)*, *Author, Subsidiary (16)* and *Author, Series (30)*. These author fields are automatically used for searching, sorting and formatting author names.

When listing multiple authors names, use a double slash (//), a semicolon(;), or a carriage return between author names. If you do not know all the names, indicate additional authors by using four slashes (////) after the last author in the field.

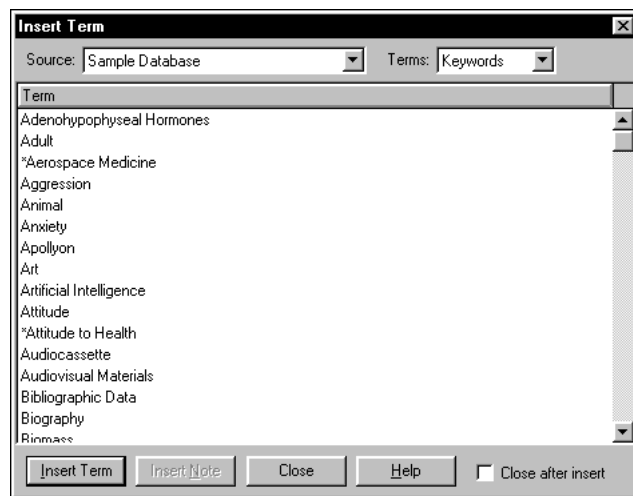
-
4. Click or tab to the *Title, Monographic (09)* field and enter:
NetResearch: Finding information online
 5. Click or tab to the *Publisher Name (19)* and enter:
Songline Studios, Inc.

6. Click or tab to *Date of Publication (20)* and enter:

1997

Note: ProCite assumes the following fields may contain dates: *Date of Meeting (12)*, *Date of Publication (20)*, and *Date of Copyright (21)*. These date fields are converted to an internal format that is used for searching, sorting and formatting references correctly.

7. To use a Field Content List for keywords, move the cursor to the *Keywords* field, then click the arrow to the far right of the field. The **Insert Term** dialog appears.



Note: Field Content Lists are internal lists generated from the *Author*, *Journal*, *Title* and *Keywords* fields. They can be used for data entry and searching.

8. Quickly type **co**, or scroll through the list to the word **Computers**. Select the word and click **Insert Term** to insert the text in the current field.

Note: You can also double-click on a term to insert it automatically.

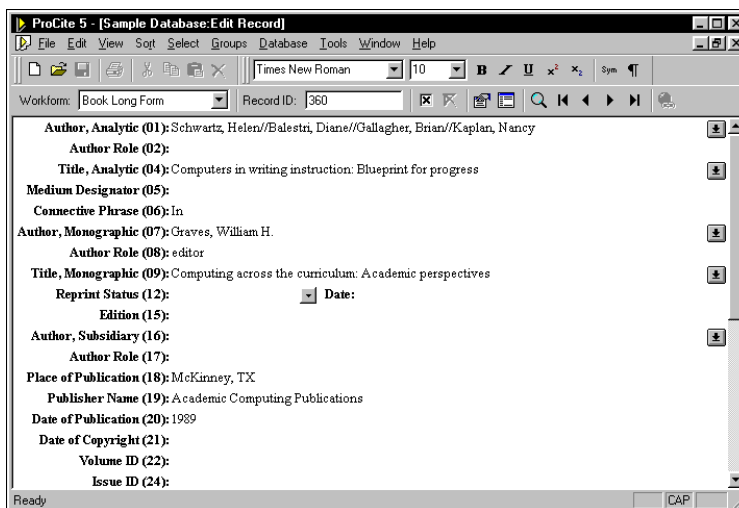
9. Type **I** to move to the terms that start with the letter I. Select **Informa-**
tion and click **Insert Term**.

10. When you are done inserting terms, click **Close** to return to the New Record window.
11. From the **File** menu, choose **Close** to close the record. When prompted about saving changes, click **Yes** to save changes to the record.

Exercise – Editing a Record

To edit a record:

1. Use the record list to locate the record by Schwartz, Helen.
2. Double click the highlighted record to edit. The Edit Record window appears:



3. Scroll to the *Keywords (45)* field, the last field. Position the cursor after the last term and type a slash (/).
4. Copy the phrase **Information Technology** from the *Notes (42)* field to the *Keywords (45)* field using Copy and Paste commands.

Note: Editing a record is just like adding a record. You can copy, move, insert and delete text from any field.

5. Close the record to save your changes and return to the abbreviated record list.

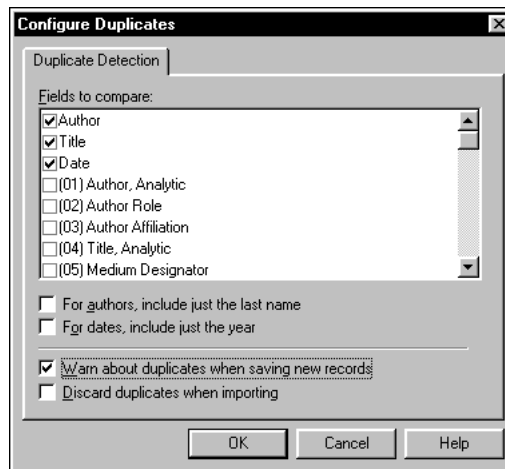
Configuring Duplicate Checking

When inserting records from multiple sources into a ProCite database, it is possible to enter duplicate records. To avoid this you can have ProCite warn you when it encounters a suspected duplicate record when saving records. You can also use the **Duplicates** tab to check for existing duplicates. You can mark duplicates and delete them after comparing the records.

Exercise – Setting Duplicate Detection

To set duplicate detection criteria:

1. From the **Database** menu, choose **Configure Duplicates**.
2. Select the check box titled **Warn about duplicates when saving new records**.



3. Click **OK** to save the change and return to the record list.

Searching and Sorting a Database

Overview

In this section you will learn to:

- Quick search for records with the Terms tab
 - Create a search strategy
 - Save a search strategy
 - Create a group of records
 - Choose a sort order
-

Quick Searching for Records with the Terms Tab

Using the Terms tab, you can list records organized by certain fields such as Authors, Journals, Keywords, and more.

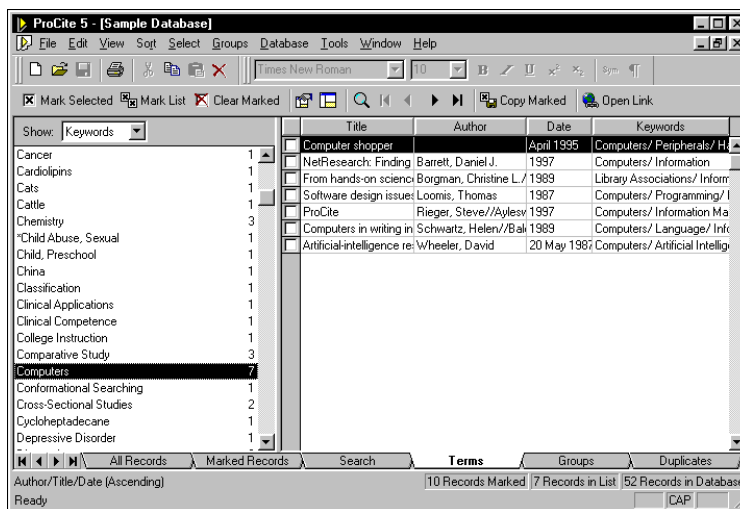
In the following exercise you will change the record list to view specific abbreviated records. The first list of records will include only those records that contain the keyword Computers.

Exercise – Specifying a List of Records to Show

To quick search with the Terms tab:

1. Click the **Terms** tab at the bottom of the window.
2. Use the drop-down **Show** list at the top left of the window to choose **Keywords**. A list of keywords appears in the left pane of the window. This list is compiled from all keywords in the active database. The number to the right of each keyword indicates how many records contain the term.

3. Scroll through the list and click on **Computers**. The records containing that term in the **Keywords** field appear in the right pane of the window.



4. Next, try changing the selection on the **Show** list to **Workforms** to view records organized by their workform type.
5. Click the **All Records** tab to return to the full listing of records.

Creating a Search Strategy

Being able to search for and find certain records in a ProCite database allows you to access information for editing or printing bibliographies as well as other functions. Once you have located specific records you can mark, delete, edit as a group, or print the references.

There are a number of ways to set up a search in ProCite. You can use the **Search** tab to search every field in every record or limit the search to specific fields for faster searching. You can also use field content lists to simplify searching for authors, titles, journal titles and keywords.

ProCite has powerful searching functions that allow you to use relational operators such as = (equal), <> (not equal), > (greater than) and < (less than) as well as logical operators AND, OR, and NOT for finding records. ProCite includes special search values for *begins with*, *ends with*, *contains*, *empty*, and *not empty*.

A Search Expression is a description of the criteria you want ProCite to use in finding records in a database. A Search Expression consists of any of the following three elements:

- **Field Identifier** (Optional) – A unique identifier that limits a search to a specific field, group of fields, workform or group.
- **Operator** (Optional) – An instruction for creating relationships between search terms or an instruction on how to search a field.
- **Search Term** – A word or phrase you want ProCite to find.

The following exercises give you experience creating and saving a Search Expression as well as showing you how to create and sort a group of references prior to printing.

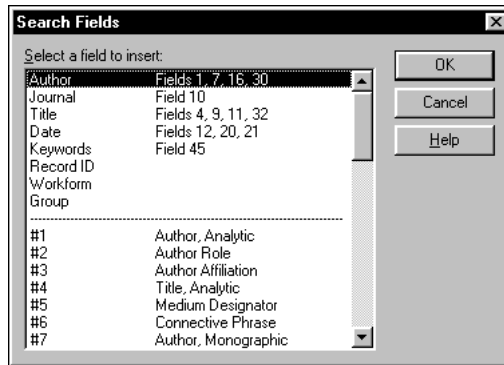
Exercise – Creating a Search Expression

To create a search expression:

1. Click the **Search** tab to display the Search window.

Notes: At this point you can enter field names, operators, and search terms either by typing them or by using a combination of typing and pop-up lists. The most thorough (and time consuming) search is where the Search Expression contains only a search term. ProCite then searches all text in every field of each record. To limit the fields to search, enter a field identifier and operator prior to the search term. The fastest searches are on the indexed fields *Author*, *Journal Title*, *Title* and *Keywords*.

2. Click **Insert Field** to limit your search to a particular field. The **Search Fields** dialog appears:

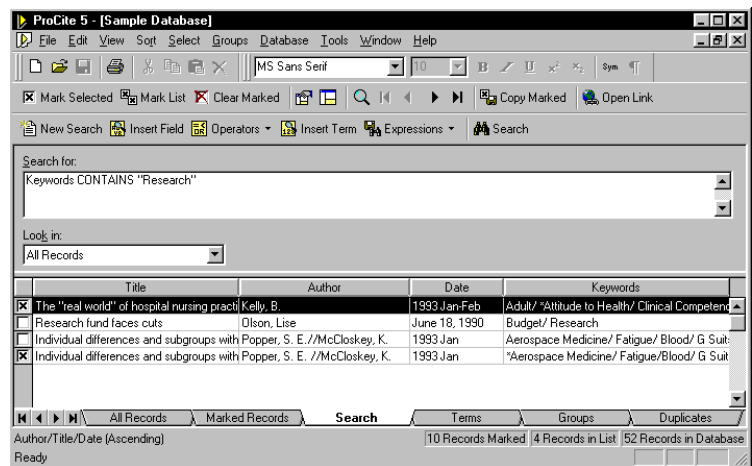


3. Highlight **Keywords** near the top of the list, and click **OK** to transfer the field identifier to the **Search For** text box.
4. Click **Operators** to enter a relational operator in the Search Expression. A list of operators appears:

=	Equal; this text appears anywhere in the field
<>	Not Equal; field does NOT contain this text
<	Less Than
<=	Less Than or Equal
>	Greater Than
>=	Greater Than or Equal
AND	Both expressions match
OR	Either expression matches
NOT	Expression does NOT match
AND NOT	First expression matches, second expression does not
BEGINS WITH	Field, Author, or Keyword begins with this text
ENDS WITH	Field, Author, or Keyword ends with this text
EXACTLY	Entire Field, Author, or Keyword matches this text
CONTAINS	Field contains this text, possibly as part of another word or phrase
= EMPTY	Field is empty
= NOT EMPTY	Field contains any text

5. Click **CONTAINS** to insert the operator in the Search Expression.
6. Click **Insert Term** to select from a list of terms. Check that the **Terms** drop box is properly set to **Keywords**. If not, use the arrow on the drop list to select the **Keywords** list.

7. Select **Research** from the list by scrolling or by typing R to quickly move to a particular alphabetic section of the list. You can also use the Up/Down directional keys to move through the list and find your selection.
8. Paste the term in your search expression by double-clicking the term or clicking the **Insert Term** button. **Close** the Insert Term dialog.
9. In the drop-down box labeled **Look in**, select **All Records**.
10. Click **Search** to initiate the search for matching records. The matching records appear in the lower pane of the Search window.



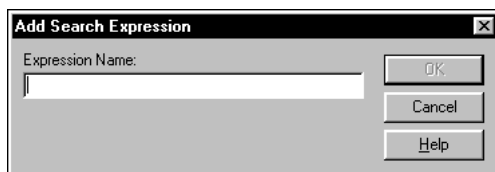
Saving a Search Strategy

It is useful to be able to save long, complicated search expressions or those that you use frequently. Use the following exercise to save a search strategy.

Exercise – Saving a Search Expression

To save a search expression:

1. On the Search tab, click **Expressions** and select **Add to Expressions**. ProCite displays the **Search Expressions** dialog.



2. Type **Search1** in the **Expression Name** box to identify the Search Expression and click **OK**.

Note: Recall a Search Expression by clicking **Expressions** and then selecting the name of the expression you want to use. Click **Search** to retrieve the same records plus new matching records entered since the last search.

Creating a Group

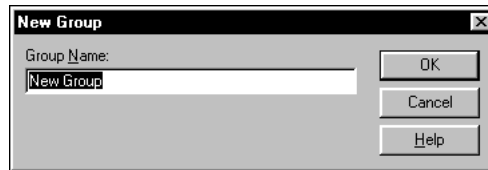
Groups are a way of creating virtual subsets of a database. Saving records in a group allows you to quickly retrieve a particular set of records. A group can contain the results of one or more searches, or a set of individual records. You can save any number of groups in your database and give each a unique name.

Exercise – Adding Records to a New Group

To save records to a group:

1. Use the search results from the keyword search. On the Search tab, click in the abbreviated record list to activate it.

2. From the **Edit** menu, choose **Select All** to highlight all records in the list.
3. From the **Groups** menu, choose **Add Record(s) to** and then **New Group**. The **New Group** dialog appears:



4. Type **Group1** as the name of your group, and click **OK** to save it.

Note: You would need to occasionally re-execute the search to update the records in a group.

5. Click the **Groups** tab at the bottom of the window to view the records in Group1. All group names are listed in the left pane.
6. To return to the full record list, click the **All Records** tab.

Selecting the Sort Order

The sort order you select for records is constant until you specifically change it. You can click-sort on any displayed column heading. Based on the fields displayed, ProCite selects the closest predefined sort to use. A second click on the column heading toggles the sort between ascending and descending order.

Pre-configured Sort Options

ProCite comes with seven predefined sort orders. They are:

- Author/Title/Date
- Author/Date/Title
- Author-Title/Title/Date
- Title/Date
- Date/Author/Title
- Call Number/Author/Title
- Record ID

You can easily select any one of these for display by choosing it from the **Sort** menu.

Custom Sorts

You can set up a custom sort order by using the **Configure Sorts** command on the **Sort** menu. You can:

- Compare one to six fields to determine the sort order on the **Custom Sort Order** tab
- Indicate how to sort empty fields, author fields and date fields on the **Custom Sort Options** tab
- Develop a Stop List of words to ignore at the beginning of a field on the **Stop Lists** tab

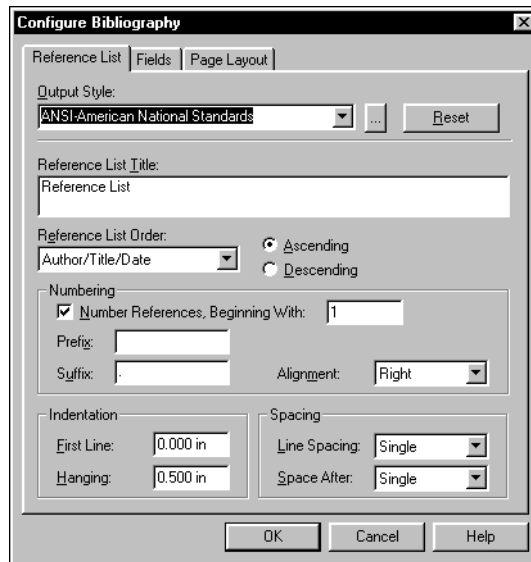
The order in which you sort a printed bibliography can differ from the viewing order on your screen. By default, ProCite uses the output style sort order for the bibliography. Use the following exercise to override the default setting and print the records using a different sort order.

Exercise – Changing a Sort Order for Printing

To change the sort order for printing:

1. From the **File** menu, choose **Print Bibliography**. A bibliography preview displays using the default output style, or the last output style selected, and its sort order.

2. Click **Configure** on the toolbar. The **Configure Bibliography** dialog displays the current bibliographic settings:



3. On the **Reference List** tab, change the **Reference List Order** by selecting the **Date/Author/Title** sort order in the drop-down list. Click the **Descending** radio button to begin the list with the most current records.
4. Click **OK** to update the bibliography preview with the new sort order.

Notes: ProCite holds this setting until you select another sort or a different output style.

5. Click **Close** to return to the record list.

Generating Bibliographies

Overview

You can “print” bibliographic citations to your computer screen, a word processor document, an HTML file, or a printer. You can print a full bibliography or a list that organizes references by subject.

In this section you will learn to:

- Create a bibliography from a record list
 - Create a bibliography with subject headings
-

Creating a Bibliography from a Record list

ProCite always displays a preview of the formatted bibliography. You can make changes to your bibliographic settings before actually printing or saving to a file. The following exercise gives you experience with formatting and printing a bibliography.

Exercise – Printing a Bibliography

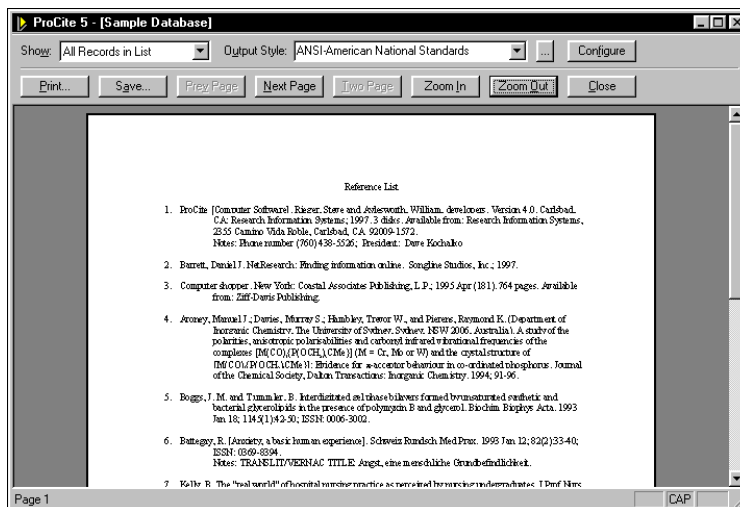
To print a bibliography directly from ProCite:

1. If it isn’t already displayed, click the All Records tab to list all records in the database.

Note: You could also print **Marked Records**, **Groups**, or any other list of records using this method.

2. From the **File** menu, choose **Print Bibliography**. A bibliography preview displays using the last output style selected.

- Use the buttons at the top of the window to **Zoom In** or **Zoom Out**, and to navigate through pages in a single or two page view.



- You can switch to a recently-used output style by using the drop-down list. For this lesson, click the ... button to the right of the output style. In ProCite's Styles folder, open the Medicine folder. Select the **Am Med Assoc** style and watch the screen refresh in the new format.
- Click **Configure** to change the bibliography settings.
 - The **Reference List** tab provides another way to change the output style, add a title to your record list, and set the reference numbering and indentation.
 - The **Fields** tab lets you suppress fields from printing and substitute alternate text for text found in records.
 - The **Page Layout** tab controls font, size, margins and page number formatting.
- Click the **Fields** tab to limit the fields printed. Remove the check mark from the **Notes** field to suppress it from printing. Click **OK** to save the change and update the bibliography preview.
- Click the **Print** or **Save** button to complete the exercise.

Note: To save the bibliography to a file (MS Word, WordPerfect, HTML or Text Only), click the Save button and adjust the Save File as Type accordingly.

8. Click **Close** to dismiss the preview.
 9. Practice printing Marked Records or groups of references using different output styles.
-

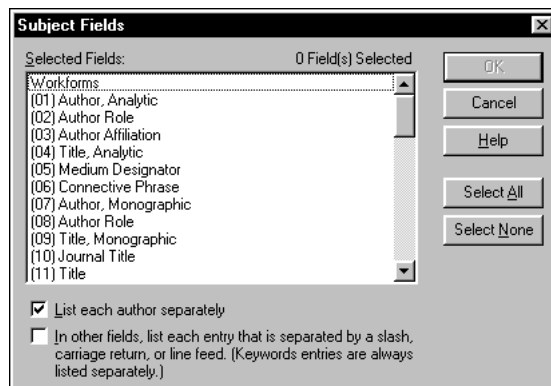
Creating a Bibliography with Subject Headings

A Subject Bibliography contains references arranged by subject headings. Typical subject headings are Keyword, Author, Title or Call Number, although you can select any ProCite field. Subject Bibliographies simplify the creation of a record list covering several topics, such as a faculty publication list or a list of holdings by category. You can also create a subject index to accompany the subject bibliography. Use the following exercise to print a standard Subject Bibliography.

Exercise – Printing a Subject Bibliography

To print a subject bibliography:

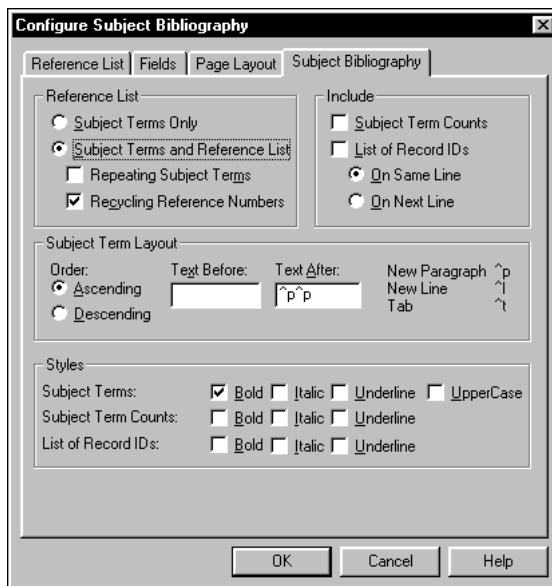
1. If it isn't already displayed, click the **All Records** tab to list all records in the database.
2. From the **File** menu, choose **Print Subject Bibliography**. ProCite displays the **Subject Fields** list, with the 45 fields listed by field number and default field name. You can also create a subject list by workform, even though it is not a ProCite field.



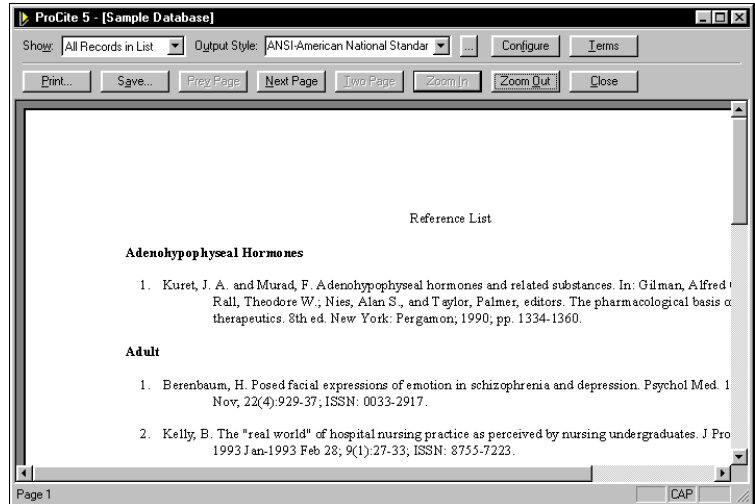
3. Scroll to the bottom of the list and highlight the **Keywords** field (45) to select the field whose contents will be used as Subject Headings. Click **OK** to display the terms found in the **Keywords** field.

Note: You can select any number of fields for subject headings. If you build the list of headings from more than one field, the subject headings generated from those fields are combined into a single list.

4. Click the **Select All** button to include all the keyword terms as subject headings or use a Shift-click to individually select or deselect terms to include in your subject bibliography.
5. Click **OK** to preview the Subject Bibliography.
6. Click the **Configure** button and you find the same selections as with Print Bibliography.
7. Click the additional tab, **Subject Bibliography**, which controls formatting specific to a Subject Bibliography.



8. Create a standard Subject Bibliography by setting the Reference List to include the **Subject Terms and Reference List**. Check the **Recycling Reference Numbers** box to restart the reference number sequence under each heading. Click **OK** to preview the results.



9. Next, create a Subject Index by selecting the **Configure** button and **Subject Bibliography** tab. This time, change the Reference List setting to **Subject Terms Only**. Include the **List of Record IDs** to print on the same line in the next section. Click **OK** to preview the results.
10. Click **Close** to close the preview and return to the record list.

Preparing a Manuscript and Bibliography

Overview

In this section you will learn to:

- Open a word processing document to use *cite while you write*
- Identify references to cite
- Prepare the bibliography and final manuscript
- Close the document and exit ProCite

Opening a Word Processing Document

ProCite 5 supports Microsoft Word 7, 97, and 2000 for Windows, Word 6.01 and 98 for the Macintosh, and WordPerfect 7, 8, and 2000 for Windows.

The Tools Menu and ProCite Toolbar

When you install ProCite, you also install ProCite menu items and a ProCite toolbar in your word processor. They contain *cite while you write* commands that allow you to locate and insert citations from your database and generate a bibliography. Each of the items on the toolbar corresponds with an item on the **Tools** menu.



Identifying References to Cite

The following exercises are designed for use with Microsoft Word, although you can apply the same steps to WordPerfect. The first step in formatting bibliographies is to locate the citations you want to include in a paper. ProCite provides three different ways to place citations in your document. Once the ProCite place holders are established, you are ready to generate the in-text citations and bibliography.

Exercise – Creating a Word Document

To create a Word document with linked ProCite records:

1. Start Microsoft Word.
2. From the **File** menu, choose **New** to create a new document. Click **OK** to continue with a blank document.

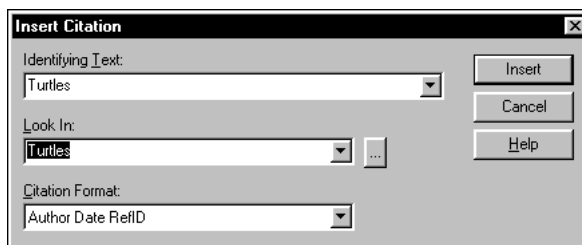
3. Type the sentence:

It's easy to cite while you write with ProCite.

4. From the **Tools** menu, select **ProCite 5 > Insert Citation**.

Note: You could also use the Insert Citation button from the ProCite toolbar.

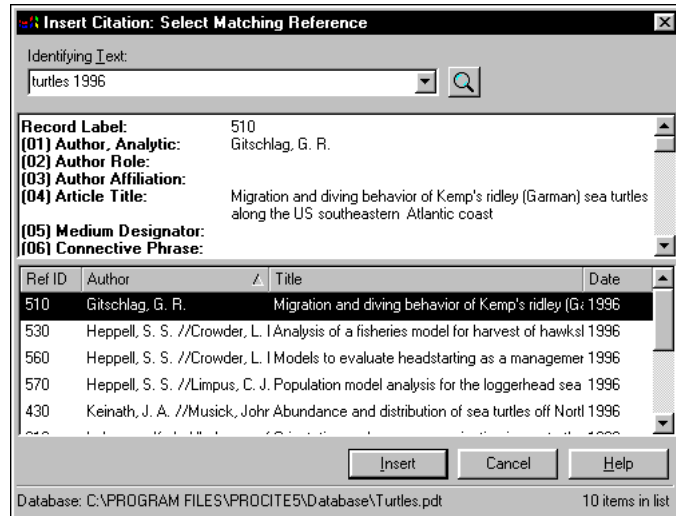
5. Type **Turtles**, a keyword, as the identifying text. Select the Turtles database in the drop-down list of databases to “Look In.”



Note: You can look for any combination of author name, date, full or partial title, keyword and record number. Separate each item with a space or a comma. Surround phrases with quotation marks.

6. Click **Insert** to insert the citation. ProCite searches the database. When a single record matches the search, it is immediately inserted. ProCite returns a list if there is more than one item that matches the search.

In this case, you receive a list of 52 references. You can easily narrow the selection list by adding another term after Turtles, for example, the year 1996. Click the magnifying glass button to restart the search with the new parameter. This time only ten references are listed.



Note: You can change the sort order of the list by clicking on a column heading. For this tour, click the **Author** column heading to sort by author names.

7. Select references to cite in your document.

Note: Select references by clicking on the first one, Shift-clicking to select a series of references, or Control-clicking (Windows) or Command-clicking (Macintosh) to select a random group. Use the same commands on highlighted items to deselect them.

For this tour, select two references: the first by **Gitschlag** and the last by **Witzell**. Click the **Insert** button to insert the ProCite place holders in your document. The place holders look like this:

```
{Gitschlag 1996 #510}{Witzell, Azarovitz, et al. 1996 #390}
```

8. Start a new paragraph and type:

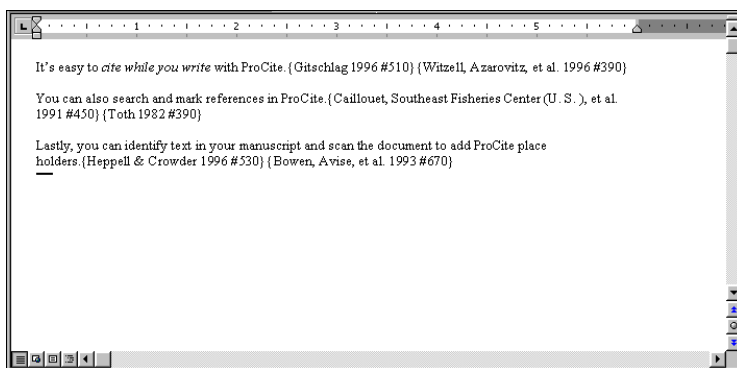
You can also search and mark references in ProCite.

9. Switch to the full ProCite application to display the Turtles database, and mark one or more records by checking the box in the left column of the abbreviated record list.
10. Switch back to Microsoft Word. With your cursor placed after the new sentence, go to the **Tools** menu and select **ProCite 5 > Insert Marked Records** to insert the ProCite place holders in your document.
11. Start a new paragraph and type:

Lastly, you can identify text in your manuscript and scan the document to add ProCite place holders.{crowder; conservation}

Note: You can use any character to delimit your identifying text. Curly brackets are a good choice and reduce the number of times you may need to “ignore” a selection. Notice that a semicolon is used to separate searches in one location.

12. From the **Tools** menu, select **ProCite 5 > Scan Document**.
13. Identify the left and right delimiters used in your document, enter the curly brackets if necessary, and select Turtles as the database to search. Click **OK** to begin the scan.
14. The first stop is the author name, Crowder. Insert a citation and ProCite automatically takes you to the next identifying text, conservation. Insert a citation from this list and the scan is complete.



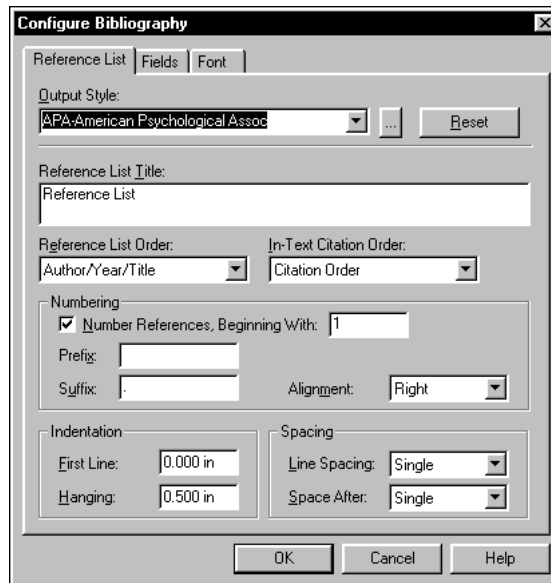
Preparing the Bibliography and Final Manuscript

Once a ProCite place holder is inserted, it is linked to a record in a ProCite database and ready to format the final manuscript and bibliography. The format is determined by the chosen output style and can include the author name and year, numeric citations, or any combination of ProCite fields.

Exercise – Generating the Bibliography

To generate a bibliography from in-text citations:

1. From the **Tools** menu, select **ProCite 5 > Generate Bibliography**. The Configure Bibliography dialog displays.
2. Set the output style to **APA-Am Psych Assoc**. Click the browse (...) button to locate this style in ProCite's Styles/Psychology folder.



3. Click **OK** to generate the bibliography. The citations in your manuscript are converted to the in-text citation format for the American Psychological Association, and a bibliography is added to the end of the document.

Notes: You can make changes to your manuscript and regenerate the bibliography at any time.

4. Select **Generate Bibliography** again and set the output style to **J Chem Soc** (Journal of the Chemical Society). You will need to use the browse button (...) to locate ProCite's Styles\Chemistry folder to select the style. Click **OK** to view this completely different style.
5. Close Microsoft Word and return to ProCite.

Creating an Output Style

Overview

Output styles define how records are cited in a manuscript and how they are printed in a bibliography. For the in-text citations and for the bibliography, list the fields to print for each workform in the order you want them printed, and then insert punctuation or text to print before or after each field.

ProCite ships with many predefined output styles, but you may find that you need to make minor modifications or even create your own style. The easiest way to create an output style is to base it on a similar output style. Save a copy of the existing output style and make changes to it. This lesson walks you through creating an entirely new output style.

Creating an Output Style

Exercise: Creating a New Output Style

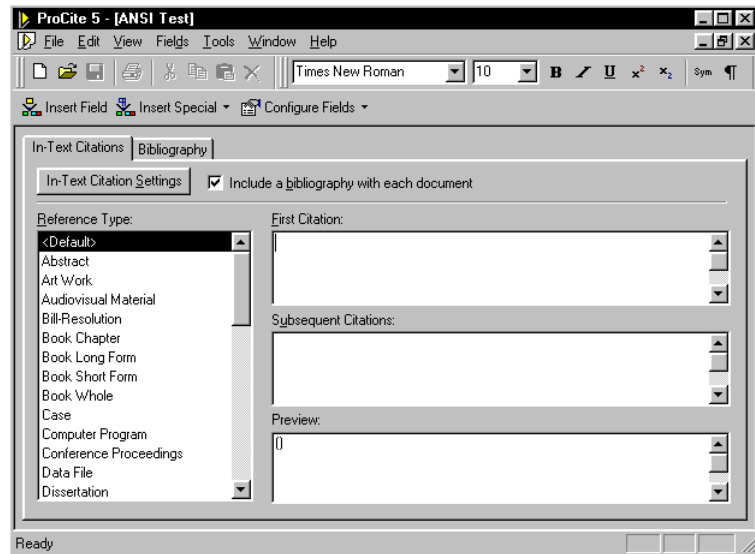
To create a new output style:

1. From the **File** menu, select **New** to display this dialog:



2. Select **Output Style** and click **OK**. ProCite displays a Workforms tab for an Untitled Output Style.
3. From the **File** menu, select **Save as** to display a file dialog.
4. For this lesson, we will create output similar to the ANSI-American National Standards style. In the File dialog, locate ProCite's **Styles/Standard** folder and enter a title for the file (such as ANSI Test). Click **Save** to save the file to disk and display a Properties dialog.

5. You can add any comments to the Properties dialog. We recommend that you include a short description of the publication on which the style is based. Click **OK** to save the information and start creating your new output style. ProCite displays a blank In-Text Citations tab:



Defining the Bibliography Style

Both the In-Text Citations tab and the Bibliography tab have two main sections: the left side, where you select a workform for which to define output, and the right side where you list the fields to print from that workform. You click **Insert Field** to insert each field you want to print — in the order you want them to print. Then you can insert punctuation and/or text to print between each field.

The *<Default>* workform style is used for any individual workform that does not have a style defined. Once a style is defined for a workform, that workform name appears in bold.

For this lesson, you are going to define a bibliography workform style only for journal articles. This is how you want journal articles to print:

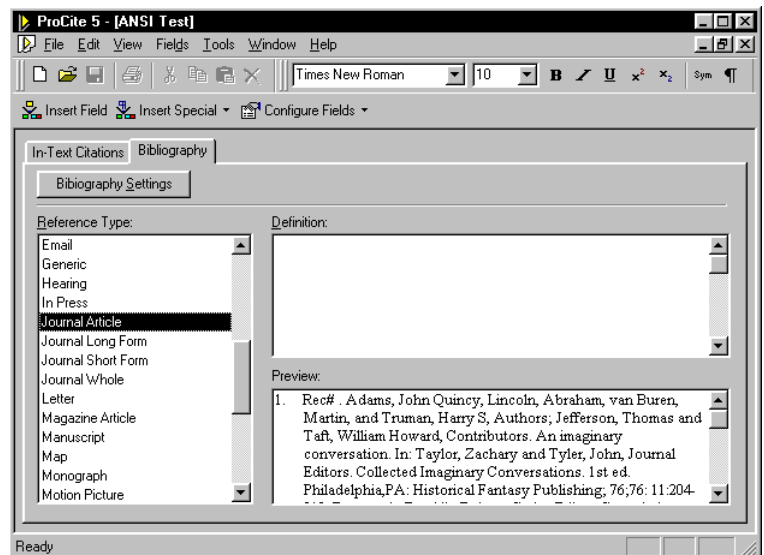
Brown, John and Smith, Jane. Title of Article. *Journal Name*.
1997 Dec 2; 44(4):146.

You will also list the Record Number, Notes, Abstract, Call Number, and Keywords fields for printing. These are “optional” fields that you can turn on or off for printing. However, in order to print them at all you must list them in the workform style.

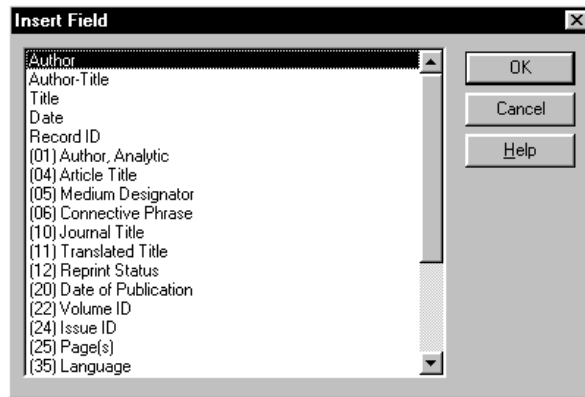
Exercise: Creating a Bibliography Format

To create a reference list format:

1. Display the **Bibliography** tab, then click on **Journal Article** in the left column.



- Click the **Insert Field** button to display the list of fields found in the selected workform:



- Select *Record ID* as the first field to insert and click **OK**. It appears in the text box as <Record ID>. Complete this field by adding a vertical bar (|), “Rec#” and a space before the field, and a period, space, and vertical bar after the field. It should look like this:

```
|Rec#-<Record-Number>.|
```

All punctuation between the vertical bars is printed with that field. If the field is empty, nothing prints.

Tip: If you don’t see a character for the spaces you entered, click the paragraph mark on the Text toolbar (¶) to display a visible character for spaces, line feeds and new paragraphs.

- With the cursor after the last vertical bar, click **Insert Field** and insert the *01 Author, Analytic* field. Complete this field by adding a period, space, and vertical bar after it. The text box now contains this:

```
|Rec#-<Record-Number>.|<01 Author,-Analytic>.|
```

Tip: Try the **Insert Special** button to insert the vertical bar as a field separator.

- For the third field to print, insert the *04 Article Title* field followed by a period, space, and vertical bar.

```
|Rec#-<Record-Number>.|<01-Author,-Analytic>.|<04-Article-Title>.|
```

6. The fourth field is the journal title. Insert *10 Journal Title* and follow it with a period, space, and vertical bar. Highlight the field name (including the "<" and ">" delimiters surrounding the field name) and click the italics icon on the Text toolbar. This will italicize the journal title.

```
|Rec#-<Record-Number>.|<01-Author,Analytic>.|<04-Article-Title>.|<10-Journal-Title>.|
```

7. The fifth field is the date of publication. Insert *20 Date of Publication* and follow it with a semicolon, space, and vertical bar.

```
|Rec#-<Record-Number>.|<01-Author,Analytic>.|<04-Article-Title>.|<10-Journal-Title>.|<20-Date-of-Publication>;|
```

8. The sixth field is the Volume ID. Insert *22 Volume ID* and immediately follow it with a vertical bar.

```
|Rec#-<Record-Number>.|<01-Author,Analytic>.|<04-Article-Title>.|<10-Journal-Title>.|<20-Date-of-Publication>;|<22-Volume-ID>|
```

9. The seventh field is the Issue ID. Insert *24 Issue ID*. Insert an open parenthesis before the field, and a closing parenthesis and vertical bar after the field.

```
|Rec#-<Record-Number>.|<01-Author,Analytic>.|<04-Article-Title>.|<10-Journal-Title>.|<20-Date-of-Publication>;|<22-Volume-ID>|(<24-Issue-ID>)|
```

10. For the eighth field, insert *25 Page(s)*. Enter a colon before the field and a vertical bar immediately after the field. Then, add a period, another vertical bar, and a line break. Enter the line break with the **Insert Special** button.

```
|Rec#-<Record-Number>.|<01-Author,Analytic>.|<04-Article-Title>.|<10-Journal-Title>.|<20-Date-of-Publication>;|<22-Volume-ID>|(<24-Issue-ID>)|<25-Page(s)>|.|
```

By putting the final period between vertical bars, that ending period will always print. It is referred to as “additional text” that is not attached to any one field. This allows the bibliographic reference to always end with a period — even when no page numbers are present in the record.

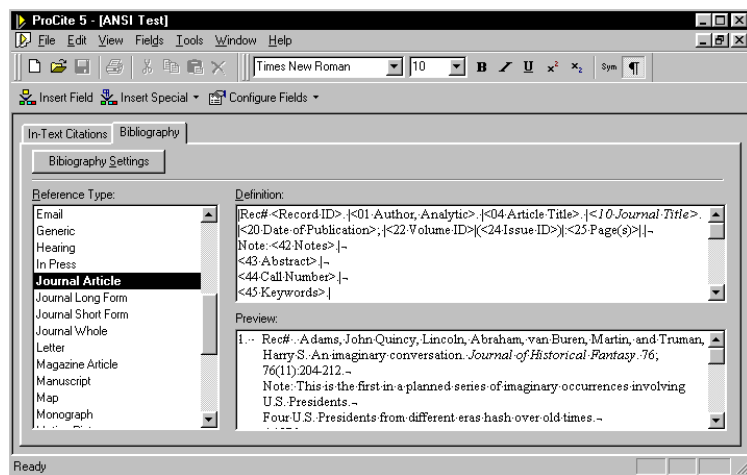
Tip: You can add “additional text” anywhere between fields. Enter text or punctuation you always want to print between vertical bars.

11. The final four fields are optional fields: 42 Notes, 43 Abstract, 44 Call Number, and 45 Keywords. Insert each of these fields so you can later turn them on or off for printing. Follow each of these fields with a period, vertical bar, and line break (except for the last field — do not follow it with a line break). Enter the text "Note: " before the Note field.

```
[Rec#-<Record-Number>.<01-Author,Analytic>.<04-Article-Title>.<10-Journal
Title>.<20-Date-of-Publication>.<22-Volume-ID>(<24-Issue-ID>):<25-Page(s)>].|
Note: <42-Notes>.|
<43-Abstract>.|
<44-Call-Number>.|
<45-Keywords>.
```

Note: You are inserting line breaks so each of these fields will start on the next line at the current indent. If you inserted new paragraphs instead, each line would start at the left margin. You will typically want to use a line break, since many bibliographies use a hanging indent.

12. From the **File** menu, select **Save** to save your changes. Your *Journal Article* definition should look as follows:



The preview at the bottom of the window helps you spot problems as you work.

Applying Special Field Formatting

You can apply special field formatting to the author, title, date, page number, and/or keywords fields for each workform. Select the workform (in this case, *Journal Article*), click on the **Configure Fields** button, and select the field to define. In this lesson, you will define output for author names, journal titles, dates, and page numbers.

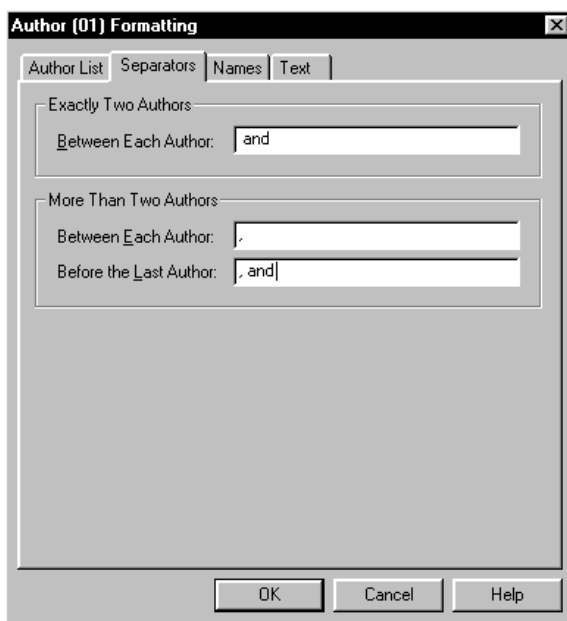
Exercise: Formatting Author Names

To format author names:

1. Click the **Configure Fields** button and select **Authors (01)**. The author formatting dialog appears:

The Author List tab determines how many author names print from each record. When a work is authored by multiple authors, you can print each name or check the **Abbreviated Author List** box to limit the number of names printed.

2. You want all author names to print, so do *not* select **Abbreviated Author List**. Select **No Substitution** if author field is empty. For subsequent works by the same author, select **Print the Author List as Defined Above**.
3. Click the Separators tab. This tab determines what punctuation prints between author names (it replaces the double slashes, semicolons, or carriage returns between author names in your ProCite record).



In the text box for **Exactly Two Authors**, enter a space, the word “and”, and another space. For **More Than Two Authors**, enter a comma and space to print **Between Each Author**. For **Before the Last Author**, enter a comma, a space, the word “and”, and another space.

4. Click the Names tab.



The style you are defining prints all author names in full, with last name first. For both First Author and All Other Authors, select the name order **Last, First Middle**. For initials, select **First Middle**. ProCite will print as much of the name as is entered in the record. Make sure both Uppercasing options are set to **None**.

5. Click the Text tab. This tab allows you to add text or punctuation that is dependent upon whether a reference has a single author or multiple authors (or editors). This style does not require such text, so make sure all the text boxes are blank.

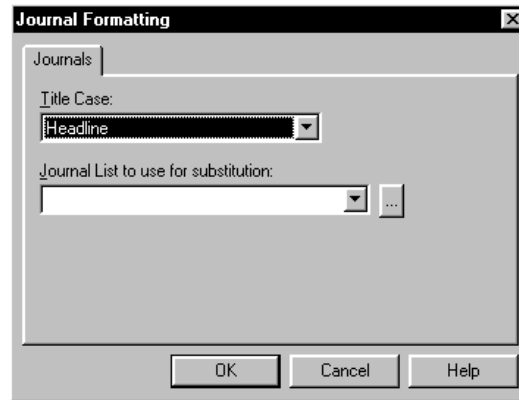


6. Click **OK** to save changes to author formatting. You should also select **Save** from the **File** menu to save all changes to the output style.

Exercise: Formatting Journal Titles

To format journal titles:

1. Click the **Configure Fields** button and select **Journals (10)**. The journal formatting dialog appears:



2. Set the **Title Case** to **Headline**. Journal titles are typically entered in headline case, where each significant word is capitalized, but this will catch any variations in your records.
3. Under **Journal List to use for substitution**, select **None**. This prints journal titles as they appear in your ProCite records. The ProCite User's Guide describes how you can use journal lists to substitute abbreviations for journal titles.
4. Click **OK** to save changes.

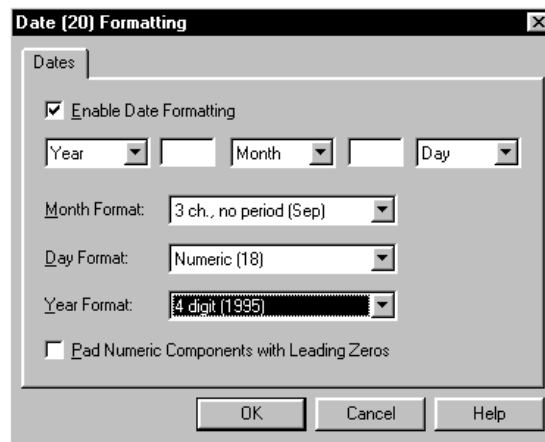
Exercise: Formatting Dates

For this style, you are going to define dates to print like this:

1989 Feb 27

To format the date:

1. Click the **Configure Fields** button and select **Date (20)**. The date formatting dialog appears:



2. Select the **Enable Date Formatting** box at the top. If this box is not checked, this dialog is ignored and dates print as they appear in your records.
3. Select the output order of the date elements. In the first drop-down list, select **Year**. In the next, select **Month**. In the next, select **Day**. In the text box between each element, enter a single space as a separator.
4. Select a Month, Day, and Year format. For Month, select **3 ch., no period**. For Day, select **Numeric**. For Year, select **4 digit** (years before 1900 and after 1999 will always print as 4-digit even when you specify 2-digit). Do not pad with leading zeros.
5. Click **OK** to save changes.

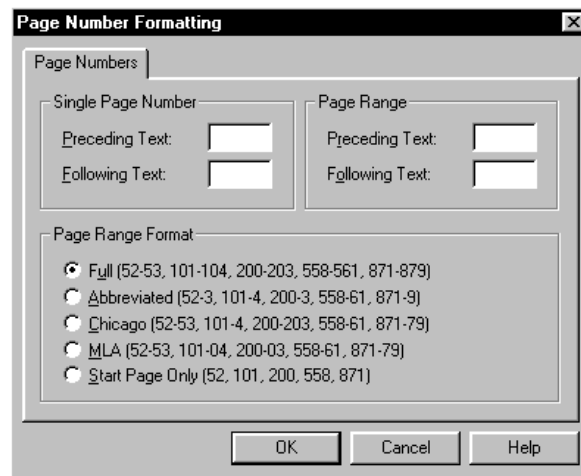
Exercise: Formatting Page Numbers

For this bibliographic style, page numbers are printed as a range immediately after the volume or issue:

1419-1427

To format page numbers in this style:

1. Click the **Configure Fields** button and select **Page Numbers (25)**. The page number formatting dialog appears:



2. Since you do not want to print any preceding or following text around the page number (such as *p* or *pp*), make sure the text boxes are blank.
3. For the Page Range Format, select **Full**.
4. Click **OK** to save changes.

Tip: Page formatting works correctly only when page numbers are entered correctly in your ProCite records. Always enter full page numbers, as in “170-190”.

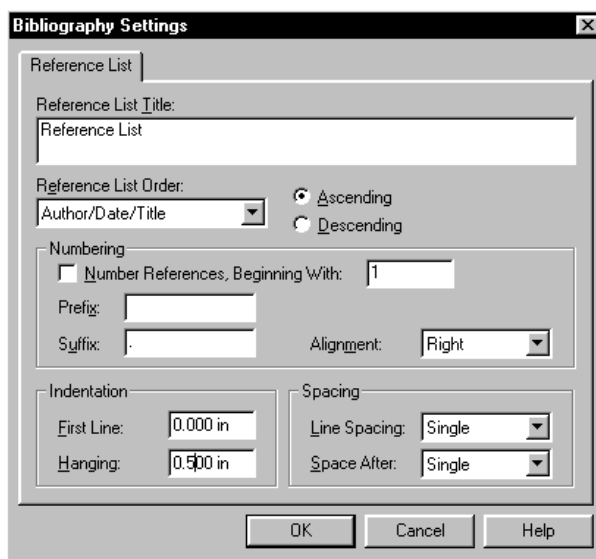
Defining the Bibliography Layout

Many bibliographic styles require a specific sort order, reference numbering, indentation, and spacing for your bibliography. You can customize these settings for each output style. For this lesson, you want an unnumbered list, with a hanging indent, in author-date order.

Exercise: Defining the Layout of the Bibliography

To define the layout of your bibliography:

1. On the **Bibliography** tab, click the **Bibliography Settings** button.



The screenshot shows the "Bibliography Settings" dialog box with the following settings:

- Reference List Title:** Reference List
- Reference List Order:** Author/Date/Title (selected), Ascending (selected)
- Numbering:** Number References, Beginning With: 1
- Prefix:** (empty)
- Suffix:** .
- Alignment:** Right
- Indentation:** First Line: 0.000 in, Hanging: 0.500 in
- Spacing:** Line Spacing: Single, Space After: Single

Buttons: OK, Cancel, Help

2. Under **Reference List Title**, enter a title to print at the top of your bibliography. You can leave the default text, "Reference List", if you want.
3. Under **Reference List Order**, select Author/Date/Title and Ascending order.
4. Do not select the **Number References** check box.
5. For Indentation, enter "0.00 in" for the **First Line** and "0.5 in" for the **Hanging** indent.

6. For **Spacing**, select **Single Line Spacing** and **Single Space After**.
7. Click **OK** to save the changes and return to the **Bibliography** tab.

Defining In-Text Citations

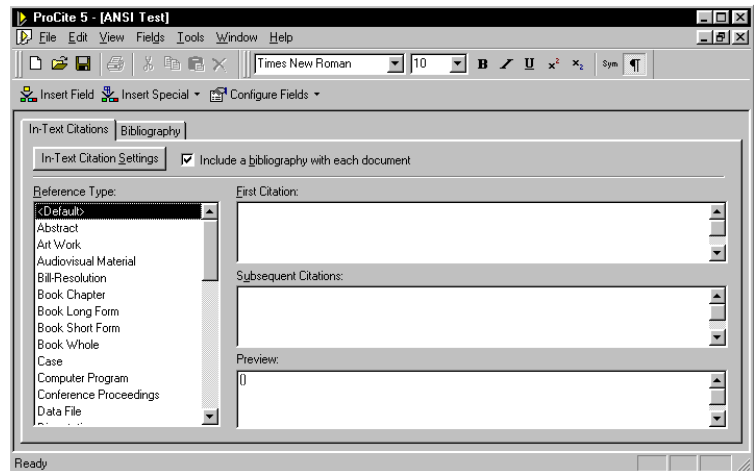
If you intend to cite references in a manuscript, you will want to define an in-text citation style. You can define a unique format for each workform type, and/or you can define a Default format for all workforms that do not have a unique format defined. For this lesson, you will define a default Author-Date form of in-text citation. For example:

(Jackson, 1989)

Exercise: Defining an In-Text Citation Style

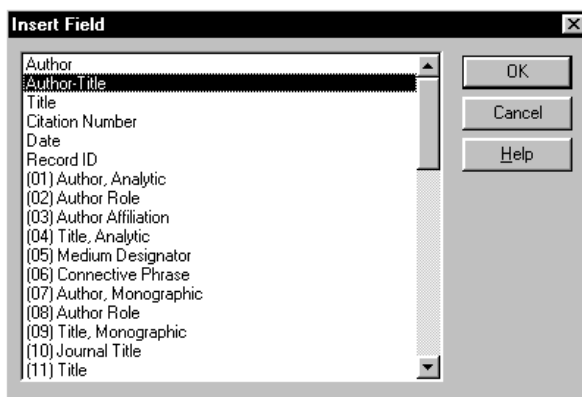
To define the in-text citation format:

1. Click the **In-Text Citations** tab and highlight *<Default>* at the top of the Reference Type list.



2. Click in the **First Citation** text box at the right to begin listing the fields to print.

3. Click **Insert Field** to display the full list of ProCite fields.



Insert the generic **Author-Title** field and follow it with a comma, a space, and a vertical bar.

```
<Author-Title>.,|
```

This prints the first author or title found in a record. It works for typical records and for records that have an empty author field. Because the *Default* in-text citation format applies to multiple workforms, you will typically use the generic fields (which use the first available field) rather than a specific field number that may not be used in all workforms.

4. Click **Insert Field** and insert the generic **Date** field. Follow it with a vertical bar.

```
<Author-Title>.,|<Date>|
```

5. Use the **Configure Fields** button and set the **Authors (01)** Names tab to print last name only for the **First Author** and **All Other Authors**. The **Name Order** and **Initials** settings are ignored, since only the last name prints.
6. Use the **Configure Fields** button and set the **Date (20)** field to print a 4-digit year only.

Notice that the preview is updated with your new settings.

7. Select the box titled **Include a bibliography with each document**.

Note: You would not select **Include a bibliography with each document** if you were formatting the in-text citations as full footnotes and wanted to eliminate the bibliography.

8. From the **File** menu, select **Save** to save changes.

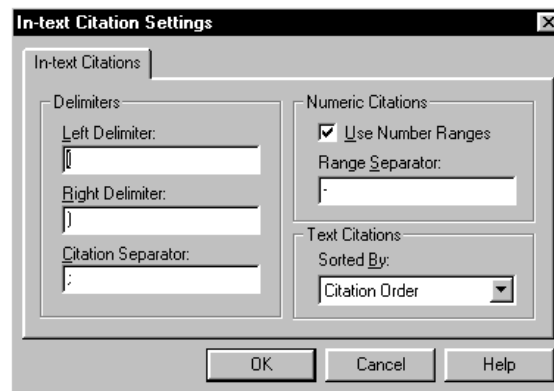
For this lesson, we want all in-text citations to print in the same format. However, you could set up a different format for subsequent citations of the same work.

Defining In-Text Citation Settings

Exercise: Defining In-Text Citation Settings

To define in-text citation settings:

1. Click the **In-Text Citations Settings** button.



2. At the left, use the default "(" for the Left Delimiter, the default ")" for the Right Delimiter, and the default ";" for the Citation Separator.
3. Since you are not defining numeric citations, ProCite will ignore that option. Under Text Citations, sort by **Citation Order** so multiple citations at the same location are sorted in the order they were entered.
4. Click **OK** to save changes and return to the **In-Text Citations** tab.

5. From the **File** menu, select **Save** to save the output style. Your output style is now fully defined for records in the workform *Journal Article*.
6. To close the output style, choose **Close** from the **File** menu.

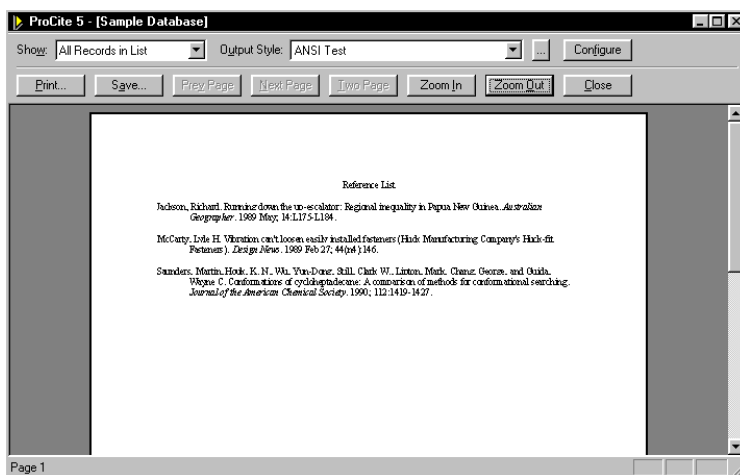
Printing with the New Output Style

You can print a bibliography or *cite while you write* with the new output style. Remember that it is defined for journal articles only!

Exercise: Printing with your New Output Style

To print the journal articles in the Sample Database:

1. Open the Sample Database (if it is not already open), and click on the **Terms** tab.
2. In the **Show** drop-down list, select *Workforms*.
3. From the list of workforms, highlight *Journal Article* to list all records entered into the *Journal Article* workform.
4. From the **File** menu, select **Print Bibliography**. The **Show** box says *All Records in List*.
5. Use the **Output Style** list to locate and select your new output style (ANSI Test or whatever name you gave the file). ProCite updates the bibliography with the new output style.



Click **Close** to dismiss the preview and return to the record list.

Exiting ProCite

From the **File** menu, choose **Exit** (Windows) or **Quit** (Macintosh) to close ProCite.

You have successfully completed this guided tour! You are ready to begin building your own reference collection and creating perfectly formatted bibliographies.

Cross-Platform Compatibility

Overview

This section explains how to share ProCite files initially created under Windows and ProCite files initially created on a Macintosh. It also lists the text characters that do not directly map between platforms.

In order to use data from an older version of ProCite, or from a Reference Manager or EndNote database, you must convert the data from that database into a ProCite 5 database. Do this by opening the old database files with ProCite 5. You could also use the **Convert** command found on the ProCite **Tools** menu.

File Sharing

ProCite 5 for Windows 95/98/2000/NT and ProCite 5 for the Power Macintosh can directly share files. Because Macintosh applications do not require file extensions, and Windows applications almost always use file extensions to indicate file type, you may need to modify disk file names as described in this section.

Note: Some file servers do not accept file names longer than eight characters. If this is the case with your server, you will need to shorten file names.

Sharing Files Created with ProCite for Windows

ProCite for the Macintosh version 5 can open any ProCite file created by ProCite 5 for Windows 95/98/2000/NT. Simply copy the files to a common server or to your hard disk — preferably to the default ProCite folders.

When you want to access a database, make sure both database files are available, and make sure you also have access to any custom workforms used in the database.

Sharing Files Created with ProCite for the Macintosh

You can share any ProCite file with other ProCite for the Macintosh or ProCite for Windows users. When you share a database, make sure you provide both database files, and make sure you also provide any custom workforms used in the database.

To share with other Macintosh users, simply copy your files to a common server or to the other individual's hard disk — preferably to the default ProCite folders.

To share with a ProCite for Windows user, or a combination of Macintosh and Windows users, you must first add these extensions to your filenames:

File Type	Add This Extension
Database Files	.PDT (primary database file) .PDX (leave intact on the key file)
Workform Files	.PWF
Term Lists	.PJL
Journal Title Lists	.PJL
Output Styles	.POS
Configuration Files	.CFG

Character Mapping

ProCite maintains an internal character set to allow for cross-platform compatibility of text. Almost all characters directly map between Windows and the Macintosh. However, there are exceptions as noted in this section.

Macintosh to Windows Character Mapping

These Macintosh Roman characters are mapped to the Symbol font on a Windows machine:

173	#	185	π
176	∞	186	∫
178	≤	189	Ω
179	≥	195	√
182	∂	197	∞
183	Σ	198	Δ
184	∏	215	◇

These Macintosh Roman characters do not appear under Windows because they do not exist in the Windows character set. If a Windows user does not edit a record that contains one of these characters, the character stays intact for viewing on a Macintosh. However, if a Windows user edits a record that contains one of these characters, the character is permanently removed.

218	l	250	·
222	fi	251	·
223	fl	253	~
240	•	254	€
245	l	255	€
249	˘		

Windows to Macintosh Character Mapping

These Windows Latin 1 characters do not map to the Macintosh. They appear as small empty boxes when viewed on a Macintosh. If a record containing one of these characters is not modified, the character remains intact under Windows. If the record is edited and saved on a Macintosh, the character is permanently removed.

128	not used	179	ª
129	not used	185	´
138	Š	188	¼
141	not used	189	½
142	not used	190	¾
143	not used	208	Ð
144	not used	215	×
154	š	221	Ÿ
157	not used	222	Ɔ
158	not used	240	ø
166	ı	253	ÿ
173	-	254	þ
178	²		

The ProCite Toolbars

Overview

Use ProCite toolbars to access common commands by clicking on an icon. If you are not sure what a toolbar icon does, hold the cursor over the icon for a moment to display a tooltip. If tooltips do not appear, go to the **Tools** menu, choose **Options**, and select the **Tooltips** box.

Some of the toolbars can be turned on or off from ProCite's **View** menu. Many of the toolbars are dimmed and unavailable when no database is open.

These are other easy ways to access ProCite commands:

- Access context-sensitive menus with a right mouse click (Windows) or control+click (Macintosh). Depending on where you are in the program, the menu displays a list of common commands compiled from the various menus.
- If you are working from your keyboard and do not want to switch to your mouse, learn the command keys indicated on the menus and described under *Keyboard Commands*.

Standard Toolbar

Use the Standard Toolbar for basic file commands and clipboard commands.



- | | |
|--------------|---|
| New | Displays the New dialog, where you can create a new database, output style, list, or workform |
| Open | Displays a file dialog so you can open a ProCite file |
| Save | Saves the current file to disk, whether a database, output style, list, or workform |
| Print | Prints a bibliography to your printer with the current settings |
| Cut | Cuts highlighted text and places it on the clipboard |
| Copy | Copies highlighted text and places it on the clipboard |
| Paste | Pastes clipboard text at the cursor |
| Clear | Deletes highlighted text |

Text Toolbar

Font, size, and type styles are typically applied by an output style. Use them in a record only when you always want it to apply—such as applying italics to Latin terms.



Font	Applies a font to selected text
Size	Applies a point size to selected text
Bold	Applies bold style to selected text
Italic	Applies italic style to selected text
Underline	Applies underline style to selected text
Superscript	Applies superscript style to selected text
Subscript	Applies subscript style to selected text
Insert Symbol	Displays the Insert Symbol dialog where you can select a symbol to insert at the cursor
Show/Hide Invisibles	Displays a visible character for spaces and new paragraphs

Bibliography Toolbar

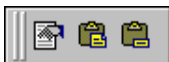
Use the Bibliography Toolbar to generate a bibliography and send it specifically to the screen, your printer, or a disk file.



- | | |
|-------------------------------|---|
| Configure Bibliography | Displays a dialog where you can select an output style and other formatting options to apply to the bibliography created by the other Bibliography Toolbar commands |
| Preview Bibliography | Displays the bibliography onscreen |
| Print Bibliography | Sends the bibliography to your printer |
| Save Bibliography | Displays a file dialog so you can save the bibliography to a text file, word processor file, or HTML file |

Copy Special Toolbar

Use the Copy Special Toolbar to copy a formatted in-text citation or formatted bibliographic reference to the clipboard. You can then paste into any application that accepts text from the clipboard.



- | | |
|-------------------------------|--|
| Configure Copy Special | Displays a dialog where you can select an output style and other formatting options to apply to the other Copy Special options |
| Copy Formatted Records | Formats the highlighted record(s) according to the current output style and copies it to the clipboard |
| Copy In-Text Citations | Formats the highlighted record(s) as an in-text citation based on the current output style and copies it to the clipboard |

Record List Toolbar

This toolbar is always available when a record list is displayed.



Mark Selected	Toggles the marked status of the selected records between marked and unmarked
Mark List	Marks the current list, adding to the existing marked set
Clear	Removes all record marking in the database
Configure Record List/ Preview Pane	Displays a tabbed dialog where you can modify the display of the record list and/or the preview pane
Show/Hide Preview Pane	Displays or removes the Preview Pane
Go to Record	Allows you to jump to a specific record in a record list
Go to First Record	Goes to the first record displayed in the current list
Go to Prev Record	Goes to the previous record in the current list
Go to Next Record	Goes to the next record in the current list
Go to Last Record	Goes to the last record in the current list
Copy Marked Records	Copies the set of marked records to another database
Open File/URL	Starts your browser and goes to the Internet location specified in the <i>Location/URL (38)</i> field of the selected record

Tip: Press the Ctrl (Windows) or command (Macintosh) key when selecting a Go to icon to move between Marked records.

Edit Record Toolbar

ProCite displays the Record Toolbar when you display a full record for insertion or editing. To turn this toolbar on or off, select **Configure Edit Record** from the **View** menu and select or deselect the **Show Record Toolbar** option.



Workform	Displays the current workform, and allows you to select a different workform for the current record
Record ID	Displays the current record ID, and allows you to enter a different record ID for the current record
Toggle Mark	Marks or Unmarks the open record
Clear Marked Set	Removes all record marking in the database
Configure Edit Record	Displays a dialog where you can modify the display of full records
Show/Hide Empty Fields	Displays or suppresses fields that do not contain information
Go to Record	Allows you to jump to a specific record in the current list
Go to First Record	Goes to the first record displayed in the current list
Go to Prev Record	Goes to the previous record in the current list
Go to Next Record	Goes to the next record in the current list
Go to Last Record	Goes to the last record in the current list
Open File/URL	Starts your browser and goes to the Internet location specified by either the selected text or the <i>Location/URL (38)</i> field

Tip: Press the Ctrl (Windows) or command (Macintosh) key when selecting a Go to icon to move between Marked records.

Search Toolbar

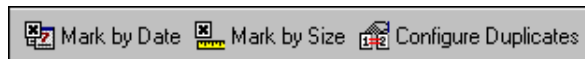
The Search Toolbar appears on the Search tab. Use these icons to help build a search expression and execute a database search.



New Search	Clears the search expression box to prepare for a new search strategy
Insert Field	Displays a list of fields to insert in the search expression box
Operators	Displays a list of logical and relational operators to insert in the search expression box
Insert Term	Displays the Insert Term dialog where you can select a term from a field content list or term list to insert
Expressions	Allows you to save or restore search expressions
Search	Executes the current search expression

Duplicate Toolbar

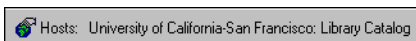
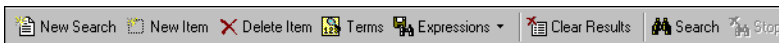
The Duplicate Toolbar appears on the Duplicates tab. Use these icons to help quickly mark and delete duplicates.



Mark by Date	Marks the newest duplicates, so the original entries are left intact
Mark by Size	Marks the duplicate records with the least amount of text, so you retain the most complete records (often those with notes or abstracts)
Configure Duplicates	Displays a dialog where you can change the duplicate record criteria by deciding which fields to compare

PubMed and Internet Search Toolbars

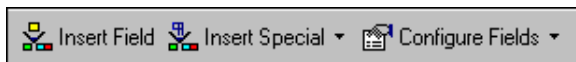
Use these toolbars when searching Internet sources.



New Search	Clears the current search expression
New Item	Adds an additional search line
Delete Item	Deletes the bottom search line
Terms	Displays the Insert Term dialog where you can select and insert a term from a field content list or term list
Expressions	Allows you to save, restore, or delete a search expression
Clear Results	Throws away the current record list before starting the next search
Search	Begins searching the selected databases with the current search expression
Stop	Stops the current search
Hosts	Displays a dialog where you can select the hosts and databases for searching and add or edit hosts or databases

Output Style Toolbar

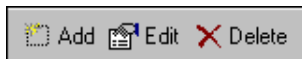
This toolbar is available when creating and editing output styles:



Insert Field	Inserts a field into the current style
Insert Special	Inserts a formatting character
Configure Fields	Configures formatting for special fields: authors, titles, dates, page numbers, and keywords

Term List and Journal List Toolbar

This toolbar is available when creating and editing term lists and journal lists:



Add	Adds a new term or journal name
Edit	Edits an existing term or journal name
Delete	Deletes a term or journal name

Cite While You Write Toolbar

This is the ProCite 5 toolbar installed in Word or WordPerfect:



Insert Citation	Displays a dialog so you can enter identifying text and insert a citation
Insert Marked References	Inserts records marked in the ProCite database
Recall Last Search	Brings up a dialog that displays the last search with identifying text; you can insert any records found in the last ten searches
Scan Document	Scans the document for citations within delimiters and inserts them
Generate Bibliography	Formats in-text citations and generates a bibliography from them
Find Previous Unlinked Citation	Looks toward the beginning of the document for unlinked text within the Scan Document delimiters
Find Next Unlinked Citation	Looks toward the end of the document for unlinked text within the Scan Document delimiters
Unformat Citations	Changes formatted citations back to unformatted citations (linked placeholders)
Revert to Original Text	Changes both formatted citations and unformatted citations back to the original identifying text, removing links
Help	Displays context-sensitive help topics.

Keyboard Commands

Overview

Many menu items in ProCite have a corresponding keyboard equivalent and/or toolbar icon. The keyboard equivalent appears on the menu next to the associated command. Here we list both Windows and Macintosh keyboard equivalents.

File and Print

Action	Windows Command	Macintosh Command
New	Ctrl+N	Command+N
Open	Ctrl+O	Command+O
Close	(none)	Command+W
Save	Ctrl+S	Command+S
Print Bibliography	Ctrl+P	Command+P
Quit	(none)	Command+Q

View and Search

Action	Windows Command	Macintosh Command
Show Preview Pane	Ctrl+T	Command+T
Go to Record		
Find	Ctrl+R	Command+R
First	Home	Home
Previous	Up	Up
Next	Down	Down
Last	End	End
First Marked	Ctrl+Home	Command+Home
Prev Marked	Ctrl+Up	Command+Up
Next Marked	Ctrl+Down	Command+Down
Last Marked	Ctrl+End	Command+End
Go to Next Tab	Ctrl+Page Down ...	Command+Pg Down
Go to Previous Tab	Ctrl+Page Up	Command+Page Up
Mark Highlighted Records	Ctrl+M	Command+M
Unmark Highlighted Records ...	Ctrl+K	Command+K
Clear Marked Set	Ctrl+Shift+K	Command+Shift+K

Copy and Paste

Action	Windows Command	Macintosh Command
Cut	Ctrl+X	Command+X
Copy	Ctrl+C	Command+C
Paste	Ctrl+V	Command+V
Clear	Del	Delete
Select All	Ctrl+A	Command+A

Apply Styles (Records, Lists, Output Styles, Dialogs)

Apply	Windows Command	Macintosh Command
Bold	Ctrl+B	Command+B
Italic	Ctrl+I	Command+I
Underline	Ctrl+U	Command+U
Superscript	Ctrl+Shift+=	Command+Shift+=
Subscript	Ctrl+=	Command+=

Enter and Edit

Action	Windows Command	Macintosh Command
New Record	F9	F9
Edit Record	Enter	Return
Save Record	F10	Command+S
Delete Record	Ctrl+D	Command+D
Insert Previous Field	F5	F5
Insert Previous Record	Shift+F5	Shift+F5
Insert Symbol	F7	F7
Insert Term	F8	F8
Open File/URL	Ctrl+L	Command+L
Move Insertion Point		
To Next Field	Tab	Tab
To Previous Field	Shift+Tab	Shift+Tab
To Beginning of Line	Home	Home
To End of Line	End	End
To Beginning of Field	Ctrl+Home	Control+Home
To End of Field	Ctrl+End	Control+End
To Start of Next Word	Ctrl+Right Arrow	Control+Right Arrow
Up One Window	Page Up	Page Up
Down One Window	Page Down	Page Down
Delete		
Previous Character	Backspace	Delete
Following Character	Del	Del (X)
Insert		
New Paragraph	Enter	Return
Line Break	Shift+Enter	Shift+Return
Tab	Alt+09	Control+Tab
Nonbreaking Space	Ctrl+Shift+Space ...	Option+Space

Output Styles

Insert	Windows Command	Macintosh Command
Grouping Operators	Alt+174	Option+\
	Alt+175	Option+Shift+\
Line Break	Shift+Enter	Shift+Return
New Paragraph	Enter	Return
Tab	Alt+09	Control+Tab
Page Break	Ctrl+Enter	Control+Return

Subject Bibliography Tab

Insert	Windows Command	Macintosh Command
New Paragraph	^p	^p
New Line	^l	^l
Tab	^t	^t

Help File

Display	Windows Command	Macintosh Command
Context-Sensitive Help	F1	Help