



***National Institute for  
Health Research***

**The NIHR Research Design Service  
for the East Midlands**

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**The NIHR Research Design Service  
for Yorkshire & the Humber**

# Managing References

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# Table of Contents

	<b>Page</b>
<b>1. Introduction .....</b>	<b>4</b>
<b>2. What is a reference management system (RMS)? .....</b>	<b>6</b>
<b>3. Major referencing styles .....</b>	<b>11</b>
<b>4. The reference management process .....</b>	<b>14</b>
<b>5. Summary .....</b>	<b>27</b>
<b>Appendix 1 Glossary of terms .....</b>	<b>28</b>
<b>Appendix 2 References .....</b>	<b>30</b>
<b>Appendix 3 Further reading &amp; sources of information .....</b>	<b>31</b>
<b>Appendix 4 A comparison between the Harvard and Vancouver referencing styles .....</b>	<b>34</b>
<b>Appendix 5 Abbreviations .....</b>	<b>38</b>
<b>Appendix 6 Comparison of the major personal bibliographic management software (pbms) packages) .....</b>	<b>39</b>
<b>Appendix 7 About the Authors .....</b>	<b>41</b>

# 1. Introduction

*There are two laws of dissemination. Firstly, the probability that a disseminated document will arrive on someone's desk the moment it is needed is infinitesimally small. Secondly, the probability that the same document will be found three months later, when it is needed, is even smaller. Too much knowledge whizzes past the clinician to become but a memory: "Now I think I did see something about...." (Muir Gray 1998).*

While finalising your research proposal on leg ulcers, you recall having seen a recent systematic review on compression bandaging for leg ulcers which had led you to embark on this research in the first place - but where was that review now? You flick through the pile of papers on your desk, check the journal collection in the Common Room, but all to no avail. Then you remember you had actually torn the article out and placed it in your filing cabinet. However, was it filed under "leg ulcers", "compression" or "bandages"?

Meanwhile one of the secretaries is grumbling because she has to stay late to type out all the references from your hurriedly scrawled notes for the article that you are writing on your previous study. It would not be so bad but the last time she did this for a colleague the article was rejected by *NT Research* and she then had to spend nearly as much time again in reformatting the references for her second choice journal.

A General Practitioner, having requested an updated literature search from a local health librarian for his study on "frequent attenders", finds himself in the embarrassing position of being unable to remember which references he already has in his collection.

The scenarios given above illustrate the importance of having a reference management system to handle such information management problems. This resource pack will guide you through the reference management process and provide some useful tips on how to manage your references effectively.

## LEARNING OBJECTIVES

The aim of this resource pack is to introduce the reader to the need for, and practicalities of, managing bibliographic references as part of the research process.

Therefore, having successfully completed the work in this resource pack, you will be able to:

1. List several reasons why you might want to manage your references for your research study.
2. Discuss the pros and cons of manual versus electronic reference management systems (either specialist software or spreadsheets / databases).
3. Describe and compare the different types of referencing systems.
4. List the major stages involved in the reference management process.
5. List the major software packages available for managing references and, if appropriate, select a package that meets your own needs.

6. Revise your word-processed manuscript in accordance with the *Uniform Requirements for Manuscripts Submitted to Biomedical Journals* and the *Instructions to Authors* for a journal likely to publish your research findings.

## 2. What is a reference management system (RMS)?

A reference management system (RMS) is any systematic means of organising your references. Such a system may be either manual ie involving recording reference details on index cards and storing articles in a filing cabinet or electronic ie involving the use of specialist software, previously referred to as Personal Bibliographic Management Software, PBMS or Citation Management Software or a spreadsheet such as Excel or a database such as Access or a combination of the two.

Whichever approach is chosen, the process of reference management can be broken down into the following three basic steps:

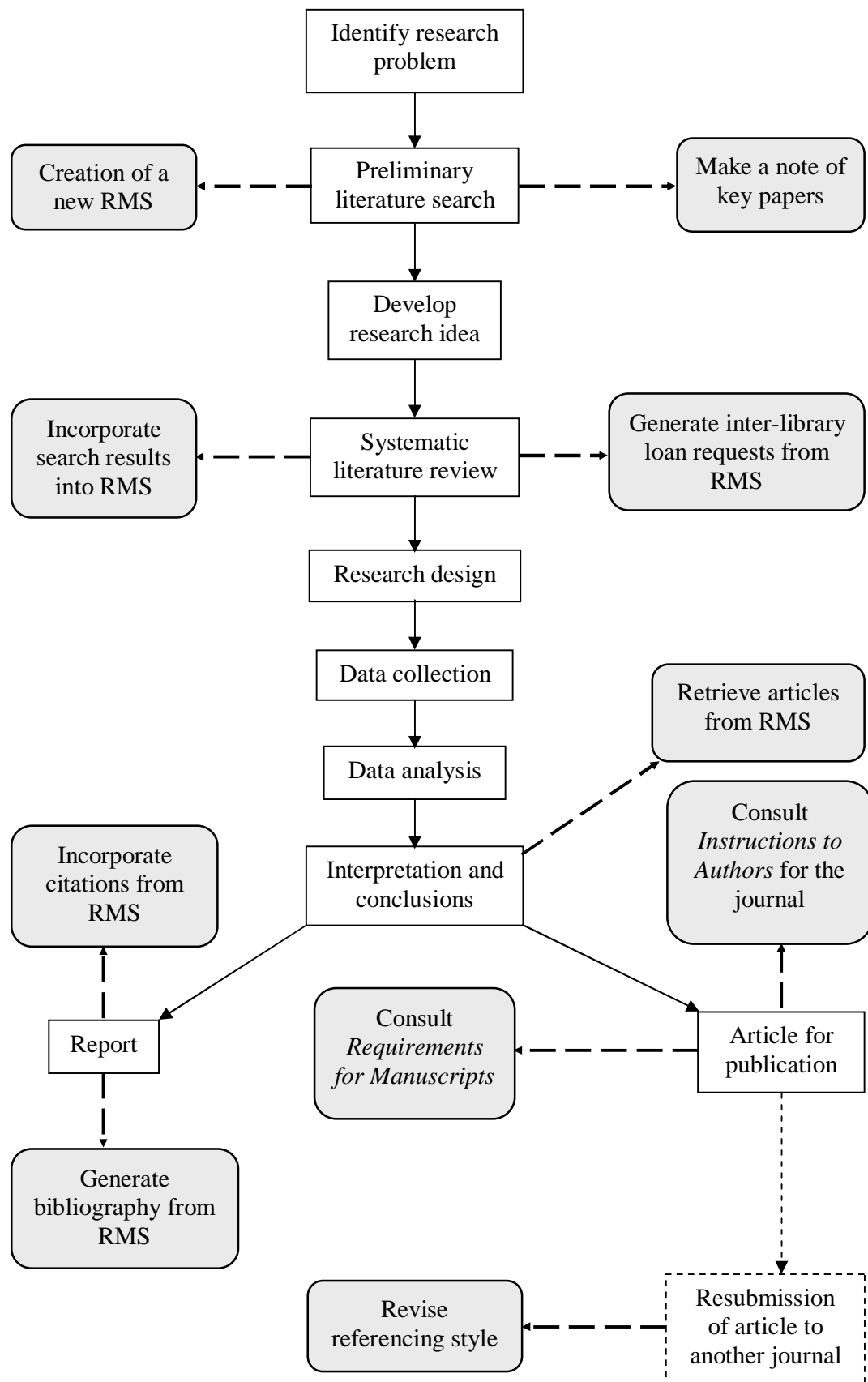
1. *Input and storage of references*, ie recording basic reference details, such as author, title, source, etc on paper-based index cards in a manual system or entering these same details onto an electronic database record.
2. *Retrieval of stored references*, ie locating the desired references for a specific purpose.
3. *Output of retrieved references*, eg the generation of a bibliography based on your reference collection.

### 2.1 How can a reference management system help you in your research project?

Increased interest in reference management in recent years has had several drivers. The imperative to research and to publish, places a premium on any tool that can assist in the writing process. In addition, evidence based practice (EBP) requires that practitioners are able to identify relevant and applicable research speedily and efficiently. Much EBP work such as systematic reviews, often requires the collection of a large amount of references.

On the next page, Figure 1 illustrates the integral nature of reference management in the research process. An effective RMS has a vital role to play throughout the research process, from identifying a research problem through conducting a systematic literature review and interpreting the results, to submitting an article for publication.

Also RMS can be used to build up a set of references on a subject over a longer period of time than a single research project. If you begin another project on a related subject your existing RMS can provide an invaluable starting point.



**Figure 1. Managing references in the research process**  
(RMS refers to Reference Management System).

## 2.2 The pros and cons of using electronic reference management software

Electronic reference management software (such as *Reference Manager*, *EndNote* and *Procite*) also provide an affordable, potentially labour-saving and practical means to create and maintain a personal database of references for your research needs. Such software will enable you to:

- Improve the management of your existing reference collection.
- Easily organise and keep track of new references, eg to record when the full text of articles have been ordered, received, etc
- Rapidly retrieve articles on the basis of the author(s) or journal or title or specific keyword(s) or their unique identifying number; something which is rather more restrictive with a manual system, because articles can only be filed in one of the above ways.
- Produce manuscripts and bibliographies in a swift and straightforward manner, including being able to automatically change the output format to conform to a specific journal style.
- Use data directly from databases accessible via the internet, such as MEDLINE, saving you having to record all the reference details manually.
- Share reference details with your colleagues (though they are likely to need to have access to the same software as you).

However, an electronic reference management system is not appropriate for everyone. For example, such packages are often expensive particularly for an individual subscription although educational institutions are likely to have site licences. You must also be aware of the “Garbage In, Garbage Out” computer phenomenon, ie you need to be clear about what you want the software to do and decide on the structure of your database at the start.

## 2.3 The pros and cons of general spreadsheet or database software to manage your references

As well as the specifically designed software you may consider developing your own system using a spreadsheet such as Excel or a database such as Access. There are a number of advantages to such a solution:

- Such software is widely available and does not need to be purchased specially. You can also share the data on a network and send it as an attachment to colleagues who will almost certainly have access to the same spreadsheet or database as you.
- You may have existing skills in using that particular software and so you can tailor the system to your own advantage. However, particularly if using a database package such as Access you may need advanced skills, in order to develop the system fully.
- The search functions on the software make it easy to find references, eg by a



particular author.

- The software has other functions such as SORT which can be useful, eg to list references by date published.

However, you must remember that there are also considerable disadvantages compared to an electronic reference management system. These include no way of importing references apart from cutting and pasting them field by field and no way of exporting them in particular styles.

## **2.4 The pros and cons of using a manual system to manage references**

In a world where access to computers is almost ubiquitous and computer literacy high, the use of a paper system to record references may seem outdated. However, there are a number of reasons why you may consider using a manual system:

- The system will be designed by you and so can be tailored to your exact needs.
- You will be able to access it anywhere and so not restricted to where you have access to a computer.
- If you are including references of diverse types and sources then you may find it easier than having to work out how to import references into an electronic system.
- You do not have to worry about access to appropriate software, compatibility issues or the software crashing.

Of course there are a considerable number of disadvantages, including no way to produce reference lists apart from typing them out, data will have to be entered manually and you cannot share the data with colleagues.

These disadvantages are significant and in many cases an electronic system will be the best solution. However, it is worth noting that one of the authors of the original version of this manual who was an experienced user and trainer on, the use of electronic reference management systems chose a manual system to hold the references for her own PhD.

## **2.5 Maximising the benefits of any system**

The important thing to note is not what type of system you use, but how having a reference management system can assist you in the research process. Reference management involves far more than just developing your own system and learning how to use it effectively. You will also need to be able to recognise the difference between the two main styles of presenting references, as well as have an awareness of the availability of *Instructions to Authors* so that your prized manuscript is not returned to you without even being read. This resource pack will attempt to guide you through both the tools and techniques of reference management.

## Key to symbols used in this pack

!	It is strongly recommended that you do whatever is stated next to this symbol.
#	Optional section or exercise. This is usually related to a section devoted entirely to electronic reference management which may not be applicable to all readers.
&	This symbol is used to indicate useful extra points, such as additional reading.
∴	In order to do the following you will need to have or do whatever is stated next to this symbol.
×	Warning. Please note whatever is written next to this symbol.

## 3. Major referencing styles

Before describing the reference management process in more detail, it is important for you to understand the importance of referencing and be aware of the two major referencing styles.

### 3.1 What is referencing?

Whenever you quote from another source, refer to it, or even allude to it, you are expected to reference it, ie to identify the place where the original citation can be found. Referencing, therefore, is the standardised method of acknowledging sources of information. Knowledge of referencing is thus essential to the research process.

### 3.2 Why is referencing important?

Important reasons for referencing include:

- To avoid plagiarism, ie “The action or practice of taking someone else's work, idea, etc, and passing it off as one's own; literary theft” (The Oxford English Dictionary 2006).
- To enable the reader to trace, verify and/or follow up the source material.
- To demonstrate that you are not just giving your own opinions, but are substantiating this with evidence.

### 3.3 What are the steps involved in referencing?

There are three basic steps involved in referencing:

- Recording all the necessary bibliographic details ie author(s), year of publication, editor(s), book title or title of article, journal name, volume number, issue number, page number(s), publisher, etc at the time of collecting the information.
- Citing the reference in the appropriate place and in the appropriate format within your report or manuscript.
- Providing either a reference list ie a list of all the sources you have referred to in you text or bibliography ie an alphabetical list, by author, of all the material you have consulted at the end of your manuscript.

### 3.4 What are the major referencing styles?

There are two main styles of referencing:

- The **Harvard** (also referred to as author-date) referencing style and
- The **Vancouver** (also referred to as footnote/endnote) referencing style.

In addition, there are numerous variations based upon these two styles, such as those recommended by specific journals and professional associations eg the American Psychiatric Association, APA.

Both the major styles of referencing have advantages and disadvantages.

## Harvard

The Harvard system is more commonly seen in the social sciences literature with the author(s) surname in brackets together with the year accompanying each citation eg Beverley 2000. For a reader who is familiar with a particular field this information provides a useful memory aid to what each previous writer has discussed. However, such notation takes up precious space and, in a text where one or two authors are cited frequently it can make the prose stilted and repetitive.

## Vancouver

The Vancouver style is much more economical, typically employing a single number often in superscript eg <sup>3</sup>, and allows multiple citations eg <sup>3-17</sup>. However, the numbers are meaningless without recourse to the bibliography and, on occasions where an additional reference is inserted or where a sentence or even paragraphs are moved around, the complete number sequence has to be reordered and rechecked.

## Choosing a reference style

Usually your choice of referencing style will be determined by your target journal or by the house style of the institution to which you submit any academic coursework. Remember, regardless of the style you choose, you should **BE CONSISTENT IN YOUR APPROACH**. Being aware of the differences between referencing styles can save you much time at a later, and often pressurised, stage of the writing process. Please refer to Appendix 4 for a detailed comparison between the Harvard and Vancouver referencing styles. Some of the common abbreviations used in citations are provided in Appendix 5.

## EXERCISE 1

Examine several articles in a recent issue of a journal that you read regularly eg *The British Journal of General Practice*, *Journal of Advanced Nursing*, etc.

Is its' reference style based on the Harvard system or Vancouver system?

What were the distinguishing characteristics that led you to that conclusion?

Are there any aspects of the style which appear to be unique to the particular journal in question? For example, although the *British Medical Journal* conforms in most respects to the Vancouver style, the volume numbers are not given in bold, two authors are not linked by 'and' or '&', and the date of publication appears in a different place.

From the issue of the journal that you have in front of you identify the following:

- (i) A journal reference
- (ii) A book reference
- (iii) A chapter in a book
- (iv) A government report
- (v) Web Page Reference
- (vi) E-mail

For each of these reference types, map the different elements, paying particular attention to the bold and italics used and to the punctuation. For example, for a journal:

Author <space> (Year) <comma> <space> "Article title" <comma> <space>  
*Journal Title* <fullstop> <space> vol. Volume Number <comma> <space> pp. Start  
Page <hyphen> End Page <fullstop>.

You may find it helpful to refer to the examples given in Appendix 4.

## 4. The reference management process

Having introduced you to the three basic steps in the reference management process - input, retrieval and output in the Introduction, this section will now consider the reference management process in more detail, from initially setting up your reference management system to finally generating a bibliography for inclusion in your manuscript submitted to a peer-reviewed journal. The principles described here may be applied to either a manual or an electronic system. Sections or exercises devoted entirely to electronic reference management are denoted by #.

The four stages are:

1. Creating a new reference management system
2. Inputting and storing your references
3. Retrieving your references
4. Outputting your references

### 4.1 Creating a New Reference Management System

The first thing you will need to do is to create a system in which to store all the references you use during the course of your research study. It is a good idea to do this at the same time as conducting your initial literature search. Will this be a manual or electronic system? Working through Exercise 2 will help you to make a choice between a manual or electronic reference management system.

! If you decide to use an electronic reference management system, it is strongly recommended that you read the following section on the current software available. It describes the major software packages currently available, as well as helping you to select the package which best meets your needs. If you have opted for a manual system you may prefer to skip the following section and move onto Section 2.

#### # Electronic Reference Management Software

At the time of writing, there are three major software packages, namely:

- *Reference Manager*
- *EndNote*
- *Procite*

Table 1 provides corresponding URLs (Uniform Resource Locators, commonly referred to as Web addresses) for each of these packages.

**Table 1. The four major electronic reference management software packages.**

--	--

Software Package	URL
Reference Manager	<a href="http://www.refman.com">http://www.refman.com</a>
EndNote	<a href="http://www.endnote.com">http://www.endnote.com</a>
Procite	<a href="http://www.procite.com/">http://www.procite.com/</a>

**Table 2. Other electronic reference management software packages.**

Software Package	URL
Biblioscape	<a href="http://www.biblioscape.com/">http://www.biblioscape.com/</a>
GetARef	<a href="http://www.getaref.com/index_en.htm">http://www.getaref.com/index_en.htm</a>
Library Master	<a href="http://www.balboa-software.com">http://www.balboa-software.com</a>
Nota Bene	<a href="http://www.notabene.com/">http://www.notabene.com/</a>
SquareNote	<a href="http://sqn.com/sqn5.html">http://sqn.com/sqn5.html</a>
Papyrus	<a href="http://www.researchsoftwaredesign.com">http://www.researchsoftwaredesign.com</a>

NB: SquareNote and Papyrus are available to download free.

## Compatibility

It is important to make sure that everyone who will need to access your database has access to the software it runs on. Most packages will produce a database which runs only its own software. Reference Manager, Endnote and Procite however do offer some compatibility and it is usually possible to download the contents of, for example, a Reference Manager database and upload it into Endnote or Procite. One advantage of using ordinary database software, such as Microsoft Access, is that the software is more likely to be available to a variety of potential users.

## Exercise 2

This pack has already introduced you to some of the pros and cons of using a manual and/or spreadsheet and/or electronic reference management system. Now take a few minutes to consider this in more detail:

In your particular case, what are the advantages of having a manual RMS? (eg are you already familiar with this approach, has this approach worked well for you in the past?).

What are the disadvantages of having a manual RMS? (eg are you likely to lose track of paper-based index cards, are you unsure of how to store your articles in your filing cabinet – by author, by subject, etc?).

What are the advantages of having a spreadsheet RMS? (eg are you already an experienced user of an application such as Excel?).

What are the disadvantages of having a spreadsheet RMS? (eg will you need to produce list of references regularly in different styles?).

What are the advantages of having an electronic RMS? (eg would a computerised system save you time by automating tasks, such as generating bibliographies in different reference styles, and importing references directly from bibliographic databases, eg MEDLINE?).

What are the disadvantages of having an electronic RMS? (eg would an electronic system prove too expensive?).

On balance, which approach seems most appropriate for you?



## Choosing an electronic reference management software package

Exercise 3 attempts to guide you through selecting a package, although it should be noted that there is no clear-cut answer as to which is the best package to use. In addition to the major packages already mentioned, there are an ever increasing number of shareware and Internet options (refer to Table 2 and Appendix 3 for further information). Each package has its own strengths and weaknesses, some of these are highlighted in Appendix 6. References to more in-depth evaluations are provided in Appendix 3. For example, although the shareware and Internet options tend to be much cheaper, usually less than £100 per single user licence, sometimes even free, compared to over £100 for the more established packages, this is usually at the expense of ongoing technical support or advanced features.

### # Exercise 3

- ! Firstly it is useful to check to see whether you already have access to one of the electronic software packages listed above, eg via a University computer network if you are affiliated to an academic institution. If so, write down the name and version of the package below.

Try to answer the following questions, regardless of whether you already have access to an electronic reference management software package:

- Will you mainly be using the package to enter references one by one, or for importing a batch of references directly from internet databases, such as Medline and CINAHL?
- Will you need to generate bibliographies from your database in specific referencing styles? The range of "output" styles varies considerably between software packages. However in many cases output styles refer to that used by particular journals which are usually either Vancouver or Harvard. Whilst this does not actually mean there are additional output styles, at least you do not have to find the reference style for the particular journal.
- How wide a range of import filters you require? This will depend upon the range of databases you are searching. This in turn will depend upon your subject, eg if you are involved in clinical research you may only be searching a number of databases such as Medline and Embase and so use only a limited number of filters. However, if you are researching on a topic that covers a number of disciplines such as social care, health care, education etc you may be using a far higher number of databases and sources. Thus a large range of import filters may be more important to you.
- Are you likely to make use of the facility to insert citations from your database directly into your word-processed manuscript?

- Will several researchers need access to the database or will you maintain the database alone?
- Is there anyone locally who can provide ongoing technical support, or would you expect this to be provided by the software company themselves (or a third party)?
- Are your existing hardware and/or software likely to create any problems regarding compatibility?
- How much money are you prepared to spend on:
  - Ø Purchasing the software initially?
  - Ø Running costs eg upgrades?

Now visit the web sites of two or more of the software packages, and determine the extent to which your criteria are met by these packages.

Below write down the name(s) of the software package(s) that best meet your needs.

- ! Before actually purchasing your chosen package, you may find it useful to download a trial version. Doing so, will also help you to follow subsequent exercises in this resource pack. Write down the URL from which you can download a trial version of your chosen package. For example, a trial version of *Reference Manager* can be downloaded from:  
<http://www.refman.com/rmdemo.asp>

## Designing a Manual System

If using a manual system you will need to think about the media you are going to use. Normally it will be a series of cards. You will then need to decide what information you wish to record about each reference. This will usually be the type of reference, title, author, bibliographic details, keywords and a notes field, though this may vary according to your needs.

## Designing a Spreadsheet or Database based System

If using a spreadsheet system based on for example Excel, normally references will be in rows and the different 'fields' in the columns. The fields will usually include type of reference, title, author, bibliographic details, keywords and a notes field though again

they will vary according to your needs. It is possible to add additional fields as you go along, though it is still preferable to try to design it correctly initially.

Similarly if using a database package such as Access, again you will need to decide which fields you wish to include and design the system appropriately.

## 4.2 Inputting and storing your references

You are likely to have several papers lying around that stimulated your initial interest in conducting your research. Before you lose track of these and embark on a full literature search, it makes sense to record details of these references in your newly created reference management system.

- # If using a software package, it is helpful to note at this stage that your reference management database is composed of a number of subsections referred to as 'fields' into which different parts of your bibliographic record can be entered eg title, author, publication year, etc. At a later stage, each of these fields may then be searched individually eg the author field, for a specific search term eg Smith.

### Exercise 4

In order to input references into your RMS, you will need to know the following basic details about the reference: the type of reference eg journal article, book, book chapter, book, conference proceeding, report, etc; the title of the article; the author(s); and the bibliographic details ie publication year, journal name, volume number, page numbers, etc. Using one of your references as an example, write down the corresponding details in the spaces below:

- The type of reference
- The title of the reference
- The author(s)
- The bibliographic details

Now enter these details into your reference management system, either as a new record in your electronic database or spreadsheet or on index cards if using a manual system.

- # If using a software package, write down the procedure involved in entering a new reference in your database. For example:

Step 1. From the <References> menu, select <New ...>, etc

- # As you will have probably discovered by now, entering references can be extremely time-consuming. If you are typing it, the reference also has the drawback of not including the full abstract, unless of course, you have laboriously typed them all in! The prospect of entering tens, if not hundreds, of references obtained from electronic literature searches, therefore, does not seem very appealing!
- # Electronic reference management software packages have an option to download, also referred to as "importing" or "capturing", references directly from internet databases, such as MEDLINE. In order to import your references directly from a literature database into your software package, you will need to know two things. Firstly the database used eg MEDLINE, CINAHL, EMBASE, etc and secondly the interface/host/service provider of that database, ie the software company or organisation responsible for providing access to the database eg Ovid, SilverPlatter, Dialog, PubMed. In addition, you must save the search results in tagged or labelled text (".txt") format.
- × Please note that you need to know this information in advance. It is not possible to import previously saved search results unless you know the database and service provider and have saved the results in tagged format.
- # Also note that not all databases have corresponding capture formats/import filters. The availability will vary between electronic reference management systems. The filters are provided with the software rather than with the database software. It may be possible to create your own filters for databases when one is not provided for. However, this can be a time-consuming and frustrating process.

References for which no filter is available must be entered as in Exercise 4.

- # If you have an electronic list of references it is possible to use the copy and paste function of your word processor to insert them into the electronic reference management system or spreadsheet. You will have to do this a field at a time, so although it is faster than typing them in by hand, it can still be time consuming.

## Exercise 5

- ∴ This exercise requires you to have access to a database, such as MEDLINE, and to be able to conduct a simple literature search. If you are unsure about this or would like assistance in developing a more effective search strategy, please contact your local health librarian.
- & You may also find it helpful to consult the following The NIHR RDS EM / YH guide which covers the basics of literature searching:

Hewitt, M. (2006) Literature Search & Critical Evaluation, The NIHR RDS EM / YH Resource Pack.

Now perform your literature search for your research study in an electronic bibliographic database, such as MEDLINE.

- # If using a software package, save your search results tagged or labelled text (".txt") or other appropriate format. Below write down the name and location of this file, as well as the steps involved in saving the search results.

If using a manual or spreadsheet RMS enter these references into your reference management system as outlined in Exercise 4. If using a software package, go to Exercise 6.

### Exercise 6

For the literature search you have conducted in Exercise 5, make a note of the:

- Database used eg Medline, AMED.
- The host/service provider/interface eg Ovid, SilverPlatter, Dialog, PubMed.

Now return to your software package and find out how to import these search results directly into your database. You may find you need to consult the online help or user manual associated with your software package. Importing records is likely to involve specifying:

- The name and location of the text file of search results you have just saved.
- The database and service provider from which the search results originate.

You are also likely to be given the option of assigning several "keywords" to the references. If this facility is available on your software package, then it is strongly recommended that you make best use of it by being consistent in your approach and using the "pop-up browser", ie the list of terms you have already used in your database and if you are sharing the database with other users making sure they do as well. Doing so will make retrieval of references much easier later on. Assigning keywords to references is also strongly recommended, if using a manual or spreadsheet system. It is important to consider the keywords you are going to use before you begin. What keywords did you choose to assign?

Below write down each of the steps involved in importing these references into your database.

## 4.3 Retrieving Your References

Several months into your research study you will probably decide to conduct another quick literature search to check that you have not missed anything that has been published since your original search. How will you know whether or not you already have these references in your collection? This demonstrates the importance of effectively storing your references to aid the retrieval process.

### Exercise 7

From your RMS, retrieve all the articles by a particular author.

Now try to search for all articles on a particular topic eg "leg ulcers". To do this it is important that you have used consistent subject headings/keywords when entering your references.

Has this exercise made you reconsider how you have stored your references? If so, in what way could you improve your storing procedures?

One of the advantages of using a software package over a manual system, is the ability to rapidly retrieve articles in a variety of ways. For example, imagine you wanted to retrieve articles both by a particular author AND on a particular topic. The only way of doing this with a manual system is to find all those by a particular author and then search through these by hand to find those on the required topic, or vice versa.

A spreadsheet system such as Excel should allow you to undertake a search that specifies more than one term, eg author and topic. This search is likely to be across all the fields in the spreadsheet. Thus there can be a problem in retrieving the term you are searching for from another field, eg a search for the word "Head" may retrieve records based on the article title, the journal title or the author.

# Most software packages, however, provide the option of combining such searches together, using something called **Boolean logic**. There are three Boolean operators, namely AND, OR and NOT. They are used in the same way as when conducting a literature search of databases such as Medline. **AND** is used to narrow searches eg combining both the author, "Smith, A.", and topic terms, "leg ulcers", together in order to retrieve only those articles on leg ulcers by Smith, A. **OR** is used to broaden searches, eg to look for either the author or the topic, thus retrieving all articles by Smith, A., whether or not they were on leg ulcers, as well as retrieving those about leg ulcers regardless of who the author was. **NOT** is used to narrow searches, eg to retrieve references by Smith, A., but not on leg ulcers.

# Now investigate in your software package how the two previous searches in this exercise, the author and topic search, can be combined using Boolean operators. Note how you can retrieve references based on each of the major fields eg authors, title, keywords, publication year, etc.

## 4.4 Outputting Your References

## Instructions to authors

Imagine you have finally found the time to write up your research for publication in a peer-reviewed journal. OK, an unlikely scenario, but let's imagine! One of the first things you should do before actually starting to write is to determine which is your target journal. Having done so, you will then need to obtain a copy of the journal's *Instructions to Authors*. This will not only detail the precise format your manuscript should take, but will help you to put the appropriate slant on your article.

The *Instructions to Authors* may be obtained from:

1. An issue of the printed journal in question. It should be noted that some journals publish these instructions in every issue whilst others only publish them at the beginning of a volume or the beginning of the year. The actual instructions can usually be found near the front or back of the issue.
2. The journal's own website should always have 'Instructions to authors' easily accessible. You should be able to find the journal's own website quite easily using a general search engine such as Google.
3. The "*Instructions to Authors in the Health Sciences*" Web site available at: <http://mulford.meduohio.edu/instr/>. This is produced by the Raymon H. Mulford Library at the Medical College of Ohio. It includes links to publisher Web sites providing *Instructions to Authors* for over 3,000 journals in the Health Sciences, arranged into an alphabetical list of journals.

## Exercise 8

Select a journal in your field that is likely to publish your research, for example, *The British Journal of General Practice*, *NT Research*, *Social Science and Medicine*, *Qualitative Health Research*, etc.

Now, obtain an **up-to-date** printed copy of the *Instructions to Authors* for this particular journal.

- Below, write down the date for the *Instructions to Authors*.
- What is the word length for original research articles?
- What is the preferred referencing style?
- How many copies of the article should be submitted to the journal?
- To whom should all correspondence be addressed?

Use the web site given above or the journal's own homepage to find the Internet version of the instructions available. Record the Unique Resource Locator (URL) below. For example, the URL for the *British Medical Journal Instructions to Authors* is :

<http://resources.bmj.com/bmj/authors/bmj-house-style>

## Creating a manuscript and bibliography

Having decided on your target journal, read the corresponding *Instructions to Authors* and browsed through recent issues, the time comes to actually write your article. It is beyond the scope of this resource pack to describe in detail how to write a paper; however, this section does attempt to offer guidance on how to incorporate references directly from your reference management system into your manuscript and how to revise your manuscript accordingly.

& The process of actually writing a research paper is covered in the following books and chapter:

Albert, T. (2000) *A-Z of Medical Writing*, BMJ Books.

Hall, G.M. (ed) (2003) *How to Write a Paper*, 3<sup>rd</sup> edition, BMJ Books.

Murray, R. (2005) *Writing for Academic Journals*, Open University Press.



Parry, G. (1996). Writing a research report, in: Parry, G. & Watts, F.N. (eds) *Behavioural and Mental Health Research: A Handbook of Skills and Methods*, 2<sup>nd</sup> edition, Erlbaum (UK) Taylor & Francis, Hove, East Sussex.

You may also find it helpful to consult the following guide:

Lacey, A. (2007). *Presenting and disseminating research*, The NIHR RDS EM / YH Resource Pack.

### Exercise 9

Produce a short sample manuscript and bibliography on your word processor based on your reference management system and in the format of your chosen journal.

- # If using a software package, you may find it includes an add-on to your word processor eg in the case of *Reference Manager* Version 11, 'Cite while you write'. Such a facility allows you to incorporate references directly from your database into your manuscript, and to automatically generate a reference list or bibliography at the end of your manuscript. In order to do this you will need to investigate how to indicate in-text citations in your word processor which are recognised by your software package.

## Revising your manuscript

At some stage in the writing process it is strongly recommended that you consult the *Uniform Requirements for Manuscripts Submitted to Biomedical Journals*. This is produced by the International Committee of Medical Journal Editors (ICMJE) and can be found at the following URL:

[www.icmje.org](http://www.icmje.org)

It details the precise format your manuscript should adhere to before being submitted to the journal editor.

### Exercise 10

Open the *Uniform Requirements for Manuscripts Submitted to Biomedical Journals* at [www.icmje.org](http://www.icmje.org)

List below the three major issues to consider before submitting a manuscript:

Read the *Requirements for Submission of Manuscripts* section. Now check to see that:

- Your manuscript conforms to the necessary criteria.
- Your references are cited appropriately.

Read the *Sending the Manuscript to the Journal* section.

- What should accompany your manuscript?
- What information should this include?

## Sharing references

Imagine your recent enthusiasm for doing research has encouraged a pharmacist affiliated to your practice to embark on her own small-scale study. Although she is working in a slightly different field, you recognise that some of your references could be relevant to her investigation. Having an effective RMS will help you to easily identify articles in each of your reference collections which will be of mutual interest.

- # software packages can help enormously with this task. They offer the ability not only to export reference details to a word processed document, but also to export references from one database to another, sometimes referred to as “merging” databases, removing duplicate references in the process.
- # Spreadsheet based RMS references can also be transferred from one to another by cutting and pasting. Of course the fields in each spreadsheet will need to be identical to allow this. It is possible to remove duplicates semi-automatically by sorting references and then deleting rows which have duplicate references in them.

## 5. Summary

This resource pack has introduced you to the concept of reference management. It has highlighted the importance of referencing, emphasised the need for effective reference management throughout the research process, demonstrated the major tasks involved in reference management, both manual and electronic, and introduced the major electronic reference management software packages currently available. In addition, you should now be aware of the *Instructions to Authors* for a journal in your field and be familiar with the standard requirements for submitting manuscripts to peer-reviewed journals. You may find it helpful to return to Page 3 of this guide and review the original learning objectives. If you would like to know more about reference management, please refer to Appendix 3 which provides numerous references for further reading.

# Appendix 1

## Glossary

<b>Bibliography</b>	An alphabetical list, by author, of ALL the material you have consulted in order to prepare your manuscript; in contrast to a <i>reference list</i> .
<b>Citation</b>	Quoting of words or passages by an author or publication, usually by way of example and/or to support an argument.
<b>Database</b>	Collection of related data. The term is now usually used to describe the management of a collection of formatted data by a computerised information system.
<b>EndNote</b>	One of the major software packages supplied by Research Information Systems (RIS).
<b>Harvard referencing style</b>	One of the two major referencing styles, often referred to as the author-date method; the other major style being the <i>Vancouver referencing style</i> .
<b>Manuscript</b>	The author's copy of a piece of written work. Here, "manuscript" is used to refer to your word-processed document, such as your article for publication.
<b>Papyrus</b>	Previously a major software package supplied by Research Software Design. However, it has not been updated since January 2004 and there is no intention to do so.
<b>Procite</b>	One of the major software packages supplied by Research Information Systems (RIS).
<b>Reference list</b>	A list of all the sources you have <u>referred</u> to in your text in contrast to a <i>bibliography</i> .
<b>Reference Manager</b>	One of the four major software packages produced by Research Information Systems (RIS).
<b>Reference</b>	To "reference" or "cite" is to point to evidence, authority or proof. To reference correctly you need to provide sufficient information to allow the reader to trace the original source material.
<b>Referencing style</b>	A standardised method of acknowledging sources of information. There are two main referencing styles:

*Harvard* and *Vancouver*, although there are many variations.

**Vancouver referencing style**

One of the two major referencing styles, often referred to as the footnote/endnote method which involves numbering each reference; the other major style being the *Harvard referencing style*.

# Appendix 2

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## Appendix 3

### Further reading and sources of information

#### Referencing and referencing styles

Monash University Library (16-7-1998), "Guide to referencing".

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The University of Sheffield Library (16-12-1997), "Writing a bibliography".

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## Appendix 4

### A comparison between the Harvard and Vancouver referencing styles <sup>a</sup>

	HARVARD STYLE	VANCOUVER STYLE
<b>Description</b>	An author-date style	A footnote/endnote style, references are numbered in the order in which they are cited in the text. Each quote or paraphrase is numbered and then details of where to find it are given either at the bottom of the page (footnoting), or in a reference list at the end of your manuscript (endnoting).
<b>Format of in-text citation</b>	Requires only the name of the author(s) and the year of publication, with no punctuation between the two items. Citations should be, whenever possible, placed at the end of a sentence (before the concluding punctuation). If there is more than one reference by an author in the same year they are generally labelled in order of publication with a lower case letter (eg Smith 1999a, Smith 1999b).	Each reference is given a consecutive number in parentheses ( ), the first time referral is made to it. The author's name may also be provided in the text, but a number must always be used. If the same work is cited later in the text, the same number must be used.
<i>Example</i>	(Bond 2000)	(1)
<b>Book citation</b>	Author's surname, Author's initial. (Year of publication), <i>Title of the book</i> , Edition [if not the first], Publisher's name, Place of publication.	Author's surname Author's initial. Title of the book. Edition [if not the first]. Place of publication: Publisher's name; Year of publication.
<i>Example</i>	Clifford, C. & Gough, S. (1990), Nursing Research: A skills-based introduction, Prentice Hall International (UK) Ltd, Hemel Hempstead, Hertfordshire.	Clifford C & Gough S Nursing Research: A skills-based introduction. Hemel Hempstead, Hertfordshire: Prentice Hall International (UK) Ltd; 1990.

<sup>a</sup> Based on Monash University Library 1998, University of Sheffield 1998a, University of Sheffield 1998b and Monash University Library 2000.

	HARVARD STYLE	VANCOUVER STYLE
<b>Book chapter citation</b>	Author's surname, Author's initial. (Year of publication), Title of chapter, in: Editor's surname, Editor's initial. (ed) <i>Title of the book</i> , edition [if not first], Publisher's name, Place of publication.	Author's surname Author's initial. Title of chapter. In: Editor's surname Editor's initial, editor. Title of the book. Edition [if not first]. Place of publication: Publisher's name; Year of publication.
<i>Example</i>	Wearn, A. & Rogers, D. (1997), Mastering MEDLINE and managing references, in: Carter, Y. & Thomas, C. (eds) <i>Research Methods in Primary Care</i> , Radcliffe Medical Press, Oxford.	Wearn A & Rogers D Mastering MEDLINE and managing references. In: Carter Y & Thomas C, editor. <i>Research Methods in Primary Care</i> . Oxford: Radcliffe Medical Press.
<b>Standard journal citation</b>	Author's surname, Author's initial. (Year of publication), "Title of article", <i>Title of the Journal</i> , vol. Volume number, Date/month of publication, pp. Page numbers of article.	Author's surname Author's initial. Title of article. <i>Title of the Journal</i> Year of publication; Volume number: Page numbers of article.
<i>Example</i>	Bull, C., Yates, R., Sarkar, D., Williamson, P.R. & Smyth, R.L. (2000), "Temperature measured at the axilla compared with rectum in children and young people: a systematic review", <i>British Medical Journal</i> , vol. 320, 28 April, pp. 1174-1178.	Bull C., Yates R, Sarkar D, Williamson PR & Smyth RL Temperature measured at the axilla compared with rectum in children and young people: a systematic review. <i>British Medical Journal</i> 2000, 320: 1174-1178.
<b>Journal paginated by issue citation</b>	Author's surname, Author's initial. (Year of publication), "Title of article", <i>Title of the Journal</i> , vol. Volume number, no. Issue number, Date/month of publication, pp. Page numbers of article.	Author's surname Author's initial. Title of article. <i>Title of the Journal</i> Year of publication; Volume number (Issue number): Page numbers of article.
<i>Example</i>	Hamberg, K. & Johansson, E.E. (1999), "Practitioner, Researcher, and Gender Conflict in a Qualitative Study", <i>Qualitative Health Research</i> , vol. 9, no. 4, July, pp. 455-467.	Hamberg K & Johansson EE Practitioner, Researcher, and Gender Conflict in a Qualitative Study. <i>Qualitative Health Research</i> 1999, 9(4): 455-467.
<b>Journal supplement citation</b>	Author's surname, Author's initial. (Year of publication), "Title of article", <i>Title of the Journal</i> , vol. Volume number, no. Suppl	Author's surname Author's initial. Title of article. <i>Title of the Journal</i> Year of publication; Volume number Suppl Supplement

	HARVARD STYLE	VANCOUVER STYLE
	Supplement number, pp. Page numbers of article.	number: S Page numbers of article.
<b>Conference paper citation</b>	Author's surname, Author's initial. (Year of publication), 'Title of paper', In: Editor's first name or initial, (ed) <i>Title of the conference</i> , Date of Conference, Publisher's name, Place of publication, pp. Page numbers.	Author's surname Author's initial. Title of paper. In: Editor's surname Editor's first name or initial, editor. Title of the conference; Date of conference; Place of publication: Publisher's name, Year of publication. p. Page numbers.
<b>Government report</b>	Author's surname, Author's initial. [or common report title] (Year of publication), 'Official title of report'. Publisher's name, Place of publication.	Author's surname Author's initial. [or common report title]. Official title of report. Place of publication: Publisher's name, Year of publication.
<b>Dissertation or thesis</b>	Author's surname, Author's initial. (Year of publication), Title of dissertation/thesis. PhD thesis, Name of academic institution.	Author's surname Author's initial. Title of dissertation/thesis [thesis]. Place of publication: Academic institution; Year of publication.
<b>Newspaper article</b>	Author's surname, Author's initial. Year of publication, 'Title of article'. <i>Title of the newspaper</i> , Date/month of publication; p. Page number (col. Column number).	Author's surname Author's initial. Title of article. <i>Title of the newspaper</i> , Year of publication Date/month of publication; Page number (col. Column number).
<b>Web page citation</b>	Author/editor's surname, Author/editor's initial. (eds) [if appropriate] (last update or copyright date), "Title of page", Place of Publication/Publisher, Available: URL (Accessed: Access date).	Author/editor's surname Author/editor's initial. Editor [if appropriate]. Title of page. Place of Publication/Publisher. Last update or copyright date. URL (Access date).
<i>Example</i>	Loft, B. & Jones, R.M. (28 April 2000), "Referencing styles: Harvard and Vancouver systems", BMA Library, Available: <a href="http://library.bma.org.uk/html/refsystem.html">http://library.bma.org.uk/html/refsystem.html</a> (Accessed: 8 May 2000).	Loft B & Jones RM Referencing styles: Harvard and Vancouver systems. BMA Library. 28 April 2000. <a href="http://library.bma.org.uk/html/refsystem.html">http://library.bma.org.uk/html/refsystem.html</a> (8 May 2000).
<b>Electronic journal citation</b>	Author/editor's surname, Author/editor's initial. (eds) [if appropriate] (Year of publication),	Author's surname Author's initial. Title of article. <i>Title of the Journal</i> [online] Year of publication;

	HARVARD STYLE	VANCOUVER STYLE
	"Title of article", <i>Title of the Journal</i> [online], vol. Volume number, no. Issue number, Date/month of publication, pp. Page numbers of article. Available: URL (Accessed: Access date).	Volume number: Page numbers of article. URL (Access date).
<b>Discussion list citation</b>	Author's surname, Author's initial. (Day Month Year), "Subject of message", <i>Name of discussion list</i> [online]. Available: Discussion list URL (Accessed: Access date).	Author's surname Author's initial. Subject of message. <i>Name of discussion list</i> [online]. Day Month Year. Discussion list URL (Access date).
<b>Personal email citation</b>	Sender's surname, Sender's initial (Sender's email address). (Day Month Year), <i>Subject of message</i> . Personal email to: Recipient's initial Recipient's surname (Recipient's email address).	Sender's surname Sender's initial (Sender's email address). Subject of message. Day Month Year. Personal email to: Recipient's initial Recipient's surname (Recipient's email address).
<b>Reference list</b>	The references made in the text are listed in alphabetical order by author(s) at the end of the paper. If the author is unknown, the title is used.	The sources you have referred to in the test are listed in numerical order.

## Appendix 5

### Some common abbreviations used in citations <sup>b</sup>

anon	anonymous – used in some style when the author is unknown
c., ca.	circa – used for approximate dates
ch., chs.	chapter, chapters
eg, eg	for example
ed., eds.	editor, editors
et al.	and others ( <i>et alii</i> ) – used when there are more than 3 authors
ibid.	in the same work, cited just above ( <i>ibidem</i> )
loc. cit.	in the place (or work) cited ( <i>loco citato</i> )
n.d.	no date
op. cit.	in the work cited ( <i>opere citato</i> )
p., pp.	page, pages
rev.	revised
suppl.	supplement
trans	translated by
v., vol., vols.	volume, volumes

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<sup>b</sup> Taken from Monash University Library 2000.

## Appendix 6

### Comparison of the major personal bibliographic management software (pbms) packages

	REFERENCE MANAGER	ENDNOTE	PROCITE
• URL	<a href="http://www.refman.com">http://www.refman.com</a>	<a href="http://www.endnote.com">http://www.endnote.com</a>	<a href="http://www.procite.com">http://www.procite.com</a>
• Current version	11	X.02	5.0
• Manual entry of references	Yes	Yes	Yes
• Importing references directly from databases	Yes	Yes	Yes
• Checking of duplicate references	Yes	Yes	Yes
• Retrieving references	Yes	Yes	Yes
• Sorting references	Yes	Yes	Yes
• Preparing bibliographies	Yes	Yes	Yes
• Inserting references into a word-processed manuscripts	Yes	Yes	Yes
• Searching the Internet	Yes	Yes	Yes
• Ability to share references	Can run on network but no multi user access	Multi user access on network or web	Can run on network
• Ease of use and documentation	Good on-line help and user manual	Good on-line help and user manual	Attractive interface with on-line help

• <b>Technical support</b>	Yes	Yes	Yes
• <b>Program updates</b>	Yes - usually entails additional cost	Yes - usually entails additional cost	Yes - usually entails additional cost
• <b>Major advantages</b>	<ul style="list-style-type: none"> <li>• Runs on Mac &amp; PC</li> <li>• Ability to search the Internet directly</li> <li>• Wide range of biomedical reference input and output formats</li> <li>• Good for developing multiple databases</li> <li>• Good technical support</li> </ul>	<ul style="list-style-type: none"> <li>• Runs on PC</li> <li>• Ability to search the Internet directly</li> <li>• Good on-line help</li> <li>• Good technical support</li> </ul>	<ul style="list-style-type: none"> <li>• Runs on PC</li> <li>• Ability to search the Internet directly</li> <li>• Attractive interface and good on-line help</li> <li>• Good technical support</li> </ul>
• <b>Disadvantages</b>	<ul style="list-style-type: none"> <li>• Expensive both to purchase and upgrade</li> <li>• Limited search abilities</li> </ul>	<ul style="list-style-type: none"> <li>• Expensive</li> <li>• Limited search facilities</li> </ul>	



# Appendix 7

## Details about the authors

### Original Authors

**Catherine Beverley** was an Information Officer, specialising in Systematic Reviews, at the School of Health and Related Research (SchHARR), University of Sheffield between 2000 and 2005. She was responsible for creating and managing reference databases for several systematic reviews. She also provided one-to-one tuition in the use of *Reference Manager* software. Catherine has devised training guides and exercises on the use of *Reference Manager* as the basis for further training courses. She is currently Knowledge Manager in the Adult Social Care Directorate of Cumbria County Council.

**Andrew Booth** is the Director of Information Resources and Reader in Evidence Based Practice at the School of Health and Related Research (SchHARR), University of Sheffield. He has extensive experience of reference management, having collaborated in a number of systematic reviews for clients including the Health Technology Assessment Programme. He is an experienced teacher on the methodology and practice of systematic reviews. Andrew has contributed an appendix on reference management for *Evidence Based Healthcare* by J.A. Muir Gray, and wrote a chapter about organising a personal knowledge base in the book: *Managing Knowledge in Health Services* that he edited with Graham Walton.

**Louise Falzon** was a Senior Information Officer for the Trent Institute for Health Services Research (TIHSR), based at SchHARR at the University of Sheffield. She co-ordinated training, including reference management training, conducted by the Information Resources section at SchHARR. Louise also taught on various courses related to literature searching and systematic reviews. She is currently Fields Trial Search Co-ordinator for the Cochrane Behavioural Medicine Field at Mount Sinai School of Medicine in New York.

### Update Authors

**Angie Rees** is an Information Officer at SchHARR. She specialises in systematic literature searching and has a long standing interest in PBMS systems and their relevance to research. Angie works as part of SchHARR's Technology Assessment Group undertaking Systematic Reviews for NICE and NHS HTA. Angie also teaches on SchHARR's various MSc courses and also on the jointly run MSc Health Informatics Course with the Dept. of Information Studies.

**Colin Lynch** is Information Services Manager for The NIHR RDS EM / YH based in the Information Resources section of SchHARR at the University of Sheffield. He manages the RDSU's Information Service and co-ordinates the training provision for the RDSU on a range of subjects including reference management.