
Using *ProCite* to manage
the UNIS bibliographies

A Manual

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Preface

This reference manual is not a complete user's guide to *ProCite*. It is written for those who have not used *ProCite* before, and need to update the bibliography at UNIS. Some information is also useful for the skilled *ProCite* user working with the UNIS standard styles for various bibliographies. In writing this brief guide, I have tried to bear in mind all the problems that I encountered during my work with the database. I hope I have considered all the relevant issues and necessary applications, to help future users of this database follow the underlying definitions for entries, styles and output. The use of this manual will hopefully lead to consistent entries and bibliographies.

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Chapter 1

Entering new records

The manual considers the styles of the annual bibliography and the reindeer bibliography among other things. In the following small reindeer pictures are used to mark the specific input rules for the reindeer bibliography, which differ from the standard input rules for the Unis bibliographies.

To open the database, open the file *.pdt (*ProCite* database). Always copy and update all necessary files and folders used by *ProCite* during the editing process and especially after installing *ProCite* on your computer. One of these is the file *.pdx (*ProCite* index). All the other files can be found under program files/**ProCite5**:



New records can be entered manually or by importing files from other files or databases. The following sections describe different methods to import new data to your bibliography.

Before you enter new records make sure that the entry does not exist already. The easiest way to do so is to go on the table **Terms** in the main reference table, and choose **show: Authors**. There you will find all publications of certain authors recorded in the bibliography.

Entries are always written in **Times New Roman**, 10pt. Exceptions of this rule are written in chapter 1.1.4.

1.1 Manual entry

To enter records manually select **database/New Record** from the menu. Choose your workform in the window that now opens. Note that only a few workforms are in use and

have a defined final style (Chapter: 1.1.1). Also, note that you always fill out the same fields as comprehensive as possible. Do not leave any empty spaces at the beginning or at the end of the entry. Title fields do not contain dots at the end of the entry. To avoid typing errors use the arrows on the right side of the input window and choose already existing phrases.

1.1.1 Choosing the workform

When opening the window **New Record** or **Editing Record** you will find the field **Workforms** in their menu bar (figure: 1.1). Of these, 18 workforms are defined in the style for use in UNIS bibliographies. Try to fit all types of reference into the following defined workforms: Abstract, Book Chapter, Book Short Form, Compendium, Conference Proceedings, Dissertation, Electronic Citation, Generic, Institution Series, Interview, Journal Article, Magazine Article, Monograph, Newspaper, Presentation, Report, Series Editor, broadcasting. If you are not sure about the classification, check with existing entries, the BIBSYS database or your librarian.

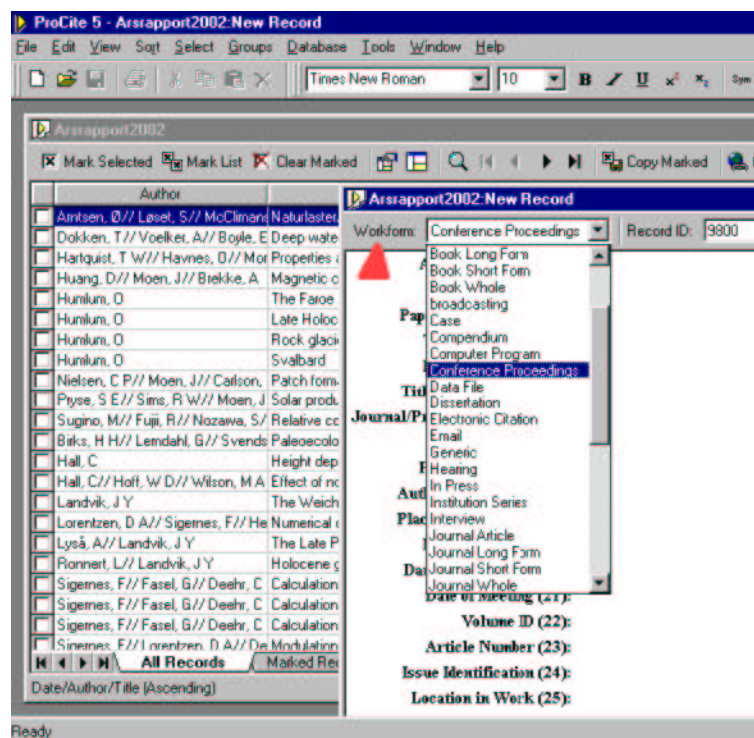


Figure 1.1: Chosing the workform for new records

Abstract

Abstracts included in this category can either stand alone or be published within proceedings or published in the www. Very often abstracts are also published in institution series or bulletins, but they will receive the workform **Abstract**.

Book and Book Chapter

Book and chapters in books are arranged in these two categories. There is no difference in scientific or *popular scientific* material primarily, but it has to be annotated in the field **Content description** (29) whether the publication is a *textbook* or a *popular scientific book*.

Broadcasting

The workform **broadcasting** includes radio or TV interviews of staff and/or students.

Compendium

Compendia are usually updated very often. Therefore only the newest version will be included in database. The workform also contains field guides and lecture textbooks.

Conference proceedings

This category collects all publications from meetings, symposia and conferences. The papers are written in article style and usually not published in peer-reviewed journals as the meeting committee basically publishes them. Information about **publisher**, **place of publication** and **date of meeting** are required.

Dissertation

In the *Library Bibliography* only PhD thesis are recorded by the **Dissertation** workform. However, field (6) **Document Type** needs to be filled in. The *reindeer bibliography* in addition contains Master theses etc.



Electronic Citation

The workform registers publications from the www, CD-ROM etc.

Generic

If a publication is absolutely impossible to group into the workforms above or below, then use the workform **Generic**.

Institution Series

Institutions (e.g. museums, universities, societies, governments) publish **Institution Series**. Usually these documents are not peer-reviewed. All entries need to have information about publishing place and publisher. There is no difference in scientific or popular scientific material primarily, but it has to be annotated in the field **Content description** (29) if the publication is *popular scientific*.

Interview

Interview includes articles from newspapers or magazines written by journalists. Staff or students are directly interviewed and cited in these articles. Field (7) or **Author, Monographic** has to be filled by the journalist's name.

Journal article

Articles in peer-reviewed journals are sorted to this workform, also if an institution publishes them.

Magazine article

Articles in *popular scientific* journals or magazines are sorted to this workform except publications by institutions.

Monograph

Continuing book series or books are included in these series. Usually they are not published by an institution but by a larger publisher. The workform does not include books or parts of these from encyclopaedia or other temporary series. Furthermore institution series or parts of these (e.g. museums, universities, societies, governments) are not included. All entries need to have information about publishing place and publisher.

Newspaper

The workform **Newspaper** collects material published in newspapers written by staff or students.

Presentation

This workform contains all kind of oral or written presentation. This covers posters, talks, invited talks, invited lectures etc.

Report

Reports are essays written at an institution (e.g. museums, universities, societies, governments). The field (23) **Record ID** is essential for a complete entry.

Series Editor

If staff or students are editors or co-editors of a document the work will be included in the workform **Series Editor**. This stands for all publishing categories (e.g. books, journals, proceedings) independent of other publications by the same person included in the book or issue.

Series Editor contains an extra field (29) that includes information about the content of the publication. A short attribute (e.g. **Series**, **Book**, **Journal**) describes the feature of the publication. This note is essential for later sorting and export of references for the annual bibliography.

1.1.2 Obligatory fields

Library data collection

The fields which have to be filled are as follows: **Author** (1), **Department affiliation** (3), **Title** (4), **Journal, Magazine or Proceedings Title** (10), **Translated Title** if language is different from English (11), **Authors Role** at the institute (17), **Publisher** (19), **Place of Publication** (18), **Date of Publication** (20), **Date of Meeting** (21), **Page(s)** (25) or **Extent of Work** (26), **Language** (35) and **Availability** (37). Note that not all of these fields are always defined in the workform style. In that case you do not have to fill out or create the missing obligatory fields for this style.

Reindeer Bibliography

The fields which have to be filled are as follows: **Author**(1) or (7), **Article Title** (4) or (9), **Journal Title**, **Translated Title** if language is different from English (11), **Publisher name** (19), **Place of Publication** (18), **Date of Publication** (20), **Page(s)** (25) or **Extent of Work** (26), **Language**(35) or (27) and **Availability** (37). Note that not all of these fields are always defined in the workform style. In that case you do not have to fill out or create the missing obligatory fields for this style.



1.1.3 Author(s)

If names of authors, publishers or editors contain umlauts or special characters they are all written with umlauts or special characters except in the *reindeer bibliography* (see below). First names are never written as full names. Double names as first names (e.g. Karl-Johannes Lundberg) are shortened to **Lundberg, K J**. Entries are made as follows: only one author: **Miller, W S**; more than one author: **Wengren, T// Sørmland, D// van der Mer, D F H**; names with pre-titles such as "van", "de" etc. start with these pre-titles, always written in lowercase. Double-barrelled surnames are listed with one name and the first name of the surname is shortened, as with the last first name. Only double-barrelled surnames with hyphen are not shortened.

Example: Eirik R **Rosengaard** Miller = Miller, E R **R**
 Ron Harris-Viik = Harris-Viik, R

To check the spelling, use the arrow to the right of the window. There you will find all authors already listed in the database. The names of staff or students employed during the year of publication are highlighted **boldface**.

Style differences in the reindeer data collection



Names of authors, publishers or editors are all written without umlauts or special characters.

Example: $\emptyset, \ddot{o} = o, \text{\aa} = aa, \text{\ae}, \text{\a} = ae, \ddot{u} = u$

Names with pre-titles such as "van", "de" etc. begin with these pre-titles. At the first author these titles start with a capital letter, otherwise they are written in lowercase.

Example: Von Holmstein, H//de Messier, F J

1.1.4 Titles: text and names

Titles of articles, books, manuscripts, etc. only have capital letters at the beginning of the title or if geographical names etc. are used. Each word of a journal name, a conference name or a proceedings title starts with a capital letter, except words such as "and", "the", "of" etc. and except conference names or proceedings titles in Scandinavian languages that are handled as titles of books. Titles (field (4) and (9)) in other languages than English might contain umlauts or special characters. For the spelling of umlauts see chapter: 1.1.3. Ordinal numbers are written as follows: 1st, 2nd, 3rd, 10th. Ordinal numbers in **Proceedings Titles** or conference titles are always written in Arabic numbers.

The title of a journal, magazine, newspaper or proceedings has to be written in the original language (e.g. Danish, Norwegian etc.) If there exist an English title, this title will be located in the **Notes** field (42). Title abbreviations are possible to record in field (9) **Anonymous title**. Otherwise field (10) contains the full journal or proceedings title.

☞ Never abbreviate journal names in field (10). Find the full journal title by comparing existing entries. For that you can use the arrows behind each field. *BIBSYS* and other bibliographic databases are also useful to verify full journal titles. Title abbreviations can be done by style formatting (see *ProCite* manual).

If the text contains Latin words such as species names, they have to be written *italic*. Special text format like **subscript** or **superscript** have to be written like in the original title.

1.1.5 Publisher information

The workforms **Book**, **Book Chapter**, **Dissertation**, **Conference Proceedings**, **Institution Series**, **Interview**, **Monograph**, **Report** and **Series Editor** require a filled in publisher field. If the publisher is still unknown after checking the databases with your librarian or the order of the record, fill out the field with [s.n.]. The same applies to an unknown place of publication. Fill the field with [s.1.].

1.1.6 Pages

Field (25) **Location in work** contains the page or page range of the article. This field is not used for books. Field (26) **Extend of work** is used for the extend of the complete work or volume.

While field (25) is obligatory for papers in journals, newspapers, proceedings, series and magazines as well as chapters in books, field (26) is important for books and chapters, reports, proceedings, monographs and dissertations.

If a record exists of several subchapters or has varied pagination, enter [**var. pag.**] in the pages field **location of work** (25). In the event that you have to count the pages yourself, write the number in sharp brackets in the **location of work** field (25) or the **extent of work** field (26). For example, if you wish to refer to p. 23, pp. 45-51 and pp. 78, write [**var. pag.**]. If you counted 47 pages write: [47].

1.1.7 Source

For further use of the bibliography and for further verification of existing entries it is necessary to note the source or the name of the official databases where the publication was found or verified. This information should be written in the **Availability**-field (37).

1.1.8 Abstract

Import abstracts whenever possible. Abstracts always help to broaden your search!

1.1.9 Keywords

Please note that keywords are imported from different sources., hence there are no use of controlled index terms. Inconsistent and incomplete indexing is therefore making keyword searches less useful. Unfortunately the Keywords entry is not consistent in spelling umlauts. When searching certain records in the Search table you therefore have to use both-way of spelling.

All keywords are written in lowercase including special abbreviations and geographical names. Keywords are delimited by two slash signs and one space ("/ / "). Keywords are preferably spelled in English letters. Special characters and umlauts are written as described in chapter: 1.1.3.

Geographical directions can be found written in words or shortened as letters (e.g. south western or sw or south west).

1.2 Importing from other files or libraries

1.2.1 Importing from EndNote

If a number of references already exists in an *EndNote* data file. Select *Tools/Convert file* in the *ProCite* menu... Choose the *EndNote* library (*.enl) you wish to import into *ProCite*, convert it and save it as *ProCite* library.

1.2.2 Importing from text files

You can import your search results directly from web databases (figure: 1.2 and below) Select **Tools/Import Text File** from the *ProCite* menu. Select your text file (*.txt) and choose OK.

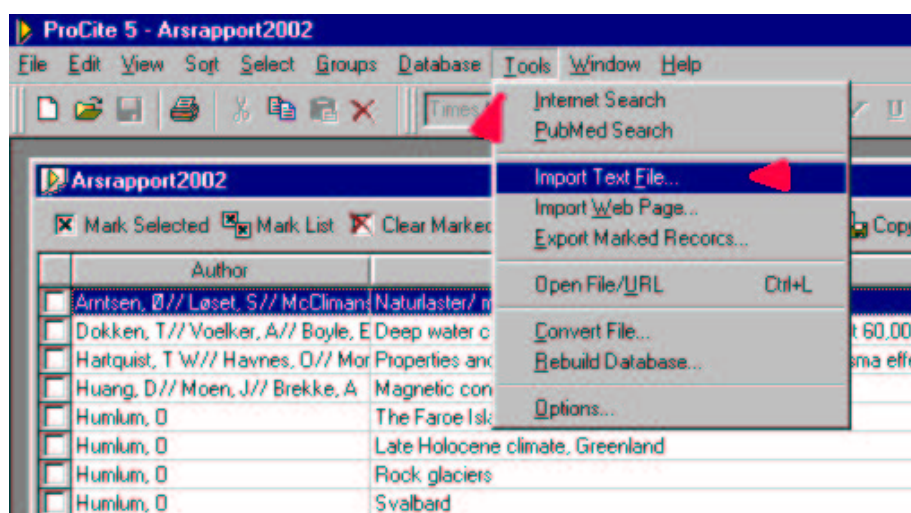


Figure 1.2: Importing text files into *ProCite*.

In the following window you have to choose the import format. If you have exported your file from the web database in the *ProCite* format you have to choose between **tagged** or **delimited** as the file type and a defined filter as the file format. If you have chosen the *RIS* format from *BIBSYS*, you should choose **tagged** as the file type and *RIS* as the file format. If you have imported from *Web of Science* you may try **tagged** as the file type and *ISI-CE* as the file format. Below the target database you choose the name of the database you wish to import your data to. As the last step you select **transfer**. If all entries in the text files are correct, your new records will be shown in your target database. Usually there are some problems with the *ProCite* format from *BIBSYS* and their book entries.

BIBSYS

In *BIBSYS* you can only export your results one by one. After choosing the record you wish to export from *BIBSYS*, choose the format in which you want to export your data from the lower **Exporting Records** menu. Normally this is the *ProCite* format or *RIS*. Mark and copy the output into a text file. This text file might contain more than one copied records.

Back in your *ProCite* library choose **Tools/Import Text File** and import your text file. In the new opened window choose e.g. *RIS* from the **File Format** filters if you exported your records from *BIBSYS* in the *RIS* format.

Do not save the new file in your existing *.pdt bibliography data file for safety reasons. Instead edit your new entries in a new file and copy the complete entries later to your main bibliography.

FirstSearch – OCLC

If you wish to export records from your *FirstSearch* session you have to keep in mind that you can only export data if your search covered **one** database only. Searching in one database enables the multiple menu functions in *FirstSearch*. After marking the records you want to export use the **Export** function. You will be asked for download and the file type you wish to export to.

Do not save the new file in your existing *.pdt bibliography data file for safety reasons. You can rather edit your new entries in a new file and copy the complete entries later to your main bibliography.

Another possibility of importing records from *FirstSearch – OCLC* is using the web function of your *ProCite* manager. Then you go in the *ProCite* menu to **Tools/Internet Search** (figure: 1.3). The key *Hosts* opens a window with all accessible hosts via *ProCite*. Not all hosts are accessible for free! Tick the hosts you wish to work with (*OCLC* for a *FirstSearch* session) and configure the hosts that require licenses. If you have finished your configurations you can start your search.

☞ The more hosts you choose at once the less good results you might get.

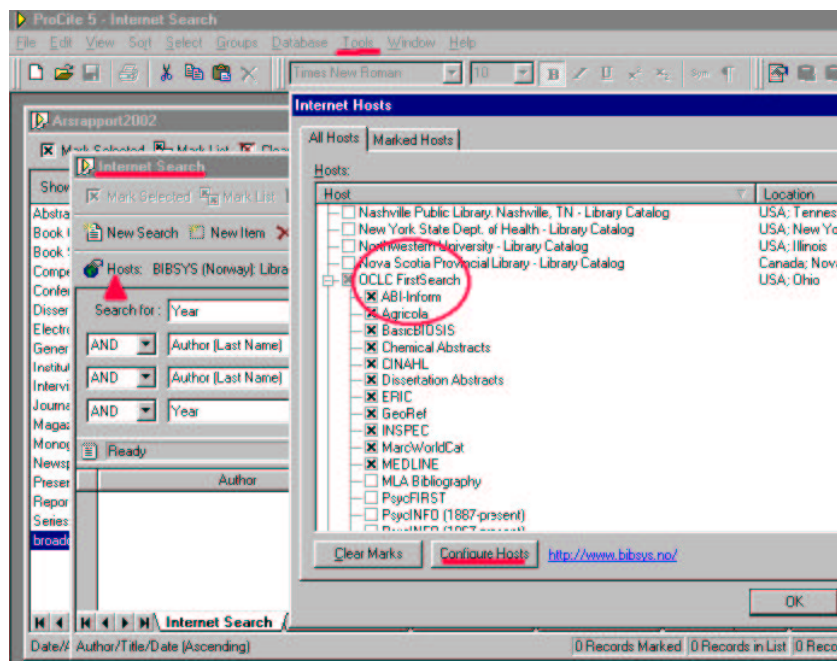


Figure 1.3: Literature search in the Internet via *ProCite*

Web of Science

You wish to keep some of your results from your search in *Web of Science*. Once you find the records you want to export use the button **submit marks** to save the highlighted entries. You can now continue your article search for different authors, years and topics. Every time you obtain a result you want to save press **submit**.

At the end of your search go to the menu and choose **marked list**. Tick **authors, title, source, abstract, page count, keywords** and **ISSN** as data included in the output. Do not select all, because there is a large amount of information that you do not need for the database. Keep the default values (**tagged**) in the export options. Choose **Save to File** for export.

For import the results into *ProCite* follow the procedure described above.

Arctic & Antarctic Regions (BiblioLine)

After your search session in AAR, mark the check-boxes of the entries you want to export your bibliography to. Select the output format and choose the **Export** button. Select your bibliography type in the window that now appears. After loading the exporting records you will be asked for the bibliography you wish to export to. It is helpful to use an ancillary bibliography where you can check and modify the imported records before the final import to your bibliography.

Chapter 2

Editing existing records

There may exist some entries in the bibliography, not completely verified or not holding all necessary information. These records have a note "not verified" or "check <field>" in field (42), and have to be edited later on.

To edit existing records you double click the record you wish to work with. Fill out the empty fields or correct mistakes in the entries. Check for undesirable spaces before and after your edited text. These spaces create problems in the output later on.

2.1 Keywords

If you enter or create keywords, try to use existing words, as this will result in a more successful search in the database. These can be found under the arrow in the **Keywords**-field of the **Edit Record** window (figure: 2.1). New keywords are treated as described in chapter 1.1.9.

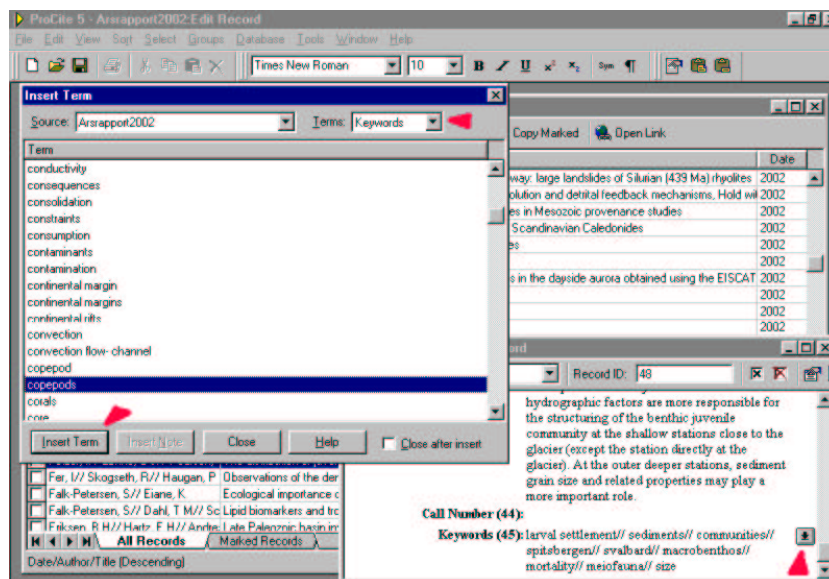


Figure 2.1: Inserting existing keywords within an Edit record window.

If you open the **Terms** table in the lower main-menu, you can select a keyword from the window-menu and you will find all references containing this keyword.

2.2 Searching in the database

If you search for certain records, authors, words etc. you can do so in the **Search** table, which you will find in the lower menu of the database. Note that you have to connect search terms or phrases with the Boolean operators AND or OR. You may truncate your words by using an asterisk (*). Phrases are defined by a double quote-environment ("**<text example>**")

To narrow your search you either restrict your request on specific fields or you select a group you have defined before. Default search data comprise the whole bibliography. For how to generate such groups look in the *ProCite* manual.

Every field has its own field-number. By writing **#<field-number>=<text>** in the **Search-field** you are only searching in the declared field. Such search phrases you can again connect with each other by Boolean operators. Instead of **<text>** you can also write specific workflow names.

Example:

- **diversity and distribution**
 - *Diversity* and *distribution* are two separate words and *and* acts as Boolean operator. Your search retrieves all entries containing the words *diversity* and *distribution* in any order.
- **"diversity and distribution"**
 - The search term will find all entries containing the phrase between the quotes.
- **Author="Lønne" and Date=1998,1999**
 - The search terms find all entries by Lønne, I. and Lønne, O.J. published between 1998-1999 including all meetings and presentations during this time.
- **#3="Geology" and (#17="Adjunct Professor" or #17="Research fellow") and not #43=EMPTY**
 - In this case you will find all entries by adjunct professors or research fellows who are working or have been working at the department of Geology. All search results will contain abstracts.¹

For more detailed descriptions of *ProCite* search look in the *ProCite* manual.

¹Field definitions: #3 - department; #17 - author affiliation; #43 - abstract

2.3 Duplicates

Duplicate entries can be found by selecting **Duplicates** in the lower menu bar (figure: 2.2). All duplicate entries will be shown if the input rules have been followed correctly. Abbreviations or misspellings of names or titles in the author field, the title field or the journal name field will result in your being unable to find duplicate entries.

☞ Check both duplicate entries before deleting. Occasionally papers have been published in different periodicals during the same year (e.g. as a paper in a proceedings and as a journal article).

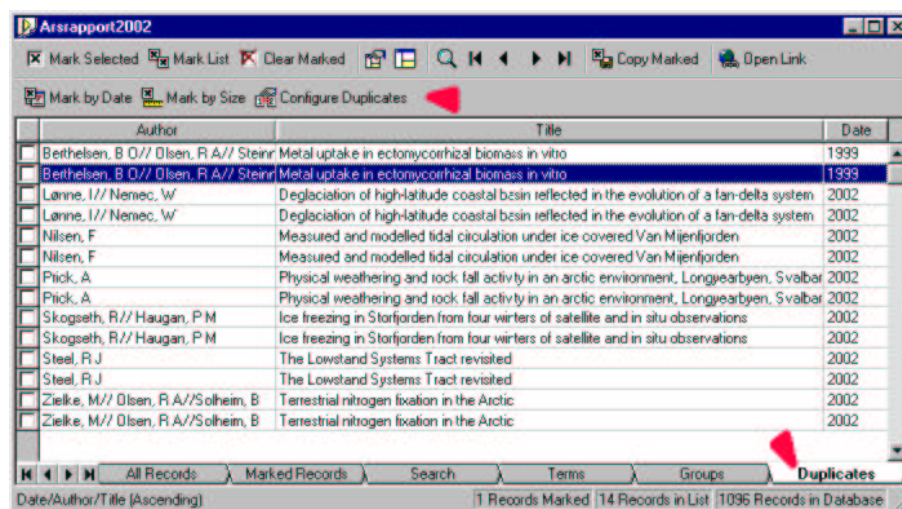


Figure 2.2: Filtering and configuring duplicates in your bibliography

2.3.1 Configure duplicates

To determine which fields are important for detecting duplicates, go to the *ProCite* menu in *Database/Configure Duplicates*. There you tick the fields you need. The default settings already contain the fields **Author**, **Title**, **Date** and **Journal Title**. It might be necessary to change the settings and add more options.

Chapter 3

Editing style format

If you want to edit your existing style format open your style-file (e.g. *.pos). All entries in bold are already defined for data export. If you want to define a new reference type you can either copy an existing definition of a reference type or create a new one. Under the **Insert Field** icon in the menu you can insert all the fields you need. When you have inserted all necessary fields check the definition of several pre-defined fields to ensure that they are consistent throughout the style.

Within the style definitions you will find a special sign – "|". This pipe sign delimits the fields between two pipes from other field definitions. If the defined output style field within a record is empty all text between the two pipes will not appear in the final output.

Example: **Author**| (**Year**):| *Title*.| **Journal**
 Title.| **Volume**| (**Issue**)|: **Page(s)** |.

- with all fields defined
 - Scott, J.R. (1999): *This is an example*. Journal of Something. 3 (1-2): pp. 124-128.
- with **Issue**-field not defined
 - Scott, J.R. (1999): *This is an example*. Journal of Something. 3: pp. 124-128.

As you can see in the example above, the format definition of the output style has already to be done in the **style.pos** file. If you wish to mark a certain text passage *italic* or **bold** you have to mark the field in the output style respectively.

3.1 Editing workflow styles

To edit a certain workflow export style mark it and go into the menu of the active window under **Configure Fields**. Choose the **Author** (01) field. If you wish an abbreviated author list tick the respective field. In the **Author List** field (figure: 3.1), change the number of authors in the **Abbreviated Author List** to the number of authors/ co-authors you wish

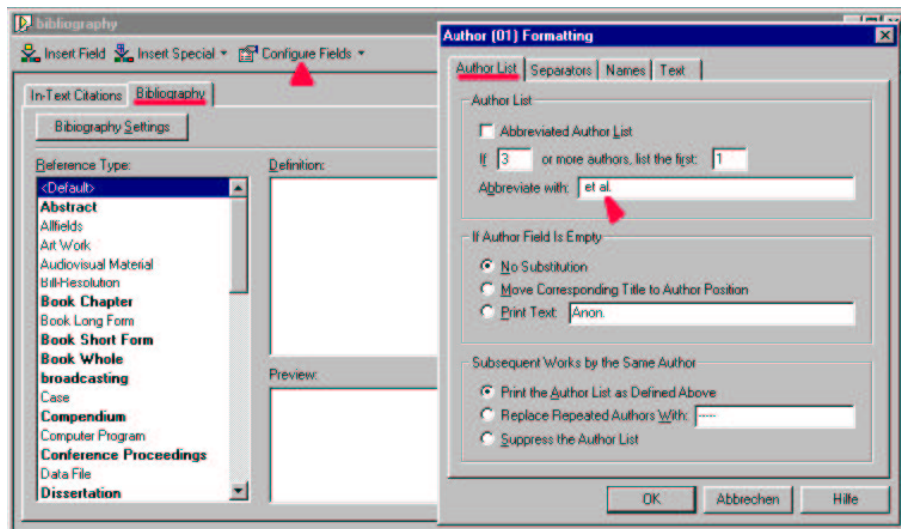


Figure 3.1: Formatting the author field before export: author list. The *UNIS library bibliographies* do not tick the field **Abbreviated Author List**.

to appear in the final reference list. Abbreviations in this list shall be done with "et al." The *UNIS library bibliographies* do not work with abbreviated lists. Under the **Separators** field (figure: 3.2) the first field should contain "& ", the second field contains a comma and the third field contains an "& ". Under the **Names** field select **Last, First Middle** as the name order and **F.M.** as initials in both cases (figure: 3.3).

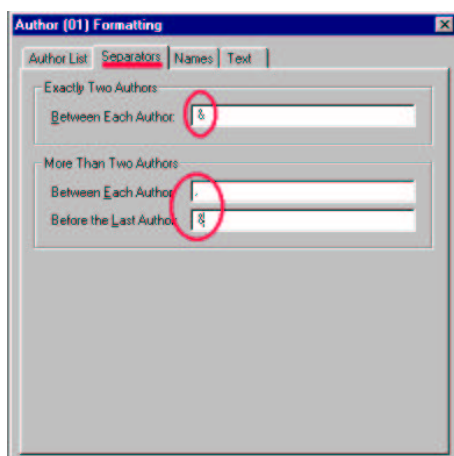


Figure 3.2: Formatting the author field before export: separators.

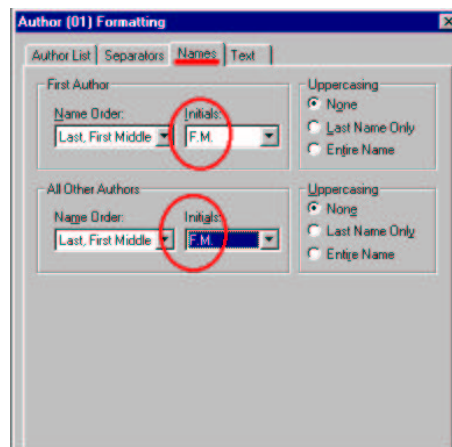


Figure 3.3: Formatting the author field before export: names and initials.

Chapter 4

Exporting data to a Word file

When you have installed *ProCite* on your computer your *Word* processor will import all necessary add ins automatically.

4.1 Export style

Define an export style for your reference library, choose **Edit/Copy special/Configure Copy Special** from the main menu (figure: 4.1).

Select the output style you wish to use, define the **Reference List Title** and choose the **Reference List Order**. Using the other fields you can already define the output format in *ProCite*. In the **Page Layout** menu you define font and size of your reference list. Use the link **Fields** in the menu to define which additional entries you want to have shown in your reference list.

To make the work with the output easier some of the styles are already pre-defined (table: 4.1).

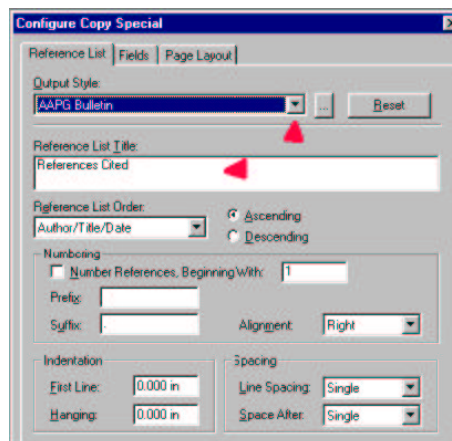


Figure 4.1: Formatting the style of the export bibliography.

Table 4.1: Pre-defined styles for *UNIS*

File	Style
Årsrapport.pos	Definition for the annual report at <i>UNIS</i>
Unis_all.pos	Definition to proof-read entries for completeness and special notes
bibliography.pos	Shortened definition for the <i>UNIS Jubilee Bibliography</i>
reindeer.pos	Definition for the <i>Reindeer Bibliography</i>

4.1.1 Abstracts

A large number of entries holds abstracts. Most of these are imported from other databases. Consider possible copyrights before you put them on a public reference list. For this reason, the settings for the *Library Bibliography* do not contain the abstracts in the output.

4.2 Exporting data to a Word document

To export data from the bibliography, mark all records you wish to export, and select **Edit/Copy special/Copy formatted records** from the menu. Now go to your open *Word* document or text editor and insert the copied data.

4.3 Creating a library with in-text citations

To create a library with the help of in-text citations from a *Word* document, it is important to read the *ProCite* User's Manual. There are no defined workform styles in the <pre-defined>.pos files for in-text citations.

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