

Word Processor Files .....	24
Windows .....	24
Macintosh .....	25
Configuration Files and Download Files .....	25
Internet Configuration Files .....	25
Uninstalling ProCite 5 .....	26
<b>Chapter 3: Using ProCite: A Guided Tour</b>	
Overview .....	27
Getting Started .....	28
Online Help.. .....	28
Opening an Existing Database .....	29
Navigating a ProCite Database .....	31
Customizing the Record List to Display Fields .....	31
Click Sorting on a Column Heading .....	34
Using the Preview Pane to View a Reference.. .....	34
Using “Go To” Commands to Find References .....	36
Drag and Drop Between Databases .....	36
Entering Records .....	37
Importing Records from a Saved Text File.. .....	38
Searching and Importing Records Directly	
from an Online Database .....	39
Capturing Web Page Information (Windows Only) .....	44
Linking a Reference to a Web Page or File .....	46
Entering and Editing ProCite References .....	46
Configuring Duplicate Checking .....	50
Searching and Sorting a Database.. .....	51
Quick Searching for Records with the Terms Tab .....	51
Creating a Search Strategy .....	52
Saving a Search Strategy .....	56
Creating a Group.. .....	56
Selecting the Sort Order.. .....	57
Pre-configured Sort Options .....	57
Custom Sorts .....	58
Generating Bibliographies .....	59
Creating a Bibliography from a Record list.. .....	59
Creating a Bibliography with Subject Headings .....	61
Preparing a Manuscript and Bibliography .....	63
Opening a Word Processing Document .....	63
The Tools Menu and ProCite Toolbar .....	64
Identifying References to Cite .....	64
Preparing the Bibliography and Final Manuscript.. .....	67
Closing the Document and Exiting ProCite.....	68

---

<b>Chapter 4: Creating, Opening, Sharing, and Managing Files</b>	
Overview .....	69
Starting ProCite .....	70
Creating or Opening a Database .....	70
Creating a Database .....	71
Opening a Database .....	72
Multiple Users Opening a Single Database .....	73
Opening a Database from an Earlier Version .....	74
Setting Program Options .....	75
General Display Settings .....	76
File Locations .....	76
Databases .....	77
Workforms .....	77
Output Styles .....	77
Lists .....	78
Search Expressions .....	78
Internet Search Settings .....	78
Default Database Settings .....	79
Record Numbering .....	79
Duplicate Detection .....	80
Sorting .....	81
Closing Files .....	81
Backing Up Files .....	81
Renaming Files .....	82
Deleting Files .....	82
Sharing Files .....	83
ProCite Program .....	83
Databases .....	83
Workforms .....	84
Output Styles .....	85
List Files .....	86
Search Expressions .....	86
Internet Search Configurations .....	86
Word Processor Files .....	87
Cross-Platform Compatibility .....	88
File Sharing .....	88
Sharing Files Created with ProCite for Windows .....	88
Sharing Files Created with ProCite for the Macintosh .....	89
Character Mapping .....	89
Macintosh to Windows Character Mapping .....	89
Windows to Macintosh Character Mapping .....	90
Damaged Files .....	90

Rebuilding a Database .....	91
When to Rebuild a Database.. .....	91
Reclaiming Disk Space.. .....	91
Repairing a Damaged File .....	92
Rebuilding a Database .....	93
Leaving ProCite .....	94
<b>Chapter 5: Viewing Records</b>	
Overview .....	95
Viewing Abbreviated Records: The Record Lists .....	96
Displaying All Records .....	98
Displaying Marked Records .....	98
Displaying Search Results .....	98
Displaying with Field Content Lists .....	99
Authors .....	99
Journals .....	100
Titles .....	100
Keywords .....	101
Displaying by Workform .....	101
Displaying Groups .....	101
Displaying Duplicate Records .....	102
Changing the Record List Display .....	102
The Default Display.. .....	102
Setting a Custom Display .....	103
Selecting the Fields.. .....	103
Setting Column Headers .....	104
Selecting Visible Fields .....	104
Saving Changes to the Display .....	104
Resizing the Column Widths .....	105
Changing the Display Font and Style .....	105
Sorting the Display .....	105
Viewing Full Records .....	106
Configuring the Edit Record View .....	107
Viewing Multiple Records .....	108
Moving Between Records .....	109
Viewing Formatted References .....	111
Viewing Bibliographies .....	112

**Chapter 6: Entering and Editing Records**

Overview .....	115
Inserting and Opening Records .....	116
Inserting a Record .....	116
Opening an Existing Record .....	118
Copying Records .....	119
Deleting Records .....	120
Selecting a Workform .....	120
Pre-defined vs. User-defined Workforms .....	121
Changing the Workform Setting .....	121
New Record .....	121
Existing Record .....	122
Changing the Record Display .....	123
Entering and Editing Data In Records .....	124
General Rules .....	124
Special Field Rules .....	125
Special Formatting Characters .....	126
Author Names.. .....	126
Dates .....	128
Keywords .....	130
Editing Keys .....	131
Inserting Special Characters .....	132
Applying a Font, Style, or Size.. .....	132
Changing the Record ID .....	133
Field Length .....	133
Finding and Replacing Text .....	134
Attaching Files, URLs, and UIs .....	134
ProCite's Lists .....	135
Types of Lists .....	135
Field Content Lists .....	135
Term Lists .....	135
Journal Title Lists .....	135
Alternate Text Lists .....	136
Using Lists .....	136
Entering Text with Lists .....	137
Modifying Lists .....	138
Copying Text .....	138
Copying and Pasting Text .....	138
Copying Fields from the Previous Record.. .....	139
Saving or Ignoring Changes .....	139

## Chapter 7: Entering Data Field-by-Field

Overview .....	141
General Data Entry .....	142
Locating Fields by Field Number .....	143
Abstract Field (43) .....	145
Address/Availability Field (37) .....	145
Author Fields (01), (07), (16), (30) .....	146
Author Affiliation Field (03) .....	149
Author Role Fields (02), (08), (17), (31) .....	150
Call Number Field (44) .....	151
CODEN Field (39) .....	151
Connective Phrase Fields (06), (36) .....	152
Date Fields (12), (20), (21) .....	152
Document Type Field (35) .....	156
Edition Field (15) .....	156
Extent of Work Field (26) .....	156
ISBN Field (41) .....	157
ISSN Field (40) .....	157
Issue ID Fields (24), (34) .....	157
Keywords Field (45) .....	157
Location in Work Field (25) .....	158
Location/URL Field (38) .....	160
Medium Designator Fields (05), (14) .....	160
Notes Field (42) .....	161
Packaging Method Field (27) .....	162
Place of Meeting Field (13) .....	162
Place of Publication Field (18) .....	163
Publisher Name Field (19) .....	163
Record ID Field .....	163
Report ID Field (23) .....	164
Reprint Status Field (12) .....	164
Reproduction Ratio Field (29) .....	164
Size Field (28) .....	165
Title Fields (04), (09), (10), (11), (32) .....	165
Volume ID Fields (22), (33) .....	167

## Chapter 8: Choosing a Workform

Overview .....	169
Locating the Available Workforms .....	170
Setting the Workform for a New Record .....	170
Changing the Workform for Existing Records .....	171
Changing the Workform for a Single Record .....	172
Changing the Workform for Multiple Records .....	173

Selecting an Appropriate Workform .....	174
Relationship between Workforms and Output Styles .....	175
Common Workform Choices .....	176
Choosing Workforms for Journal and Book Entries .....	179
Journal Entries .....	179
Book Entries .....	180
<b>Chapter 9: Importing Records</b>	
Overview .....	181
Importing Tagged Records .....	182
The Tagged Records .....	182
Basic Procedure .....	183
Importing Delimited Records .....	185
Basic Procedure .....	185
Preparing a Delimited Import File .....	187
Field Format .....	187
Field Order .....	188
Setting Import Options .....	191
Comma Delimited .....	192
Tab Delimited .....	193
Custom Delimited .....	194
<b>Chapter 10: Global Editing</b>	
Overview .....	197
Global Edit .....	198
Global Find and Replace .....	200
Global Change Workform .....	202
Global Move Field .....	203
<b>Chapter 11: Sorting Records</b>	
Overview .....	205
The Available Sort Orders .....	206
Selecting a Sort Order for Display .....	206
Selecting a Sort Order For Printing .....	207
Creating a Custom Sort Order .....	208
Basic Procedure .....	208
Selecting the Fields .....	209
Setting Ascending or Descending Order .....	210
Sorting Special Field Data .....	211
Sorting Empty Fields .....	211
Sorting Author Names .....	212
Sorting Dates .....	212
Character Sorting by Language .....	212
Changing the Language Setting .....	212
How the System Specific Sort Affects Database Sharing .....	214

How ProCite Sorts .....	215
Sort Levels .....	215
Alphabetic Sorting .....	216
Numeric Sorting .....	216
Symbol Removal .....	217
Date Sorting .....	217
Call Number Sorting .....	218
Empty Field Sorting .....	218
Using Stop Lists .....	219
The Available Stop Lists .....	219
Generic Stop List .....	219
Author Stop List .....	220
Changing the Stop Lists .....	220
<b>Chapter 12: Detecting Duplicate Records</b>	
Overview .....	223
Detecting Duplicates During Data Entry .....	223
Searching the Database for Duplicates .....	224
Setting Duplicate Record Criteria .....	225
<b>Chapter 13: Searching and Finding Records</b>	
Overview .....	229
Finding a Single Record .....	230
Quick Searching with Field Content Lists .....	231
Highlighting Records .....	232
Marking Records .....	232
Searching a Database .....	234
Performing a Search .....	234
Elements of a Search Expression .....	236
Search Term .....	237
Field Identifiers .....	238
Operators .....	239
Creating Search Expressions .....	244
Building a Search Expression .....	244
Saving a Search Expression .....	247
Restoring a Saved Search Expression .....	248
Editing a Saved Search Expression .....	248
Deleting a Search Expression .....	249
Renaming a Search Expression .....	249
Sample Search Expressions .....	250
Finding a Search Term .....	250
Finding Multiple Search Terms .....	250
Finding Dates .....	251
Finding Record IDs .....	252
Finding Empty and Not Empty Fields .....	252
Finding the Last Records Entered .....	252

**Chapter 14: Saving Records in Groups**

Overview .....	253
Creating a Group .....	254
Saving Search Results .....	254
Saving Any Set of Records .....	254
Using a Group .....	255
Viewing or Printing Records in a Group .....	256
Marking Records from a Group.. .....	256
Searching a Group .....	257
Deleting a Group.. .....	257
Modifying a Group .....	257
Adding or Removing Records .....	258
Renaming a Group .....	258

**Chapter 15: Internet Capabilities**

Overview.. .....	259
Searching and Importing from the Internet .....	260
Connecting to Host Servers .....	260
Dial-up Internet Connections .....	260
Testing the Servers .....	261
Allowing Access Through Firewalls .....	263
Selecting Z39.50 Sites to Search .....	266
Searching Z39.50 Internet Sites or PubMed .....	268
Saving or Discarding Search Results .....	271
Creating and Managing Search Expressions .....	272
Creating a Search Expression.. .....	272
Saving a Search Expression .....	273
Restoring a Search Expression .....	275
Editing a Saved Search Expression .....	275
Deleting a Search Expression .....	275
Renaming a Search Expression .....	275
Setting Internet and PubMed Search Options.. .....	276
Configuring ProCite to Search Z39.50 Sites .....	278
Adding or Modifying Z39.50 Host Configurations.. .....	278
Adding or Modifying Database Configurations .....	280
Importing Web Pages (Windows Only) .....	284
Including URLs and UIs in Records .....	285
Printing to HTML Files .....	286
Copying References to Email Messages.. .....	287
Copying via the Clipboard.. .....	287
Copying from the Preview Pane .....	287
Copying from a Disk File .....	288

**Chapter 16: Cite While You Write**

Overview..	289
Word Processor Notes .....	290
Microsoft Word for Windows or Macintosh .....	29 1
Field Codes .....	29 1
Converting Word 6 or 7 documents to Word 97 (Windows Only) .....	292
WordPerfect for Windows .....	293
Windows Registry .....	293
Style Additions .....	293
Field Codes .....	293
Other Word Processors .....	293
Linking Citations to ProCite Records .....	294
Forms of Citations in the Manuscript .....	294
Inserting Citations .....	295
Basic Procedure .....	295
Scanning for Existing Citations .....	296
Basic Procedure .....	297
Matching Inappropriate Items .....	299
Inserting Marked Records from ProCite .....	300
Including Citations in Footnotes or Endnotes .....	300
Matching Multiple Records .....	30 1
Recalling a Previous Search .....	302
Unformatted Citations .....	302
Generating a Bibliography .....	303
Basic Procedure .....	304
Changing the Bibliography Layout .....	306
Output Style .....	306
Adding an Independent Reference to the Bibliography .....	308
Using a Variable Citation Format .....	308
Generating a Bibliography from Multiple Documents..	309
Entering Identifying Text .....	3 10
Entering Author Names .....	3 12
Single Authors .....	3 12
Multiple Authors .....	3 12
Compound Names .....	3 13
Repeated Authors..	3 13
Corporate Authors .....	3 14
Entering Titles .....	3 14
Entering Dates .....	3 14
Date Ranges .....	3 15
Entering Record IDs .....	3 15
Entering Multiple Citations .....	3 16
Entering Additional Text .....	3 16
Adding Commands to Identifying Text .....	3 17

---

Changing Linked Citations .....	3 17
Editing Citations .....	3 17
Reverting to Original Text .....	3 18
Moving or Copying Citations .....	3 18
Deleting Citations .....	3 19
Adding Citations Later .....	3 19
Associating ProCite Databases .....	3 19
Changing the Database Association .....	3 19
Working with Linked Records in ProCite .....	320
Making Changes to the ProCite Database .....	320
Using Other Word Processors .....	321
Inserting Author-Date Citations .....	321
Inserting Numbered Citations .....	321
Generating a Bibliography .....	322
<b>Chapter 17: Printing Bibliographies</b>	
Overview .....	323
Previewing and Printing a Simple Bibliography .....	324
Basic Preview and Print Procedure .....	324
Printing to Catalog Cards .....	326
Previewing Formatted References .....	327
Printing to the Clipboard .....	328
Setting Up Your Bibliography .....	328
Reference List Settings .....	329
Output Style .....	330
Reference List Title .....	330
Reference List Order .....	330
Numbering References .....	331
Indentation .....	332
Line Spacing .....	333
Field Suppression or Substitution .....	334
Optional Fields .....	334
Short Form .....	335
Alternate Text .....	335
Page Layout .....	336
Font and Size Settings .....	336
Margins .....	336
Page Numbers .....	337
Saving Your Bibliography Settings .....	337
Simple Bibliography .....	337
Subject Bibliography .....	337
Bibliography from a Manuscript .....	338

Printing a Subject Bibliography .....	338
Basic Procedure .....	339
Subject Bibliography Settings .....	342
Printing a Subject List or a Subject Bibliography .....	342
Including Subject Term Counts or Record IDs .....	343
Sorting the Subject Terms .....	344
Inserting Space or Text Around Subject Terms .....	345
Applying Styles .....	345
Examples of Subject Bibliographies .....	346
Using Author Names as Subject Headings .....	346
Using Keywords as Subject Headings .....	347
Cross Referencing Subject Headings .....	347
Using Call Numbers as Subject Headings .....	348
<b>Chapter 18: Building List Files</b>	
Overview .....	349
Creating Term Lists and Journal Lists .....	350
Description of the List Formats .....	350
Term Lists .....	350
Journal Title Lists .....	351
Opening a List .....	352
Creating a New List .....	352
Opening an Existing List .....	352
Entering, Editing, or Deleting Items .....	353
Importing Items from a Text File .....	354
Creating the Text File .....	354
Importing the File .....	358
Styled Text in a List .....	359
Creating an Alternate Text List .....	359
<b>Chapter 19: Printing Lists</b>	
Overview .....	361
Printing a Subject List .....	361
Printing an Indexed Subject List .....	366
Printing a Field Content List .....	368
Printing a Term List or Journal Title List .....	369
Printing an Alternate Text List .....	369
<b>Chapter 20: Using Alternate Text</b>	
Overview .....	371
Substitution with Journal Title Lists .....	372
Building a Journal Title List .....	372
Inserting ProCite Records .....	372
Using a Journal Title List for Substitution .....	373
Applying Styles .....	375

Substitution with Alternate Text Lists.....	375
Building the Alternate Text List.....	375
Preparing the ProCite Records .....	376
Activating the Alternate Text List.....	376
Applying Styles .....	378
<b>Chapter 21: Record IDs and Renumbering</b>	
Overview .....	379
Using Record IDs .....	379
Assigning Record IDs .....	380
Automatic Numbering .....	380
Changing the Settings for New Databases .....	381
Changing the Record Number Increment.....	382
Manual Numbering .....	382
Duplicate Record IDs .....	383
Renumbering Records .....	383
<b>Chapter 22: Creating and Modifying Workforms</b>	
Overview .....	385
When to Create a Workform .....	386
Special Document Types .....	386
Relationship to Output Styles .....	386
Implications of Modifying Workforms .....	387
Changing the Workform Definition .....	387
Renaming a Workform.....	388
Creating or Modifying a Workform .....	388
Opening the Workform .....	388
Basing a New Workform on an Existing Workform .....	388
Opening a New Blank Workform .....	389
Editing an Existing Workform .....	390
Selecting the Fields .....	390
Assigning Field Names .....	391
Saving the Workform .....	391
Sharing Workforms .....	392
Deleting Workforms .....	393
Selecting the Appropriate ProCite Fields.....	393
Fields and Their Default Names .....	394
Special Fields .....	394
Author Fields .....	395
Date Fields .....	395
Call Number Field .....	395
Keywords Field .....	396
Location in Work Field .....	396
Title Fields .....	396
Selecting the Field Numbers .....	396

<b>Chapter 23: Creating and Modifying Output Styles</b>	
Overview .....	399
How Output Styles Work.....	400
Creating and Modifying Output Styles .....	400
Creating a New Output Style .....	401
Modifying an Output Style .....	403
Deleting an Output Style .....	404
Renaming an Output Style .....	404
Defining In-Text Citation Formatting .....	404
Basic Procedure .....	405
Numeric Citations .....	407
Citation Number Order.....	408
Delimiters and Separators.. .....	408
Number Ranges .....	409
Author-Date Citations .....	410
Delimiters, Separators, and Sorting .....	411
Author Formatting .....	412
Other Special Fields Formatting .....	414
Including Page Numbers .....	414
Footnotes.. .....	414
Defining Bibliography Formatting .....	415
Basic Procedure .....	415
Defining Workform Styles .....	417
Basic Procedure .....	418
Inserting and Deleting Fields .....	420
Inserting a Field .....	420
Deleting a Field .....	421
Inserting Punctuation .....	422
Preceding and Following Punctuation .....	423
Suppressing Extraneous Punctuation .....	425
Applying Punctuation to Groups of Fields .....	426
Inserting Additional Text .....	427
Inserting Formatting Characters .....	428
New Lines and New Paragraphs.. .....	428
Blank Lines .....	429
Page Breaks .....	430
Tabs.. .....	430
Applying Type Styles .....	431
Formatting Special Fields .....	432
Basic Procedure .....	433
Author Formatting .....	434
Author List.....	435
Separators .....	439
Name Formatting .....	440
Field Dependent Preceding and Following Text .....	443

---

Title Formatting .....	444
Journal Title Formatting .....	446
Date Formatting .....	447
Page Numbering .....	450
Field Dependent Preceding and Following Text .....	450
Page Range Formats .....	45 1
Keywords .....	45 1
<b>Chapter 24: Exporting Delimited Records</b>	
Overview .....	453
Basic Procedure .....	453
Setting Export Options.. .....	456
Comma Delimited.. .....	457
Tab Delimited .....	458
Custom .....	459
<b>Appendix A: Troubleshooting .....</b>	<b>463</b>
<b>Appendix B: ProCite Workforms and Fields .....</b>	<b>469</b>
<b>Appendix C: The ProCite Toolbars .....</b>	<b>483</b>
<b>Appendix D: Keyboard Commands .....</b>	<b>493</b>
<b>Index .....</b>	<b>497</b>