

Arts Technologies for Learning Centre
Teaching with Technology Workshop Series

Advanced ProCite Skills: Automating Library and Database Searching

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Advanced ProCite Skills: Automating Library and Database Searching

This workshop will help participants get references from online library catalogues and databases into ProCite databases with a minimum of fuss. From within the ProCite program, participants will learn how to link directly to various local, national, and international library catalogues and how to save their search results as ProCite database entries. Next, participants will learn how to save other online database search results (such as MLA WebSPIRS) in formats that ProCite can convert to database material. Lastly, participants will learn how to download and use third-party configuration files that will allow ProCite to convert searches from other major databases.

What? And Why?

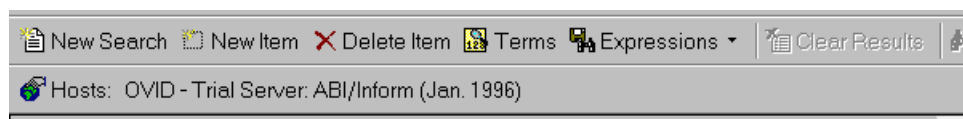
Often, we spend hours at the library, searching the catalogue and online databases. We look up books, scrawl call numbers on little bits of paper, locate the book, then enter it into our database. ProCite allows us to search (among other things) the U of A GATE system, and to have the results (call numbers included) downloaded into a ProCite database. On other occasions, we search online databases, email the results to ourselves, and print them. These records are then manually entered into ProCite databases. However, ProCite 5 is very good at translating these email text files directly into database records, no retyping necessary. Even if ProCite itself doesn't have a built-in converter for your particular database, you can usually find third-party converters (called configuration files) on the web to do the job for you.

Using ProCite to Search Online Library Catalogues

From Start > Programs > ProCite 5 > ProCite 5, open the program. The last-used database will open. You will create a new database called 'downloads' into which you can save your searches. To do this, choose File > New, and 'new ProCite database' from the dialog box. Name the new database 'downloads' and save it to the desktop (N.B. The ProCite program folder will be the default location; be sure to browse for the desktop before saving the database).

From the menu bar, choose Tools > Internet Search: the display changes.

Note the appearance of two new menu bars:



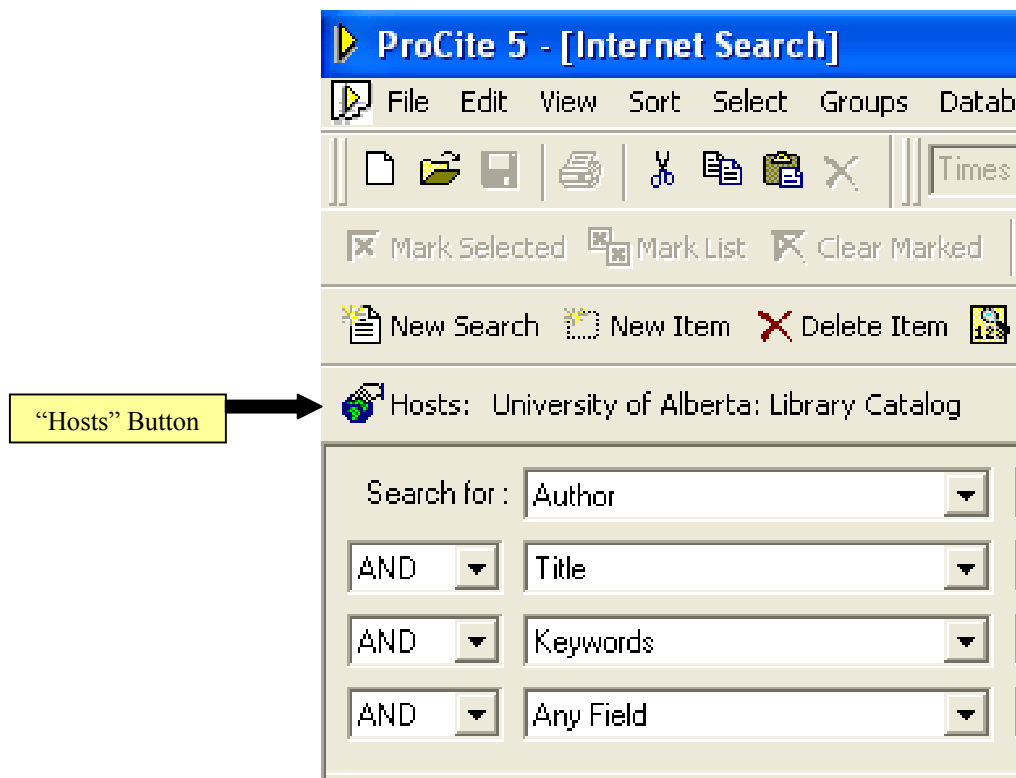
The first, upper bar concerns the search terms: *New Search* will clear all the text boxes in the search window. *New Item* plops a new, blank, line in the search window. *Delete Item* can delete an unused search line, although all blank lines are just ignored in a search. Clicking *Terms* generates a dialog box where you can select any exiting terms from a ProCite database that is currently open. (We won't go through this in this workshop. If however, you'd like to do this on your own, follow these instructions: Click in the field where you'd like the search term inserted; select the name of the database from the "Source" drop-down list; select a category (Author, Journal etc.) from the "Terms" drop-down list; highlight your search term and click "Insert Term." Voila!) *Expressions* allows for the saving, reuse, and editing of idiosyncratic search expressions you might like to use over multiple sessions.

The second, lower bar indicates which remote databases (library catalogues are remote databases) you have chosen to search. The default host is usually 'OVID Trial Server,' although in many U of A labs the default is set to the U of A library (The Gate).

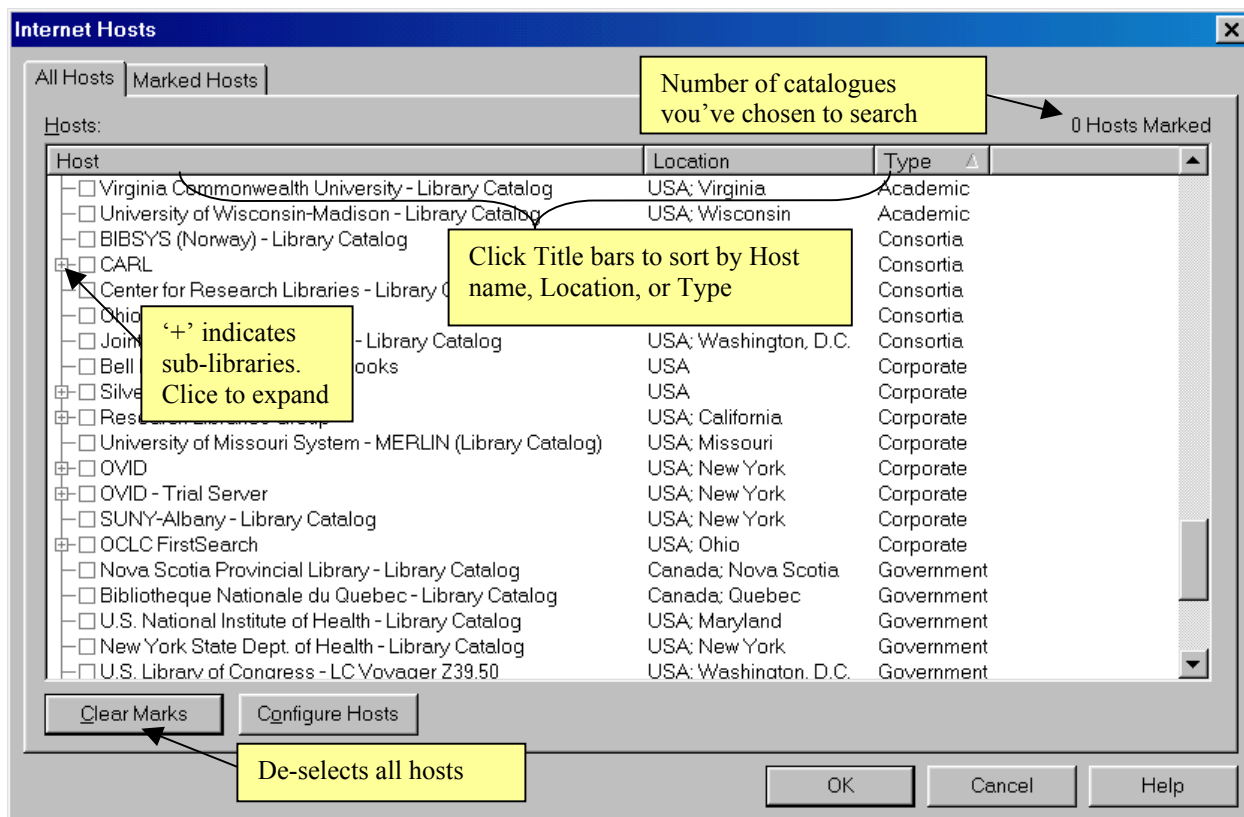
Let's try it. Let's search the U of A to generate a printout of texts and call numbers to bring to the library to find a bathtub-worthy novel to read.

First we need to choose which library to search.

1. Click 'Hosts'.



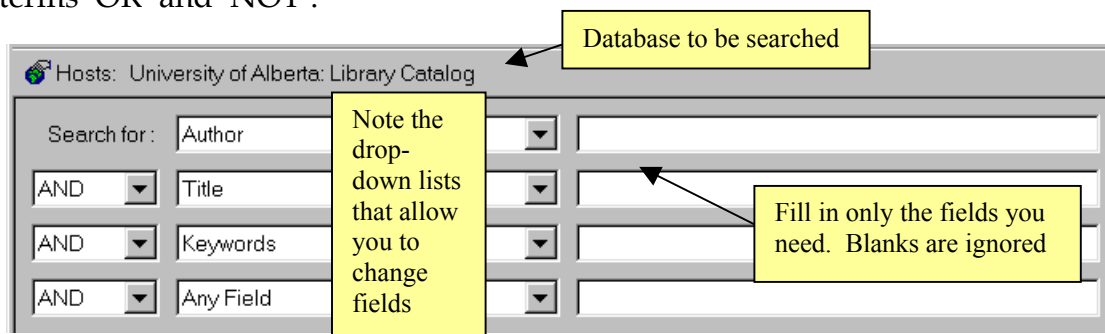
A dialog box appears:



2. Select the University of Alberta Library Catalogue by ticking the box beside its name.
3. Click 'OK'

Next, we need to establish our search terms:

1. Fill in the appropriate fields. If you are trying to find *Lady Audley's Secret*, punch that in the Title field. If you are looking for books about gardens, type that into the Keywords field.
2. In the boxes that all currently say 'AND' note that you can choose the other boolean search terms 'OR' and 'NOT'.



3. Using buttons on the upper menu bar, practice adding and deleting items, just for fun.
4. Once you've got a good and complicated search expression, save it by pressing the *Expressions* button, and selecting 'Add to Expressions' from the drop down list. Choose a name for your expression, then save it. Now, clear the search fields by pressing the *New Search* button. To regain your search terms, click *Expressions* again: notice your saved expression at the bottom of the drop-down list.
5. When you're satisfied with your search expression, click the *Search* button on the upper menu bar.

If you've concocted your search terms well, you should have a pile of references thus:

The screenshot shows the ProCite software interface. At the top, there are search fields: 'Search for:' with a dropdown set to 'Author', and another field with 'AND' and a dropdown set to 'Title', followed by the search term 'Lady Audley's Secret'. Below this is a status bar that says 'Ready'. The main area is a table with three columns: 'Author', 'Title', and 'Date'. The first row is highlighted in blue and contains: Braddon, M. E, Lady Audley's secret, 1862. Other rows include: Braddon, M. E, Lady Audley's secret, 18-?; Braddon, M. E//Skilton, David, Lady Audley's secret, 1988; Braddon, M. E//Taylor, Jenny, Lady Audley's secret, 1998; Hazlewood, C. H//Braddon, M. E, Lady Audley's secret an original ve, 186-; =Lee's Opera House (Fredericton, N, Lee's Opera House Tuesday eve's, 18-?; Maxwell, Mary Elizabeth (Braddon), Lady Audley's secret A novel, 1863; Roberts, George//Braddon, M. E, Lady Audley's secret a drama in tw, 1863?. At the bottom, there is a menu bar with 'Internet Search', 'Marked Records', 'Search', and 'Terms'. Below the menu bar, it says 'Author/Title/Date (Ascending)', '0 Records Marked', '8 Records in List', and '8 Records in Database'. There is also a 'Ready' status bar and a 'NUM' button.

Author	Title	Date
<input checked="" type="checkbox"/> Braddon, M. E	Lady Audley's secret	1862
<input type="checkbox"/> Braddon, M. E	Lady Audley's secret	18-?
<input type="checkbox"/> Braddon, M. E//Skilton, David	Lady Audley's secret	1988
<input type="checkbox"/> Braddon, M. E//Taylor, Jenny	Lady Audley's secret	1998
<input type="checkbox"/> Hazlewood, C. H//Braddon, M. E	Lady Audley's secret an original ve	186-
<input type="checkbox"/> =Lee's Opera House (Fredericton, N	Lee's Opera House Tuesday eve's	18-?
<input type="checkbox"/> Maxwell, Mary Elizabeth (Braddon)	Lady Audley's secret A novel	1863
<input type="checkbox"/> Roberts, George//Braddon, M. E	Lady Audley's secret a drama in tw	1863?

Notice that your search results are a ProCite database. Open a record; note how, for the most part (barring librarian error) the information is in the right fields. Awesome!

These records are in a temporary database: to preserve them, you must copy them to your "downloads" database. Select the records you wish to preserve, and then mark them. Under the Database menu item, select 'copy marked records' and then navigate to your downloads database. Done!

Alternatively, you may just wish to print out your results, and you can do this from the temporary database the same way you would from any other ProCite database. Remember, you can include call numbers in your print out, thus eliminating the need for all of those tiny bits of paper!

We have searched just one library, but you can search many of them at the same time; just select multiple hosts in the same way we selected a single host for this search. Remember, though, the more hosts, the longer the search time. Also, the fields available for search vary from database to database, so in a multiple host search, some of your queries may fall on deaf disks.

(Please note: Since the release of ProCite 5, the U of A Library has changed the way that it organizes its data. If you are using ProCite on a public workstation at U of A, your ProCite configuration has been updated. If, however, you are using your own version of ProCite, you will need to modify the configuration for this host. You can find the instruction for how to do this at

<http://www.library.ualberta.ca/subject/healthsciences/procite/SIRSIProCiteConfig.pdf>

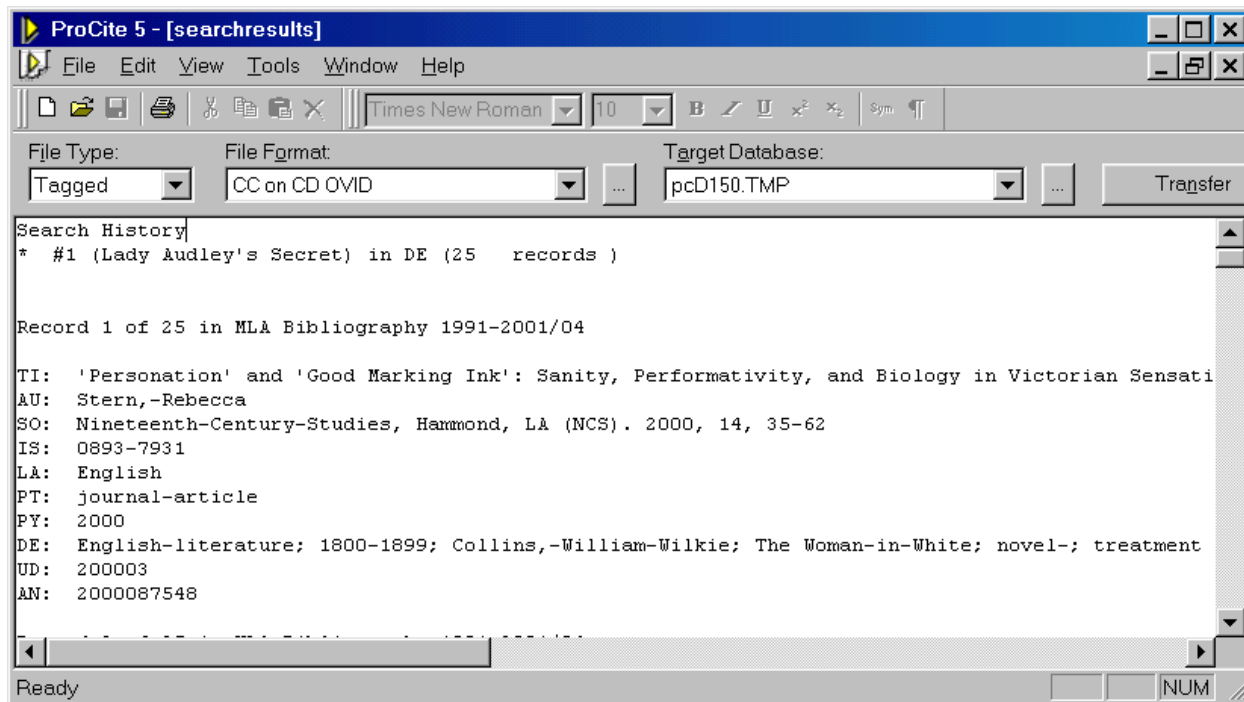
Using ProCite to Convert Search Files into Database Records

This is the other method by which ProCite can automate the turning of your database searches into bibliographic records. We will begin by converting records that ProCite is already equipped to handle (in this case, records from the MLA database). First, you will need a text file of search results. If you email results to yourself, you can cut and paste text from the email into a notebook (Start > Programs > Accessories > Notebook), and saving the resulting files as whatever.txt. To save time, you've already saved the file called searchresults.txt; we will be using this to practice on.

To convert searchresults.txt to ProCite database records:

1. From the menu bar, select Tools > Import Text File. A dialog box will pop up, prompting you to locate the text file in question. It is on the desktop. Select the searchresults.txt file and click 'OK'
2. You will see a change in the ProCite display – see the graphic on the next page of this handout. The main window features the text file: above this, you will need to specify precisely what kind of database you used, what the format of the text file is, and what database you'd like the converted records to be directed to, before the conversion can proceed:
 - *File type*: tagged, or delimited. Tagged files have field identifiers like AU or TI. Delimited fields looks like word soup, and have a lot of commas, quotations marks, and semicolons in them. So searchresults.txt is a tagged file.
 - *File Format*: searchresults.txt springs from an online MLA search on SilverPlatter WinSpirs. (N.B. the name of the online database, the MLA International Bibliography, is not necessarily the same as the **format** of the database, SilverPlatter. Check for the platform of your database before you try to convert records.) From the drop-down list, select the format

'SilverPlatter (SPIRS) ver 2'. Every single database is different, and they often don't announce their format, so you may have to email for tech support. If you get this part wrong, nothing is going to work.



- *Target Database*: you can select this from either the drop-down menu (open databases) or the browse button (any database at all). Let's choose the downloads database from the desktop.
- Now you can click 'Transfer' – this action will likely generate an attention box telling you that there is 'No Database Identifier Found.' For more arcane databases, you would do well to select 'use default'. However, if you now click 'Choose..' you will be able to find 'MLA International Bibliography' in the selection box. Select it and click 'OK'
 - An attention box will inform you that 25 records have been converted, and 0 discarded. This means it all worked 😊.
 - To see your new records, select Window > downloads to transfer over to that database. Notice how there are 25 marked records in the database: these are the converted records. If anything was marked before, it's not marked now. In any case, click the 'Marked Records' tab to see only the converted records. Double-click on some of them to see how well the information is spread across the fields.

Using Third-Party Configuration Files to Convert Data

One of the great things about ProCite is that it allows people (even you!) to build customized configuration files to import data from any number of sources. You can find lots of these configuration files on the web (I've attached a list of useful web resources at the end of this handout). However, the best approach is always to see if the library that you are using has made custom configuration files for its own resources. Fortunately for us, the U of A library has a number of custom configuration files designed specifically for online databases in the U of A system. To access these configuration files, go to