

Arts Resource Centre  
Teaching with Technology Workshop Series

## **Introduction to ProCite**

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**Author:** Aimée Morrison

**Revised by:** Mo Engel

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## Introduction to ProCite

### What is ProCite?

ProCite is a *bibliographic database*; it is an excellent tool to keep track of reading lists, generate printed bibliographies, import reference lists into wordprocessing documents, and assure proper reference formatting in a variety of citation styles. In addition, it can be used to keep notes on a text, to keep track of call numbers of frequently used resources, and to conduct library and online-database searches.

### Database basics

A **database** is a collection of meaningful data items – they are meaningful because they are organized into **records** and **fields**.

Element	Is Like ...	Example
<b>Database</b>	Bibliography	all of the items in a Works Cited list
<b>Record</b>	Individual Citation	Ross, Andrew, and Social Text Collective. <u>Universal Abandon? the Politics of Postmodernism</u> . Cultural Politics: 1. Minneapolis: University of Minnesota Press, 1988.
<b>Field</b>	One Fact	<b>Author:</b> Ross, Andrew // Social Text Collective <i>or</i> <b>Series Title:</b> Cultural Politics

Microsoft Access and PeopleSoft are two databases you might be familiar with. Access is a *general* database because users customize it to meet their specific needs. PeopleSoft is a human resources database – it is *pre-configured* to organize information in ways useful to human resources administrators. Similarly, ProCite is a database pre-configured to be very helpful to users who need to keep track of large amounts of bibliographic information.

### Bibliographic database

In ProCite, the *workforms*, *fields*, and *output styles* have all been designed with books in mind.

**Workforms** are record-types which have different fields necessary to reference most types of bibliographic materials. There are 39 workforms in ProCite. These include:

- books (chapters or whole), journal article, works in press, art work, motion picture, conference proceedings, and web pages, among others.

**Fields** allow for the meaningful capturing of data, for later sorting and formatting.

There are 45 fields in ProCite – not all fields occur in all workforms, though.

Fields include:

- four different kinds of **author** fields (analytic, monographic, author roles, etc.), different **dates** (original publication, reprint, publication), and **titles** (analytic, monographic).

**Output styles** automatically format your records into numerous citation standards.

Your printout is based on how the output style is configured to format the contents of a certain field, in a certain workform. For example, ANSI references do not underline book titles, but MLA citations do – because you’ve entered the title information in the Title field, though, you do not need to format this yourself! The output style does this automatically. No retyping! Because the data is meaningfully encoded, you can switch from one output style (MLA) to another (Chicago A) with just the click of a button.

MLA

- Ross, Andrew, and Social Text Collective. Universal Abandon? The Politics of Postmodernism. Cultural Politics: 1. Minneapolis: University of Minnesota Press, 1988.

~ or ~

Chicago A

- Ross, Andrew, and Social Text Collective. 1988. *Universal abandon? The politics of postmodernism*. Cultural Politics, 1. Minneapolis: University of Minnesota Press.

### Will This Make My Life Better, Faster, Easier?

Yes. Using a bibliographic database to keep track of all of the resources in your life will be helpful in all three ways!

Better: You will have more control over your data, and be able to link and organize it in your own special ways, and share it with others with ease.

Faster: Because you will never need to retype bibliographic information, and because you can generate Word, WordPerfect, and Web documents over and over from the same reference materials in different combinations and formats.

Easier: Never look up a formatting style again. Ever.

So now let’s get started. In this workshop, we will learn how to navigate the ProCite environment, how to make use of the information in our databases, how to enter and alter individual records, and how to generate properly formatted bibliographies for print or export to a wordprocessing program

## Navigating a ProCite Database

From the desktop shortcut, or from **Start > Programs > ProCite 5 > Procite**, open the ProCite program. The most recent ProCite database used on that machine will open automatically. If the title (look on the bar at the top of the window) does not say 'workshop', click the *File Open* icon on the menu bar, and navigate to the workshop database on the desktop.

Your window should look like this:

The screenshot shows the ProCite 5 - [workshop] window. The title bar reads "ProCite 5 - [workshop]". The menu bar includes File, Edit, View, Sort, Select, Groups, Database, Tools, Window, and Help. The toolbar contains icons for file operations and search. Below the toolbar is a preview pane showing the text: "Innis, Harold A. The Strategy of Culture. Toronto: U of Toronto P, 1953." Below the preview pane is a record list table with columns for Author, Title, and Date. The record list is currently showing records 1 through 17. At the bottom of the window, there are tabs for "All Records", "Marked Records", "Search", "Terms", and "Groups". The status bar at the bottom shows "Author/Date/Title (Ascending)", "0 Records Marked", "117 Records in List", and "117 Records in Database".

	Author	Title	Date
<input type="checkbox"/>		Glossary	Fall 1993
<input type="checkbox"/>		Stop Signs on the Web	11 January 2001
<input type="checkbox"/>	Adam, Alison	Artificial Knowing: Gender and the Thi	1998
<input type="checkbox"/>	Adam, Alison// Green, Eileen	Gender, Agency, Location and the Net	1998
<input type="checkbox"/>	American Federation of Information Pro	A National Survey of the Public's Attitu	??
<input type="checkbox"/>	Balsamo, Anne	Feminism for the Incurably Informed	Fall 1993
<input type="checkbox"/>	Bardini, Thierry	Bootstrapping: Douglas Engelbart, Co	2000
<input type="checkbox"/>	Baudrillard, Jean	The Ecstasy of Communication	1988
<input type="checkbox"/>	Bellamy, Edward	Looking Backward: 2000-1887	?
<input type="checkbox"/>	Bender, Gretchen// Druckrey, Timothy	Cultures on the Brink: Ideologies of Te	1994
<input type="checkbox"/>	Benedikt, Michael	Cyberspace: First Steps	1993
<input type="checkbox"/>	Birk, David	Language, Literature and Critical Prose	1999

Annotations on the right side of the screenshot:

- Common functions (points to the toolbar)
- Preview pane (points to the text area above the table)
- Record list (points to the table)
- Tabs (points to the "All Records" tab)
- Good to know (points to the status bar)

I've given you a big database to play with here, to get a sense of how you can use ProCite to organize and navigate large masses of material. Essentially, the program allows you to input data, and then to look at it lots of different ways. Let's investigate.

### Record List

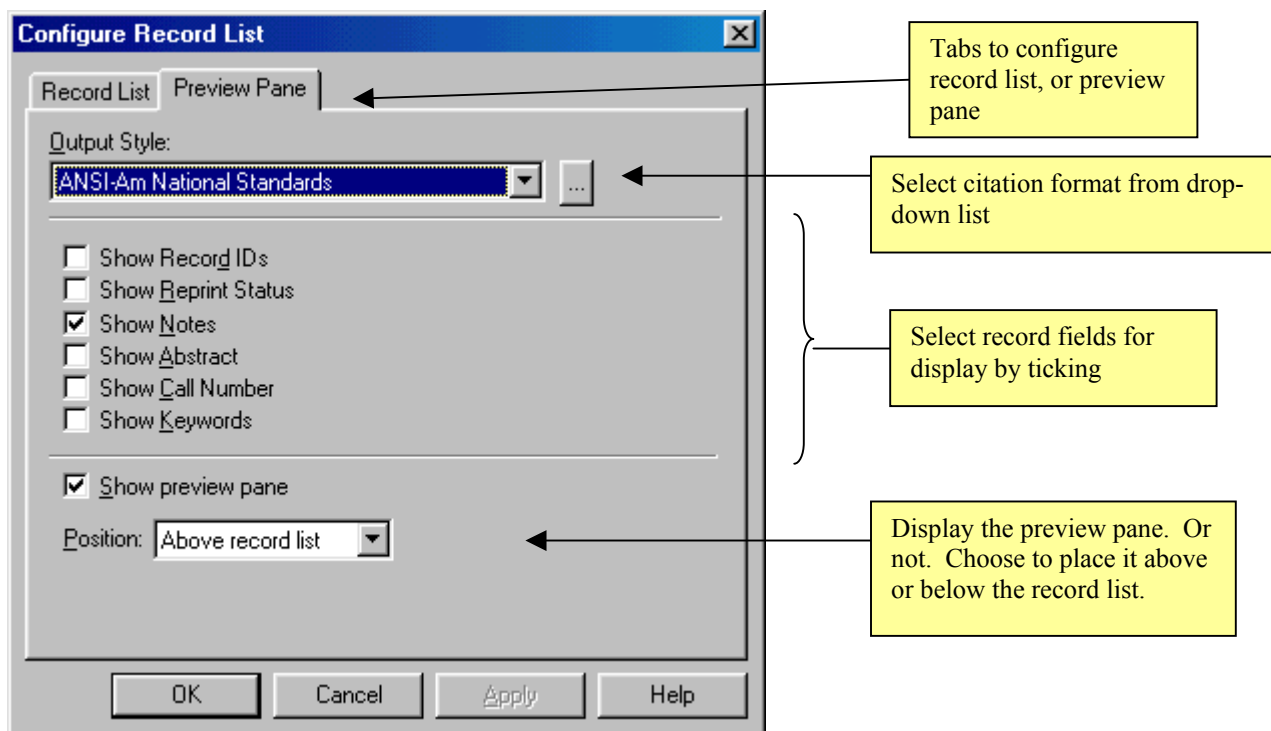
- Scroll through the **records**; use the **scroll bar**. Try also the little record-flicker arrows, on the common functions bar, or at the left of the **tabs**.

- Sort the records. By default, all records are sorted by Author/Title/Date. To sort the record list by title, click the grey bar at the top of the record list that says 'Title'; sort by date the same way; return the sort to author.
- Resize the Author/Title/Date fields by grabbing the separator between them and dragging to the desired location. Hover over the border until you see an arrow like this  $\longleftrightarrow$  then click and drag.
- To see a full citation, select a record from the record list by clicking it once; notice how the citation appears in the preview pane.

### Preview Pane

You can change a lot about the preview pane; you can change the output format (ie, from Chicago to MLA ), you can change the size and placement of the pane, and you can change what fields show up in the preview

- Reconfigure the pane; right click within the preview pane and select **Configure Preview Pane**. Another way to do this is to select **View > Configure Record List ...** from the menu bar, then click the 'Preview Pane' tab.



- Resize the pane by dragging the grey resize bar that separates it from the record list.

- Make the preview pane appear and disappear by pressing the ‘Show/Hide Preview Pane’ button on the common functions bar. It looks like a little collection of windows. If you hover over it with your mouse, it’ll tell you what it is ☺

### Sorting Tabs

By default, a ProCite Database displays all of the bibliographic records that it contains. This is great some of the time, but what if you want to display only certain records? This is where the **tabs** that run along the bottom of the record list come in handy.



As you can see, one of the options (the default) is “All Records.” However, by clicking on these tabs, you can display records in different ways: you can search for particular terms using the “Search” function; you can display records containing pre-set terms by using the “Terms” tab; you can manually mark a series of records to display using the “Marked Records” tab; or, you can search for duplicated records by clicking the “Duplicates” tab. Remember, these tabs determine which records will be *displayed*; all of the other records are still in the database, they just aren’t cluttering up your screen. Play around with each of these functions to get a feel for what they do.

### Better Navigating of the Masses of Information In Your Database

Via the Terms tab, you can view records according to what kind of workform they’re in, by keywords, by title, by journal, and by author. Try it now – how many whole books are there in the workshop database? How many book chapters? Do any authors appear more than once? How many different journals does the database feature articles from?

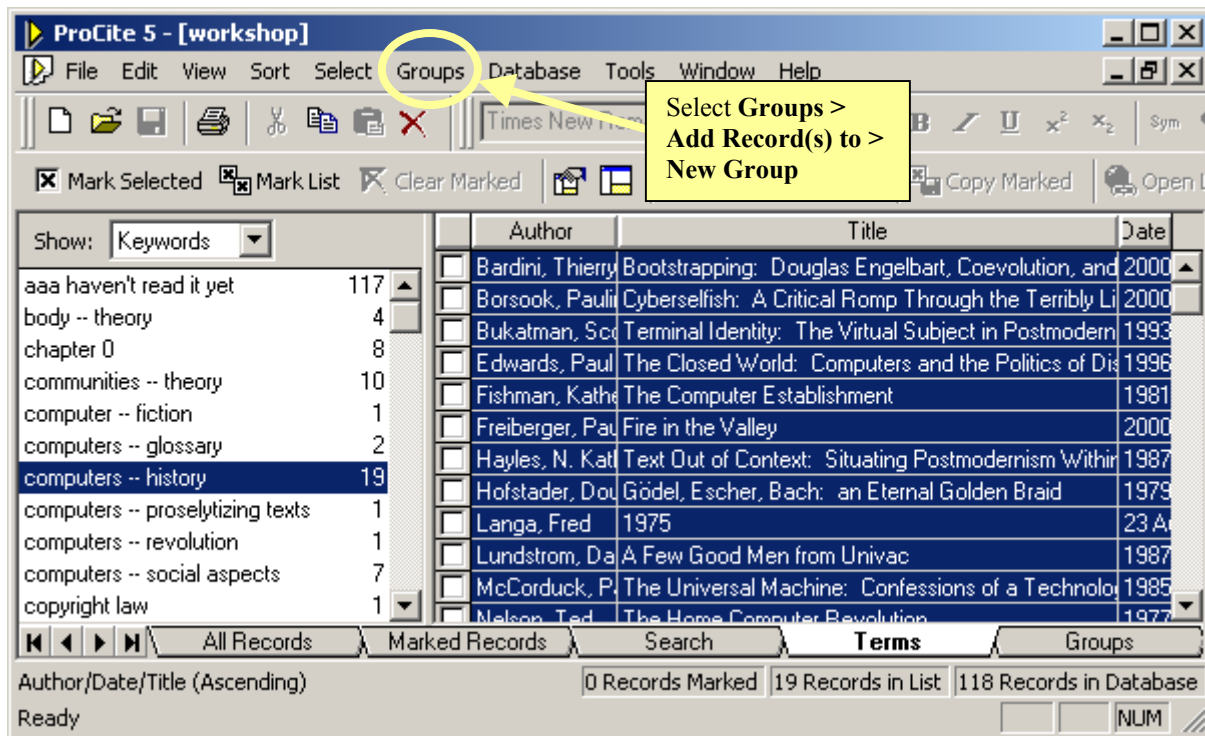
Probably the most useful term of all is ‘keywords’ because these are terms you devise yourself to organize your records: how many records are indexed under cyberspace – theory?

Another good way to organize your records, especially if you have very big databases that you use for a number of purposes, is to link them into *Groups*.

### Groups

To add records to a group, you need to select the appropriate records, then indicate the group to which you’d like them added. We’ll try an example from the workshop database. We’ll select a particular keyword and make a group out of it. Then we’ll add more records to this same group.

- Select the Terms view of the record list; order the records by keyword
- Find a keyword with lots of records in it (I've used computers – history in the example below). Select all the records belonging to this keyword. Your display should be similar to the window below:



- From the menu bar, select **Groups > Add Record(s) to > New Group**, as indicated in the illustration.
- You will be prompted to name the group. Aimée (the author of this database) chose to name the group 'chapter one' because that's what she was reading all those computer histories for.

If you now click the Groups tab, you will see your group listed on the left, and the records in the group on the right. Now we will add more records to the group.

- **To add a new record** to an existing group, select the desired record in any ProCite view.
- Select **Groups > Add Record(s) to**. Notice that your new group appears in the bottom of the drop-down list. Select it, and the record will be sorted to that group.
- You can always create a new group the way we did earlier; if you create enough groups that they don't all fit on the drop-down list, you can always choose **Groups ...** to select the appropriate group to which to add records.

You can also remove records from a group, or delete an entire group: this will NOT delete the records, but will remove them from the group. Similarly, deleting a group is like removing a keyword; it will not remove the records in question from the database.

- **To remove a record** from a group, select the record in the Groups view.
- From the menu bar, select **Groups > Remove Record(s)**.
  
- **To delete a group**, select the group in the Groups view.

From the menu bar, select **Groups > Delete**. You will be prompted to confirm the delete.

## Entering Records

Now that you've seen what a good database looks like, and how it will make your life better, you need to learn how to build your own. The process begins with creating new records. There are several ways to get new information from somewhere else and into your ProCite database:

1. *Manually*, by typing in the information yourself
2. *Copying* information from another ProCite database
3. *Executing searches* of library databases directly from ProCite
4. *Converting* a tab-separated text file (ie, emailed search results from MLA)

Time constraints necessitate concentrating on the first aspect. A later workshop will focus on automating record-keeping by generating electronic library search results. ARC mentors are more than happy to help you out with this individually if you want to drop by the lab for help. Feel free to email me ([mengel@ualberta.ca](mailto:mengel@ualberta.ca)) to set up an appointment.

### **Manual Record Entry**

We're going to add some new records to the workshop database. We will key in information from a variety of sources – journals, books, book chapters, motion pictures.

Adding a new item to your bibliographic database consists of adding a new record to your record list. To open a blank, new record, select **Database > New Record** from the menu bar, or press the **F9** key on your keyboard.

Things to do:


- Choose the appropriate Workform from the drop-down list in the common functions bar.
- Start to enter the bibliographic information. Use the **tab key** (good idea) or the mouse (gets very tired, very fast) to move between fields. Skip the fields you don't need.
  - Separate multiple authors using two slashes; use the *last name, first name* form (separated by a comma)
  - Separate multiple keywords with a single slash followed by a space
  - Corporate or government authors should be prefaced with the = sign
  - Don't add punctuation! Don't format titles! Just type!
  - Take note of the drop-down lists - very helpful if the same three people in the same four journals write everything you ever need to cite.

The screenshot shows the ProCite 5 software interface with the following fields and annotations:

- Workform:** Book Whole (Annotation: Choose your record type here)
- Record ID:** 3420
- Author, Monographic (07):** Baudrillard, Jean (Annotation: Not really useful to you)
- Author Role (08):**
- Title, Monographic (09):** The Ecstasy of Communication
- Translated Title (11):**
- Reprint Status (12):**  **Date:**
- Edition (15):**
- Author, Subsidiary (16):** Schutze, Caroline// Schutze, Bernard (Annotation: Note format for multiple authors)
- Author Role (17):** trans.
- Place of Publication (18):** New York
- Publisher Name (19):** Semiotexte
- Date of Publication (20):** 1988
- Original Pub Date (21):**
- Volume ID (22):**
- Extent of Work (26):** 107
- Packaging Method (27):** pp
- Series Editor (30):** Lotringer, Sylvère//Fleming, Jim (Annotation: Click on this and a box pops up to let you select titles already in the database)
- Series Editor Role (31):** eds
- Series Title (32):** Foreign Agents Series
- Series Volume ID (33):**
- Address/Availability (37):**

Additional annotations include:

- Fill in the fields you need – tab to go forwards, shift-tab to go back. Blank fields just get ignored in the citation.

- Save your record by either pressing F9 to open a new record, by pressing Ctrl-S, or clicking the close button and responding 'Yes' at the save prompt.
- Close your new-record window by clicking the lower of the two close buttons  in the top right of the ProCite window. Now you're back at the record list window. Try to find the record you've just input - note that in the 'good to know' bar, there are now 118 records in the list. Good work!

## Generating Bibliographies

Generating bibliographies is one of the most useful features of ProCite. Again, your options are multiple: you can print an über-bibliography of all the records in the database, or you can print only selected records. Also, you can save these as word-processing documents, and import the bibliographies into pre-existing documents.

What you need to do:

- Select records for bibliography
- Select fields to print
- Fiddle with layout and output style
- Print or save the bibliography

### Selecting Records

In ProCite, a highlighted record is called a 'selected record.' Marked records have X's in the little boxes on the left of the record list. The good-to-know bar at the bottom of the ProCite window lets you know how many records are marked.

#### Selecting Records:

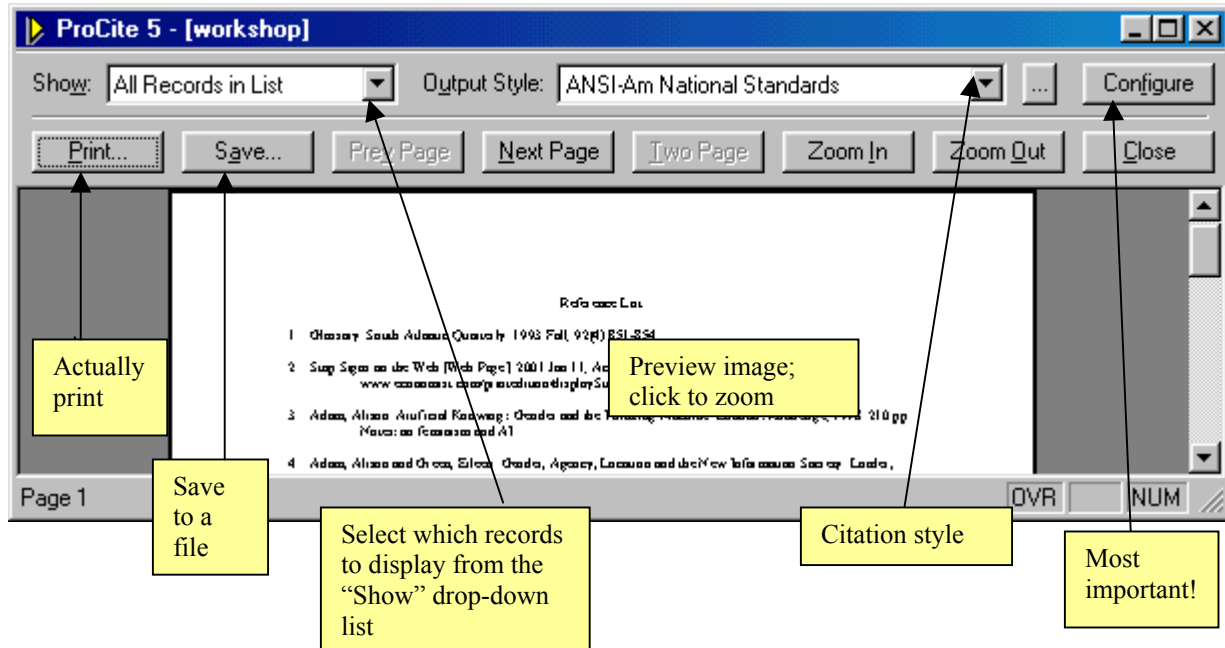
- Select a record by clicking on it once in the record list
- Select multiple, sequential records by holding down the *Shift* key, clicking the first record and then the last. All should be highlighted.
- Select multiple, non-sequential records by holding down the *Ctrl* key, then clicking each desired record

#### Marking Records:

- Mark a record by clicking in the little box beside the entry in the record list.
- Mark multiple records by selecting them as above, then clicking the **Mark Selected** button on the common functions bar.

## The Bibliography Interface

Once you've selected the records you want in your bibliography, click the **Print** button, or select **File > Print Bibliography**. Counter-intuitively, this does not actually print anything, but just jogs you along in the editing process. You will see a new window, that looks like this, only taller:



You can see that the bibliography has a title; the references are numbered; they are formatted in ANSI. You can and will change all of this!

First, from the 'Show:' drop-down list, choose whether to 'print' *all the records* in the list, the records that are *selected*, or the records that are *marked*.

Next, click the **Configure** button that I've marked as most important on the diagram. A box will pop up--here is where you really customize your bibliography:

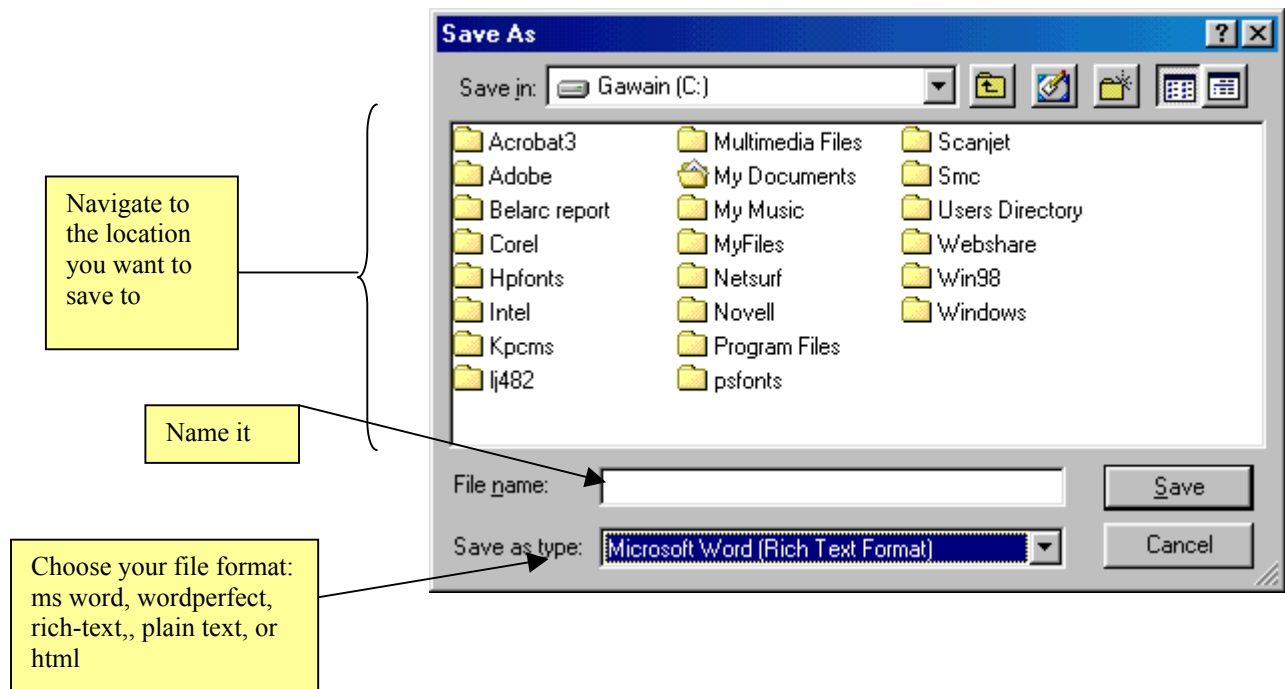
- **Reference List** tab: here you can change the sort order, the title, the indentation, and the citation style.
- **Fields** tab: here you can choose which fields from the record to include; this is useful, say, if you are going to the library with your list, and would like the call numbers to print out.

- **Page Layout** tab: here you can choose different fonts, whether to number pages, and set the margins

### From Process to Product, Finally

Once you have the bibliography set up the way you want, you can print it directly, or save it as a file for later fiddling.

- **Printing:** Click the **Print** button. Presto!
- **Saving:** Click the **Save** button. A dialogue box pops up that looks like:



- Once you've saved the bibliography in this manner, you can open the file in whatever word processing application you use.

## **I Want It, I Want It!! Where Can I Get It??**

### **Buy It:**

ProCite is available for purchase at the U of A Microstore (the computer section of the bookstore in SUB).

Current price (according to their website) for students with a valid ONECard: \$179

Current price (according to their website) for staff with a valid ONECard: \$299

Site License Fee (excluding media) by **indent only** from CNS: \$210

### **Use It:**

Coutts Lab, L-110 Education S (ProCite 5)

Rutherford Labs, 2-03 & 2-05 Rutherford South (ProCite 4)

Arts Resource Centre, 250 Arts (Faculty of Arts Faculty, Staff, TAs and RAs Only), (ProCite 5)

HUCO Lab, 112 Arts (Priority to HUCO Students), (ProCite 5)

## **Select Internet Resources**

### **ProCite's own Frequently Asked Questions (FAQ)**

<http://www.procite.com/support/pcfaq.asp>

### **U of A's ProCite Page**

(an excellent resource for advanced searches, including U of A specific configuration files)

<http://www.library.ualberta.ca/services/healthsciences/procite>

### **The ProCite Users' Electronic Discussion List**

(including troubleshooting tips and configuration files)

<http://www.indiana.edu/~librcsd/procite>

### **NYU's ProCite Page**

(again, more configuration files)

<http://library.nyu.edu/bib/procite.html>

### **University of Michigan ProCite Configuration Files**

<http://www.lib.umich.edu/knc/bmip>