Guided Tour

This Guided Tour provides an introduction to RefViz™, how it works, and its basic functions through the following sections:

RefViz™ Overview

RefViz™ is a text analysis and visualization software application designed to retrieve, analyze, organize, and facilitate the comprehension of the huge amounts of literature that are available to researchers today.

Retrieve

RefViz™ can retrieve reference information from many data sources and content providers. In addition, it allows you to work with references contained in bibliographic management software or those in files on your computer.

 The Reference Retriever™ provides a convenient interface for searching all of your favorite data sources **simultaneously**. You can enter a query once and Reference Retriever™ will identify and retrieve the relevant references in each data source, remove duplicates, and automatically create a visual analysis and presentation.

 Direct connectivity with bibliographic management software, such as EndNote®, provides immediate visualization of your reference libraries and lets you find the most relevant citations for your papers.

 You can also work with lists of references contained in files, such as the results from past internet searches.

Visualize

References are organized by thematic content and presented in interactive visualizations that facilitate rapid identification of major themes and areas of interest. RefViz™ makes it easy to cast a wider net when searching the literature, broaden your understanding of the field, and identify and save important documents.

Why Perform Text Analysis?

Searching literature data sources such as PubMed®[1], ERIC, or PsycINFO is often an iterative query process that must balance the size of the final download with the potential loss of important information. Usually, the first query submitted is fairly generic and the results are overwhelming in number and cover a wide range of associated topics. A second, more refined query usually reduces the number of hits, but, depending on the subject matter, the resulting abstract set can be either too small to be informative or still too large to read and comprehend. Ideally, the larger information set will maximize learning about a topic of interest. However, it is difficult to remember both the broad concepts and the significant details for a large set of references. The text analysis and visualization capabilities in RefViz™ facilitate this process.

1. PubMed is a registered trademark of the National Library of Medicine.

With RefViz™, you can get an overview of all of your references, and then gain in-depth knowledge of the topics of interest. While gaining a deeper knowledge of these topics, you can find out who else is working in your area, and read what they have published. You can also find trends over time and new topics emerging in your field.

If you have bibliographic data in different software packages - for example, if some people in your group use EndNote® and others use ProCite® - and you would like to combine all the references to obtain an overview of the entire reference collection, you can import data from each database and create a combined visualization.

How Does Text Analysis Work?

The process RefViz™ uses to divide a set of references into topic groups can be compared to the approach you might use to organize the references that tend to accumulate on your desk over time. Most likely, you would begin by reading the abstracts for each paper and placing them in stacks according to subject. RefViz™ sorts electronic copies of your important papers using a similar process: ***reading*** the contents, ***finding*** word patterns and their associations, and ***dividing*** the set of papers into groups based on subject matter. But, in addition to sorting papers, it also arranges the resulting stacks according to subject matter. This level of organization is analogous to arranging the stacks of similar papers on your office floor according to overlapping themes among the stacks.

Instead of making one large stack for all the papers discussing a wide-ranging topic, such as medicine, you might decide to break that stack up into smaller groups based on subtopics, such as diagnosis, treatment, research, and public health studies. Groups of documents discussing the diagnosis of a certain disease might be placed next to the groups about research and treatment of that same disease. Groups of papers on the diagnosis, treatment, and research for another disease might be placed in a region distinct but somewhat close to the other disease set. The papers on public health would be separated from the other sets of papers. In our analogy of organizing papers in your office, the final step might be to place labels on top of each stack as a reminder of what they are about. RefViz™ also labels each group with the three terms that help distinguish it from the other groups in the reference set. These labels provide an easy to understand overview of the main topics in your reference collection.

This within-stack and across-stack organization of your references is what you will see in the RefViz™ Galaxy™ visualization, but with a powerful advantage: ***interactivity***. After the initial survey of the main themes in your reference collection, RefViz™ provides a suite of tools that allow you to query the literature set as a whole and find associations among topics, concepts, and document groups.

How Do I Influence the Perspective on the Analysis?

As you learn more about the themes in the reference set, it is often productive to influence the perspective of the analysis by applying a customized set of rules for grouping the references. RefViz™ provides a tool to help you understand which automatically-selected topics influence your analysis. You can then modify these topics, if you choose, to emphasize topics of interest, or de-emphasize those that are less important to you.

How Does RefViz™ Sort References into Groups?

RefViz™ uses mathematical algorithms to divide a set of papers into concept-based groups. Starting with a vocabulary list determined from the Titles and Abstracts for each set of references, RefViz™ uses a statistical model to find key concepts. Unlike other literature sorting applications, RefViz™ defines key themes and concepts based on the context of the entire reference set rather than using predefined rules.

RefViz™ sorts references into groups in the following steps:

1. Identifying words that represent key concepts, primary and secondary, for a reference set.
2. Using key concepts to create a mathematical signature for each document.
3. Applying standard mathematical clustering algorithms to partition the document set into groups of similar papers.

The result is a much richer comparative analysis than a simple categorization of documents based on word counts. Coupling this with powerful visualization methods provides rapid insight into large reference collections.

Install and Start RefViz™

System Requirements

Macintosh[1] G4 or better (optimized for G5), OS 10.3.x or higher, JAVA 1.4.2, 256 MB RAM, and 1 GB free hard disk space are recommended.

Installation

1. If you have a RefViz™ CD, insert it into your hard drive, go to the Mac OSX folder, and double-click the installer application. Click **Next** after reading the information on the first screen.
2. Read the license agreement and click on the radio button **I accept the terms of the License Agreement**. Click **Next** to continue.

1. Macintosh is a registered trademark of Apple Computer, Inc.

3. You are offered an option for installation location. The default location is Applications/RefViz. You may type in or browse to another location, if desired. Click **Next** to continue.
4. Choose your preferences for creating shortcuts to RefViz™. The default behavior is to add a RefViz™ icon to your dock. Click **Next** to continue.
5. Click **Install** to install RefViz™.
6. Click **Done** to dismiss the installer.

Starting RefViz™

1. Click on the RefViz™ icon in the dock, or double-click on the RefViz™ icon in the RefViz folder.
2. The first time you start RefViz™, a Registration window displays asking for a registration number. If you have already purchased RefViz™, enter your registration number.

   Otherwise, choose **Trial** mode.

    The trial mode allows you to use all features for 30 days. After 30 days, you will only be able to use the sample data provided. To convert from Trial mode to unlimited access you must purchase the program.

Purchasing and Registering

1. To Purchase, click on the **Purchase** button in the start-up Splash screen or in the About RefViz dialog available from the RefViz menu.
2. On the resulting RefViz™ web page either follow the links for purchasing RefViz™ online (North America and certain other countries) or follow the link to your local distributor for pricing and ordering information.
3. Once you have a valid RefViz™ serial number, click the **Register** button in the start-up Splash screen or in the About RefViz dialog.
4. Enter the serial number and click **OK**.
5. Complete the RefViz™ registration form and click on **Submit** to register your serial number with Thomson ResearchSoft.
6. Check the RefViz™ web site (www.refviz.com) for updates and new format files (import filters).

Connectivity with Thomson ResearchSoft products

RefViz™ supports communication with EndNote® and ProCite®. You can send references of interest identified in RefViz™ directly to your bibliography management software. If you have installed your other Thomson ResearchSoft product in a non-standard location, you will have to designate the location. Choose RefViz -> Preferences and then click on the Helper Application tab; click on the "**...**" button to identify your bibliography manager application.

You can also use the references in your bibliography management software to create a RefViz™ visualization. With newer versions of bibliographic

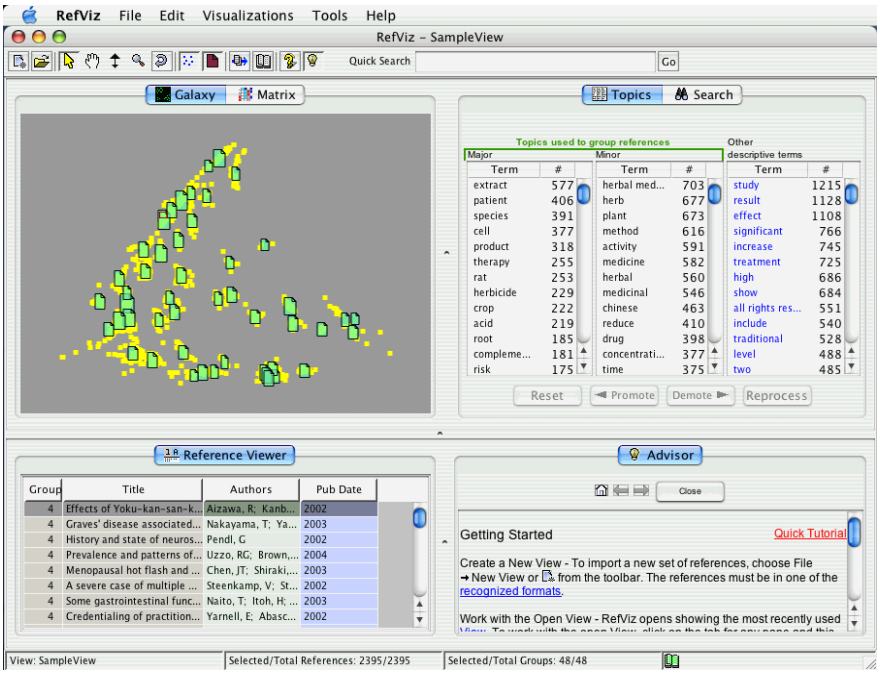
management software, you may have an option to create a RefViz™ analysis directly via a data visualization menu item; check the manual for your version of software to see if this is supported.

Get Started

1. To start RefViz™, click on the RefViz™ icon in the dock or double-click on the icon in the RefViz folder.

   A Create New View dialog appears. From here you can begin the process searching for references or bringing in references from a variety of sources. Details on how to Create a New View will be discussed below. For now, close the dialog and explore the RefViz™ interface.

2. The RefViz™ window opens with four panels:
   - Visualizations are contained in the upper-left panel.
   - The Topics Tool and Search Tool are contained in the upper-right panel.
   - The Reference Viewer is in the lower-left panel.
   - The Advisor is in the lower-right panel.



3. If desired, resize the window or the individual panels to meet your needs.

   To resize the entire RefViz™ window, place the cursor over the Grow box in the lower right-hand corner and click and drag.

To resize a specific panel, place the cursor over the divider between the panels and then click and drag to the desired position.

4. Click on the tabs in each panel for contextual help in the Advisor panel and review its contents to learn about the visualizations and tools.
5. Use the links in the Advisor to learn about text analysis and interpretation of results.

 The Advisor initially displays advice on Getting Started, including a helpful link to a simple tutorial. Once you click on specific panels, the Advisor updates to show advice relevant to that panel. To get back to the Getting Started Advisor, click on the **Home** () button.

6. To stop RefViz™, choose **Quit** from the **RefViz** menu.

SampleView Description

RefViz™ provides a sample data set to help you understand text analysis and learn about the software. The 2395 references in the SampleView were downloaded from the ISI Web of Science® web site querying all three Citation Databases with:

```
herb* AND (garden* OR medicin* OR farm*)
```

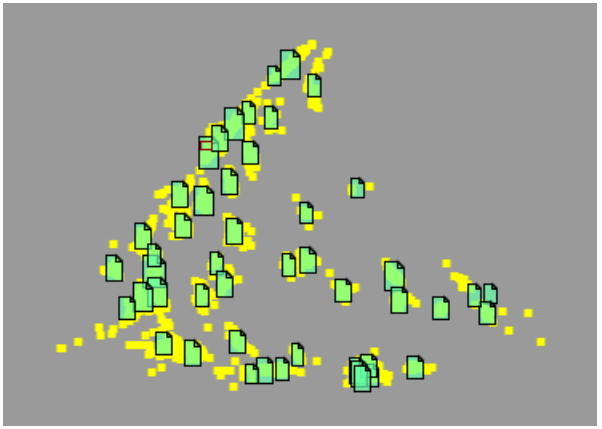
 Access to the Web of Science® requires a subscription. If you want to be guided through the analysis of a set of references, see the Tutorial that is included in the RefViz™ Help files. The Tutorial, which uses a public domain data source, is also accessible from the Getting Started home page of the Advisor.

Visualizations

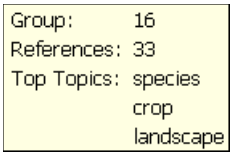
There are two visualizations, Galaxy™ and Matrix™, both of which provide a global perspective of the information content in a reference collection.

Galaxy™ 

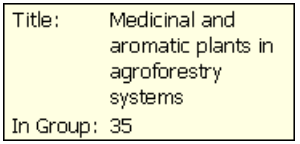
The Galaxy™ visualization is an interactive environment that lets you explore thematic relationships in your reference collection. The Galaxy™ groups references according to how they are related conceptually, providing an overview of how each reference is related to every other reference. In this visualization, each point  represents a single reference and each paper icon  represents a group.



1. Use the mouse to hover over group icons and view information about the group, including three terms that help describe it and distinguish it from the other groups, the group number, and the number of references in the group.



Hover over a reference point to view its title.



Note that in this example the groups in the lower-right region of the Galaxy™ are mostly about farming and herbs, their cultivation, or the use as herbicides;

groups in the upper region are mostly about therapies;

and groups in the lower left contain a mix of references about herbage diets in farm animals, extracting herbal preparations from plants, and studies on the health effects of exposure to herbicides.

Thus, the information flow for the entire reference collection is from herbs in farming to herbs to medicine as you move from 3 o'clock and around clockwise in the Galaxy™ visualization.

The Galaxy™ visualization always shows a logical flow of information for any reference set analyzed by RefViz™.

2. Select references using one of the following options:

- Left click on group icons to select the group and all references that are part of that group. To select more than one group, push the Command key when clicking.
- Left click and drag a box around a region in the Galaxy™.
- Left click on points to select individual references.

The Topics Tool and Reference Viewer show more content detail for the selected references, and are updated anytime new references are selected.

- The Topics Tool lists the vocabulary for the selected references. See the Topics Tool section for more information.
- The Reference Viewer presents a list of all selected references and a way to view content details. See the Reference Viewer section for more information.

3. If desired, change the color scheme used in the Galaxy to accommodate your preferences.
   1. Choose **RefViz -> Preferences...**
   2. Click on the **Galaxy** tab if it is not in front.
   3. Click on the **User-defined (Editable)** radio button.

      The six color squares below become active.
   4. For each color choice, click once on a square to open a color chooser dialog.
   5. Pick the color you want to use and click **OK**.
   6. Complete your changes by clicking **OK** to close the Preferences window.

Matrix™

The Matrix™ visualization is a two-dimensional representation of the associations between concepts and groups. Use this visualization to examine your reference set in the following ways:

- Obtain an at-a-glance overview of the major concepts discussed across groups.
- Review which subjects tend to be discussed together in the literature.
- Understand the overlap and association between concepts.

Specifically, the Matrix™ can be configured to represent associations between the reference groups and their Major Topics or to represent the co-occurrence of Major Topics with other Major Topics in the references.

Groups vs. Major Topics

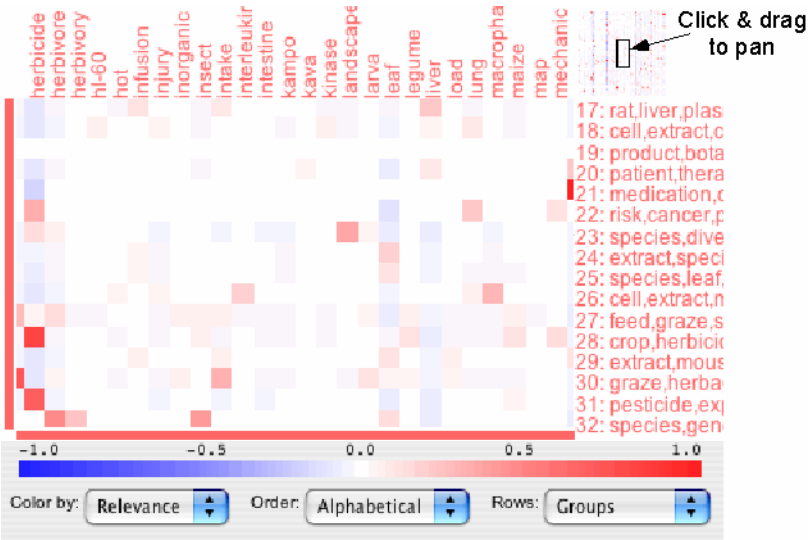
1. Click on the Matrix™ tab or choose Matrix™ from the Visualizations pull-down menu.

By default, the Matrix™ visualization is calculated so that rows represent the same groups seen in the Galaxy™ visualization and columns represent the Major Topics for the View.

Row labels show the group number and the three terms that help describe it and distinguish it from other groups.

You can click on a cell to select the references in the row (group) containing the column term. By selecting the entire column (clicking on the column label), you can select all records containing the column term.

2. Left click on the black box in the thumbnail image in the upper-right portion of this panel. Drag the box around the thumbnail to view different regions of the Matrix™. For finer control in moving the Matrix™, choose the pan cursor from the toolbar.



3. Hover over cells in the Matrix™ to view pop-up notes with group number and terms; the Major Topic for the column; a value for the relevance, or strength, of the association between column term and the references in the group; and the number of references in that cell.

Group:	45: leaf,species,herbivore
Major Topics:	insect
Relevance:	0.17391
Counts:	14

Cell color intensity also indicates the strength of the association. Red means the column's Major Topic is a concept important to the group, and blue tells you the column's Major Topic occurs rarely or not at all in

the group. White indicates that there is no significant association in either direction between the group and Major Topic.

By default, the Major Topics (columns) are sorted alphabetically. This facilitates searching for terms of interest.

4. Choose **Similarity** from the middle drop-down list at the bottom of the Matrix™.

   This orders both the columns (Major Topics) and the rows (groups) based on how the terms are related conceptually and emphasizes the *sets* of terms that describe each group. This also shows you which groups are most related to each other.

5. Move the black box in the thumbnail until you can see blocks of red cells together. Use the pan cursor as needed for fine control.

6. Look at the Major Topics (column labels) that have adjacent red colored cells in a row.

   The proximity of these Major Topics indicates that they are used similarly within the same group of references. For example, as shown in the following figure, the Major Topics graze, pasture, and herbage were very important concepts in one group (brighter reds) and were also similarly used to a lesser extent in other groups (pink cells).

7. Click on a group row label.

   This selects all references in the group and highlights (in red) all Major Topics (columns) that occur at least once in the selected references. The middle section of the RefViz™ status bar (bottom of the main frame) will indicate how many references you have selected.

8. Click on the Galaxy™ tab to see that these same selections have been made in the Galaxy™ visualization.

Major Topics vs. Major Topics

1. Click on the **Matrix** tab or choose **Matrix** from the Visualizations pull-down menu.

2. Choose **Major Topics** from the rows drop-down list at the bottom of the Matrix panel.

   When rows represent Major Topics, cell color intensity indicates which terms tend to be discussed together in the literature. Red cells indicate a higher than random co-occurrence across the reference collection of the column and row terms. Blue means there are few references about both subjects.

Click on a cell to select the references and highlight other terms that co-occur with the row and column labels. Viewing these co-occurrences tells you which themes tend to be discussed together in the literature.

3. Sort columns and rows based on **Similarity**. This orders both directions of the Matrix™ based on how similar they are in concept.
4. Right click with your mouse in the middle of the Matrix™ to get the zoom cursor and move it up or down to zoom in or out of the visualization. As you shrink the graphic area, you get an overview of regions of red cells representing concepts that tend to be discussed together in the reference set. Zooming in lets you see column and row terms and more details in the visualization.
5. Drag the black box in the thumbnail to a region containing a block of red cells. Use the pan cursor as needed.

   The Major Topics that intersect in a red colored cell have a high degree of co-occurrence and are likely related conceptually. In addition, Major Terms that are near each other in the row or column labels will also have some thematic similarity.

   Based on the co-occurrence of certain topics as indicated by red cells, this region represents references about raising dairy cows.

6. Choose the select cursor from the RefViz™ toolbar. Left click in a Matrix™ cell to select the references contained in that cell. In the preceding example, the references containing both graze and sward (land covered with grassy turf) have been selected as indicated by the black box around the cell.
7. Click on the Galaxy™ tab to see that these same selections have been made in the Galaxy™ visualization.
8. Review the updated Topics Tool contents.

   Major Topics such as clover and ryegrass occurring with the Major Topics seen earlier suggest these references also discuss the types of vegetation for grazing.
9. Review the reference titles in the Reference Viewer table to see what the specific documents are about.

Tools

Use RefViz™ tools for more detailed exploration of the content and relationships in the reference collections.

Topics Tool

This tool contains three lists of terms representing the vocabulary for the reference collection.

- **Major topics** are terms determined by RefViz™ to be best for distinguishing and sorting references into groups.
- **Minor topics** are additional distinguishing concepts that are found to be associated with the Major Topics to further enrich the major concepts and understand synonyms. They do not influence group assignments as much as Major Topics.
- **Other terms** are vocabulary words in the currently-selected references that are, as the name implies, descriptive, but not useful for differentiating references.

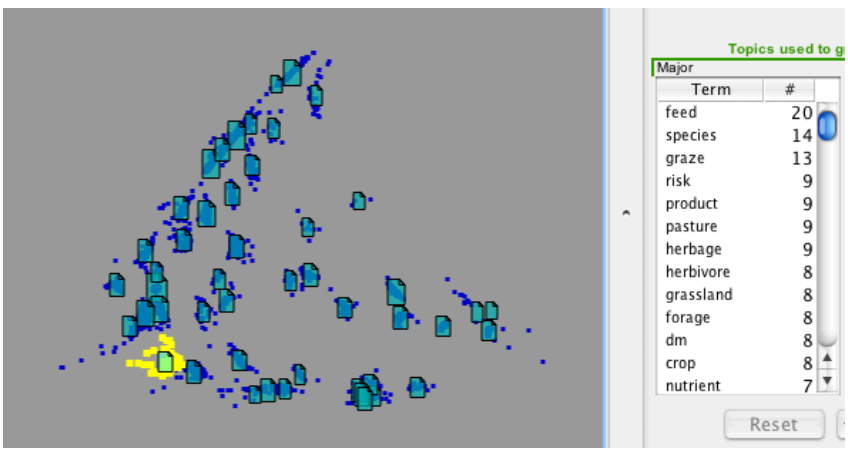
See above for a description of how RefViz™ uses these different types of vocabulary words to group references.

1. Select all references by choosing **Select All** from the **Edit** pull-down menu.

   The Topics tool updates to show all vocabulary terms for the View.

   The top Major Topics represent the major themes or concepts for the View. Terms such as extract, patient, and therapy indicate themes about herbal medicine. Terms such as herbicide and crop represent themes about farming.

   The Major Topics for the group selected in the Galaxy™ in the next figure indicate this group is about feed for farm animals.



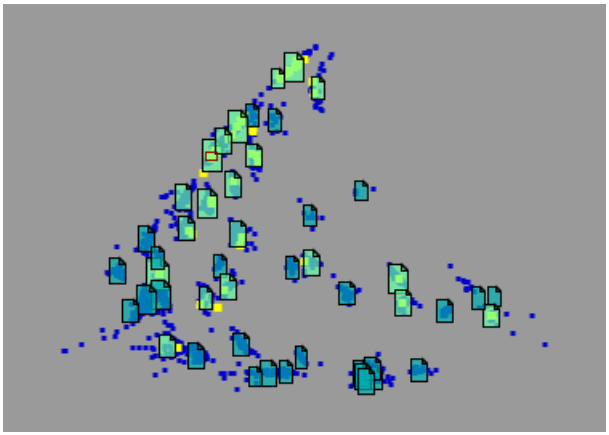
   Now consider the group to its immediate right. The two groups are quite similar as indicated by their location in the Galaxy™ visualization and their overlapping Major Topics, but there are important differences as well. The Major Topics for the second group include leaf, species, and herbivore. This group is more focused on the quality of the crops and

their interactions with herbivores, insects, and other environmental conditions.

Search Tool

Use this tool to query the reference set and focus on areas of interest.

1. Click on the **Search** tab
2. Enter “asthma” in the top parameter field. You may choose to search all text fields or use the field pull-down list to choose individual fields. Choose “All Text Fields” and click **Search**.



Most of the selected references can be found in the region at the top dealing with medical studies and to a lesser extent in the middle-right section dealing with laboratory studies.

You will also notice that one of the groups near the bottom, in the area dealing with feed for farm animals, also mentions asthma.

You may find it useful to hide the group icons so that you can see the individual references better. To do this, click on the group icon button ( ) in the toolbar.

3. Use the Galaxy™ Magnify cursor ( ) to lasso the region containing this reference. If necessary, repeat the magnification to see the individual highlighted reference.
4. Hover over the selected reference to pop up its title.

   You can see that asthma is relevant to diseases that come from working with animal feed. You can get the full information from this reference using the Reference Viewer.

Reference Viewer

Use the Reference Viewer to browse references in a single-line display, sort references based on information in various fields, view reference details, and find where search terms occur.

1. Review the list of references resulting from your search with the term “asthma”.
2. Click on rows to highlight each reference in the list and locate the corresponding point in the Galaxy™ visualization.

   The reference in the list that is highlighted is indicated in the Galaxy™as a point enclosed in a box. You may need to hide the group markers to see a specific reference.

   Default columns for the Reference Viewer are the group, title, authors, and publication date. You can view any available fields in the Reference Viewer table by choosing **Tools -> Choose Reference Fields**.
3. Sort on individual columns by clicking on column headers.
4. Double-click on a row to open a separate Reference Window in which you can view the content of each reference.

   Any search term will be highlighted in **green**. Synonyms of search terms will be highlighted in **tan**.
5. Contents for each reference can also be viewed in a Preview Pane. Choose **Tools -> Show Reference Viewer Preview Pane**.
6. Search each reference for additional terms with a Find function available in the Preview Pane. To do this, choose **Tools -> Show Find in Preview Pane**. (The Reference Viewer Preview Pane must be displayed for the Find option to be active.)
7. Enter a search term and click **Find**.

   The search term will be highlighted in **turquoise** in any reference viewed in the Preview Pane.

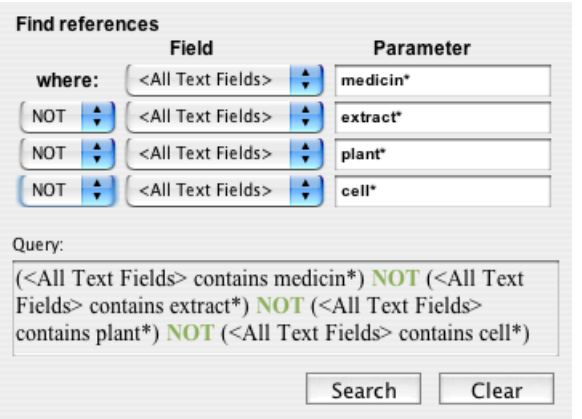
Create a Subset View

Once you have used the SampleView to gain a broad perspective on various sources and uses of herbs, you may decide you want to focus your bibliography on medicinal uses of herbs only.

1. Use the Search Tool tool to select references with the query:

   `(medicin*) NOT (extract*) NOT (plant*) NOT (cell*)`

   as shown in the following figure.



2. Click **Search** to select the 610 references that match the query.
3. Choose **File -> Create Subset View**.

   The resulting dialog allows you to provide an extension name for the Subset View. All Subset Views retain the name of the original View and require an extension name to identify the new View. In this example, you might replace the default extension “subset1” with “medicine” to remember how the View was created.
4. Click **OK**.

   RefViz™ uses all of the selected references to create a new View and, since there will be new groups, calculates new topics and relationships among references in the context of the information contained in this smaller set of references.

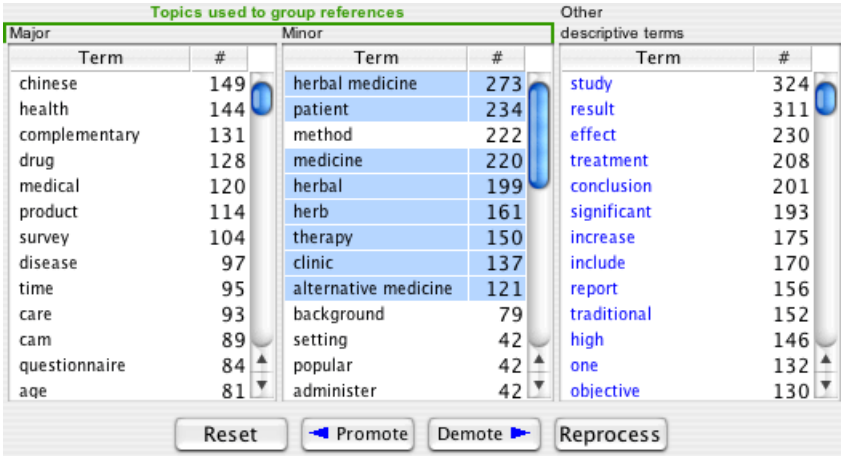
   When processing is complete, SampleView.medicine will automatically open for review in the Galaxy™ visualization.

Reprocess a View

1. Review the group pop-ups for the “SampleView.medicine” Subset View created in the previous section.

   Note several groups have the same Major Topics including medicine, patient, and herbal. Since you already know this reference set is focused on herbal medicine, it might be useful to look at this data set with a different perspective. For example, let’s move the focus away from the clinical perspective.
2. Select all the references in the View using **Edit -> Select All**.
3. Highlight “herbal medicine”, “patient”, “medicine”, “herb”, and related words in the Major Topics list.
4. Click the **Demote** button.

This moves the highlighted words from the first column to the middle column of Minor Topics as in the following figure.



Demoting Major Topics to Minor Topics decreases the amount of influence they have on group assignments. Minor topics contribute to understanding relatedness among Major Topics, but do not directly influence group creation.

The **Reprocess** button is now activated. When clicked, RefViz™ will reprocess the View without the usual steps of creating a vocabulary list and assigning terms to the three lists above. Instead, it will use current vocabulary and topics in the lists above to compare references and create groups.

5. Click **Reprocess**.
6. Add an extension to the name SampleView.medicine to identify your new View.

   A logical extension might be “new.topics”. RefViz™ will process the new View and automatically open it for review.

   Some new groups are focused on case studies and clinical trials of herbal medicines, some groups on the risks associated with herbal remedies alone or in combination with conventional therapies, and other groups contain references about identification of the active chemicals in medicinal herbs.

Send References to Bibliographic Management Software

RefViz™ is designed to integrate smoothly with EndNote® and ProCite® bibliographic management software. This allows you to seamlessly send references you identify in the visualizations to your bibliography manager.

If you are using EndNote® 9, RefViz™ is preconfigured to communicate with that software. If you are using ProCite®, if you have a different version of EndNote®, or if you have installed EndNote® in a non-standard location, use the **Helper Application** tab in the Preferences dialog to point to your bibliographic software.

1. Select references of interest in your RefViz™ View.

   Those selections, for example, might come from choosing a region of the Galaxy™ or the results of a search.

2. Choose **Send References to -> Bibliography Manager** from the **File** menu or click on the RefViz™ toolbar to initiate an automatic export.

3. If you choose ProCite®, you have the option to choose an existing database or provide a name for a new database. EndNote® will provide a browser to pick an existing database.

Create a New View

There are three ways to create a View of references in RefViz™. You can use Reference Retriever to search one or more online data sources and create a View, you can import lists of references contained in files and import, and you can send references to RefViz™ directly from some bibliographic management software.

Using Reference Retriever™

The Reference Retriever™ provides a convenient interface for searching all of your favorite data sources **simultaneously**. You can enter a query once and Reference Retriever™ will identify and retrieve the relevant references in each data source, remove duplicates, and automatically create visual analysis and presentation.

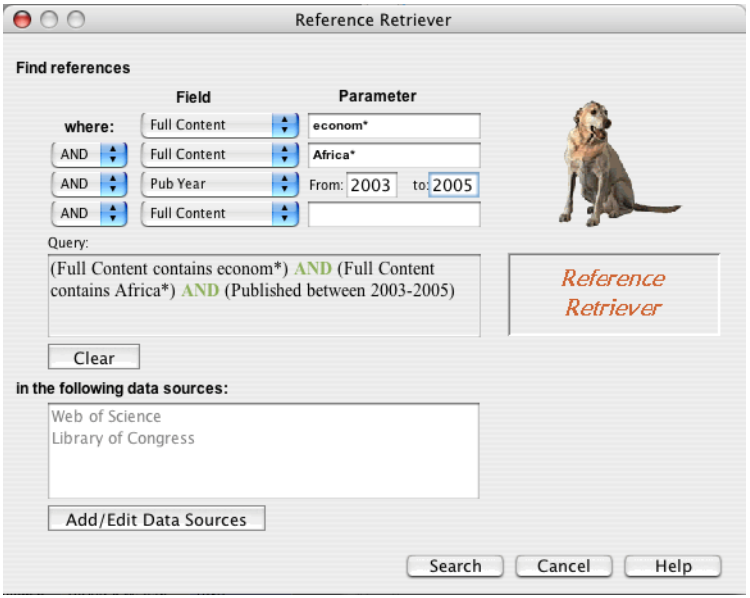
To search for references and automatically create a View:

1. Choose **New View** from the **File** menu or click on the icon from the toolbar.

2. Choose **Searching database(s) using Reference Retriever** and click **OK**.

3. Enter your query in the Search interface.

   You can choose to search for terms anywhere in the reference record or limit the search to specific fields. You can also search according to publication year.



4. If the data sources shown are not where you want to search, click **Add/Edit Data Sources** to choose the online data sources you want.

   You can also configure new data sources in the window that opens.

   Access to some data sources requires a subscription.

5. Click **Search**.

   Reference Retriever™ will search each of the data sources and report the number of references found at each site.

6. Type in a name for the View that will be created.

7. Click **Retrieve** to have Reference Retriever™ get the references.

   Reference Retriever™ will then automatically remove duplicates of any records found in more than one data source. Next, it will create and open the View.

Importing References from Files

You can create a View from lists of references contained in files, such as the results from past internet searches. For new searches, you will generally find it easiest to use the Reference Retriever.

Supported Data Formats

RefViz™ allows you to import references in files in the text formats below:

- ResearchSoft RIS export format

- ISI Web of Knowledge℠ – ISI Web of Science®, ISI Current Contents Connect®, ISI Proceedings℠, BIOSIS Previews®, CAB ABSTRACTS®, PsycINFO
- PubMed®[1] MEDLINE®[2] format – choose MEDLINE from the PubMed Display drop-down before downloading (Send to: File)
- OVID®[3] – including MEDLINE®, ERIC, and PsycINFO
- OCLC – including MEDLINE®, ERIC, and PsycINFO
- CSA – including MEDLINE®, ERIC, and PsycINFO

Access to some of these data sources requires a subscription.

To create a View with a file containing references:

1. Choose **New View** from the **File** menu or click on the icon from the toolbar.
2. Choose **Using reference file(s)** and click **OK**.
3. Use the browser to navigate to your reference file and click **Open**.

   RefViz™ will check the format and import if it matches one of the accepted formats listed above.

   Incomplete references (missing a title, for example) will be filtered at import. Check the RefViz™ Help files for more details on incomplete references and changing this default setting.
4. After import, name the View in the Create New View window. Click **OK**.

   RefViz™ will start processing the View and automatically open it when completed.

Sending References Directly from Bibliography Management Software

Direct connectivity with bibliographic management software, such as EndNote®, provides immediate visualization of your reference libraries and lets you find the most relevant citations for your papers.

Check the User's Manual for your bibliographic management software to see if that version supports direct connectivity to RefViz™. If not, you will need to export the references using RIS export format, then launch RefViz™ and import that file as described in the previous section.

Send References to RefViz™

1. In your bibliographic management software, select or mark the references you want to visualize.

1. PubMed is a registered trademark of the National Library of Medicine.
2. MEDLINE is a registered trademark of the National Library of Medicine.
3. Ovid is a registered trademark of Ovid Technologies, Inc.

 To visualize all the references in a library, you can leave all unselected.

2. Choose the **Data Visualization** menu item (**Tools** menu in EndNote®).

   The selected references will be sent to RefViz™ which will automatically launch and create a View.