

# **NB Ibidem Tutorial**

## **Acknowledgement**

Nota Bene Associates, Inc. would like to thank Mary Bernard for her work in producing this version of the NB Ibidem Tutorial.

## Ibidem Help: Contents

# Ibidem Help: Table of Contents

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## Ibidem Introduction and Overview

Ibidem is a bibliographic database system tightly integrated with the Nota Bene word processor. With Ibidem, you can develop your own personal bibliographic database and use it throughout your career to keep bibliographic information readily available. You will have many options for sorting and searching through the sources you have used in your research. Ibidem will also automate the process of inserting citations in your papers and generating reference lists or bibliographies. In-text citations (footnotes, endnotes, short form or reference numbers) and reference lists or bibliographies are displayed on screen as you are writing your paper and they can be formatted in the publishing style you select, with changes made easily at any time.

### A General Introduction to Bibliographic Databases

Bibliographic databases are predefined structured databases. Structured databases require that information entered into a database be stored in "fields," each of which holds a specific type of information. Traditional databases require that the user define the fields for the database.

Bibliographic databases are set up with predefined fields, such as author names, years of publication, publisher, titles, and so on. You enter the information for each book, article or other work in the fields that are provided. Once the information has been entered, Ibidem can find the record you need and insert properly formatted citations in your documents. A properly formatted reference list of the works cited in your paper will be generated automatically. You also have flexible options for generating bibliographies that include all of the records in your database, or any group of records that you select.

Right now, you are probably accustomed to typing bibliographic information as citations, in a "sentence-like" form, using punctuation stipulated by your style guide, as in this example:

Berlin, G. & Sum, A. 1988. Toward a More Perfect Union: Basic Skills, Poor Families, and our Economic Future. New York: Ford Foundation.

If you cite the same work in another paper at another time, you type the same information again. If you have to reformat the citation in a different style, you might have to go back through your notes to find the author's full name. Even if all the information required is in the current citation, you probably need to retype the citation with different punctuation, perhaps in footnotes or in a different sequence. This is precisely the sort of work Ibidem will do for you.

With Ibidem, bibliographic information needs to be entered (and proofread) only once. For each resource work, you will have a different record with the information entered in the appropriate fields. Your database is the collection of all the records that you have entered. This database is used not only to keep track of information, but also to generate citations and bibliographies.

## Entering Data

Ibidem makes it easy to enter bibliographic information. Information for each record is entered in fields (author, title, publisher, etc.) Different fields are needed for different kinds of works, and data entry templates provide you with the correct fields. The data entry template for a book includes those fields necessary for citing a book, just as the data entry template for an article in a journal includes fields prompting you to enter the bibliographic information you will need for a proper citation of a journal article.

Fields are also available for information that will not appear in your citations. Use the keywords field to identify works on a particular subject, and then you will be able to generate a reading list on that subject. The abstract field can be used for your brief comments about the work. Use the record link field to link to a Nota Bene document with more extensive reading notes.

Ibidem will use the data you enter and the rules of the publishing style that you select to generate your citations and bibliographies. Needless to say, entering the data accurately is important. There are a few guidelines to follow. Author's names are entered with last name first and multiple authors are separated with a semi-colon. For example, if "Smith, Sophie; Jones, Stanley" is entered in the author field, the program will be able to format citations and bibliographies in accord with the various publishing styles (some styles invert first and last names while others do not, and styles vary in the way multiple authors are listed). However, if "Sophie Smith and Stanley Jones" is entered, the program will not be able to apply the correct formatting and would not be able to properly alphabetize under the name "Smith". You will learn more about the guidelines for entering data in the tutorial that follows, and information about how to enter data in each field is easily available as you work.

## Generating Citations and Reference Lists or Bibliographies

Generating formatted citations with Ibidem is easy. Before we take a quick look at how you will use Ibidem to cite works in your papers, we should perhaps review the basic terms Ibidem uses to differentiate between types of citations and citation lists.

**In-text Citations:** These are citations that appear in the body of a paper. They can be in the form of author-date or short form cites (Smith, 1980), numbered cites (1), footnotes, or endnotes.

**Reference List:** A reference list is a compilation of citations for the works cited in a particular paper.

**Bibliography:** A bibliography is any compilation of citations. It might include works consulted for a paper or a grant proposal, or works to be included on a reading list, or works dealing with a particular topic. The principal difference between a reference list and a bibliography, for Ibidem, is that bibliographies do not need to be directly tied to the works cited in a document. Bibliographies are generated directly from the database; reference lists are generated when Ibidem scans a document for cites.

To cite a work in your paper, simply locate the record for the work in the database, and choose **Cite, Insert Citation**. It's that easy. Ibidem will prompt you for the pages you want to reference and then insert the in-text citation in the style you have selected for the document. Your reference list will be generated automatically and updated on screen whenever you press **Update Dynamic Citations** button on the main Nota Bene screen (or press **Alt+F7**).

### IbidPlus

IbidPlus is an extension of Ibidem that allows you to use all of the controls of Ibidem for non-bibliographic databases. Databases can be used to keep track of collections, household inventories, student records, or any information that can be entered in fields that you define. Set up your database in Ibidem as a customized database rather than a bibliographic database, or use pre-defined options for addresses or field notes. When a non-bibliographic database is active, menu items like "Generate, Bibliography" will automatically be changed to "Generate, Report." Ibidem's flexible options for searching and sorting and generating various lists and reports will all be available.

### Learning to use Ibidem

The tutorial we have included here will take you through a series of exercises showing the basics of entering data and citing works in your papers. Once you've finished the tutorial, you will be ready to use Ibidem for your own projects.

Two other ways to learn about Ibidem are the Ibidem videos and the Ibidem sample file:

- A series of short videos on Ibidem (and on other aspects of the program) is available by clicking **Help, Instructional Videos**.
- A Nota Bene file IBIDEM.SMP provides an example of a document with citations that have been generated by Ibidem. It presents a series of exercises that demonstrate how to use Ibidem to maintain your bibliographic database and cite works in a document. To access this file, click **File, Open**. On the left side of the Open File dialog, browse to your C:\Nbwin\Document\Samples folder (if C:\Nbwin is not your main program folder, substitute the correct drive and/or folder). When you click on the Samples subfolder, you should see IBIDEM.SMP on the right side of the dialog. Double-click on it to open.

We recommend that you take advantage of all three learning methods: the tutorial presented here, the IBIDEM.SMP sample file and the videos.

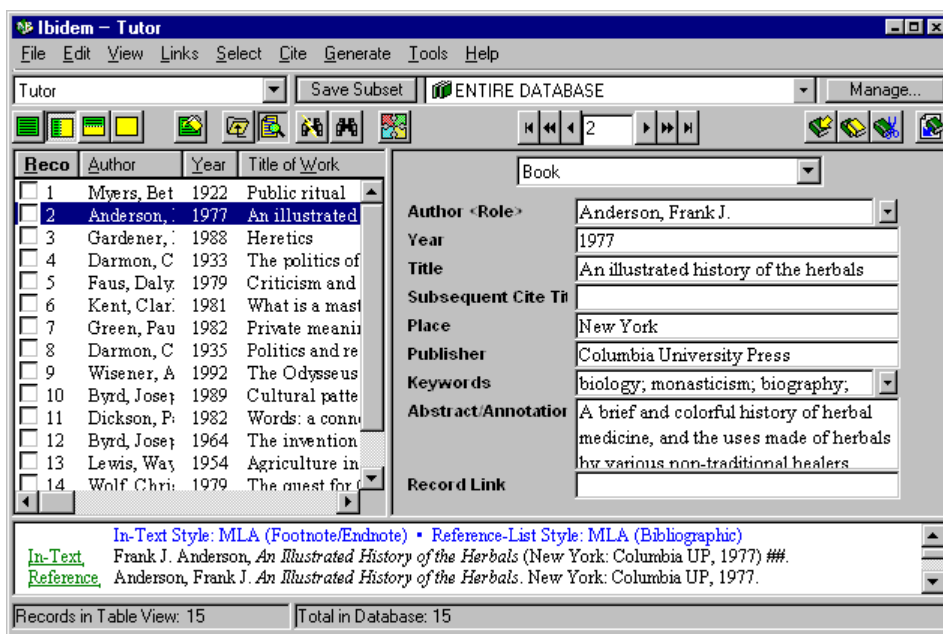
## Ibidem Tutorial

### Ibidem Tutorial 1: Starting Ibidem

It is easiest to follow this tutorial if you have a printed version to look at while you go through the suggested exercises. A printable version of this tutorial in PDF format is provided with Nota Bene, and a PDF version of the full Ibidem Help, including this tutorial, can be downloaded. Assuming that you have Nota Bene (Lingua Workstation, Scholar's Workstation or the trial version) and the free Adobe Acrobat Reader installed on your computer, you can use Windows Explorer or My Computer to browse to your Nbwin\Document\Help folder and open IBIDEM.PDF. This file can also be opened by opening Ibidem (**F7** or **Tools, Ibidem**) and clicking **Help, Tutorial (PDF Format)**. The PDF version of the full Ibidem Help (including this tutorial) can be downloaded from [www.notabene.com/NBHelp.html](http://www.notabene.com/NBHelp.html). Clicking **Help, Printable Manual** on the Ibidem screen will give you an option to go directly to this page to download.

In this tutorial, you will be introduced to the basics of using Ibidem. We will take a quick look at how data is entered in Ibidem. Then we will cite a few records in a document, and see how the reference list is automatically generated. We will also introduce subsets and record links, two features that can be very useful in managing your data and your reading notes. When you have completed the tutorial, you will be ready to begin entering records for your own research sources and including citations in your documents.

For this tutorial, you will need to have Nota Bene open, with a blank document on the screen. To open Ibidem, click **Tools, Ibidem** on the Nota Bene Main menu or press **F7**. The main Ibidem screen will display.



Three databases are provided with the program as examples. In the screen shot above, the Tutor database is open. Once you have learned to use Ibidem, you will want to create your own database and enter your own bibliographic data.

As you go through this tutorial, you will become familiar with the various buttons and options on the Ibidem Screen. Take a moment now to browse through the menus and familiarize yourself with the screen.

## Ibidem Tutorial 2: The Ibidem Screen

For the first several exercises in this tutorial, we will use the Samples database. At the top left corner of your Ibidem screen, you will see a white box with the name of the currently open database. This is the database drop list. If this is the first time you have used Ibidem, the drop list will say "Tutor" indicating that the Tutor database is currently open. Click on the button to the right of this box and select "Samples." This will open the Samples database and the word "Samples" should now appear in the database drop list as shown below.

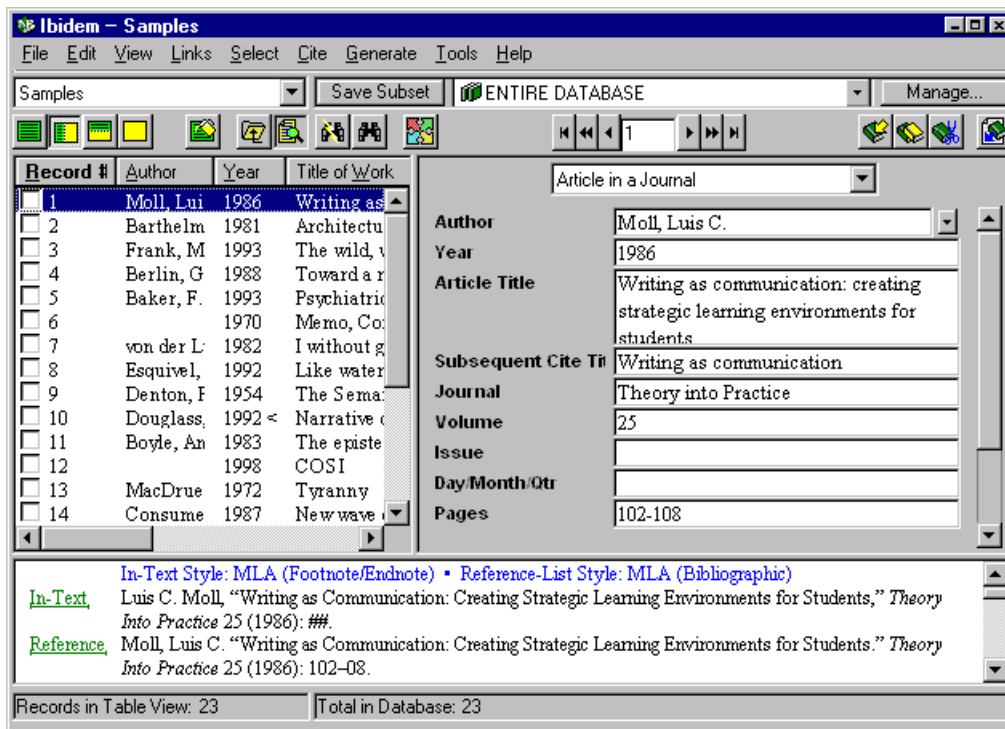


Table View on the left side of the screen displays one line for each record. You can click to select any record, and details will be displayed in Record View on the right side of the screen. The preview panel at the bottom of the screen shows how this record would appear when inserted in a document as a citation (In-Text) and as part of a bibliography (Reference).

In the example above, Table View is on the left and Record View is on the right. You can also arrange your Ibidem screen so that Table View is on top and Record View is on the bottom, or so that either view is the only one visible. Try clicking each of the four green and yellow buttons just under the database drop list to see the different views that are available.

The borders of the Ibidem screen can be dragged so that you see the information you need more easily. Move your cursor to the border between Table View and Record View until your cursor takes the shape of a double-headed arrow. Then hold your left mouse button down, and move the border to the left or to the right. Ibidem will remember the change you make for future sessions. Similarly, you can move most other borders including the borders between column labels in Table View and the border between field names and fields in Record View.

The preview panel at the bottom of the screen can be shown or hidden, and there are many options for this display. Click **View**, **Preview Panel** to show or hide this panel.

## Ibidem Tutorial 3: The Samples Database

The Samples Database has examples of books, articles and other works that demonstrate how bibliographic information for basic types of sources should be entered in the database. Let's take a look at several different types of bibliographic records.

Click on **record 4** to display the record for the book by Gorden Berlin and Andrew Sum.

The screenshot shows the Ibidem software interface. On the left, a table lists 17 records. Record 4 is highlighted in blue. The table has columns for Record #, Author, and Year. Record 4's author is 'Berlin, Go' and its year is 1988. On the right, the 'Record View' for record 4 is displayed. The record type is 'Book'. The author field contains 'Berlin, Gorden; Sum, Andrew'. The year is '1988'. The title is 'Toward a more perfect union: basic skills, poor families, and our economic future'. The subsequent cite title is 'Toward a more perfect union'. The place is 'New York'. The publisher is 'Ford Foundation'. The keywords are 'book, two authors'. The abstract/annotation field is empty. A status bar at the bottom indicates 'Records in Table View: 19' and 'Total in Database: 19'. Two callout boxes provide additional information: one on the left points to record 4 in the table, stating 'The record highlighted in the Table View is displayed for editing in the Record View.'; another on the right points to the record view, stating 'The Data Entry Template name identifies the type of resource in the record. Notice that the Data Entry templates includes fields that are appropriate for the type of resource material.'

Record #	Author	Year
<input type="checkbox"/>	1 Moll, Luis	
<input type="checkbox"/>	2 Barthelme	
<input type="checkbox"/>	3 Frank, Mi	
<input checked="" type="checkbox"/>	4 Berlin, Go	
<input type="checkbox"/>	5 Baker, F. J	
<input type="checkbox"/>	6	
<input type="checkbox"/>	7 von der La	
<input type="checkbox"/>	8 Esquivel, J	
<input type="checkbox"/>	9 Denton, R	
<input type="checkbox"/>	10 Douglass,	
<input type="checkbox"/>	11 Boyle, An	
<input type="checkbox"/>	12	
<input type="checkbox"/>	13 MacDruet	
<input type="checkbox"/>	14 Consumer	
<input type="checkbox"/>	15 Shimahara	
<input type="checkbox"/>	16 Shipstone,	
<input type="checkbox"/>	17 Kameham	

This is a record for a basic book. Notice that author names are entered with the first and last names inverted, and the names of individuals separated by a semi-colon. Author names, as well as translators, editors, and other contributor names should be entered in this manner, so that Ibidem can reformat the names for different publishing style requirements.

Click on other records in Table View and you will see that there are records for different kinds of works. Record number 4 is a book; record numbers 1 and 2 are articles in a journal, etc.

With your cursor in Table View, you can browse through the records in the database with the **Up** and **Down** arrow keys or with **PageUp**, **PageDown**, **Home** or **End**. Or you can click on the arrows to the left and right of the box with the record number in it (the number 4 in the example above).

If you put your cursor in one of the fields in Record View, you will find that you can edit the content of the field. You do not need to do anything to save the changes that you make. Any changes will be saved automatically when you switch to a new record or close the database.

Click in the Author field in the Record View now, and then press **Ctrl+PageDown**. This will display the next record in the database, with your cursor in the same field of the next record.

Take a few moments to browse through the records and the different types of records that are included. Note that the fields listed are appropriate for each type of record.

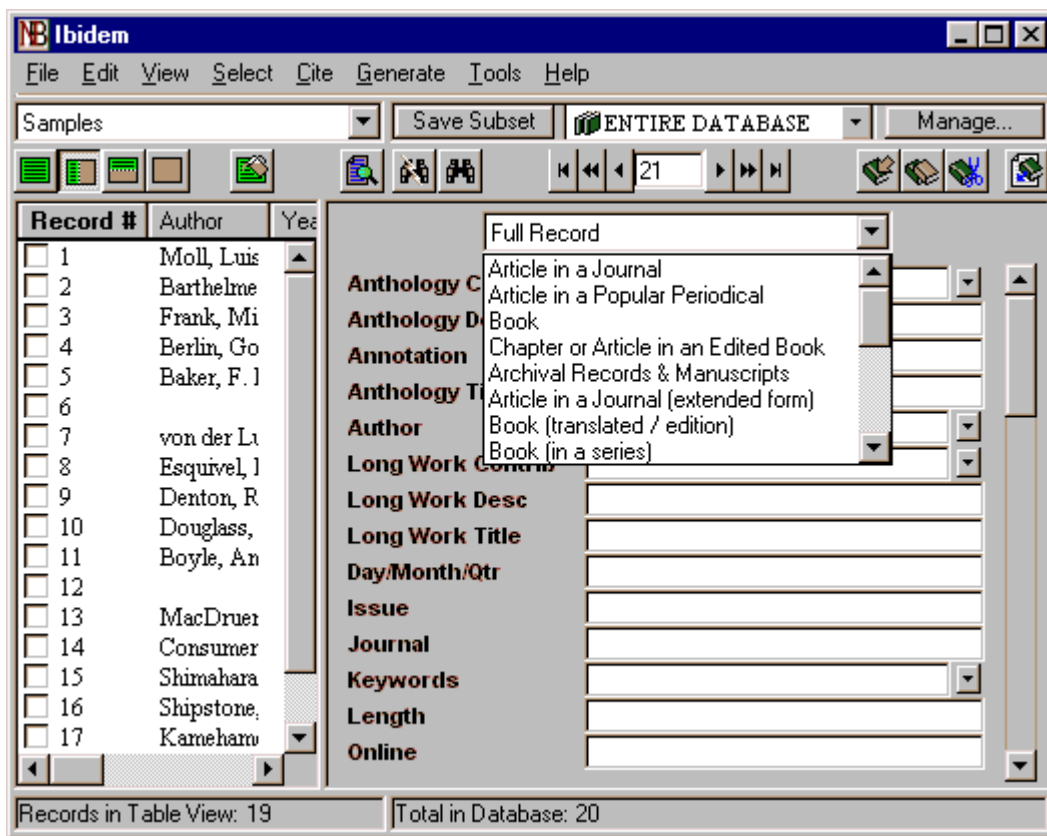
The data entry template drop list is the box that contains the word "Book" in the above example. Only the fields appropriate for the type of work shown in the data entry template box are displayed. To see all of the fields that are predefined in an Ibidem database, return to record 4, click button at the right side of the drop list and scroll down select "Full Record." Return to "Book" before you go on to the next exercise.

## Ibidem Tutorial 4: Add a New Record

Now that we've had a look at the basic types of records you can enter in Ibidem, let's add a new record for a book.

To add a new record to the current database:

- 1 Click **Edit, New Record**. Ibidem will display a blank new record.
- 2 Click on the Data Entry Template drop list to display the available Data Entry Templates.



- 3 Click to select the **Book** Data Entry Template. This is the form you will want to use for entering information on basic books. If the book you are citing lists a translator, editor, or other contributor on the title page, is an edition other than the first, or perhaps is a work in a series, you will need to use one of the other Book templates.
- 4 Click in the Author field. Enter **Bloom, Harold** as the author name, and press the **Tab** key to move the cursor to the Year field. Now complete the record by entering information in the fields as follows:

Year: 1998  
 Title: Shakespeare: the invention of the human  
 Place: New York  
 Publisher: Riverhead Books

The record is automatically saved when you switch to a different record, close the database or exit from Ibidem. There is no need to do anything to save the data you have entered.

Notice that the we entered the author's last name first, followed by a comma, a space and then his first name. We entered the title with only the first word capitalized. There are specific guidelines for how data should be entered, and these guidelines must be followed precisely. The data that you enter will be used by the program to generate citations in formats that may vary from one publishing style to another. When the publishing style that you select requires it, the author's name will be shown with the first name first, and the title will be capitalized.

Guidelines for entering names, roles (editor, translator, etc.), years and titles are available in Ibidem Help, or in FieldTips that can be viewed as you work. FieldTips can be displayed automatically (Auto FieldTips on) or manually (Auto FieldTips on). Click **Help, Auto FieldTips** to turn Auto FieldTips on or off.

- Automatic FieldTips: When Auto FieldTips is on, information about each field will be displayed when you place your cursor in the field.
- Manual FieldTips: When Auto FieldTips is off, information about each field will be displayed when you place your cursor in the field and press **Ctrl+F1**.

It is extremely important to "follow the rules" when you enter data in Ibidem fields. Take a moment to look at the rules for entering names, roles, years and titles. Make sure that Auto FieldTips is on, then take a look at each of the following:

- Click in the Author field. On the FieldTips screen, read the Rules that are shown in blue. Click NAMES to read more detailed information about entering names.
- Click in the Author field. On the FieldTips screen, click ROLES to read detailed information about entering roles.
- Click in a Title field. On the FieldTips screen, read the Rules that are shown in blue. Click TITLES to read more detailed information about entering titles.
- Click in the Year field. On the FieldTips screen, click YEARS to read detailed information about entering years.

In summary, remember that names are entered with last name first. Multiple authors are separated with semi-colons. Titles are entered with the only first word and proper names capitalized (unless it is a non-English title). Years are entered with 4 digits. If you remember these simple rules, and know how to obtain more detailed instructions, you should have no problems entering data in Ibidem.

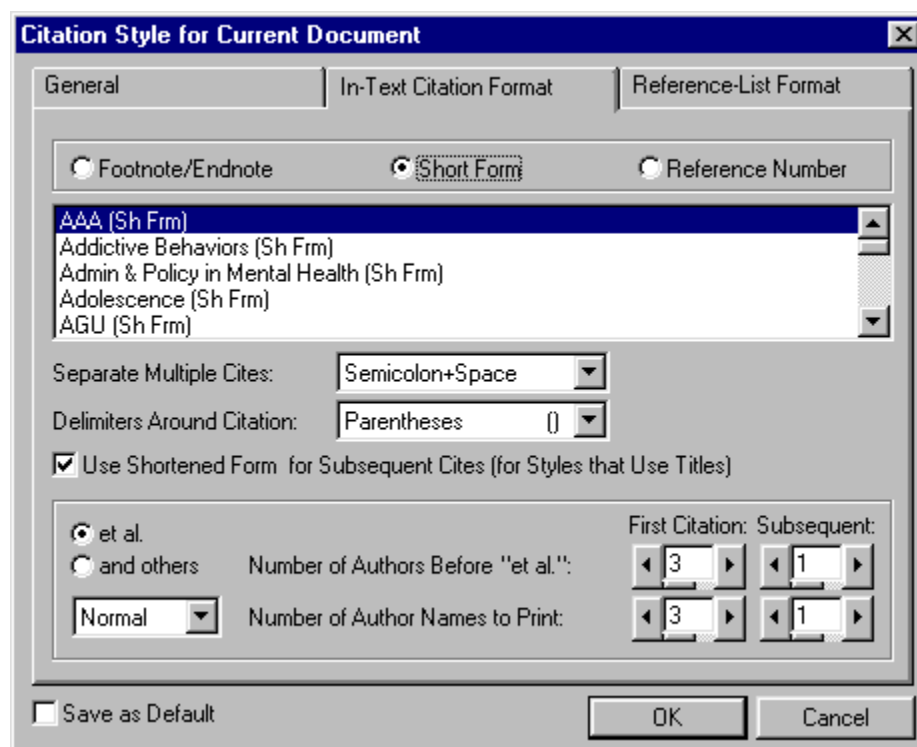
In the next exercises, we will see how simple it is to select a publishing style for your paper and cite a work that you have entered in the database.

## Ibidem Tutorial 5: Setting a Document Style

Citing works in your papers with Ibidem begins with selecting a style for your references from dialogs.

In this exercise, we are going to define the style for the citations in the blank document you now have open in Nota Bene. If you do not currently have blank document open, open one now. We are going to define style for the citations in this document as American Anthropological Association (AAA):

- 1 Go to Ibidem, and open the Samples database.
- 2 On the Ibidem Main Menu, click **Cite, Document Style**. The Citation Style for Current Document dialog will display.
- 3 Click on the In-Text Citation Format tab to display the In-Text Citation Format dialog.
- 4 Notice that the In-Text Citation Format is now set to Footnote/Endnote, and that the publishing style is set to AAA. We are going to leave the publishing style as AAA, and change the In-Text Citation format to Short Form. To do this, just click on the radio button for Short Form. The options for Short Form In-Text Citations will display.



Ibidem sets the options for using separating multiple cites, the delimiters, the use of et al., and other such variations on Short Form In-Text cites with default values associated with the publishing style selected. Any of these options can be changed for your papers. For the moment, we are going to use the default settings for AAA Short Form In-Text citations.

- 5 Click on the Reference List Format tab. The Reference List Format dialog will display:
- 6 Highlight the publishing style selection for AAA (with indents).
- 7 Click the General tab and you will see that the Samples database is highlighted. This is the database that was open when you clicked **Cite, Document Style** in step 2. Only one database can be associated with a given document. The General tab can be used to select any database, but for this exercise and the following two exercises, we will use the Samples database.
- 8 Click **OK**. Clicking **OK** will define the database that is associated with your open Nota Bene document (the first tab) and it will set the style for the in-text citations (second tab) and set the style for the reference list (third tab). All of this information will be written into the codes in your Nota Bene document and is visible in Show Codes view, but not in Graphics view.

For more detailed information on the options in the three tabs in the Citation Style for Current Document dialog, see [General](#) and [In-Text Citation Format](#) and [Reference List Format](#).

In exercise 6, we will insert a citation in this document, and in exercise 7, we will change the document style and reformat the citations. In preparation for the next exercise, type the following text in your document.

Citing a source with Nota Bene and Ibidem is easy.

Save the document that you just created so that you can return to it in the next exercises and make sure that you remember the filename and the folder in which it is saved.

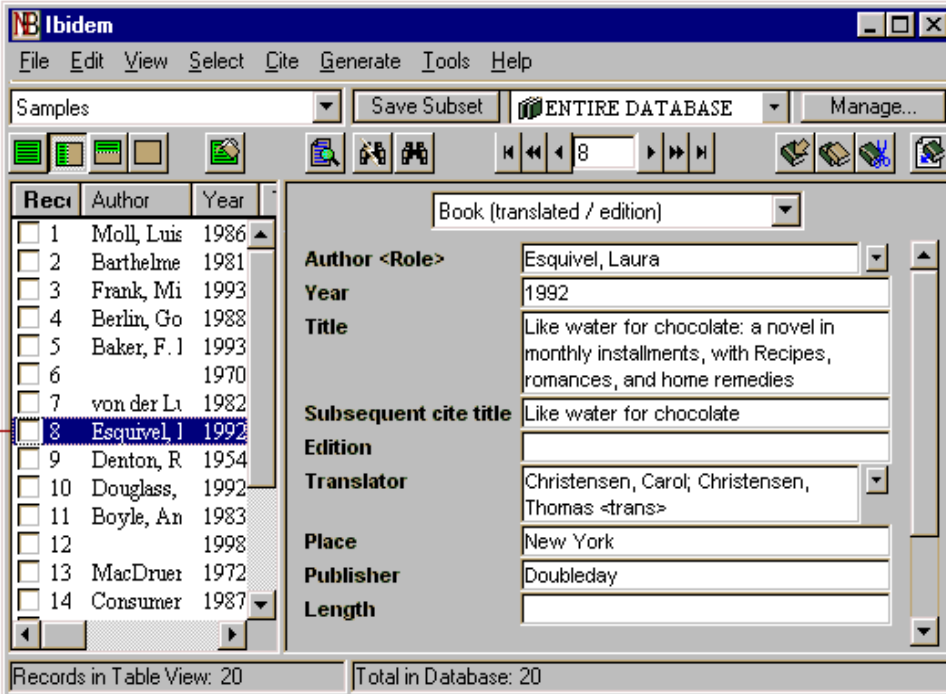
## Ibidem Tutorial 6: Citing Sources in Your Document

To cite sources in your document, you simply need to position the cursor in the text, and choose the record containing the bibliographic information for the citation.

- 1 Open the document you created in the previous exercise (if it is not already open), and place your cursor at the end of the following sentence:

Citing a source with Nota Bene and Ibidem is easy.

- 2 Go to Ibidem (click Tools, Ibidem or press F7 or click the Ibidem button on the Nota Bene screen). In the Ibidem Table View, double-click on the entry for Esquivel (or click on the record and then click **Cite**, **Insert Citation** or press **Ctrl+Insert**).



Double click on the Table View entry for the record to insert a citation in your document.

Rec#	Author	Year
<input type="checkbox"/> 1	Moll, Luis	1986
<input type="checkbox"/> 2	Barthelme	1981
<input type="checkbox"/> 3	Frank, Mi	1993
<input type="checkbox"/> 4	Berlin, Go	1988
<input type="checkbox"/> 5	Baker, F. J	1993
<input type="checkbox"/> 6		1970
<input type="checkbox"/> 7	von der La	1982
<input checked="" type="checkbox"/> 8	Esquivel, L	1992
<input type="checkbox"/> 9	Denton, R	1954
<input type="checkbox"/> 10	Douglass,	1992
<input type="checkbox"/> 11	Boyle, An	1983
<input type="checkbox"/> 12		1998
<input type="checkbox"/> 13	MacDruet	1972
<input type="checkbox"/> 14	Consumer	1987

Book (translated / edition)

**Author <Role>** Esquivel, Laura

**Year** 1992

**Title** Like water for chocolate: a novel in monthly installments, with Recipes, romances, and home remedies

**Subsequent cite title** Like water for chocolate

**Edition**

**Translator** Christensen, Carol; Christensen, Thomas <trans>

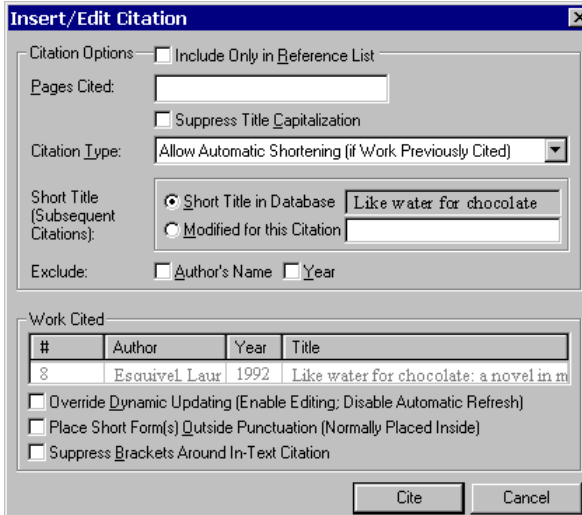
**Place** New York

**Publisher** Doubleday

**Length**

Records in Table View: 20      Total in Database: 20

The **Insert/Edit Citation** dialog will display:



**Insert/Edit Citation**

Citation Options:  Include Only in Reference List

Pages Cited:

Suppress Title Capitalization

Citation Type: Allow Automatic Shortening (if Work Previously Cited)

Short Title (Subsequent Citations):

Short Title in Database: Like water for chocolate

Modified for this Citation:

Exclude:  Author's Name  Year

Work Cited

#	Author	Year	Title
8	Esquivel, Laur	1992	Like water for chocolate: a novel in m

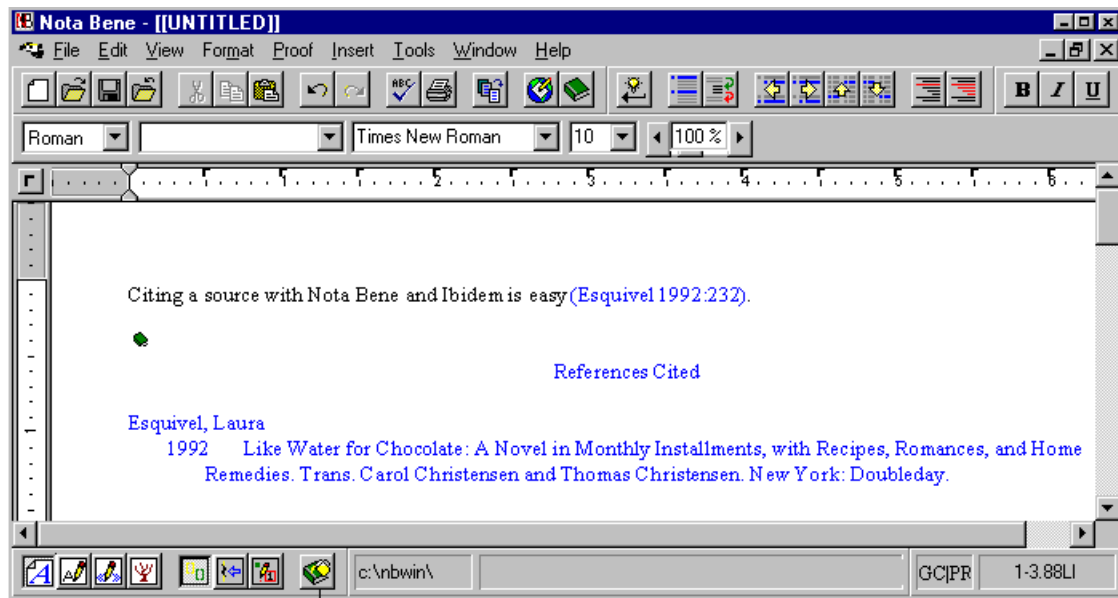
Override Dynamic Updating (Enable Editing; Disable Automatic Refresh)

Place Short Form(s) Outside Punctuation (Normally Placed Inside)

Suppress Brackets Around In-Text Citation

Cite      Cancel

- 3 Enter **232** in the Page Cited box, and click **Cite**. A formatted in-text citation will be inserted into the Nota Bene document. The blue text indicates that it is dynamic text generated by the program. It will not print in blue.
- 4 Press **Enter** twice. This will add two lines between the end of the text and the reference list. Now click the **Update Dynamic Citations** button at the bottom of the screen (or click **Format, Bibliographic References, Update Dynamic** or press **Alt+F7**). This will generate a formatted reference list at the end of the document as shown below.



Update Dynamic Citations button

- 5 Try adding a few sentences and two or three more citations to this document. The works cited must all be added from the Samples database because this is the database that is associated with this document. Click the **Update Dynamic Citations** button to see the additional works that you have cited added to the reference list.
- 6 Place your cursor on the blank line after the end of the text, but before the beginning of the reference list. Press **Ctrl+Enter**. This will add a hard return so that the reference list starts on the beginning of the next page.

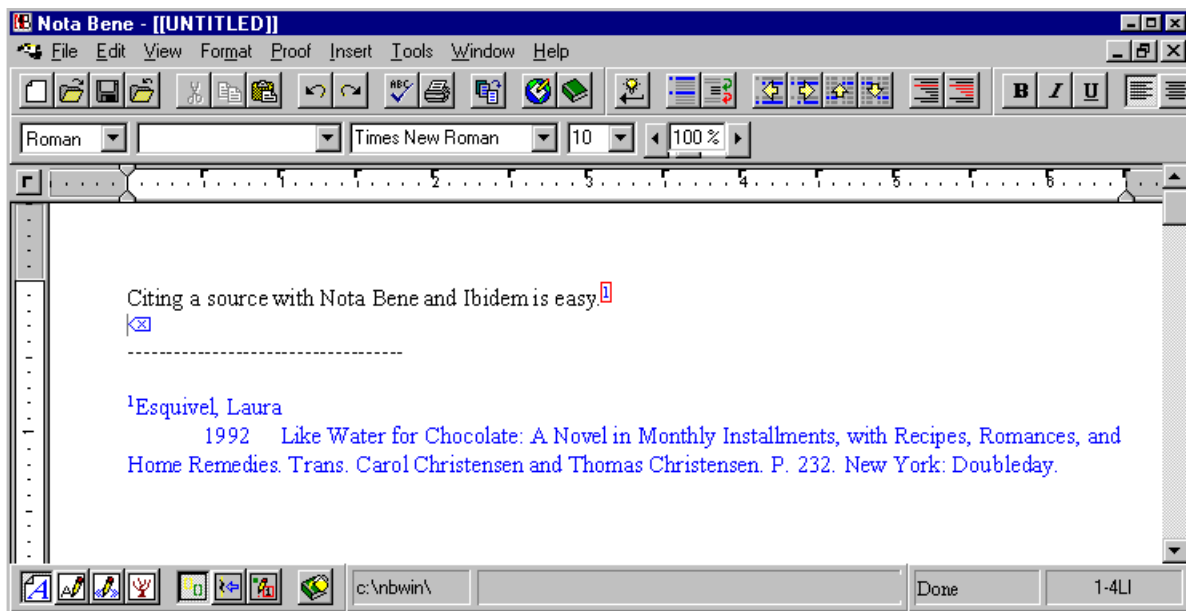
In the next exercise, we are going to reformat this document in a different style. Proceed directly to the next exercise, or save this document so that you can return to it in exercise 7 (if you save the document, remember the filename and the folder in which it is saved).

## Ibidem Tutorial 7: Changing the Document Style

To change the style of your in-text citations and reference list for a document, you simply choose another publishing style from the menus.

For this exercise, we are going to use the document that you produced in the previous exercises. We will change the document style for the citations and reference list and then reformat all of the citations and the reference list. If the document you produced in the previous exercise is not still open, open it now. In the previous exercise, citations were formatted as short form citations in AAA (American Anthropological Association) style. In this exercise, we will change the style to Footnote/Endnote.

- 1 Open Ibidem and click **Cite, Document Style** to open the Citation Style for Current Document dialog.
- 2 On the In-Text Citation Format tab, click Footnote/Endnote. You can choose a different publishing style, or keep the AAA style. Click **OK** to record the changes and click **Yes** to update the citations. You should now see that the short-form citation has been changed to a footnote as shown below.



There are two non-printing markers showing in the screen above. The blue X pentagon under the word "Citing" is a page-break marker, indicating the presence of a forced page break. The red square around the footnote number indicates the presence of a footnote or endnote, and makes it easier to find the notes on the page as you are working. These markers can be turned on or off by pressing **Shift+F10**.

Note that Ibidem does not distinguish between footnotes and endnotes. Footnotes can be converted to endnotes in the Nota Bene word processor. For more information, go to Nota Bene, press **F1** to open Help and follow the link to Footnotes and Endnotes and read the Footnote/Endnote Overview.

## Ibidem Tutorial 8: Sorting and Searching

In the examples we have used so far, the databases have been so small that you could find any record by visually skimming through all the records. However, once you develop your own database, and enter hundreds or thousands of records, it will be easiest to find records by sorting or by searching.

When you open a database, it is sorted by record number. To sort a database alphabetically by author, all you need to do is click the "Author" label at the top of the column in Table view. Click again to sort in reverse order (Z to A). Similarly, click on "Year" or "Title of Work" to sort the record by those fields.

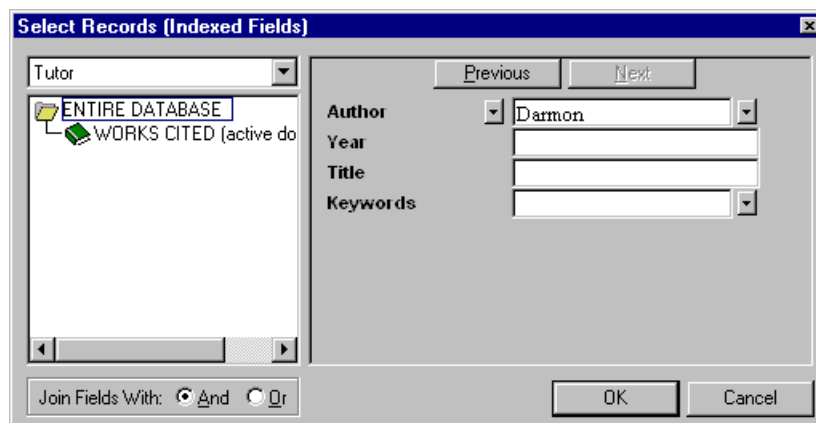
In this exercise, and the following exercises, we will use the Tutor database. Open the Tutor database now, and click on the labels to sort by author, then by year and then by title.

Sorting works well for a small database, but searching will be more useful as your database grows. There are two search options available in Ibidem.

**Fast Search** can be used only in certain fields ("indexed" fields), and it will find only text that is at the beginning of the field or after a semi-colon (in any field, semi-colons should be used to separate multiple entries, e.g. multiple authors or multiple keywords).

**Text Search** can be used to find any text in any field.

You can open the search dialogs using menus (click **Select** and then **Fast Search** or **Text Search**) or tool bar buttons (click one of the two search buttons at the top of the Ibidem screen) or keyboard shortcuts (press **Ctrl+F** for fast search or **Ctrl+T** for text search). To see how this works, use one of these methods to open the fast search dialog and enter "Darmon" in the Author field as shown below.



Click **OK** and Ibidem will display the two records by Cynthia Darmon.

The text search gives you more options and control and should be used for more complex searches. See [Searching/Selecting Records](#) for more information.

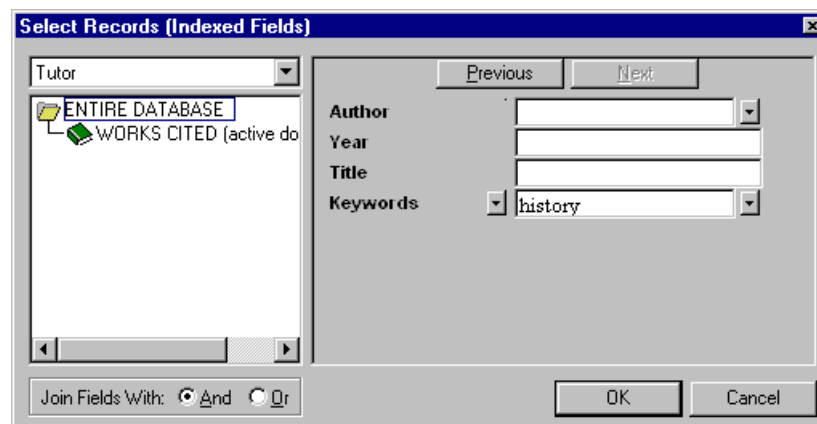
## Ibidem Tutorial 9: Using Subsets

It is generally recommended that you maintain only one bibliographic database. If you want to work with a smaller group of records, you can create a subset of your main database. Subsets can be searched and sorted just like a database. Subsets are also used for generating bibliographies or any report that includes some but not all of the records in a database.

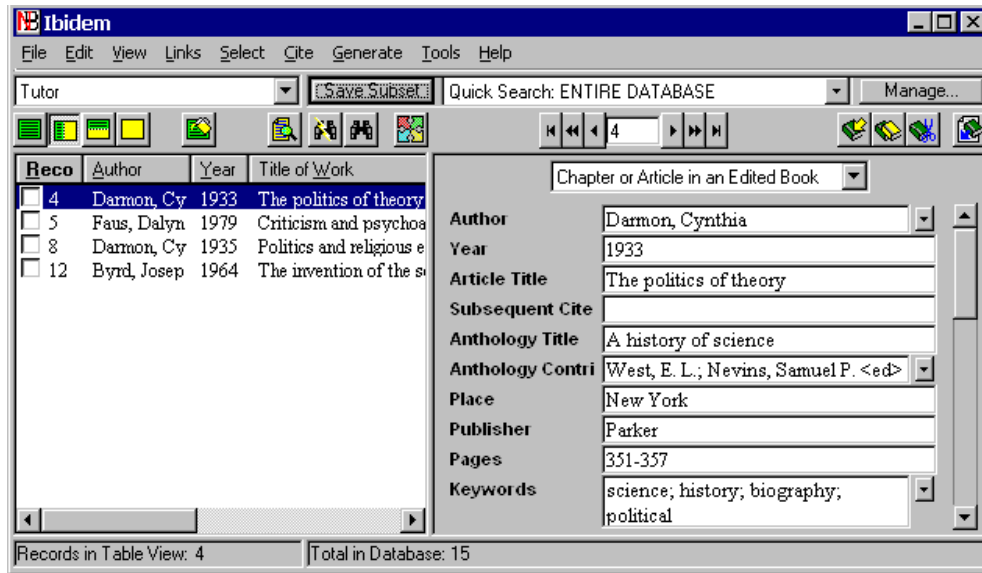
Subsets are often created based on keywords. For example, suppose you want to identify all of the works in your database that are related to the 17th century. You could enter "17th century" in the keyword field of every record that should be included. Then search the keyword field for "17th century" and create a subset. Subsets can be automatically updating, so records that you later add with "17th century" in the keyword field would be automatically included in the subset. The subset can displayed on screen, and it can be used to generate a variety of printed reports. This is a powerful tool for generating reading lists on a particular topic or bibliographies that include some but not all of the records in your database.

In this exercise, we will create a subset of all of the records that have the keyword "history" in the Tutor database.

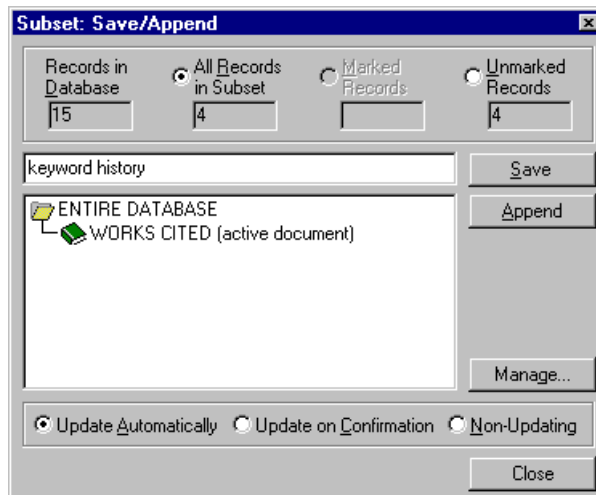
- 1 Open Ibidem and select the Tutor database.
- 2 Press **Ctrl+F** or click the Fast Search button at the top of the Ibidem screen.
- 3 Place your cursor in the Keywords field, and click the button to the right of the field. This will open a list of all of the keywords that are being used. Double-click on the word "history" to enter it in the box as shown below. You could also just type in the word "history," but using the drop down list to select it gives you the assurance that you are selecting a keyword that is actually used and that you are not mistyping it.



- 4 Click **OK**. Ibidem will find all of the records that have "history" as a keyword and display them in Table View as shown below:



- 5 To save this set of 4 records, click the **Save Subset** button.
- 6 The Subset: Save/Append dialog will open. Type in a name for the subset. It is a good idea to use a name that will help you remember how the subset was created. Type "keyword history" (without the quotes) in the space provided as shown below. Notice that the Update Automatically radio button is selected. This means that any records that are added or edited later will be included in the subset if they have the keyword "history" in the keyword field. Click **Save** to save the new subset.

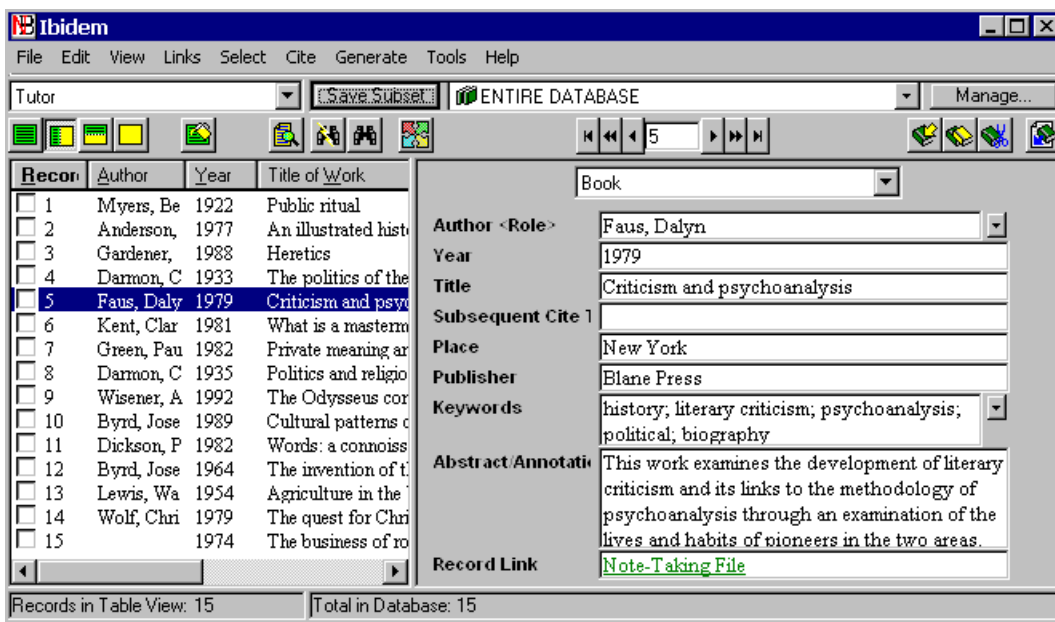


Once a subset has been created, it will appear on the subset drop list. To open the subset, select the database from the database drop list at the top left of the screen, and then select the subset from the subset drop list that is to the right of the Save Subset button.

## Ibidem Tutorial 10: Taking Reading Notes

Short notes on different books, articles or other works can be entered in the Abstract field of a bibliographic database. However, for longer reading notes, you can use Ibidem to create separate files which then can be indexed as part of an Orbis textbase. The Ibidem Record Link can be used to dynamically link a note-taking file to your Ibidem record. In this exercise, we will create a dynamically linked file for taking notes and show how page numbers can be tagged in your reading notes.

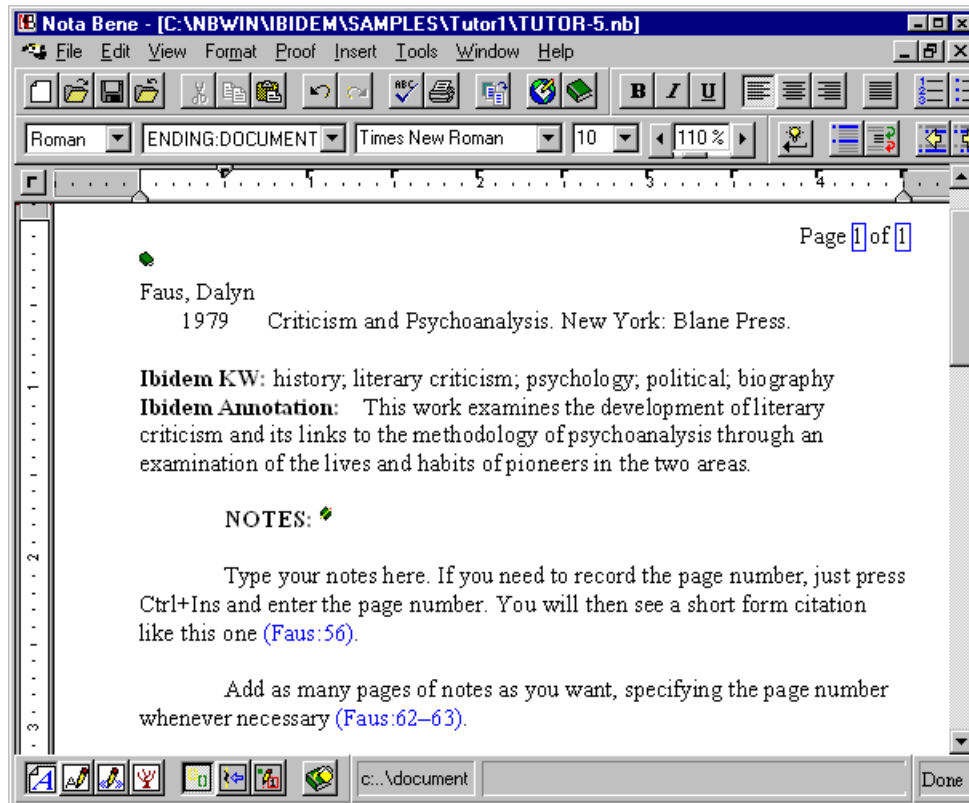
- 1 Open Ibidem and select the Tutor database.
- 2 Click to select one of the records in the Tutor database. Record number 5 is selected in the example below. Notice that Keywords and Annotations are used in this database.



- 3 Click the **Record Link** button (the multi-colored button on the Ibidem tool bar). Click Yes to indicate that you want to create a new link for the record.
- 4 In the Links: Insert/Edit dialog, the required information will be automatically filled in. The default format for the file is American 8x11.5 paper. You can change this by selecting European A4 or a note card format in the Link Type box.
- 5 Click **OK** to generate the note-taking file.

The note-taking file that is generated will be named and it will be saved in a subfolder in the folder where your database is located. The name of this file is Tutor-5.nb. (It is linked to the 5th record in the Tutor database.) You can take your reading notes in this file (as many pages as you want), and return to it at any time by clicking the green link in the Record Link field.

As you are taking notes, you may need to make a record of a page number. Try typing a line or two in your new note-taking file. Leave your cursor at the end of the text you have just typed and press **Ctrl+Ins** (or right-click and select **Cite Page Number**). The Edit/Insert Citation dialog will open and all you need to do is enter the page information and click **Cite**. You will see that a short form citation is inserted with the page information that you want to preserve. The citation is shown in blue, indicating that it is generated by the program.



While only the author and page number are shown in this short form citation, there is a link to the record in Ibidem, so all the bibliographic information that would be used in any citation or bibliography is available. When you are writing a paper, this text including the citation can be copied to your open document, either by copying and pasting, or by inserting retrieved text directly from Orbis. This provides an extremely efficient way of transferring material from your notes to the paper you are writing. As soon as you update the citations in the paper you are writing, this citation will be automatically reformatted according to the publishing style you have selected (as a footnote, endnote or short form citation in any publishing style) and the work will be included in the bibliography (properly formatted, of course).

## Ibidem Tutorial 11: Creating Your Own Database

Now that you have finished the Ibidem tutorial, you are well prepared for creating your own bibliographic database.

There are a few suggestions we would like to make at this point, which might help you as you begin to develop your own database.

- Y Use one bibliographic database rather than multiple databases. An Ibidem database is limited to approximately 64,000 record numbers which is more than enough for virtually any individual user.
- Y If you are using IbidPlus for non-bibliographic databases, you can set up as many non-bibliographic databases as you want.
- Y Create a separate folder for each Ibidem database. It can have the same name as the filename that you assign to the Ibidem database.
- Y Make sure that you back up your databases. See [Backing up an Ibidem Database](#).
- Y If you enter keywords in your database, you can use the keywords to create subsets.

This concludes the Ibidem Tutorial. If you would like a second review of some of the features in Ibidem, open \Nbwin\Documents\Samples\Ibidem.smp. *Ibidem.smp* is an active Nota Bene file with citations that have been generated by Ibidem. A series of exercises will provide a second introduction to Ibidem.

You might also be interested in seeing a series of short videos that show how Ibidem is used. To access these videos, click **Help, Instructional Videos**.

Or, you can move directly into creating your own database, and begin entering records for your own research. See [New Database](#) in *Ibidem Help* for instructions on how to create your own database.