QUOSA INFORMATION MANAGER:

Getting Started

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QUOSA Information Manager (QIM) enables researchers in the life sciences to retrieve full articles, organize their literature collections, and perform powerful full-text searching. It also has many other features that automate and accelerate literature searches and management.

Downloading QUOSA Information Manager

If you haven't already done so, take a moment to go to www.quosa.com/downloads.html and download QIM. Follow the instructions from the installation wizard to install it.

Registering QUOSA Information Manager

After installing QIM, you will be asked to register your copy in order to get an authorization code. When the registration dialog box appears, do the following:

1. Click **Proceed**.
2. Complete the short registration form to receive your authorization code. It will be emailed to you after you register. Use it when contacting QUOSA Customer Support. (You do not need to enter this code in any dialog.)

Starting QUOSA Information Manager

(**Note**: Before starting QIM, you may find it helpful first to watch one of the brief Flash demos available on the QUOSA website (www.quosa.com), such as "*Full Article Retrieval*" or "*Short Introduction to QUOSA with Ovid.*")

A QIM icon should be on your desktop. Double-click on it to start**.**

> *A word about channels*: Check to ensure that the channel shown next to the **Current Channel** field (just below the QIM **Main Menu** bar) is the appropriate one for accessing full articles at your institution. Some channels are customized for particular institutions. Select the one your institution has if you see it in the **Channels** drop-down list (available from the **Main Menu** bar). (See Figure 1.)

Taking a Quick Tour of the QUOSA Information Manager Interface

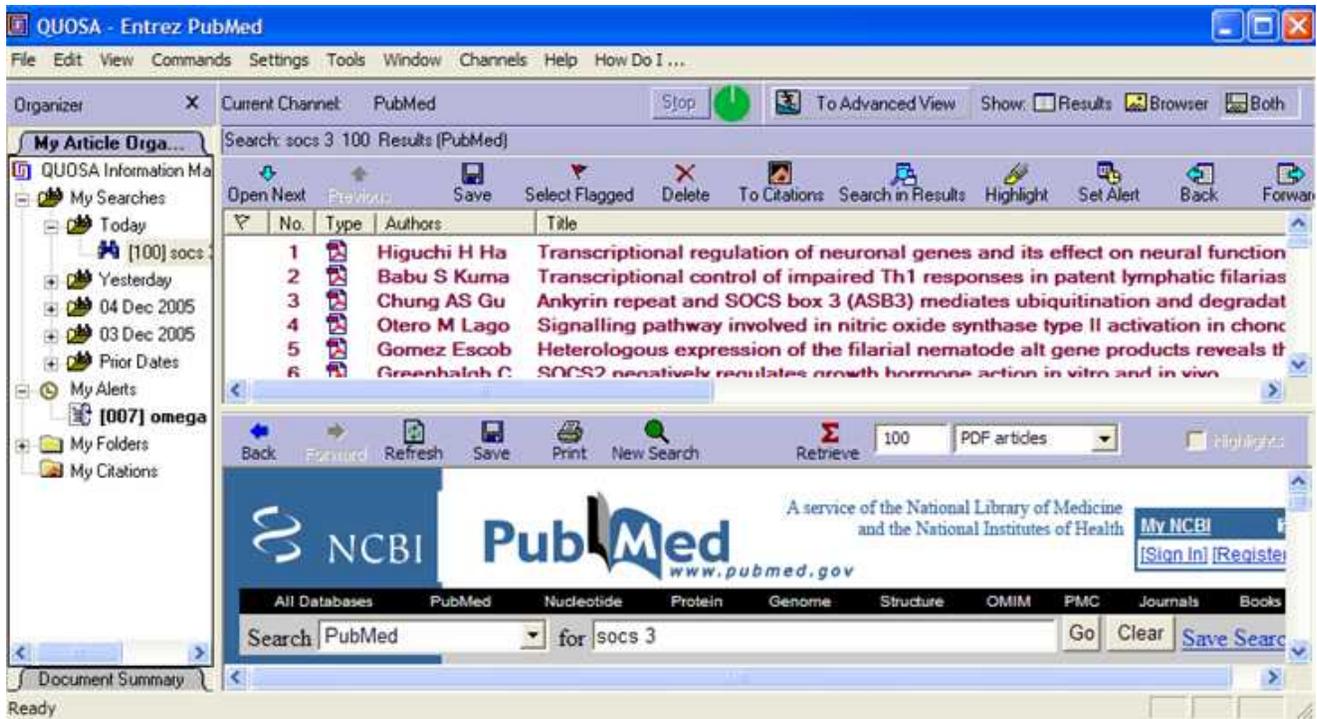There are three panes in the QIM interface, as shown in Figure 1:

Figure 1: QIM Interface: Three Panes (Results top half; Browser bottom half; My Article Organizer/Document Summary on left)

Browser Pane. This pane has an embedded Internet browser and is always visible when you start QIM. It is where you start searches in PubMed, USPTO, and other channels, and where QIM displays a list of article references that match your search terms; it is also the pane where you review abstracts or full-text articles. The **Sigma** button (**r**) on this browser's toolbar is used to retrieve the references of interest to you. QIM will put them into the **Results** pane (see next).

Results Pane. This pane appears and displays new results after you click the **Sigma** button or when you work with previous results. It shows up above the **Browser** pane. The columns (*No.*, *Type*, *Authors*, *Title*, and so on) can be moved around. Note the buttons at the top right of the QIM window for switching between Results and Browser panes, or keeping both.

Organizer Pane. This pane, which is on the left-hand side, has two tabs:

My Article Organizer. This tab shows your searches (**My Searches**), listing the searches you've made today, yesterday, and so on; your alerts (**My Alerts**), listing the alerts you've set; your folders (**My Folders**), containing any full-text articles or abstracts you've saved; and your citations (**My Citations**), the repository of full articles linked with your citation manager.
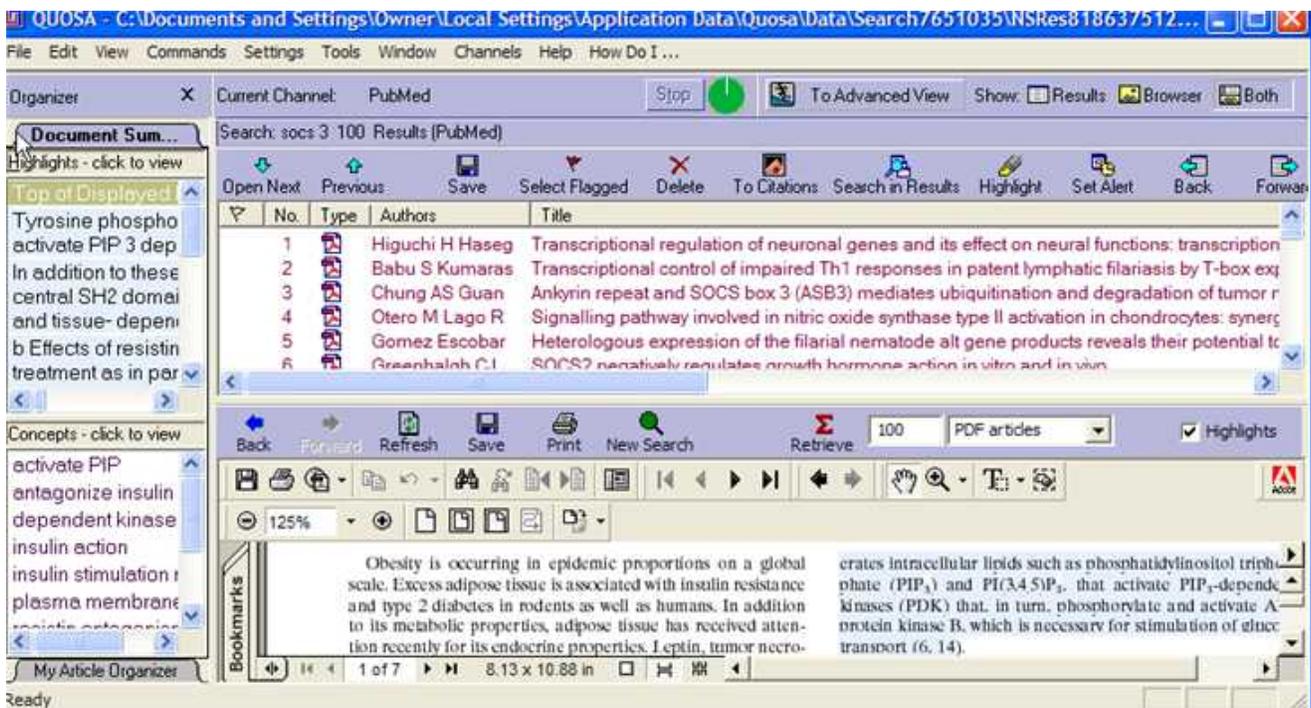
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Figure 2: Document Summary Tab (on left)

Document Summary. This tab shows (in the upper half) any passages extracted from the article currently displayed in the **Browser** pane that contain the search terms used in your search. These extracted passages are in colors (usually one color when the entire search term is found and another color when part of a search term is found). Clicking on a color-coded passage will scroll the **Browser** pane to the place where the passage appears in the text. In Figure 2 above, note the blue extract on the left and the passage in blue on the right in the **Browser** pane.

Searching in PubMed Using QUOSA Information Manager

To begin a search in the PubMed **Browser** pane, do the following:

1. Type "*socs 3*" (or an alternative search expression) in the PubMed "**for**" search box (see Figure 1).
2. Click **Go**. PubMed will return a list of references by title, author(s), journal, and so on.

Looking at Your Searches

QIM conveniently arranges your searches, as follows (see Figure 1):

1. Click on the **My Article Organizer** tab.

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2. Click on **My Searches**. You will get a display of all the searches you've performed, arranged by date and showing the search terms used.
3. Click on one of the searches and the list of the articles found in that search will be displayed in the **Results** pane.
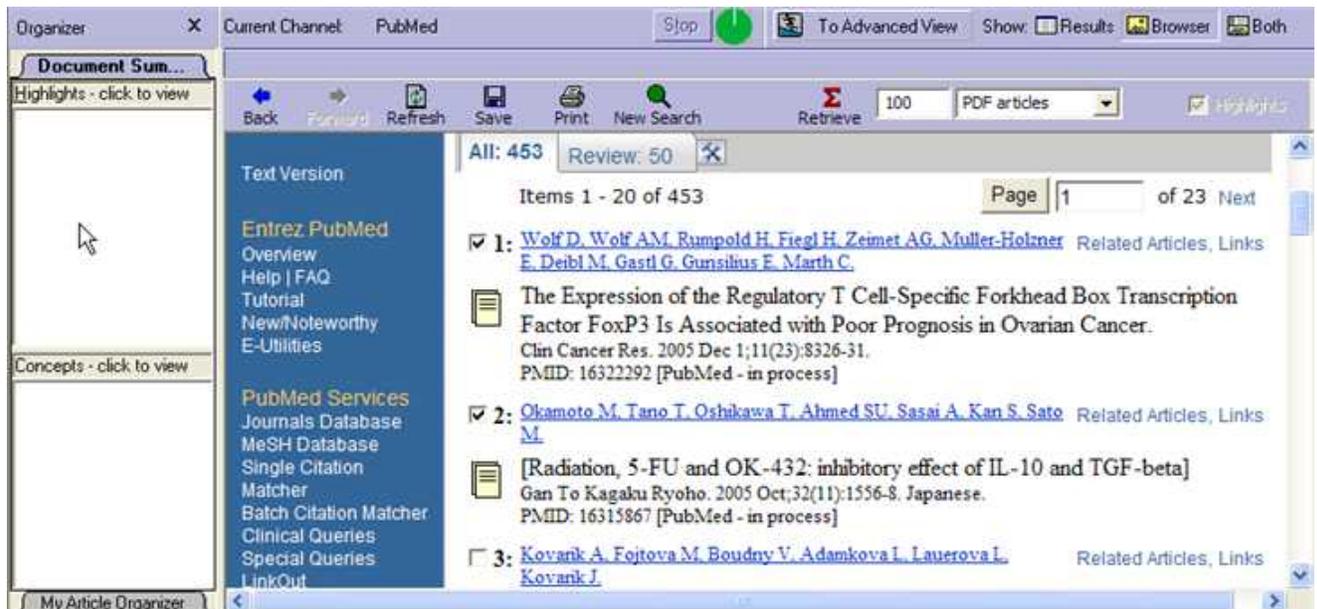

Figure 3: Selecting references for retrieval

You are now ready to automatically retrieve the references you want from this list. To do this:

1. Either check the checkbox of each article of interest in the PubMed list of references (see Figure 3) or set the number of articles you want to retrieve in the text box next to the **Sigma** (Retrieve) button.
2. Set the preference you want for the format of the article (abstract, PDF, or HTML).
3. Click **Sigma** to retrieve the articles and put them into the **Results** pane.

The green stopwatch (at the top of the QIM window) turns blue during the retrieval process, and then green again when the retrieval is done. The **Results** pane now contains a list of article titles. If you chose PDFs, QIM will have retrieved them; if PDFs were not available, QIM will have retrieved HTML versions. Abstracts will be retrieved if neither full-text format is available. Icons in the **Type** column indicate whether the article is a PDF, HTML version, or abstract. In Figure 1, you can see that the results displayed have the PDF icon.

Sorting Article References in the Results Pane

You can sort the **Results** list by title, author, source, and so on. A click on a column header will sort the rows by the contents in the column. The order of the columns can be rearranged by dragging the column headers to the left or right
.

Opening Articles in the Results Pane

You can open an article by double-clicking on the reference (the text will be displayed in the **Browser** pane below). If the complete article is not available, the abstract will appear instead. To display the next article in the list**,** click on the **Open Next** button (see Figure 2) or just double-click the reference.

Reviewing Articles

You can quickly review an article as follows:

1. Click the **Document Summary** tab. As noted earlier, it will show color-coded excerpts from the article currently in the **Browser** pane. When you have multiple search terms (for example, "*omega protein AND liver*," the most relevant ones (meaning both parts of the search expression were found) are colored yellow; when only one part is found, the passages are shown in blue.
2. Click on one of the excerpts. The **Browser** pane will scroll to the section in the full text where the excerpt occurs.

Searching in Results

To do a full-text search of the articles in the **Results** pane, do the following:

1. Click on **Search in Results** on the **Results** pane toolbar.
2. Enter the search parameters in the **Search in Results** dialog and click **OK**. QIM will perform a search on the results. (Complete search options and information on syntax can be viewed by clicking on the **Help** button in the **Search in Results** dialog.)

Saving Results in QUOSA Information Manager Folders

QUOSA folders are designed to support features such as exporting references to citation managers; they're also indexed for faster searching.

To save *selected* articles into a QUOSA folder, do the following:

1. Flag the desired articles (by clicking in the column with the flag icon).

2. Click the **Select Flagged** button on the **Results** pane toolbar.
3. Click the **Save** button.
4. From the **Save Document** dialog, choose an existing folder or create a new folder, and click **OK**.

To save *all* the articles in the **Results** pane:

1. Click on **Select All** under the **Edit** menu option before clicking on the **Save** button.
2. From the **Save Document** dialog, choose an existing folder or create a new folder, and click **OK**.

The saved results will appear in **My Folders** in the **My Article Organizer** tab on the left.

Exporting References to a Citation Manager

You can easily export citations to EndNote©, Reference Manager©, or ProCite©. Before you start, however, you first need to set your citation manager setting in QIM. Do the following:

1. Go to **Settings** on the **Main Menu** bar.
2. Click **Citation Manager**.
3. Click **Select Citation Manager**.
4. Select your citation manager.

Now, to export *selected* citations, do the following:

1. Flag the articles of interest in the **Results** pane.
2. Click on **To Citations** on the **Results** pane toolbar. If your citation manager is already installed on your computer, it should launch; you will be prompted for the library or database into which you want to save the citations.
3. Select one and click **Open**. You will immediately see the citations for the selected articles listed in your library/database.

To export *all* the articles into your citation manager, do the following:

Click on **Select All** from the **Edit** menu option before clicking on **To Citation** on the **Results** pane toolbar**.**

If you open one of the new citation records in your citation manager, you will see the link automatically inserted there by QUOSA. It links to the full article saved on your computer.

Automating Search Alerts

You can set QIM to automatically search PubMed for newly published articles and save the results. For example:
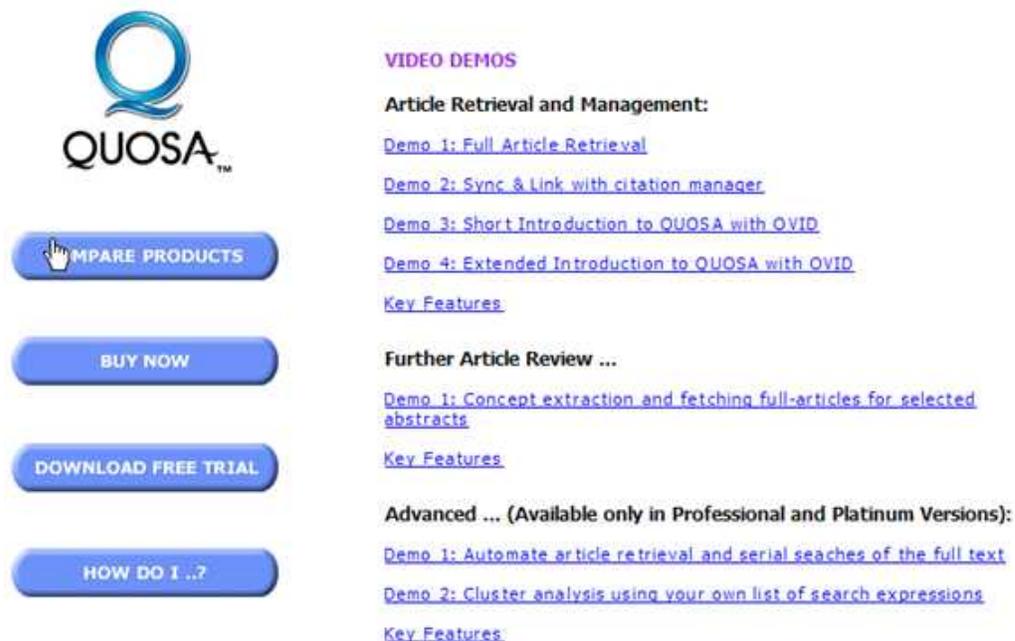
1. Click on **My Article Organizer**, then **My Searches**, and then click on the "*socs 3*" search performed earlier.
2. Click on **Set Alert** on the **Results** pane toolbar. It will bring up the **Configure Search Alert** dialog. Set the parameters, and click **OK**.

Note that the computer must be on and connected to the Internet for search alerts to occur. This is one reason for setting **Enable Startup Accelerator** when installing QIM (set from **Settings** on the **Main Menu** bar).

Finding More Information on Using QUOSA Information Manager

There are many, many more features in QIM that will make your day-to-day and project work easier. Click on **How Do I …** on the **Main Menu** toolbar for a list of topics.

For additional information on using QIM, go to www.quosa.com and click **Demos**. You'll find an array of demos on basic and advanced features as shown in Figure 4 below.

Figure 4: Available Demos on QUOSA Website