

# 5.1.2.4 References Tab

Select the **Manage Settings Configuration** menu and click the **References** tab. The **References** tab of the **Configuration** page allows you to select which fields are mandatory when entering references and setting the formatting for references.

**Configuration** Project: Viky's Project 2 [Help](#)

This page allows you to edit the project's configuration. Each setting is described in detail in the "Help" link in the top right corner of the screen.

After making modifications, press the "Update" button at the bottom of the screen.

**References** In Setup Change Status

Project Questions Assets **References** Statistical Flags Search Statistics Cases Set Standard Exhibits Advanced Properties

Show list of existing references to pick from  Yes

Show drop down interface (no auto complete) for reference selection  Yes

References can be set for the following components

Allow users to add new Book references to the project Yes, including new sources

Allow users to add new Journal references to the project Yes, including new sources

Allow users to add new URL references to the project Yes, including new sources

Allow users to add new Equation references to the project Yes, including new sources

**Select mandatory fields for references:**

**Books**  Source  Edition  Date  Author  Publisher  Chapter  Page

**Journals**  Source  Date  Article  Volume  Issue  Author  Page

**Urls**  Source  Date

**Equation**  Source  Description

Set the format for the references using the keywords given below:

#TITLE	Name of the book	#DATE	Date the book was referenced
#TITLE_EDITION	Name of the book with edition	#EDITION	The book's edition
#AUTHOR	The book's author	#PUBLISHER	The book's publisher
#CHAPTER	Chapter referenced in the book	#PAGE	Page number referenced in the book
#ARTICLE	The title of the article in the journal	#VOLUME	The journal's volume number
#ISSUE	The journal's issue number	#URL	URL of the website
#Name	The equation name	#Description	Description of an equation

Book:

URL:

Journal:

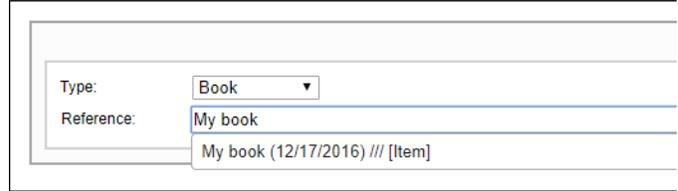
Equation:

Update Reset Restore Defaults

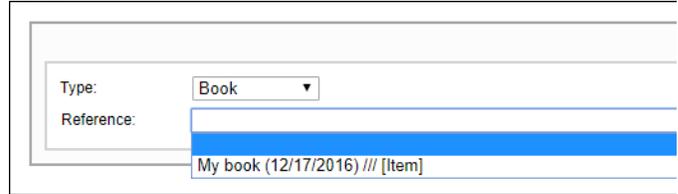
Option	Description
Show list of existing references to pick from	Select <b>Yes</b> if you want to require references that already exist to be displayed in the Question editor pages.

**Show drop-down interface (no auto complete) for reference selection**

If the **Show drop-down interface (no auto complete) for reference selection** setting is not selected (this is by default), then the user is shown the autocomplete-based reference selection User Interface in **Create New** pop-up on the **Write Question / Modify Question** page instead. Users can start to type in the reference. The system locates references that match what you typed in the list. Select the reference from the list.



Select the **Yes** check box if you want to show the drop-down-based reference selection user interface to the user instead. This allows the user to select from a list of existing references when they click the drop-down arrow. The list displays all existing references in the project, regardless of the type of reference. Users are prevented from typing in a new reference.



**References can be set for the following components**

You must identify where you will allow references to be set:

- On only **Items** (Default for new and all existing projects)
- On **Items and Keys**
- On **Items, Keys and Distractors**

**Allow users to add new <Book, Journal, URL, Equation> references to the project**

Select from one of the following options:

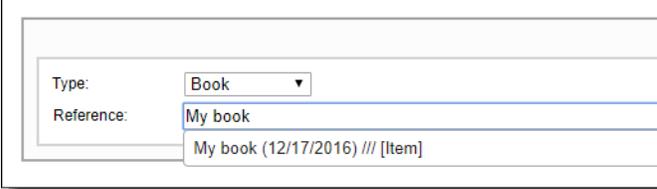
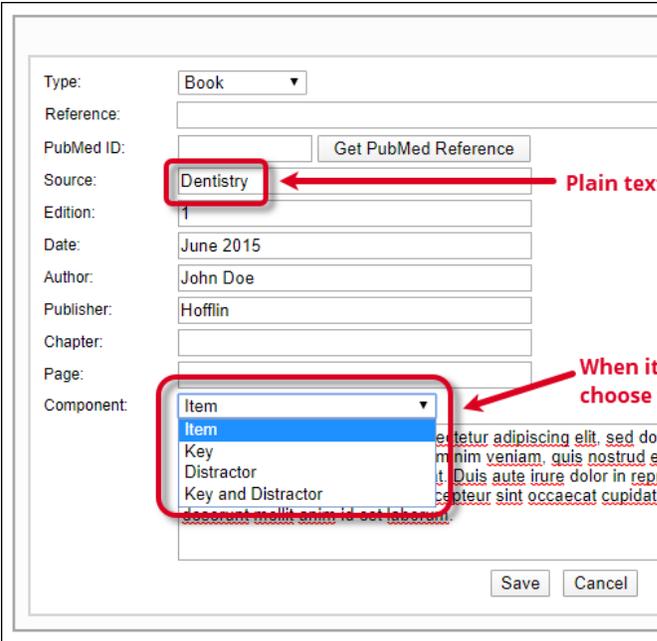
- Yes, including new sources
- Yes, from existing sources
- Not allowed

The following table summarizes how the reference settings work:

Option	Behavior for Adding New Entries	Behavior for listing existing entries	Modify existing References
<b>Yes, including new sources</b> (default setting for all reference types)	Allow users to insert references from new sources for Books, Journals, URLs, or Equations.  Existing references are listed and can be selected.	All references are listed.	Yes
<b>Yes, from existing sources</b>	Writers/reviewers are able to add new references to the project, but they cannot write the source. They must pick an existing source from the drop-down list and then complete the other fields. The rules for selecting existing references and adding new references apply to writers/reviewers. Project Managers are always allowed to add new references to their projects.	All references are listed.	No

<b>Not allowed</b>	Prevents users from inserting a specific type of reference.	References cannot be added.  The <b>Create New</b> button is grayed out for the selected reference type.	No
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The following table summarizes how the reference settings work:

Option	Description
<b>Allow users to add new Book references to the project</b>	<p>If a book reference already exists for a project, you can begin typing the book reference in the <b>Reference</b> field. References that match the typed characters are listed. Select the desired reference from the list.</p>  <p><b>Yes, including new sources selected:</b> Click <b>Create New</b>. Displays plain text box for manual entry in the Source field. The <b>Source</b> and <b>Date</b> reference fields are mandatory.</p>  <p><b>Yes, from existing sources selected:</b> Click <b>Create New</b>. Click the <b>Source</b> drop-down list and select an existing book reference from the list. The <b>Source</b> drop-down list is populated by source data for Book type reference entered by the Project Manager. Item writers, reviewers and validators are not able create a new source. You must fill in any of the other reference fields.</p>

Type:

Reference:

PubMed ID:

Source:

Edition:

Date:

Author:

Publisher:

Chapter:

Page:

Component:

**Not Allowed selected:** The **Create New** button is grayed out and you are not able to add a new Book reference. You can type in an existing book reference in the **Reference** field and select it from the list. You are unable to modify the existing reference source, edition, date, author, and publisher. You can add **Chapter**, **Page**, and **Component** reference fields.

Type:

Reference:

Source:

Edition:

Date:

Author:

Publisher:

Chapter:

Page:

Component:



This setting is applicable only to a user with a non-Manager role and has no affect for a user logged in as the Project Manager.

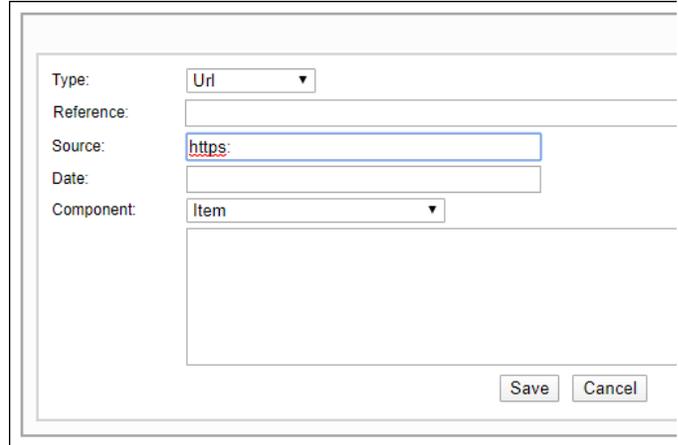
**Allow users to add new URL references to the project**

If a URL reference already exists for a project, you can begin typing the URL in the **Reference** field. References that match the typed characters are listed. Select the desired reference from the list.



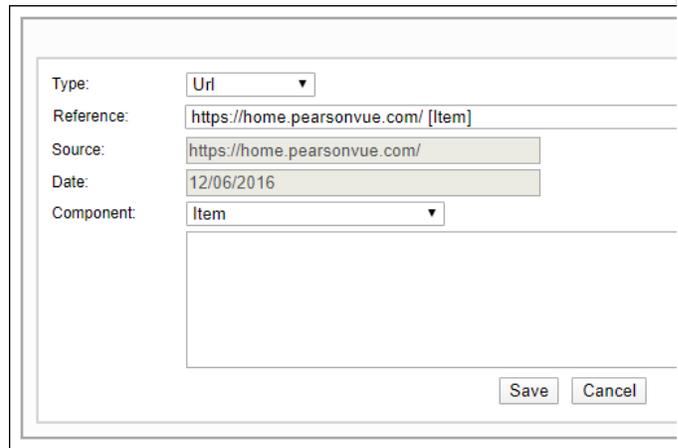
The screenshot shows a form with the following fields: 'Type' is a dropdown menu with 'Url' selected; 'Reference' is a text input field containing 'https'; below it is a list of suggestions, with 'https://home.pearsonvue.com/ [Item]' visible. There are also 'Save' and 'Cancel' buttons at the bottom right.

**Yes, including new sources selected:** Click **Create New**. You can manually enter the URL into the **Source** field. **Source** and **Date** reference fields are mandatory.



The screenshot shows a form with the following fields: 'Type' is a dropdown menu with 'Url' selected; 'Reference' is an empty text input field; 'Source' is a text input field containing 'https'; 'Date' is an empty text input field; 'Component' is a dropdown menu with 'Item' selected. There are also 'Save' and 'Cancel' buttons at the bottom right.

**Not allowed selected:** The **Create New** button is grayed out and you are not able to create a new URL reference. You may type an existing URL reference into the **Reference** field and select it from the list. You are not able to modify the existing reference. You can add a **Component** for the URL.



The screenshot shows a form with the following fields: 'Type' is a dropdown menu with 'Url' selected; 'Reference' is a text input field containing 'https://home.pearsonvue.com/ [Item]'; 'Source' is a text input field containing 'https://home.pearsonvue.com/'; 'Date' is a text input field containing '12/06/2016'; 'Component' is a dropdown menu with 'Item' selected. There are also 'Save' and 'Cancel' buttons at the bottom right.

**Allow users to add new Journal references to the project**

If a journal reference already exists in the project, you can type the journal reference into the **Reference** field. References that match the typed characters are listed. Select the desired reference from the list.

Type:	Journal ▼
Reference:	Journal
	American journal of obstetrics and gynecology (03/01/1975) //L

**Yes, including new sources selected:** Click **Create New**. Displays plain text box for manual entry in the source field. You must enter all the desired reference fields. **Source** and **Date** are required fields.

Type:	Journal ▼
Reference:	
PubMed ID:	<input type="text"/> <input type="button" value="Get PubMed Reference"/>
Source:	Journal
Date:	<input type="text"/>
Article:	<input type="text"/>
Volume:	<input type="text"/>
Issue:	<input type="text"/>
Author:	<input type="text"/>
Page:	<input type="text"/>
Component:	Item ▼
	<input type="text"/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

**Yes, from existing sources selected:** Click **Create New**. Select an existing journal reference from the **Source** drop-down list. The **Source** drop-down list is populated by source data for Journal type references entered by the Project Manager. Item writers, reviewers and validators are not able create a new source. You must fill in any of the other reference fields.

Type:

Reference:

PubMed ID:

Source:

Date:

Article:

Volume:

Issue:

Author:

Page:

Component:

**Not Allowed** selected: The **Create New** button is grayed out and you are not able to create a new Journal reference. You can type in an existing journal reference in the **Reference** field and select it from the list. You are unable to modify the existing reference. You are able to add **Article**, **Volume**, **Issue**, **Page** and **Component** reference fields.

Type:

Reference:

Source:

Date:

Article:

Volume:

Issue:

Author:

Page:

Component:



This setting has no effect for a user logged in as the Project Manager.

**Allow users to add new Equation references to the project**

If an equation reference already exists in the project, you can type the equation reference name into the **Reference** field. References that match the typed characters are listed. Select the desired reference from the list.

Type:

Reference:

**Yes, including new sources selected:** Click **Create New**. Enter a **Name** for the new equation. Create the equation in the **Description** field.

Type:

Reference:

Name:

Description:

$\sqrt{5}$

Component:

**Not Allowed selected:** The **Create New** button is grayed out and you are not able to add a new Equation reference. You can type in an existing Equation Name in the **Reference** field and select it from the list. You are unable to modify the existing reference. You can add a **Component** to the equation reference.

Type:

Reference:

Name:

Description:

Component:

**i** When references are added to an item, they are listed in the **References** accordion tab of the item. Any Components for a reference are listed in the right column. Empty reference fields are listed with "/" to identify the field. Both long Source names and long Components are supported. Components can be up to 15000 characters in length.

**References**

Selected References	Component fields
<input type="checkbox"/> <input type="checkbox"/> Book Reference 1 (12/17/2016) John Doe/Hofflin// [Item]	Sample Book Reference.
<input type="checkbox"/> <input type="checkbox"/> Dentistry (June 2015) John Doe/Hofflin/3/37 [Item]	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
<input type="checkbox"/> <input type="checkbox"/> https://home.pearsonvue.com/ [Item]	Sample URL Reference
<input type="checkbox"/> <input type="checkbox"/> Reference with a really, really, really, really, really, really, really, really, really long title and no Component (June 2015) /// [Item]	
<input type="checkbox"/> <input type="checkbox"/> Sample Equation Reference/√5 [Item]	Sample equation reference.
<input type="checkbox"/> <input type="checkbox"/> Sample Journal Reference (2/26/19) /// [Item]	Sample Journal reference

Comments

ref

**!** Under the **Select mandatory fields for reference** section, the source is always set to enabled and is grayed out, thus preventing its modification by the user. This is because the source is the most important distinguishing parameter that is unique to a reference.

1. Select **Show list of existing references to pick from** as **Yes**, when requiring the already existing references to be displayed in the Question editor pages.
2. If the **Show drop down interface (no auto complete) for reference selection** setting is not selected (this is by default), then the user is shown the autocomplete-based reference selection user interface in **Create New** pop-up on the **Write Question / Modify Question** page instead.

This screenshot shows a reference creation form. At the top right is a [Help](#) link. Below it, the 'Type' is set to 'Book' in a dropdown menu. The 'Reference' field contains the text 'My book'. To the right of this field is a 'Create New' button. Below the 'Reference' field, a preview of the reference is shown: 'My book (12/17/2016) /// [Item]'.

Select the **Yes** check box if you want to show the drop-down-based reference selection user interface to the user instead.

This screenshot shows the same reference creation form as above, but with a different configuration. The 'Reference' field is now a dropdown menu with a downward arrow. The dropdown is open, showing the option 'My book (12/17/2016) /// [Item]' highlighted in blue. The 'Create New' button is still present to the right.

3. Select how users are allowed to add references from the drop-down lists.
4. Select the mandatory fields for references for Equations, Books, Journals, and URLs by selecting the corresponding boxes. A selected check box indicates that the field is mandatory.
5. To control the display of references on the **Question Metadata** tab of the **Examine Question** page, type in the keywords provided along with any formatting and supporting text. The below screenshot shows how the four reference types are displayed with the default keywords format order.

Develop Questions | Prepare Assets | Create Exam Form | **Manage** | Observe | Manage Item Bank | View Item Bank

Settings | Blueprint | Users | **Project Bank** | Reports | Import | Custom Menu | Queue

Welcome edvturner (Last Login: 04/14/20 03:13 PM) [Home](#) [Tasks](#) [Logout](#)

**Configuration** Project: Viky's Project 2 [Help](#)

This page allows you to edit the project's configuration. Each setting is described in detail in the "Help" link in the top right corner of the screen.

After making modifications, press the "Update" button at the bottom of the screen.

In Setup ▾ Change Status

Project | Questions | Assets | **References** | Statistical Flags | Search | Statistics | Cases | Set Standard | Exhibits | Advanced Properties

Show list of existing references to pick from  Yes

Show drop down interface (no auto complete) for reference selection  Yes

References can be set for the following components Item ▾

Allow users to add new Book references to the project Yes, including new sources ▾

Allow users to add new Journal references to the project Yes, including new sources ▾

Allow users to add new URL references to the project Yes, including new sources ▾

Allow users to add new Equation references to the project Yes, including new sources ▾

**Select mandatory fields for references:**

**Books**  Source  Edition  Date  Author  Publisher  Chapter  Page

**Journals**  Source  Date  Article  Volume  Issue  Author  Page

**Urls**  Source  Date

**Equation**  Source  Description

Set the format for the references using the keywords given below:

<b>#TITLE</b>	Name of the book	<b>#DATE</b>	Date the book was referenced
<b>#TITLE_EDITION</b>	Name of the book with edition	<b>#EDITION</b>	The book's edition
<b>#AUTHOR</b>	The book's author	<b>#PUBLISHER</b>	The book's publisher
<b>#CHAPTER</b>	Chapter referenced in the book	<b>#PAGE</b>	Page number referenced in the book
<b>#ARTICLE</b>	The title of the article in the journal	<b>#VOLUME</b>	The journal's volume number
<b>#ISSUE</b>	The journal's issue number	<b>#URL</b>	URL of the website
<b>#Name</b>	The equation name	<b>#Description</b>	Description of an equation

Book:

URL:

Journal:

Equation:

Update | Reset | Restore Defaults



Omitting a keyword causes that information about the reference to not appear at all. Repeating a keyword causes that information to be repeated in the citation.



Text that is not a keyword is reproduced literally. Use such text only for formatting the appearance of the citation.

## Book Edition field

By default, all new projects include the **#EDITION** field along with the title of the book as **#TITLE\_EDITION**.

**Select mandatory fields for references:**

Books  Source  Edition  Date  Author  Publisher  Chapter  Page

Journals  Source  Date  Article  Volume  Issue  Author  Page

Urls  Source  Date

Equation  Source  Description

Set the format for the references using the keywords given below:

#TITLE	Name of the book	#DATE	Date the book was referenced
#TITLE_EDITION	Name of the book with edition	#EDITION	The book's edition
#AUTHOR	The book's author	#PUBLISHER	The book's publisher
#CHAPTER	Chapter referenced in the book	#PAGE	Page number referenced in the book
#ARTICLE	The title of the article in the journal	#VOLUME	The journal's volume number
#ISSUE	The journal's issue number	#URL	URL of the website
#Name	The equation name	#Description	Description of an equation

Book:

The reference that is produced lists the **Source** (book title), **Edition** (value entered) edition. The Edition field may be a max of 7 characters.

[Help](#)

Type:

Source:

Edition:

Date:

Author:

Publisher:

Chapter:

Page:

Component:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**References**

**Selected References**

Dentistry, 1 edition (June 2015) /// [Key and Distractor]

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

If the **Edition** field is left blank, only the book title is listed in the reference that is produced.

**References**

**Selected References**

  Dentistry (June 2015) /// [Key and Distractor]

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Alternately, you can change the book reference to **#TITLE (#EDITION)**.

**Select mandatory fields for references:**

**Books**     Source     Edition     Date     Author     Publisher     Chapter     Page

**Journals**     Source     Date     Article     Volume     Issue     Author     Page

**Urls**     Source     Date

**Equation**     Source     Description

Set the format for the references using the keywords given below:

<b>#TITLE</b>	Name of the book	<b>#DATE</b>	Date the book was referenced
<b>#TITLE_EDITION</b>	Name of the book with edition	<b>#EDITION</b>	The book's edition
<b>#AUTHOR</b>	The book's author	<b>#PUBLISHER</b>	The book's publisher
<b>#CHAPTER</b>	Chapter referenced in the book	<b>#PAGE</b>	Page number referenced in the book
<b>#ARTICLE</b>	The title of the article in the journal	<b>#VOLUME</b>	The journal's volume number
<b>#ISSUE</b>	The journal's issue number	<b>#URL</b>	URL of the website
<b>#Name</b>	The equation name	<b>#Description</b>	Description of an equation

Book:

The reference lists the **Source (Edition)**.

Help

Type:

Source:

Edition:

Date:

Author:

Publisher:

Chapter:

Page:

Component:

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

References

Selected References

- ✕
▶
Dentistry (1) (June 2015) John Doe/Hofflin// [Item]

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

If the **Edition** field is left blank, the book title is listed with an empty set of parentheses for edition in the reference that is produced.

References

Selected References

- ✕
▶
Dentistry () (June 2015) John Doe/// [Item]

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.