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.
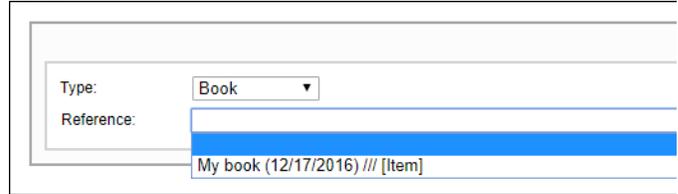

Option	Description
Show list of existing references to pick from	Select **Yes** if you want to require references that already exist to be displayed in the Question editor pages.

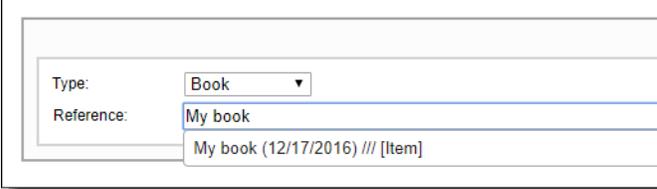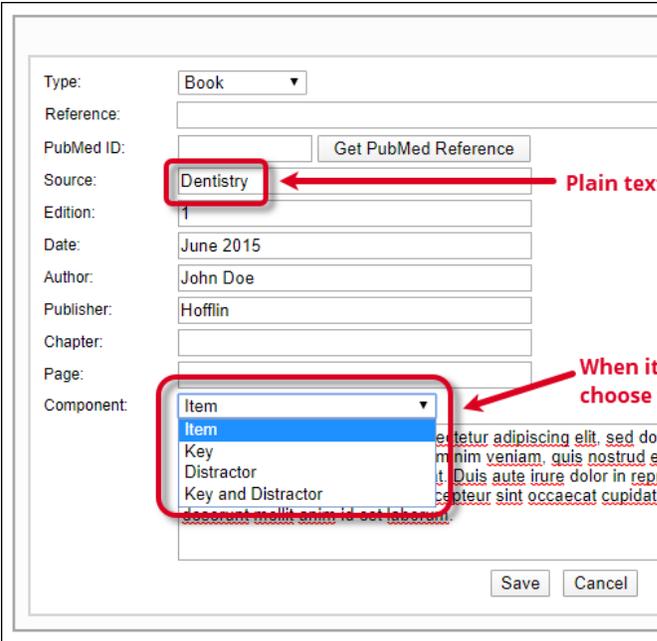| Show drop-down interface (no auto complete) for reference selection	If the **Show drop-down interface (no auto complete) for reference selection** setting is not selected (this is by default), then the user is shown the autocomplete-based reference selection User Interface in **Create New** pop-up 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
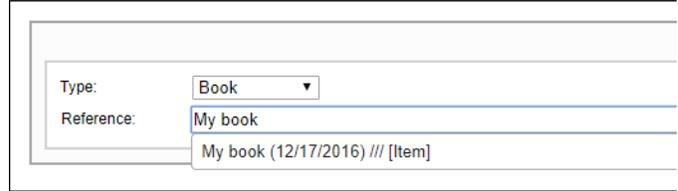
The following table summarizes how the reference settings work:

Option	Behavior for Adding New Entries	Behavior for listing existing entries	Modify existing References
Yes, including new sources (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
Yes, from existing sources	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

Not allowed	Prevents users from inserting a specific type of reference.	References cannot be added. The **Create New** button is grayed out for the selected reference type.	No

The following table summarizes how the reference settings work:

Option	Description
Allow users to add new Book references to the project	If a book reference already exists for a project, you can begin typing the book reference in the **Reference** field. References that match the typed characters are listed. Select the desired reference from the list. **Yes, including new sources** selected: Click **Create New**. Displays plain text box for manual entry in the Source field. The **Source** and **Date** reference fields are mandatory. **Yes, from existing sources** selected: Click **Create New**. Click the **Source** drop-down list and select an existing book reference from the list. The **Source** 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.

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.

⚠ 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.

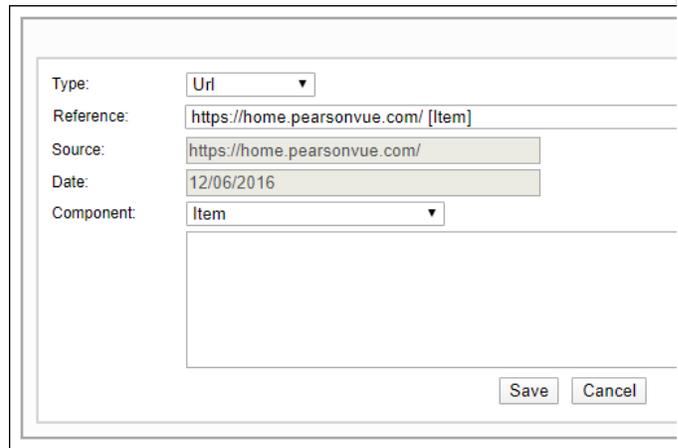|	
Allow users to add new URL references to the project	If a URL reference already exists for a project, you can begin typing the URL in the **Reference** field. References that match the typed characters are listed. Select the desired reference from the list.

Type: Url ▼
Reference: https
                 https://home.pearsonvue.com/ [Item]

<u>**Yes, including new sources**</u> selected: Click **Create New**. You can manually enter the URL into the **Source** field. **Source** and **Date** reference fields are mandatory.
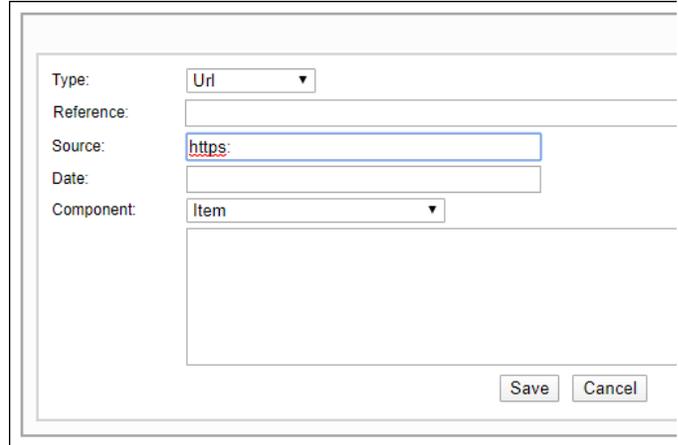
Type: Url ▼
Reference:
Source: https:
Date:
Component: Item ▼

                         Save   Cancel

<u>**Not allowed**</u> 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.

Type: Url ▼
Reference: https://home.pearsonvue.com/ [Item]
Source: https://home.pearsonvue.com/
Date: 12/06/2016
Component: Item ▼

                         Save   Cancel

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.

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.

Yes, from existing sources selected: Click **Create New**. Select an existing journal reference from the **Source** drop-down list. The **Sourc e** 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.

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.

⚠ 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:	Equation ▼
Reference:	square
	Square root of 5/ [Item]

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

Type:	Equation ▼
Reference:	
Name:	Square root of 5
Description:	

$$\sqrt{5}$$

| Component: | Item ▼ |

Save   Cancel

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.

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.

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.

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

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.

⚠️ 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.

ℹ️ 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: `#TITLE_EDITION (#DATE) #AUTHOR/#PUBLISHER/#CHAPTER/#PAGE`

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

Type:	Book ▾
Source:	Dentistry
Edition:	1
Date:	June 2015
Author:	
Publisher:	
Chapter:	
Page:	
Component:	Key and Distractor ▾

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Save   Cancel

References

Selected References

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

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Add Reference

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

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

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

Type: Book

Source: Dentistry

Edition: 1

Date: June 2015

Author: John Doe

Publisher: Hofflin

Chapter:

Page:

Component: Item

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Save   Cancel

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.

Add Reference

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.

Add Reference