

**LOYALIST**



The Parrott Centre

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 **RefWorks**  
**Fundamentals**

**Loyalist College**  
**Library**

(February 8, 2008 update)

# RefWorks

*is a web-based bibliography manager that allows you to create a personal database of references used for research.*

## **RefWorks allows you to:**

- ✓ *Import and store references from print, electronic & various other sources*
- ✓ *Create and save annotations and notes*
- ✓ *Organize research in folders*
- ✓ *Format in-text citations as you work*
- ✓ *Generate bibliographies in standard output styles*

## **Contents**

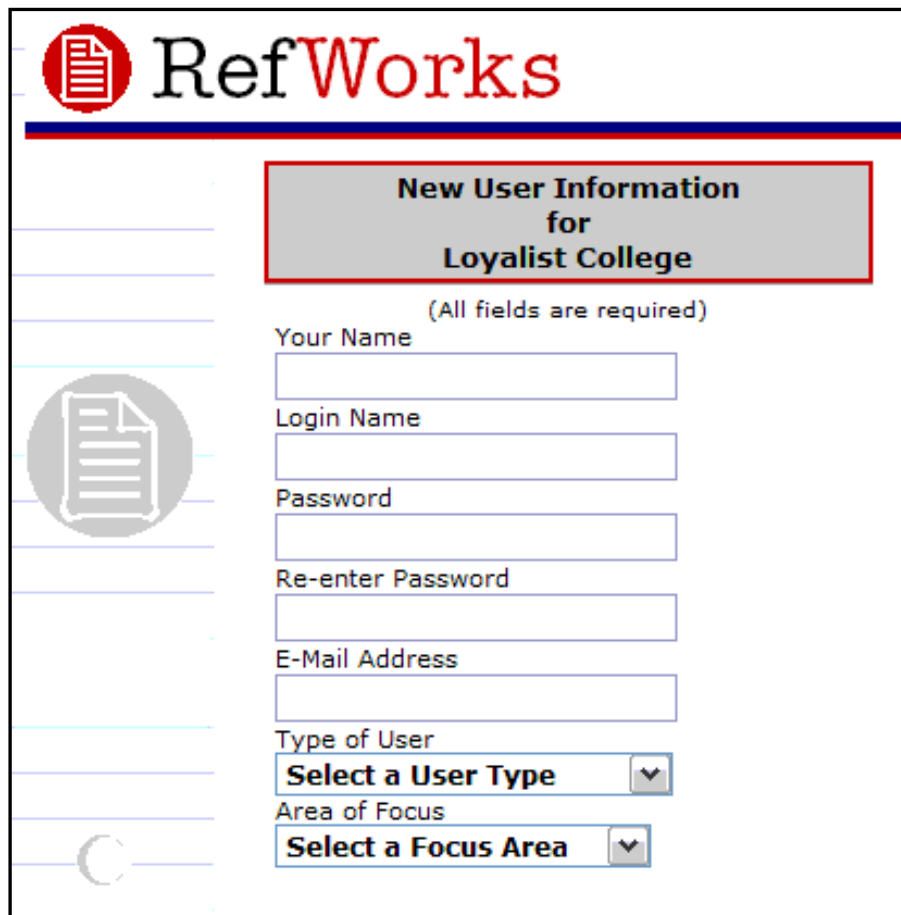
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## RefWorks Fundamentals

### Task 1 Set-up an account

1. Open your browser and visit [www.loyalistlibrary.com](http://www.loyalistlibrary.com) > Citation Style Guides > RefWorks \*\*
2. Click on **Sign up for an Individual Account**.
3. Fill in the form.
4. Click **Register**.
5. Close your browser. A confirmation message that contains your login name, password and group code will be sent to your e-mail account.
6. To begin using RefWorks, go to [www.loyalistlibrary.com](http://www.loyalistlibrary.com) > Citation Style Guides > RefWorks\*\* and login to your new account.

\*\* *Off campus users will be prompted to enter their library number and password.*

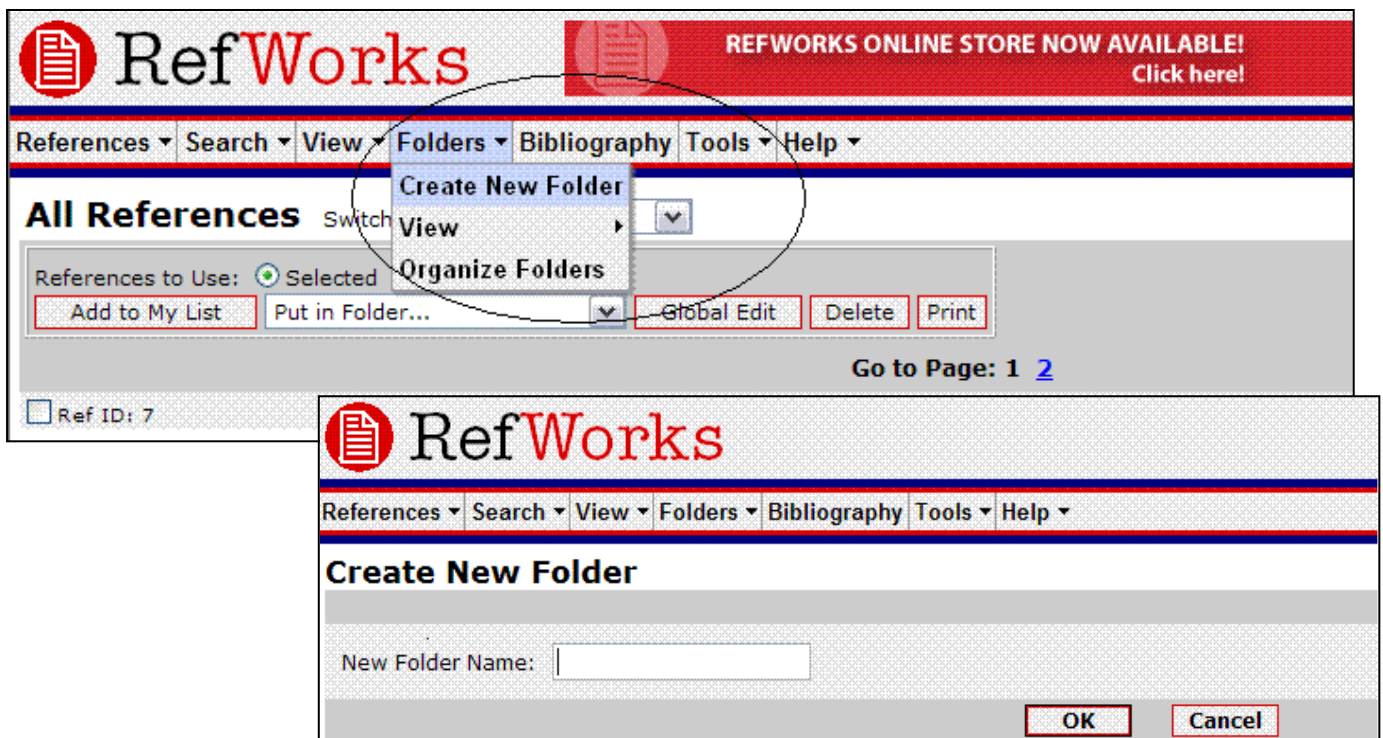


The screenshot shows the RefWorks registration page for Loyalist College. At the top left is the RefWorks logo, a red circle with a white document icon. To its right is the text 'RefWorks' in a red serif font. Below this is a horizontal bar with a blue top and red bottom. The main heading is 'New User Information for Loyalist College' in a grey box with a red border. Below the heading is the note '(All fields are required)'. The form contains several input fields: 'Your Name', 'Login Name', 'Password', 'Re-enter Password', and 'E-Mail Address'. At the bottom are two dropdown menus: 'Type of User' with the text 'Select a User Type' and 'Area of Focus' with the text 'Select a Focus Area'. On the left side of the form, there is a large, faint watermark of a document icon.

## **Task 2 Create folders to organize your information**

(Optional, but an excellent tool to organize your citations right from the start. )

1. In the toolbar click **Folders > Create New Folder**
2. In the box provided, give the folder a name, then click **OK**.
  - You can make as many folders as you need
  - You can add/remove folders at any time
  - You can move references from one folder to another at any time
  - References can belong to more than one folder at any time
3. To view all your folders click **Folders > Organize folders**
  - RefWorks will display a list of all folders and provide a link to their contents
  - You can search all folders by keyword simultaneously by using the **Search RefWorks** box on Toolbar
4. To view all your citations at once: **View > All References**
5. To view the contents of one folder: **View > Folder > choose folder**



### Task 3 Add new reference manually

1. Click **References > Add New Reference**.  
(A list of field explanations can be found by scrolling to the bottom of the screen.)
2. In the **View Fields used by box** select a citation style, eg., APA, MLA.
3. Choose the **Folder** you wish to store your citation in. (This can be done later if you wish)
4. Select **Ref Type** that matches the document in hand, eg., book, journal.
5. Change **Source Type** from “print” to “electronic” as required.
6. Enter information in all fields marked with ✓ if they apply to your document. If a piece of information does not exist, leave it blank.
7. The **Descriptor Lookup** box may appear when you are entering information in the Author, Periodical Title and Descriptor fields. These are names or headings that are already in your database. Double click to select from these terms if they apply.
8. In the **Abstract** field enter a summary of the work if you plan to produce an annotated bibliography. This field is searchable.
9. **Save** reference, or **Save & Add New** to continue adding more references.

The screenshot shows the RefWorks 'New Reference' form. The form includes a navigation menu at the top with 'References', 'Search', 'View', 'Folders', 'Bibliography', 'Tools', and 'Help'. The main form area is titled 'New Reference' and includes a 'View fields used by' dropdown set to 'APA - American Psychological Ass'. Below this are fields for 'In Folder(s)', 'Ref Type' (set to 'Journal Article'), and 'Source Type' (set to 'Print'). There are several fields with checkmarks indicating they are used by the selected style: 'Authors', 'Title', 'Periodical, Full', 'Pub Year', 'Volume', 'Issue', 'Start Page', and 'Other Pages'. An 'Author Lookup' popup window is open over the 'Authors' field, showing a list of names: 'Taras, David', 'Task Force on the Canadian N', 'Thomas, David', 'Thompson, Bonnie', 'Thompson, John Herd', and 'Tippett, Maria'. The 'Abstract' and 'Notes' fields are at the bottom of the form, each with a rich text editor toolbar. The 'Save Reference' and 'Save & Add New' buttons are at the top right of the form area.

## Task 4 Import Citations from Online Databases

### A. From EBSCOHost

This task works best with your RefWorks account open in a separate browser window.

Note: The process for importing citations from other vendors is similar.

1. Select the EBSCO database you wish to use, conduct a search.
2. From the results list, mark/select the records you wish to import by clicking the **Add** link to the right of the record.
3. Click the **Folder has Items** link (top right corner of the screen)
4. Click **Export**.
5. Place a check mark beside the items you wish to export and click “selected” or “all” as needed, then click **Export**.
6. Choose **Direct Export to RefWorks**, then **Save**
7. Your records should be imported into your **Last Imported Folder** in RefWorks.
8. Adjust information in **Globally Edit Fields for Imported References** if necessary and click **Edit**. This step can be used to add/change database information to all imported citations simultaneously

The screenshots illustrate the following steps:

- Step 1:** Search for 'influenza' in the 'Academic Search Elite' database.
- Step 3:** Click the 'Folder has Items' link in the top right corner of the search results page.
- Step 4:** Click the 'Export' button in the 'Folder Contents' page.
- Step 5:** In the 'Export Manager' dialog, select 'Direct Export to RefWorks'.
- Step 6:** Click the 'Save' button to complete the export.

## B. From ProQuest

This task works best with your RefWorks account open in a separate browser window.

1. Select the ProQuest database you wish to use, conduct a search.
2. From the results list, select the records you wish to import by putting a **checkmark** in the box to the left of the record.
3. Click on the **My Research** tab (at the top of the screen)
4. Click the **Export Citations** option located in the **My Research** section.
5. Choose the **Export Directly to RefWorks** option
6. The RefWorks button in the task bar at the bottom of your screen will flash to when the citations have been moved to RefWorks
7. Click on the RefWorks application to **View Last Imported Folder** or to **Globally Edit Fields**.
8. Adjust information in **Globally Edit Fields for Imported References** as necessary and click **Edit**. This can be used to additional database information to all imported citations simultaneously if needed.

The screenshots show the following steps:

1. ProQuest search results page with the **My Research** tab highlighted.
2. Search results list with two items checked.
3. **My Research** section with the **Export citations** option highlighted.
4. **Export Citations** dialog box with the **Export directly to RefWorks** option highlighted.
5. Windows task bar showing the RefWorks application icon highlighted.

## Task 5 Import data from a Saved Text File

This example uses PubMed as a data vendor.

(<http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?db=PubMed>)

1. In a separate browser window open PubMed and carry out a simple search.
2. From your search results, select items to save by clicking in the checkbox to the left of the appropriate citations.
3. In the **Display** drop down box, select **Medline** to view your records.
4. In the **Send to** drop-down, select Text. A new window will open with your references. Use your **Browser's Save As** function to save the file to your computer. Make sure to save the file as a .txt file in the **Save as file type** drop-down.
5. In **RefWorks**, select **References > Import** from the toolbar.
6. Select **NLM PubMed** as the data source and **PubMed** as the database.
7. **Browse** to find the text file you saved to your computer and click on **Open**.
8. Click **Import**. Your records should appear in the **Last Imported Folder**.

The image shows a composite screenshot of a web browser. The top portion displays the PubMed search results for 'avian flu'. The search bar contains 'PubMed' and 'for avian flu'. Below the search bar, there are tabs for 'Limits', 'Preview/Index', 'History', 'Clipboard', and 'Details'. The 'Display' dropdown is set to 'Summary', and the 'Send to' dropdown is set to 'Text'. The search results show two items, each with a checkbox and a numbered callout: '1' points to the checkboxes, and '2' points to the 'Send to' dropdown. The first item is 'Hampton T.' with a citation from JAMA. The second item is 'Krau SD, Parsons LC' with a citation from Crit Care Nurs Clin North Am. Below the PubMed interface is the RefWorks 'Import' page. The 'Import Filter/Data Source' dropdown is set to 'NLM PubMed' (callout 5), and the 'Database' dropdown is set to 'PubMed' (callout 6). The 'Import References into' dropdown is set to 'Specify Folder (optional)'. The 'Import Data from the following Text File' section is selected, and the file path 'C:\Documents and Settings\Stephanie\Desktop\avian flu.txt' is entered. The 'Encoding' is set to 'ANSI - Latin I'. A 'Browse...' button is visible (callout 7). At the bottom of the page, the 'Import' button is highlighted with a red arrow and a callout '8'.

## Task 6 Search z39.50 Database from within RefWorks

(Note: This example uses Pubmed)

1. Click on **Search > Online Catalog or Database**
2. Select **Pubmed** from the drop-down
3. Enter a keyword or Boolean search in the quick search area
4. Mark/Select items you wish to import
5. Click "Import"
6. Close the search results page and return to RefWorks.

**RefWorks** January 2008 Release: New Features Now Available! [CLICK HERE!](#)

References ▾ Search ▾ View ▾ Folders ▾ Bibliography Tools ▾ Help ▾

**All Refe**  
References to  
Add to My  
Ref ID: 7

Advanced  
Lookup by Author  
Lookup by Descriptor  
Lookup by Periodical  
**Online Catalog or Database**  
RSS Feed

rd View ▾  
All in List  
Global Edit Delete Print  
Go to Page: 1 2

**RefWorks**

References ▾ Search ▾ View ▾ Folders ▾ Bibliography Tools ▾ Help ▾ Search

**Search Online Catalog or Database** [Request a Z39.50 Site](#)

Online Catalog or Database to Search:  
PubMed ▾

Max. Number of References to Download: 50 ▾

Quick Search for: (With Quick Search on PubMed you can simply enter terms you are interested in or use more sophisticated search [here](#))  
influenza  
Search Clear

**RefWorks**

**Search Results for "influenza"**

References to Use:  Selected  Page  All in List  
Import Import to Folder... ▾ (Note that references are also put in the Last Imported folder)  
Go to Page: 1 2

Ref ID: 1 Journal Article Reference 1 of 50  
PubMed Links [View in PubMed](#) [Related Documents](#)  
Title: Home remedies. Sometimes, a good option  
Authors:  
Source: Mayo Clin.Health Lett., 2007, 25, 12, 4-5, United States

Ref ID: 2 Journal Article Reference 2 of 50  
PubMed Links [View in PubMed](#) [Related Documents](#) More by Alves Galvao, ▾ Go  
Title: Amantadine and rimantadine for influenza A in children and the elderly  
Authors: Alves Galvao,M.; Rocha Crispino Santos,M.; Alves da Cunha,A.  
Source: Cochrane Database Syst.Rev., 2008, (1), 1, CD002745, England

Link to Pubmed for additional searching

## **Task 7 Create a list of references in preferred Output Style**

1. In RefWorks, click **Bibliography**.
2. Select an **output style**, eg., APA, MLA, etc.
3. Select the **Format a Bibliography from a List of References** radio button.
4. In **File Type to Create**, choose either RTF (Rich Text Format), Word, HTML, or text.
5. In the **References from Folder** drop-down box choose the folder you wish to access.
6. Click on **Create Bibliography**.
7. A list of properly formatted references will be created for you to save, print, or email as required.

The screenshot shows the RefWorks interface for creating a bibliography. The page title is "Bibliography" and it includes a navigation menu with "References", "Search", "View", "Folders", "Bibliography", "Tools", and "Help". A search bar is located in the top right corner. The main content area is titled "Bibliography" and contains several sections:

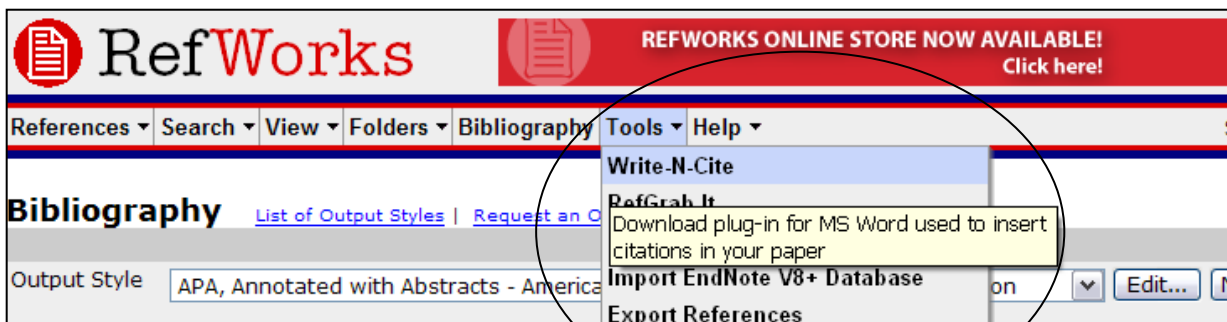
- Output Style:** A dropdown menu is set to "APA - American Psychological Association, 5th Edition". A "Preview Styles" button is below it.
- Format Paper and Bibliography:** A section with a link "How to Enter Citations into your Document".
- Document to Format:** A text input field with a "Browse..." button.
- Format a Bibliography from a List of References:** A radio button is selected.
- File Type to Create:** A dropdown menu is set to "RTF (Rich Text Format)".
- Include:** Radio buttons for "All References (6930)", "My List (0)", and "References from Viruses". The "References from Viruses" option is selected.
- Create Bibliography:** A prominent button at the bottom of the form.
- Document Formats Supported:** A list of supported formats: Word for Windows 2000 or later, Word for Mac 98 or later, OpenOffice.org Writer (.odt), HTML, Rich Text Format (RTF), and Text.

Numbered callouts (1-6) with red arrows point to the following elements:

1. The "Bibliography" menu item in the top navigation bar.
2. The "Output Style" dropdown menu.
3. The "Document to Format" input field.
4. The "Format a Bibliography from a List of References" radio button.
5. The "File Type to Create" dropdown menu.
6. The "Create Bibliography" button.

## **Task 8 Create a Bibliography with Write-n-Cite (optional)**

To install the optional Write-n-Cite go to Tools >Write-N-Cite and follow the instructions.



### **With Write-N-Cite installed:**

1. Open **Microsoft Word**, begin your document, and give it a file name.
2. Launch the **Write-N-Cite** plug in on the Word toolbar or from the Word menu option **Tools > Write-N-Cite**.
3. You will be prompted to enter your RefWorks login and password. Off campus users will also be prompted to enter a **group code** first.
4. You can select **Always on top** to keep Write-N-Cite visible.
5. Do a **quick search** in the Write-N-Cite window for the document you wish to cite.
6. In your Word document, place your cursor **where you want to insert the citation**.
7. Return to the Write-N-Cite window, click the **Cite** link next to the record that you want to cite. A citation placeholder will be placed in your Word document.
8. Return to your document and continue typing text and add a few more citations. You can include more than once citation placeholder in the same grouping (known as citing multiple sources)
9. Re-save your document, and keep it open if you wish to prepare a bibliography.

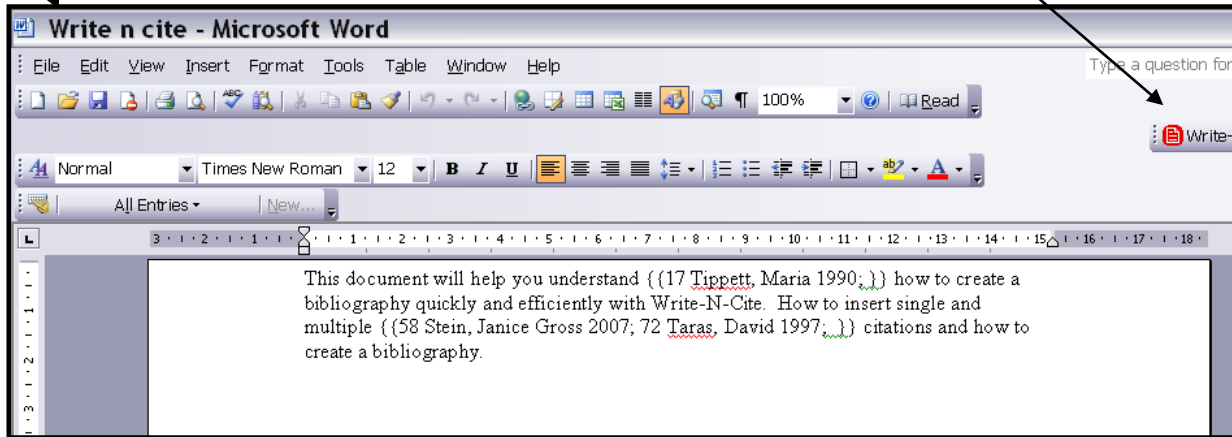
### **To prepare a bibliography with Write-N-Cite:**

10. In the Write-N-Cite Window, click on **Bibliography** and choose an **output style**.
11. This will format your document complete with bibliography. Review the document, “save as” with a new filename, then close the formatted paper.

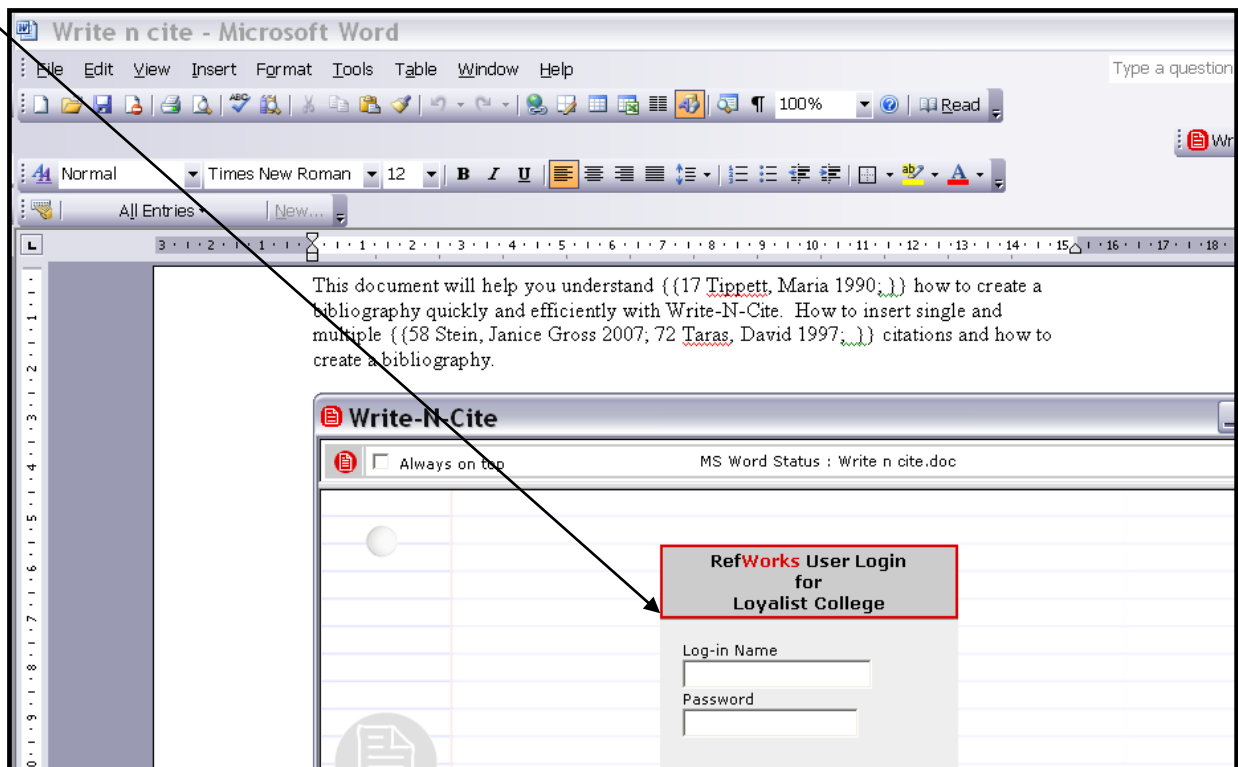
**NOTE:** Remember *to always work and edit in the original Word document*. (You can save as many final documents, at various stages and in as many styles as you wish.)

## Create a Bibliography with Write-N-Cite ... cont'd

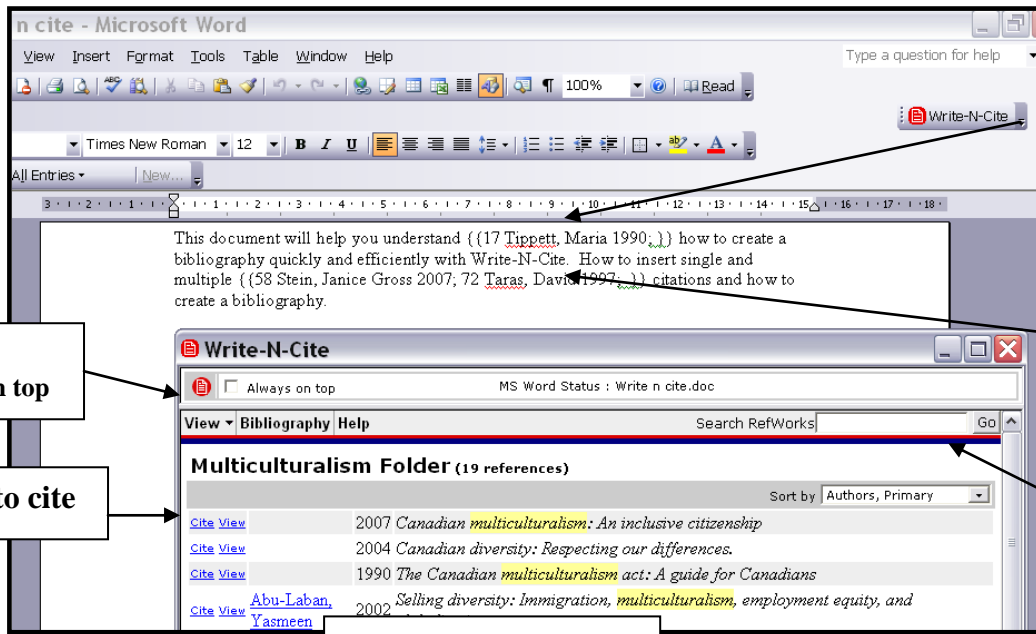
- 1 Open **Microsoft Word**, begin your document, and give it a file name.
- 2 Launch Write-N-cite



- 3 You will be prompted to enter your RefWorks login and password. Off campus users will also be prompted to enter a **group code** first.



# Create a Bibliography with Write-N-Cite ... cont'd



4 Always on top

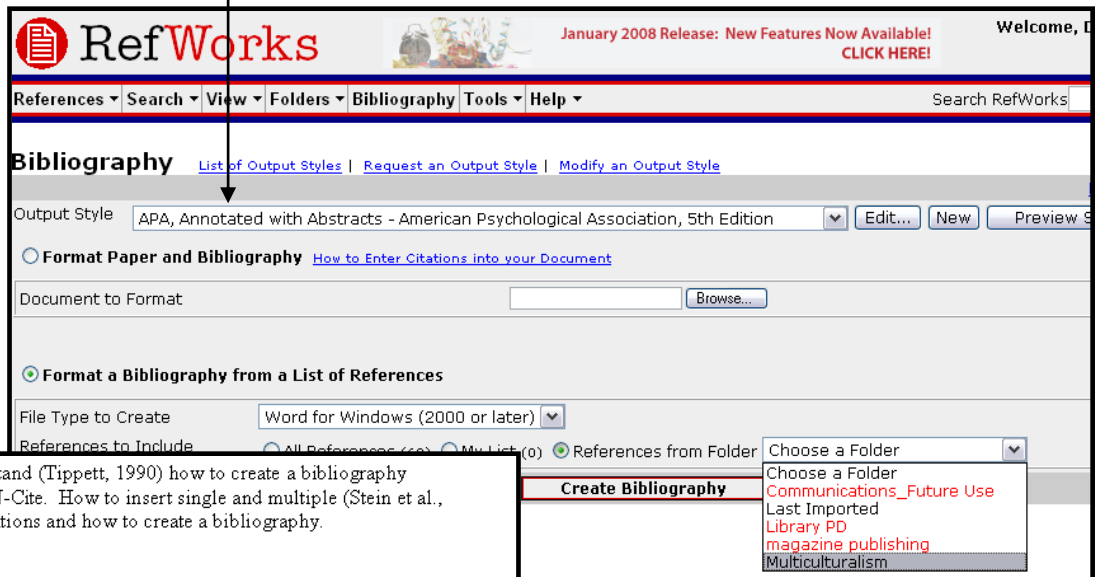
7 Click to cite

6 Place Cursor in document

8 Cite multiple sources

5 Quick Search

10 Choose output style



11 Final document

This document will help you understand (Tippett, 1990) how to create a bibliography quickly and efficiently with Write-N-Cite. How to insert single and multiple (Stein et al., 2007; Taras & Rasporich, 1997) citations and how to create a bibliography.

References

Stein, J. G., Cameron, D. R., Ibbitson, J., Kymlicka, W., Meisel, J., Siddiqui, H., et al. (2007). *Uneasy partners: Multiculturalism and rights in Canada*. Waterloo: Wilfred Laurier University Press.

The contributors to this volume examine the conflict between equality rights, as embedded in the Charter, and multiculturalism as policy and practice, asking whether the charter value should have which under what circumstances

## **Task 9 Create a Bibliography without Write-N-Cite**

This document will help you understand how to create a bibliography quickly and efficiently when Write-N-Cite plug in is not available. (This can happen when working from machines other than your own or off-campus).

1. Open your word processor, begin your document, and give it a file name.
2. Login to **RefWorks**.
3. Do a quick search for **the item you wish to cite**.
4. In the **Switch to:** choose the **One line/Cite view** option.
5. Choose a reference and click on its **Cite** link to the left hand.
6. A temporary **Citation Viewer** box will open containing the RefWorks temporary citation placeholder.
7. Click **Select Citation**, right click on the highlighted citation, then click **Copy** from the menu that appears.
8. In your document, place your cursor where you want the citation to appear, then **paste** the citation placeholder into your document.
9. Repeat the previous steps to add subsequent citations, making sure to **Clear the Citation Viewer** after each step.
10. Close and save your document.
11. From the RefWorks toolbar select **Bibliography**.
12. Choose an output style.
13. Select **Format Paper and Bibliography**.
14. Browse to locate your file as the **Document to Format**.
15. Click on **Create Bibliography**.
16. You now have a second (final) document, with citations and formatted bibliography. Save your **Final document as a separate file**.

**Note: Check your final document for capitalization and other errors.**

- **Errors in the body of your document should be corrected in the original file; errors in citations should be corrected in your RefWorks account.**
- **RefWorks does not capitalize place names and proper nouns. Please check your final document before you submit for marking.**

## Create a Bibliography *without* Write-N-Cite ... cont'd

**1 Start document**: A Microsoft Word document titled "Cultural policy" is open. The text "While the connection between multiculturalism and Canadian cultural policy has been" is visible.

**2 Start RefWorks**: The RefWorks interface is shown. The "References" tab is active, and the "View" dropdown is set to "One line/Cite View".

**3 Search**: A search for "multiculturalism" is performed in the RefWorks search bar.

**4 Switch to One line/cite view**: The view is confirmed to be "One line/Cite View".

**5 Cite**: A citation for "Taras, David" is selected from the search results.

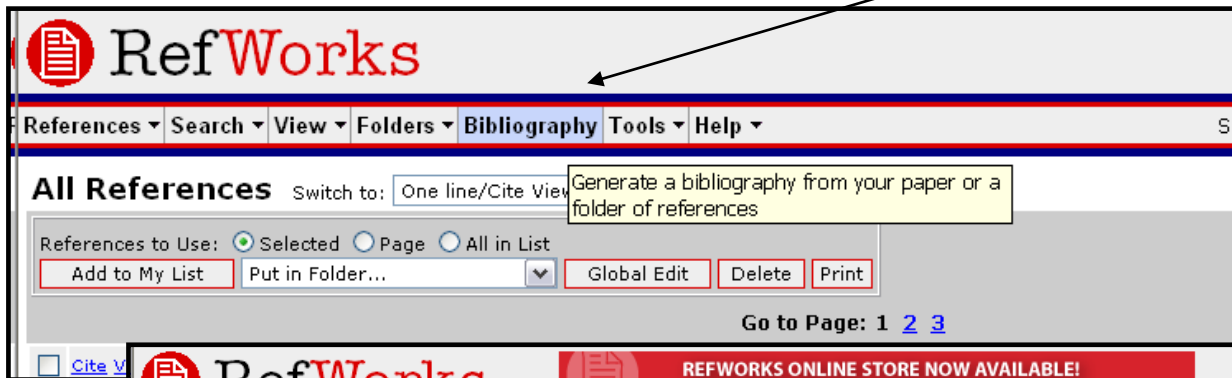
**6 Citation viewer**: The "Citation Viewer" window is open, displaying the citation: "Taras, David 1997".

**7 Select then copy**: The citation text is selected, and the context menu is open with "Copy" highlighted.

**8 Paste in document**: The citation "Taras, David 1997" is pasted into the Word document at the end of the sentence: "While the connection between multiculturalism and Canadian cultural policy has been strong in recent decades, this has not always been the case {{72 Taras, David 1997;}}. Historically,".

## Create a Bibliography *without* Write-N-Cite ... cont'd

11 Select Bibliography

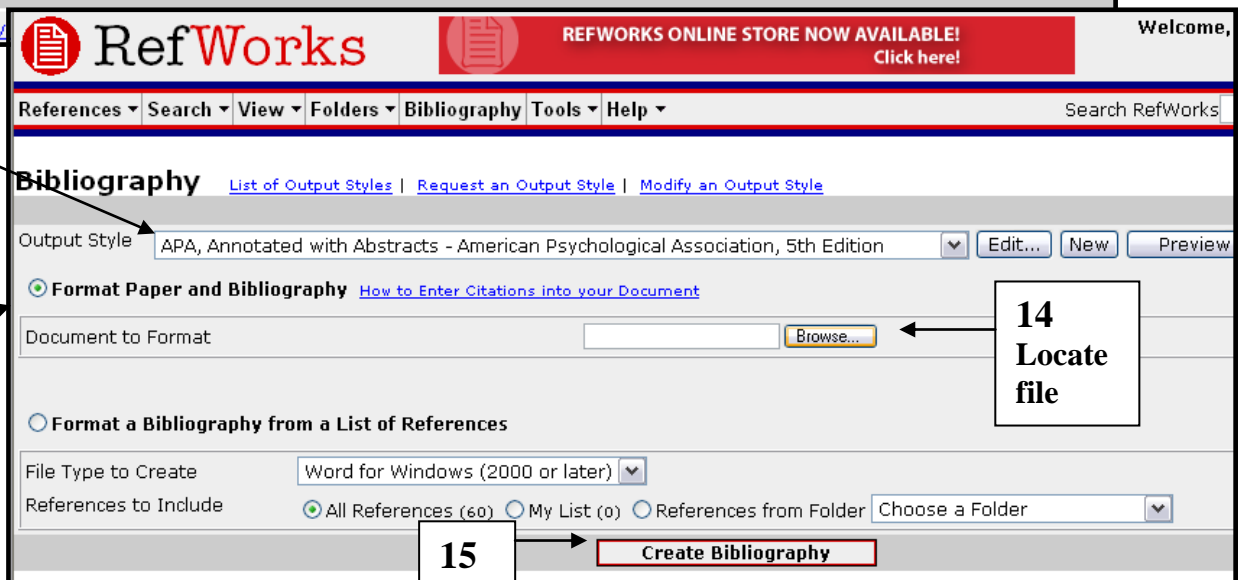


12 Output Style

13 Format paper

14 Locate file

15



16 Final document

