

Getting Started with RefWorks

Connection: Internet Access Required

Platform: Mac/PC

RefWorks is bibliographic management software, or a database manager, you can use to collect and organize citations. You can even use RefWorks to automatically create a formatted bibliography based on the information stored in your RefWorks account. RefWorks is available to all Lewis & Clark students and you can easily access it from the **Your Library Accounts** link at <http://library.lclark.edu>.

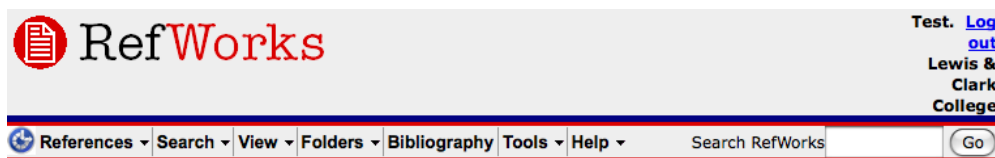
Create a RefWorks Account

To get started using RefWorks, you need to create an account.

1. To start RefWorks, simply go to the Watzek Library home page and click on the **Your Library Accounts** link. This opens a page with links to all your Library accounts, including RefWorks. Click **RefWorks** to load RefWorks and open the the RefWorks User Login page (right). If you are off-campus you will be prompted for your L&C Account information before the RefWorks Login page will load.
2. Click **Sign up for an Individual Account** to create your account. We recommend you use your e-mail login and password. If you forget your login and password, click **Forgot your log-in?** to have RefWorks email you the information.
3. Once you complete the required information, your RefWorks database will open to the Getting Started screen with links to Tutorials and other getting started information.

Main RefWorks Window

Use the RefWorks Toolbar Menus to access commands and different areas of RefWorks. The Toolbar is at the top of the RefWorks window. Several online RefWorks tutorials are located under **Help**. Download special add-ins like Write-N-Cite and RefGrab-It from the **Tools** menu.



Add References to your RefWorks Database

There are many ways to add references to your RefWorks database. The easiest method is to use direct import (sometimes called direct export) from an online database that supports RefWorks. Your results and the specific steps to follow will vary per database provider (PsycINFO, First Search, EBSCO, CSA, JSTOR, etc.) If you are not getting the results you expect, we can help at the IT Help Desk or Watzek Reference Desk.

Before you get started, turn off your pop-up blocker or be prepared to tell your blocker to allow pop-ups from RefWorks and your database search site. Pop-up blockers are on by default in L&C public computer labs and classrooms.

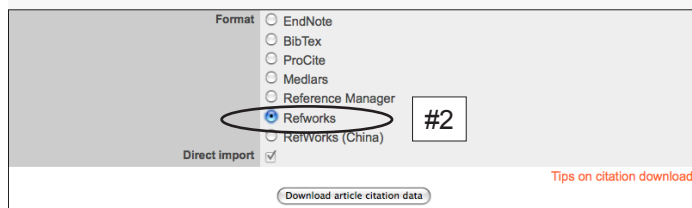
Direct Import

Direct import will directly transfer citation information to RefWorks. Links or buttons such as **Export**, **Save to RefWorks** or **Send to Citation Manager** usually trigger a direct import of the citation(s).

Anthrosource

1. Search as normal. When you are ready to direct import a citation or list, click **Send to Citation Manager**.

2. A Citation Manager web page will pop-up and prompt you to select an export method. Go to **Format** and select the **RefWorks** radio button and click **Download article citation data**. If logged in, your RefWorks window will pop open and the import process will begin. Otherwise, you'll be prompted to login to RefWorks.



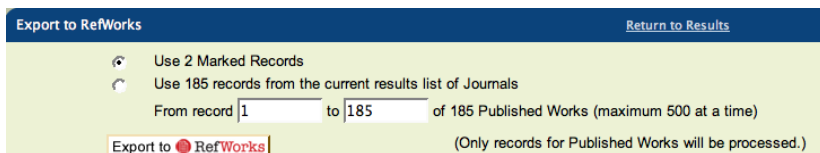
3. Click **View Last Imported Folder** to verify your import.
4. Click the Edit link next to any reference in the folder list to see exactly what information was imported.

Look for the RefWorks logo on the toolbar above the search results

CSA (Sociological Abstracts)

1. Search as normal. When ready to direct import click the RefWorks logo button to open the Export dialog box.
2. Click Export to RefWorks to start the import process.

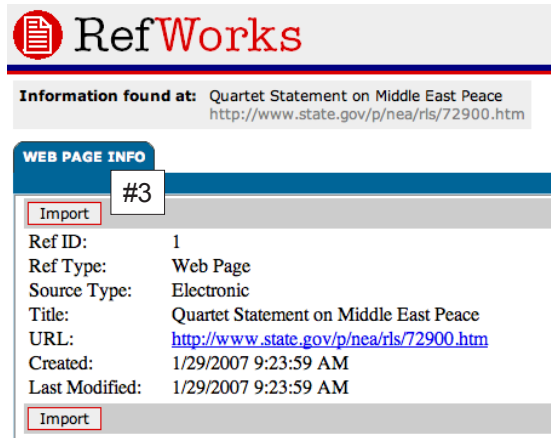
[Mark or Clear all on page](#) | [Update Marked List](#) | [Save, Print, Email](#) |  RefWorks



RefGrab-It for Web Pages

RefGrab-It is a web link that imports the current web page into your RefWorks account. The RefWorks **Tools** menu has instructions on how to add RefGrab-It to your personal computer.

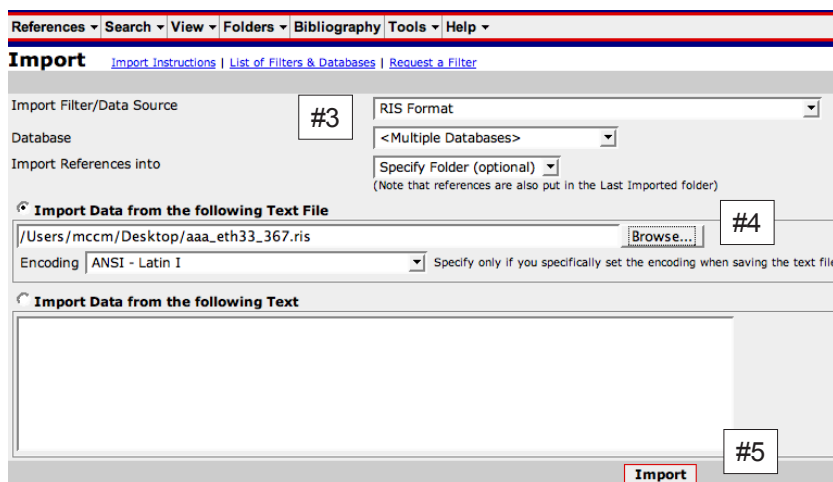
1. Click the RefGrab-It bookmark.
2. RefWorks will open a Web Page Info page that previews the information that will be added to your RefWorks Account.
3. To Import, click the **Import** button.



Importing Saved Search Results

Some databases don't support direct export. Save your search results, download them and then use RefWorks Import feature to add citations.

1. Search as normal. Mark any records you would like to save. Be sure to note the database vendor (CSA, ISI, for example) and the name of the specific database you are searching. You will need to download your saved citations to your computer.
2. In RefWorks, go to the Reference Menu and select **Import**.
3. Make the appropriate choices for the Data Source and Database.
4. Click **Browse** to select the saved file you downloaded to your computer in Step #1.
5. Click **Import** to have RefWorks add the saved citations as references in your library.



NO IMPORT is 100% error free. If you plan to use RefWorks to format your bibliography you will need to double check imported information for accuracy! Pay special attention to the Reference Type and other fields required by your style.

When all else fails, you can manually enter citations using the **Add New Reference** command under the Reference menu. The New Reference screen is identical to the Edit Reference screen. Simply tab to move between fields and either type or copy and paste citation information, notes, etc.

Folders

Folders are the primary method for organizing and storing collections of references for easy retrieval when you are ready to cite or create a bibliography. An individual reference can be added to multiple folders providing an easy way to cross-reference. You can open existing folders from the View menu. Create and manage folders from the Folders menu.



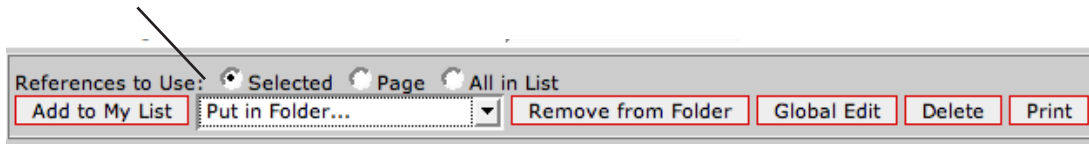
Built-in Folders

Everyone has at least three built-in collections of folders All References, References not in a Folder and Last Imported



Creating & Adding References to Folders

1. Go to the Folders menu and select **Create New Folder**. Type a name for the folder and click **OK**.
2. Go to the **View** menu and select All References. A list of all the references in your account appears.
3. Just above each reference in a shaded bar is a Ref ID number and selection checkbox. Click in the checkbox to select references you want to move OR click the Page or All in List buttons on in the Reference List toolbar as desired.
4. Go to the **Put in Folder** drop-down menu and select a folder. All selected references will be added to this folder.

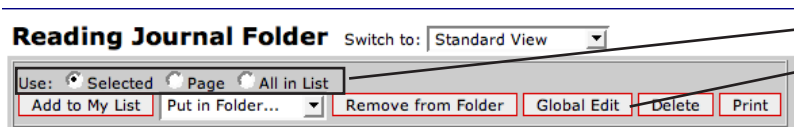


Removing Reference from Folders

1. Open the folder and locate the reference to be removed. Click in the Ref ID check-box.
2. Click the Remove from Folder button. Do NOT click Delete, as this will erase the reference from your database.

Global Edit & Other Group Commands

In addition to Folder commands, there are other commands you can use at the top of the Reference List to manage and organize groups of references such as Delete, Print and Global Edit. Global edit is useful for stripping out unwanted notes or descriptor information in several references at one time.

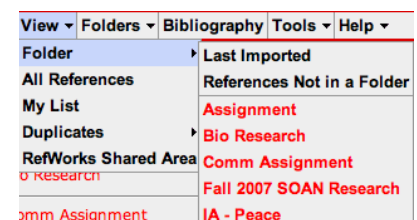


Use these buttons to manage your citations including **Global Edit**. Select which citations to change with the **Use** radio button options.

Editing References

Remember, garbage in = garbage out. It is your responsibility to review and correct any errors or omissions in references. This is especially important if you import references as information can be incomplete, contain typos and abbreviations, and even specify the wrong reference type.

1. To view references, make a selection from the View menu or type a search term in the Search Refworks box. **View >> All References** will display all references in your RefWorks account.
2. To edit a reference, click on the **Edit** link for that reference. It will open the **Edit Reference** page which will display detailed field information for this reference.



Why advance peace in the Middle East?

3. Type or copy and paste the appropriate information in the boxes available. Special instructions for data entry will appear to the right of the box as in the author field below. If you selected a particular bibliographic style, required fields will be indicated with asterisks or check marks.

Add key word descriptors, type an abstract, or include detailed notes. Make any corrections to imported information such as abbreviated Periodical names or incorrect Reference Types.

Remember to click **Save Reference** when you are done making your edits! After you save, click **Back to Reference List** to return to your list or click **Next** to open the next reference on your list in Edit mode.

User Fields

RefWorks provides 15 user fields to customize for your own use. You can even name these fields (Tools >> Customize). These fields are searchable and can be modified whenever you edit a reference. Below are some ideas for effectively using these fields:

- Note whether a source is Primary vs. Secondary
- Direct Quotations (don't forget the page number!)
- List of Papers & Assignments that cited this reference

Descriptors

Each RefWorks reference has a descriptor field (think key words) designed to assist in finding references. Imported references often include descriptors as part of the imported data.

You can add to or edit these descriptors. Descriptors have a term list which will automatically pop up when you click in the descriptor field of a reference. Use a semi-colon to separate each descriptor in Edit mode. The Search menu has a Lookup command that allows you to quickly locate and even perform group edits based on the term list.

Lookup by Descriptor in Your RefWorks Database

[[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [L](#) [M](#) [O](#) [P](#) [S](#) [T](#) [U](#)]

Abundance Estimation - UNI		
Abundance Estimation	(1)	Edit Delete
academic search premier	(1)	Edit Delete
ARAB-Israeli conflict -- 1993-	(2)	Edit Delete
ASSAD, Bashar, 1965-	(1)	Edit Delete

Create a Stand-Alone Bibliography

1. Select the references you wish to include. It is easiest to collect references in a folder.
2. Select **Bibliography** from the RefWorks toolbar.
3. Select **Access Output Style Manager** from the Output Style menu. Add your favorite styles and select the one you want to use.
4. Select **Format a Bibliography from a List of References**, the File Type, and the References to use. A word about file types: HTML will allow you to preview or print directly from the browser. It's a good way to spot check imported references. In most cases you'll want to select one of the Word formats.
5. Click on Create Bibliography at the bottom.

Bibliography [List of Output Styles](#) | [Request an Output Style](#) [Back to Reference List](#)

Output Style: **MLA 6th Edition** #3
Edit... New Preview Styles

Format Paper and Bibliography [How to Enter Citations into your Document](#)

Document to Format: Browse...

Format a Bibliography from a List of References #4

File Type to Create: HTML #4

Include: All References (83) My List (0) References from Folder... #4

Create Bibliography #5

Document Formats Supported

- Word for Windows 2000 or later
- Word for Mac 98 or later
- OpenOffice.org Writer (.odt) ***BETA-TEST***
- HTML
- Rich Text Format (RTF)
- Text

Carefully review your bibliography. You can copy and paste into a Word Document (or just output as Word) if you wish to edit the document. Typos and abbreviations should be corrected in RefWorks so the citation will format correctly next time.

Troubleshooting Tips

- Consider deactivating pop-up blockers before using RefWorks.
In Internet Explorer, go to Tools > Popup Blocker > Turn Off Popup Blocker.
In Firefox, go to Tools > Options > Content and deselect "Block pop-up windows."
In Safari, go to Safari > and deselect "Block Pop-Up Windows."

Further Information

Bibliographic Research Workshop handout - http://www.lclark.edu/~kosansky/200/200fa08/200fa08_bib_guide.pdf

Watzek Library RefWorks Help Page - <http://library.lclark.edu/reference/refworkshelp.htm>

RefWorks Online Help - access through Help Menu

RefWorks Contact Us link - access through RefWorks Help Menu

RefWorks Tutorial - <http://www.refworks.com/tutorial>

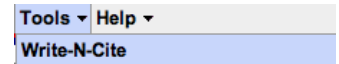
RefWorks Advanced Tutorial -
<https://www.refworks.com/tutorial/advanced/RefWorks%20Advanced%20Feature%20Tutorial.html>

RefShare Tutorial - <http://www.refworks.com/tutorial/RefShare%20User%20Tutorial.htm>



Create a Bibliography and In Text Citations with Word and Write-N-Cite

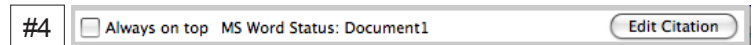
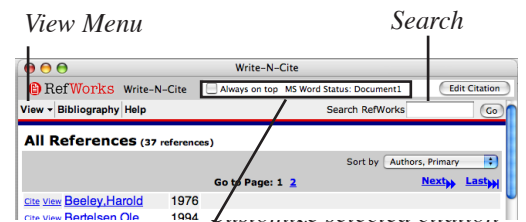
Write-N-Cite is a helper program you can use to format your in-text citations and Bibliography with MS Word. Write-N-Cite is installed on computers in the Watzek and Dubach labs. Download a copy to your personal computer from the RefWorks Tools menu.



TEST YOUR CITATION STYLE EARLY ON IN YOUR PAPER WRITING PROCESS. To preview a style, select **Preview Output Styles** from the **Tools** menu. Keep in mind there is often more than one version of popular styles such as APA and Chicago. Preview or create a test bibliography in RefWorks early on to make your selected style works as expected. Styles can be modified, but this is not for the faint of heart. RefWorks support or IT can help if you need to modify a style.

Write-N-Cite with MS Word:

1. If you haven't downloaded Write-N-Cite, do so from the RefWorks Tools menu. Run the installer when prompted.
2. Launch MS Word or open your Word Document.
3. Launch the **Write-N-Cite** application from either the Word plug-in (Windows only) or directly from a shortcut, the Dock or Programs list. You will be prompted to Login to RefWorks. Once you login, you will see the Write-N-Cite application window open to **cite view** (right) for your RefWorks database.
4. Make sure Write-N-Cite is connected to your MS Word document in the status area. If you do not see the name of your document next to MS Word Status, click the Load it button. If you want to keep Write-N-Cite on top of all other windows on your system, check the Always on top box.



5. Write-N-Cite defaults to viewing all citations. If you have a large collection of citations, you may want to select a particular folder from the View Menu. You can search your collection using the Search RefWorks box.
6. Once Write-N-Cite is connected to your document and you've selected the references you wish to view, type in Word as normal. Whenever you want to include a citation, switch to Write-N-Cite and click the **Cite** link next to the appropriate citation. Write-N-Cite will automatically copy and paste a temporary citation in your document.



7. To customize or preview your in text citation, click the Edit Citation button in Write-N-Cite. Here you have options for adding page numbers, text or suppressing information. Specific page works with styles that cite page numbers. Use text after for styles that do not cite page numbers by default.
8. Once you are ready to format your final paper, click the Bibliography button in Write-N-Cite.
9. Select the Output Style you wish to use and click **Create Bibliography**. RefWorks will upload your word document and automatically download and open a formatted version of your document. It will be named *Final-originaldocname*.

