



# RefWorks

## Overview

RefWorks is a personal information and research manager that allows you to create your own online database of bibliographic information that can be organized and used when writing a paper or article.

Temporary citation placeholders pointing to citations in your RefWorks database are inserted into a document at the exact spot where final in-text citations and/or footnotes should appear. Once the draft version of the paper or article is completed, RefWorks “reads” those temporary citation placeholders, and, based on the output style that you have chosen (from over 800 options), formats them according to that style, and creates a bibliography or endnotes. A new version of the paper is returned to you for saving.

Because RefWorks is web-based, you can access your account from any computer with internet access. Data is stored on RefWorks’ servers – not locally on Knox servers.

With RefWorks, you also have the ability to share a database in read-only format with others.

### **This training session will cover:**

- ◆ Creating an account and logging in
- ◆ Navigation
- ◆ Getting references into RefWorks
- ◆ Working with references: viewing, organizing, sorting, searching
- ◆ Creating a bibliography
- ◆ Sharing references using RefShare

## Getting Help for Refworks

There are a variety of options for getting help with using RefWorks:

- Once you are logged into RefWorks, go to the Help menu. Use the **online help** and the **tutorials**.
- Use the **FAQ (Frequently Asked Questions)** at <http://deptorg.knox.edu/library/refworks/refworksfaq.htm>
- Contact one of the reference librarians.

## Creating an Account

1. Point your browser to [www.refworks.com/refworks](http://www.refworks.com/refworks) (or click on the link on the library's web page).
2. Click on **Sign up for an Individual Account**.
3. Fill in the form.
4. Click **Register**.

Congratulations you now have a RefWorks account!  
Close your browser. Open your browser and return to [www.refworks.com/refworks](http://www.refworks.com/refworks) and login to your new account.

Email address must be a Knox address!

**New User Information for Knox College**

(All fields are required)

Your Name  
Reference Librarian

Login Name  
reference

Password  
\*\*\*\*\*

Re-enter Password  
\*\*\*\*\*

E-Mail Address  
reference@knox.edu

Type of User  
Other

Area of Focus  
Other

## Logging in to RefWorks from Off-campus

When you use RefWorks from home or **from a computer not connected to the Knox network**, you will log in a bit differently. After clicking on the link to RefWorks from the Library's web page, you will see this dialog box:

The Group Code is  
**RWKnox**

**Welcome to RefWorks**  
Your Online Research Management, Writing and Collaboration Tool

Remote Access | Individual Log-In | Trial Log-In

To Access your Institution's RefWorks subscription remotely,  
Enter the **Group Code** here.

Go To Login

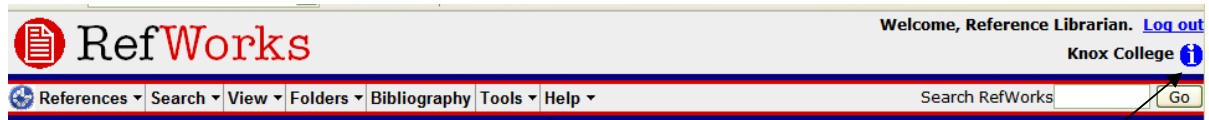
Athens users  
Login through your institution (Shibboleth users)

[Don't know your Group Code?](#)

Enter the Group Code (from above) and continue logging in.

## Navigation

Navigate within RefWorks with the toolbar and the pull-down menus.



"Help" is available in two places.

Explore the toolbar.

## Getting References into RefWorks

### ◆ Add a new reference manually.

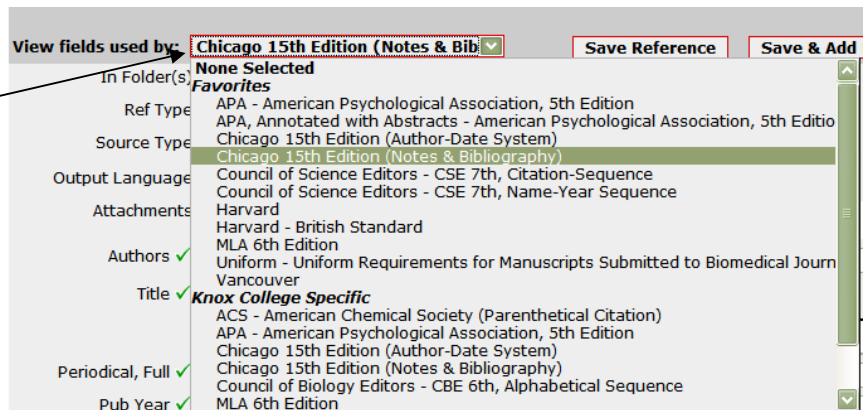
1. Click **References** pull-down menu, then **Add New Reference**.

2. Change the **fields to view** by selecting a style (View Fields used by box).

3. Select the reference type.

4. Enter details in all fields marked with ✓ (i.e. fields required for correct citation for this output style).

5. **Save** reference, or **Save & Add New** to continue adding more references.



### ◆ Import references from a library catalog search.

1. Click on the **Search** menu, select **Online Catalog or Database**.

2. Choose a library catalog from the alphabetical drop-down list.

3. Set the **Max. Number of References** to something manageable (25 or 50).

4. Do a **Quick Search** or an **Advanced Search** (to select a field to search within).

5. Your search results will display in another window or browser tab. At this point the references are not yet in your RefWorks database. To import references, from the top or bottom of the page, select "**All in list**", "**Page**" or **select specific references** to import by checking the boxes next to each reference.

6. Click the **Import button**, and confirm that you want to import the references.

7. Return to your RefWorks database (look for the other RefWorks browser tab). You should see a message telling you how many references were imported.

8. Click on the button that says "View Last Imported Folder."

9. Move your newly imported references around to folders as you wish. If you do not move them they remain in the "References Not in a Folder" category.

## ◆ Direct Export from an EBSCO database.


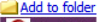
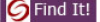
RefWorks works with database partners to expedite the process of automatically transferring data from one service or database into RefWorks. **This is known as Direct Export.** The complete list of Direct Export partners is available from:

[http://www.refworks.com/content/products/direct\\_export.asp](http://www.refworks.com/content/products/direct_export.asp)

Check the RefWorks online help for detailed instructions for a specific vendor.

1. Go to an EBSCO database and conduct a search.
2. Select several records to import by clicking on the **Add to folder** link underneath each citation.

Click the Add to folder link here for each reference you want to export into your RefWorks database.

4. [COLLEGE PRESIDENT ON THE PRAIRIE: JOHN H. FINLEY AND KNOX COLLEGE IN THE 1890'S](#)   
Gettleman, Marvin E.; History of Education Quarterly 1969 9(2): 129-153 25p. Historical Period: 1890's (AN: A000028868.01)  
Abstract Only  
 [Add to folder](#)  
 [Find this article.](#)  
Notes: Knox does not have a print subscription to this title. Click on the Find It button to check for online subscriptions.

3. Click on the **Folder button** located at the top of the screen.
4. Select the items to export (check the “select all” option) and click on the **Export icon**:

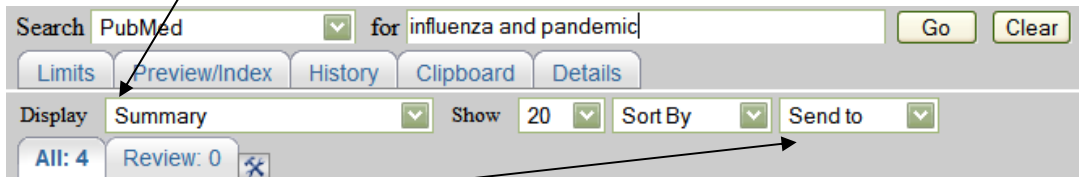


5. Click the “Direct export to RefWorks radio button.
6. Click the **Save** button. Your records should be imported into your **Last Imported Folder** in RefWorks. You should see a message telling you how many references were imported.
7. Click on the button that says “View Last Imported Folder.”
8. Move your newly imported references around to folders as you wish. If you do not move them they remain in the “References Not in a Folder” category.

## ◆ Import data from a saved text file.

For some databases, there is no Direct Export function for use with RefWorks. In this case, you will need to save your references in a text file and import them into RefWorks. In this example, we are using the PubMed database. **Go to the library web page, click on the Databases A-Z link and select PubMed from the list.**

1. Try a simple search on a topic (try Influenza).
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** summary, select **Medline** from the drop-down list to view your records.



4. In the **Send to** drop-down, select Text.
5. A new window will open with your references.
6. 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.
7. In **RefWorks**, go to the **References** menu option on the toolbar and select **Import**.
8. Select **NLM PubMed** as the data source and **PubMed** as the database.
9. **Browse** to find the text file you saved to your computer and click on **Open**.
10. Click **Import**. Your records should appear in the **Last Imported Folder**. You should see a message telling you how many references were imported.
11. Click on the button that says "View Last Imported Folder."
12. Move your newly imported references around to folders as you wish. If you do not move them they remain in the "References Not in a Folder" category.

### To use this method with search results from the Knox Library Catalog:

1. Perform your search in the library catalog.
2. Mark items you want by checking the boxes to the left of the items. **Note: Be sure to click "Retain Selections" before moving to the next page of references.**
3. When you are finished marking references, click "Retain Selections" again.
4. At the bottom of the page, click "Selected, all pages" radio button and make sure the "Full record" format is chosen:

Print or Email	
<b>Which records?</b>	<b>Select format:</b> (Email is always "full.") Full Record <input type="button" value="Print/Save"/>
<input type="radio"/> All this page	<b>Enter your email address:</b> <input type="text"/> <input type="button" value="Email"/>
<input checked="" type="radio"/> Selected, all pages <small>Click "Retain Selections" between pages.</small>	<input type="button" value="Put Selected Titles in MyBookbag"/>

5. **Click the Print/Save button.** Copy your references to the clipboard or save them to a text file on your computer.
6. In your RefWorks account, under the References menu, select Import.
7. Select "Endeavor/Voyager" as the Import Filter. Browse for your file or paste the data in the box. Click the **Import button**.

## Working with References

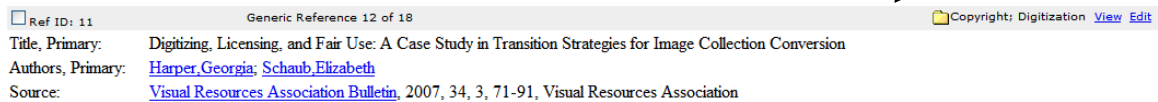
### ◆ Organizing references: Creating folders and moving information

Create a new folder from the **Folders menu > Create new folder**. (You can rename, delete or clear a folder of references from the Folder menu > Organize folders.)

You can move references around from folder to folder:

1. When viewing a list of references, check the references you want to move (or select the “page” or “all in list” radio button at the top of your list of references).
2. Click the “Put in folder...” drop-down list and select a folder.

References can exist in more than one folder. You can see the folders in which a reference resides in the **Standard** and **Full** views:



**Note:** To find references that have not been filed in a folder go to the Folder menu > View > References not in a folder.

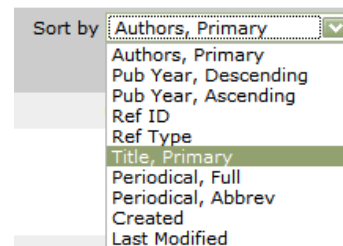
### ◆ Searching for references

The quick search box at the top right-hand of the RefWorks application searches for your terms across all fields. To do more precise searching use the Advanced Search from the pull-down menu on the toolbar. The Advanced Search allows you to select specific fields for searching and limit by a specific folder.

In addition to searching, you can lookup reference by author, descriptor or periodical. Go to the **Search menu** and select “**Lookup by Author**” or “**Lookup by Descriptor**”.

### ◆ Sorting references


The sort function is located at the top-right of the RefWorks application:



## Sharing References

With RefWorks you have the ability to share your references, either your entire database or selected folders within your database. When you share a database (or folder), **people viewing your references do not have the ability to change, delete or add references**, but you may give them the ability to use the references in bibliographies, or export or print references.

1. To share, go to the **Folders menu** and select **Share Folders**.
2. Click the **Share database** button to share the entire database, or click on a **Share folder** button to share a specific folder.
3. Make choices about how you want to share your database or folder by checking the boxes next to the items on the screen.
  - **Take note of the URL** at the top of the screen (you can email this to yourself). This is the URL you will need to give to people (or post on your Moodle site) so that they can see your shared references.
  - The last portion of this dialog screen refers to the RefShare options.



Click the Reference Sharing Options box to make your shared references **publicly available on the Knox RefShare site**. If you do this, you may also want to give it a title and description.

When you elect to share references via RefShare, your sets of references **become public** on the Knox RefShare site at <http://www.refworks.com/refshare/?site=050481210230000000/> . This RefShare site also accessible within RefWorks from the View menu > RefWorks Shared Area.

## Create a List of References in Preferred Output Style

There are 3 methods to **view a group of references in proper bibliographic style.**

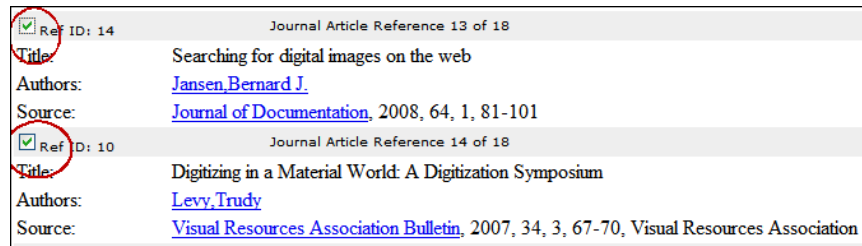
◆ The first method allows you to view all references, or references from a specific folder:

1. In RefWorks, click the **Bibliography menu option** from the toolbar.
2. Select an output style from the drop-down list.
3. Select the **Format a Bibliography from a List of References** radio button.
4. Select **RTF (Rich Text Format)** as **File Type to Create**.
5. Select one of your folders in the **References from Folder** drop-down.
6. Click on **Create Bibliography**.

A list of properly formatted references will be created as an RTF file for you to save, print, or email as required.

◆ The second method involves using the My List feature:

1. With a list of references in view, put checkmarks in the boxes next to the references you want to (temporarily) add to My List.



Ref ID	Title
<input checked="" type="checkbox"/> Ref ID: 14	Searching for digital images on the web
	Authors: <a href="#">Jansen, Bernard J.</a>
	Source: <a href="#">Journal of Documentation</a> , 2008, 64, 1, 81-101
<input checked="" type="checkbox"/> Ref ID: 10	Digitizing in a Material World: A Digitization Symposium
	Authors: <a href="#">Levy, Trudy</a>
	Source: <a href="#">Visual Resources Association Bulletin</a> , 2007, 34, 3, 67-70, Visual Resources Association

2. Click the **Add to My List button** located at the top of the page. (You can see what's in the My List by selecting it from the View menu.)

3. Click on the Bibliography menu item on the toolbar.
4. Choose an output style.
5. Click the **Format a Bibliography from a List of References** radio button.
6. Choose a file type to create.
7. Click the **My List** radio button.
8. Click the **Create Bibliography** button. You now have a second document (or an HTML page from which you can copy the references), with proper citations and formatted bibliography. Save this document with a new name.

◆ The third method uses the “Switch to” view to view all the references in a folder in a particular style. You must first customize your view to include up to 3 styles:

1. From the **Tools menu**, select **Customize**.
2. In the drop-down lists next to “Output Styles Choices for Reference View” choose up to 3 different output styles.
3. Scroll to the bottom of this page and click the **Save** button.

After completing your customization, return to a list of References (select an option from the **View** menu). Change the “**Switch to**” view to select one of the output styles that you just added. You can then copy and paste references from here into documents.

## Citations: Using Write-N-Cite with MS Word

Write-N-Cite is a plug-in for Microsoft Word that allows you run an abbreviated version of your RefWorks database in Word. This allows you to quickly search for and cite references in your paper.

First download the correct plug-in from within RefWorks: Go to the Tools menu, select Write-N-Cite. **Windows users will need to download and install Write-N-Cite III**, and Mac users will need to download and install Write-N-Cite 2.5.

Log out of RefWorks.

1. Open **Microsoft Word** and type some text.
2. Launch the **Write-N-Cite** plug in. [This is in a different place depending on what version of MS Office you have: in Office/Word 2003: on the Word toolbar or from the Word menu option Tools > Write-N-Cite; in Office/Word 2007 the Write-N-Cite is under the Add-Ins tab].
3. Login to your RefWorks database.
4. Do a **quick search** in Write-N-Cite for a reference you've added to your database.

5. In your Word document, place your cursor in the text, **where you want to insert the citation.**



6. Back in Write-N-Cite, click on the **Cite** link next to the record that you want to cite.
7. Return to your document and notice the temporary citation placeholder for the citation—the placeholder has the reference ID number, author and date surrounded by curly braces:

{{ 15 Mopsik,Eugene 2008 }}

Continue typing text and add a few more citations. You can include more than once citation placeholder in the same grouping.

8. Save your document.
9. Back in the Write-N-Cite Window, click on **Bibliography** and choose an output style. Click on the **Create Bibliography** button.
10. Your paper is now formatted: your temporary citation placeholders have been changed and a bibliography has been added to the end of your document.

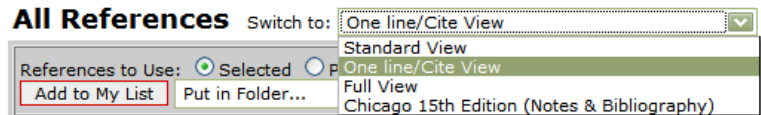
**Note:** If you want to revise your paper and add additional temporary citation placeholders you do NOT need to unformat your document. Simply add the new temporary citation placeholders to the appropriate spot(s) in the paper and re-format your paper. Your newly added placeholders will be formatted and the bibliography will be updated.

## Citations: Citing *Without Write-N-Cite*

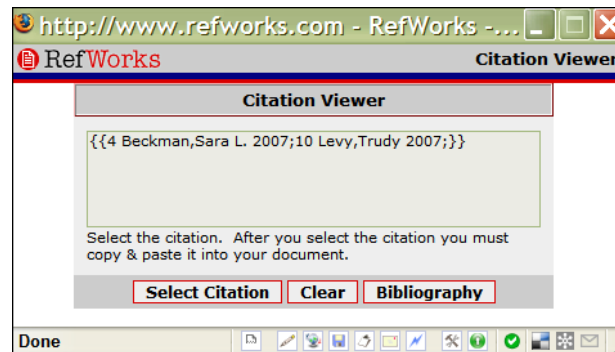
Open your word processor and type the following text (or any text):

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. Login to RefWorks.
2. Do a quick search for reference.
3. Choose the **One line/Cite view** in the **Switch to:** drop-down.



4. Choose a reference and click on its **Cite** link.
5. A box will open with the RefWorks temporary citation placeholder.
6. Click on the **Select Citation** button.
7. In your document, place your cursor where you want the citation to appear and **paste** the citation placeholder into your document.
8. Repeat the previous steps with another citation, or multiple citations, placing them elsewhere in the text (make sure to **Clear the Citation Viewer** first!).
9. Close and save your document (file type must be either .doc, .odt or .rtf).
10. In RefWorks click on the **Bibliography menu option** from the toolbar.
11. Choose an output style.
12. Select the **Format Paper and Bibliography** radio button.
13. Browse to locate your file as the **Document to Format**.
14. Click on **Create Bibliography**.
15. You now have a second document, with proper citations and formatted bibliography. Save this document with a new name.



### *Important Note!*

RefWorks formats bibliographies based on the available information. If your citation is incomplete (or inaccurate) in your RefWorks database, your citation will be incomplete (or inaccurate) in your formatted bibliography.

## **Backing Up and/or Exporting a Database**

RefWorks (the company) backs up all data as part of their normal business practice. You may wish to backup or export your database as an extra precaution, or because you are leaving Knox and will no longer have access to the Knox RefWorks service.

To make a backup of (and restore) your database:

1. From the Tools menu, select **Backup/Restore**.
2. By default, all Backup options are selected. Click the **Perform Backup** button.
3. You will be prompted to save a .rwb file or .zip file to our computer. (The .rwb file is not readable—it is only useful for restoring into a RefWorks account. To get a readable file of references, use Export instead of Backup.)
4. To restore, **select Tools > Backup/Restore**.
5. Click the **Restore** button.
6. Browse to find your backed up RefWorks database file.
7. Check the options to include.
8. Click on **Perform Restore**.

**Note:** Restoring a database overwrites everything in your account.

To export your database:

1. From the Tools menu, select **Export References**.
2. Choose the “References to include”
3. Choose an option for the Export Format.
  - RefWorks Tagged Format will allow you to easily import your file into RefWorks.
  - Tab Delimited allows you to easily import your file into Excel or another database application such as Filemaker Pro.
4. Click the **Export to Text File** button.
5. Another window/tab will appear with your file’s data. Save this data to a text file.

## Advanced Features and Functions\*

- ◆ Using the Output Style Editor to customize an output style
- ◆ Using the RefGrab-It tool to bring citations into your database from web sites
- ◆ Importing an EndNote database
- ◆ Importing references from a Filemaker Pro database, Excel spreadsheet, etc.
- ◆ Using RSS feeds
- ◆ Duplicate detection
- ◆ Adding attachments to a citation
- ◆ Using the Global Edit function
- ◆ Working offline with references from your RefWorks database

\*Things that you might want to explore on your own; or things that could be covered in an advanced RefWorks training session.