

## Going Over the Basics of



<http://www.refworks.com/RefWorks>

### Create a RefWorks Account

1. Select Sign Up for an Individual Account
2. Enter the required information: Your Name, Login Name, Password, and E-Mail address
3. Select from the pull-down menus the Type of User you are, as well as your Area of Focus, then select Register

### Build Your Database > Import Reference Data Directly

1. Use the *save or export function* within an online database, select the save to RefWorks option. If there is not a save to RefWorks option, select the save as text file option.
2. If you already are logged into your RefWorks account, the import will begin. If you are not logged in, do so, and then the import will automatically begin.
3. Once the import is complete, select from the menu View > Folder > Last Imported to review the imported references.

### Build Your Database > Import Reference Data from Saved Text Files

Save references you want to import into RefWorks from an online database, catalog, or other bibliographic management program as a text file (.txt).

1. Once logged into your RefWorks account, select from the menu References > Import.
2. Select from the subsequent menus the relevant source:
  - Import Filter/Data Source > name of database provider (e.g., CSA, EBSCOhost, ERIC, Endeavor Voyager)
  - Database > name of specific database (e.g., Biological Sciences, Academic Search Premier, EIRC, National Agricultural Library Catalog)
  - Import References Into > optional – specify the name of the folder you want the data imported into, if you do not choose a folder the references will be put into a folder entitled *Last Imported*
3. Use the Browse button to locate the text file you want to import.
4. Once you see the name of the text file you want to import in the box to the left of the Browse button, select Import.
5. Once the import is complete, select from the menu View > Folder > Last Imported to review the imported references.

### Build Your Database > Enter Reference Data Manually

1. Select References > Add New Reference
2. Under View required fields for, select the Bibliographic Style you plan to use (e.g., APA, CBE, MLA)
3. Under Ref Type, select the type of reference you are entering (e.g., Article, Book, website).
4. Under Source Type, select Print or Electronic
5. Once you have selected the Bibliographic Style, Ref Type, and Source Type you will notice a *red asterisk (\*)* next to fields that require information to create an accurate citation (i.e., an APA Book in print/paper format shows an asterisk next to the following fields of information: Authors, Book Title, Pub Year, Editor, Edition, Publisher, Place of Publication, Links, Retrieved Date; additionally, at the bottom of the page there is a Additional Comments about APA section defining the fields and their use by the style).
6. Enter information in the required fields. Select Save once you are finished.

### Build Your Database > Import Reference Data from Non-Database Sources

**RefGrab-It** is a downloadable utility program found at the following path Tools > RefGrab-It. Once this utility program has been downloaded to your computer, you will see a link to it on your browser toolbar in the Links area.

1. When you want to add a website or other non-database source, click the RefGrab-It button on your browser toolbar.
2. If you already are logged into your RefWorks account, the import will begin by displaying the information about the website as it will be imported. If you are not logged in, do so, and then information about the website will be displayed.
3. Click the Import button. Once the import is complete, select from the menu [View](#) > [Folder](#) > [Last Imported](#) to review and/or edit the imported reference.

## Search Your RefWorks Database

Can be done in one of three ways:

- **Quick Search.** Use [Search RefWorks](#) box in upper right hand corner to enter search term(s), then select [Go](#)
- **Advanced Search.** [Search](#) > [Advanced Search](#), can combine up to four search terms and search all your Database's references, or limit your search to specific folders in the Database
- **Lookup Indexes.** Database indexes the authors, descriptors, and periodicals in your Database in A-Z order
  - [Search](#) > [Lookup by Author](#), provides an indexed list of all the authors in your Database
  - [Search](#) > [Lookup by Descriptor](#), provides an indexed list of all the descriptors in your Database
  - [Search](#) > [Lookup by Periodical](#), provides an indexed list of all the periodicals in your Database

## Manage Your References

- **Create Folders.** [Folders](#) > [Create New Folder](#), type the name of the folder you would like to create in the *New Folder Name* box, then click [OK](#)
- **Place References into Folders.** [Folders](#) > [View](#) > [Last Imported OR Folders](#) > [View](#) > [References Not in a Folder](#), you can then select the references you want from the list and then use the pull-down [Put in Folder...](#) menu to select the folder you want to put your references into
- **Organize Folders.** [Folders](#) > [Organize Folders](#), here you can *rename* or *delete folders*, you can also *create a new folder*, *share folder*, or see the number of references you have in each of your folders, as well as the total number of references in your database
- **Sort References.** Use the [Sort by](#) pull-down menu to sort your references by one of the following: Authors/Primary, Pub Year/Descending, Pub Year/Ascending, Ref ID, Ref Type, Title/Primary, Periodical/Full, Periodical/Abrev, Created, or Last Modified
- **Globally Edit References.** Choose the references you want to edit, and then select the [Global Edit](#) button. Once on the *Global Edit* page, you must select the [Field to Edit](#) from the [Choose Field to Edit...](#) pull-down menu. You also need to decide [If Field Already Contains Data](#), do you want your edit to append or overwrite the existing data.
- **Share References - RefShare.** [Folders](#) > [Share Folders](#), select the [Share Folder](#) button next to the name of the folder you would like to share, choose the preferences you want from the [Shared Folder Options](#), then [Save](#) – you can then email the html link to those you want to share the Folder with, or let people know it is accessible within RefWorks via [View](#) > [RefWorks Shared Area](#)

## Create Formatted Citations and Generate a Bibliography > Use Write-N-Cite or One line/Cite View

Create and format in-text citations and a bibliography in a *variety of formats* (i.e., .doc, .txt, .rft, .html). This can be done two ways:

1. **Write-N-Cite.** A downloadable utility program found at the following path [Tools](#) > [Write-N-Cite](#). Once this utility program has been downloaded to your computer, you will see an icon for it in the upper right hand corner when you open Word (Word 2003) OR under the Add-Ins tab (Word 2007). **\*\*Downloaded it but still don't see it? Try opening a new Word document. Still don't see it? Go to [Start](#) > [All Programs](#) > [RefWorks](#) > and click [Install Write-n-Cite Plug-in for Word](#).\*\***
  - i. When you are ready to insert a citation in your paper, select the [Write-N-Cite](#) icon from within Word. You will be prompted to, and need to, login to your Individual RefWorks account.

- ii. Once in your account, select the Cite link to the left of the reference you want to insert. Use this same method to insert all the citations in your paper, then Save your document.
  - iii. Select Bibliography within *Write-N-Cite* to format the citations you have inserted and to create a References list. Select the Output Style necessary for your paper from the pull-down menu, and then select the Create Bibliography button to generate the newly formatted document.
  - iv. A new page will come into view that says, "Please wait while we process the file..." Once the file has been processed/created, a new document, appended with Final-, will be downloaded to your desktop, and you will see a message that reads, "Your manuscript was processed successfully. No errors were encountered". This document is 'edit-able'; you can continue to revise it, as needed.
2. **One line/Cite View.** If you are using a public computer where you cannot download Write-N-Cite, or Netscape browser, use the One Line/Cite View function.
- i. When you are ready to insert a citation in your paper, use the Switch to: pull-down menu to switch your view from the Standard View or Full View to the One line/Cite View.
  - ii. Once in this view, select the Cite link to the left of the reference you want to insert. A *Citation Viewer* will then pop-up.
  - iii. Select Citation to copy the citation then put your cursor where you want the citation inserted in your paper and use the Paste function of Word to insert the citation. Save and Close your document once you have added all the references you need for your paper.
  - iv. To format the citation and create a bibliography, select Bibliography, choose the *Output Style* for your paper, select Format Paper and Bibliography, and then use the Browse... button to locate your saved paper/document.
  - v. Once your document appears in the *Document to Format* box, select the Create Bibliography button. This will generate a new/final version of your paper, downloaded to your desktop, with the citations and Bibliography formatted to the specific citation style you selected. This document is 'edit-able'; you can continue to revise it, as needed.

## RefWorks References

*RefWorks User Quick Start Guide* (n.d.). (Version 4.1). San Diego, CA: RefWorks. Retrieved August 21, 2007, from [http://www.refworks.com/refworks/help/RefWorks\\_Quick\\_Start\\_Guide.pdf](http://www.refworks.com/refworks/help/RefWorks_Quick_Start_Guide.pdf)

*RefWorks website*. (2006). Retrieved September 15, 2007, from <http://www.refworks.com/>