



# RefWorks User

## Quick Start Guide Version 3.1

### Logging In

#### Institution-Wide Subscribers

Access [www.refworks.com / refworks](http://www.refworks.com/refworks) and then enter your personal Login Name and Password. (First-time users need to sign up for an individual account following the screen prompts.)

*NOTE: Remote Users, accessing RefWorks from off site or from a non-registered IP address, must enter the institution's "Group Code" prior to entering the personal Login Name and Password.*



# RefWorks

[www.refworks.com](http://www.refworks.com)

#### Technical Support

[support@refworks.com](mailto:support@refworks.com)

+1 775-327-4105

#### Order Information

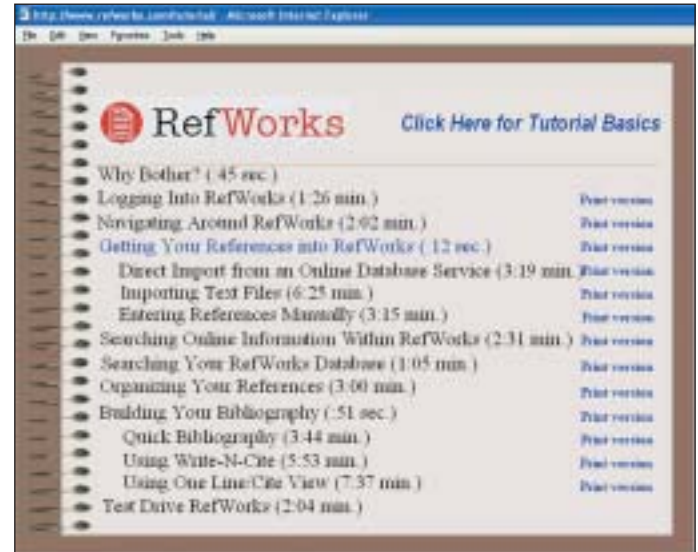
[refworksinfo@csa.com](mailto:refworksinfo@csa.com)

+1 800-843-7751 (U.S. & Canada)

+1 301-961-6700 (Worldwide)

## Need More Help?

### Online Tutorial



A tutorial providing explanations of various RefWorks functions is available online. To access it, click on **Tutorial** appearing at the top of every RefWorks page.

### Technical Support



#### Online

Click on **HELP** at the top of the screen to access detailed instructions, frequently asked questions, administrator tools, and much more.

#### E-Mail

Send questions or problems to [support@refworks.com](mailto:support@refworks.com).

#### Phone

Contact RefWorks Technical Support at +1 775 327 4105.

# Creating Your RefWorks Database

There are three ways to create a database — importing data directly from an online database service; importing data from saved text files; or manually typing in the data.

## Importing Data Directly



You can import records directly into RefWorks from a number of online database services (listed below) without the need to create a text file.

1. Under the save or export function within the online service, select or click onto **RefWorks**.
2. If you also have your RefWorks account already open, the import will automatically begin. If not, then you will be prompted to the RefWorks login page, after you login, the import will automatically begin. **A**
3. When the import is complete, select **View Last Imported Folder** to review the imported records.

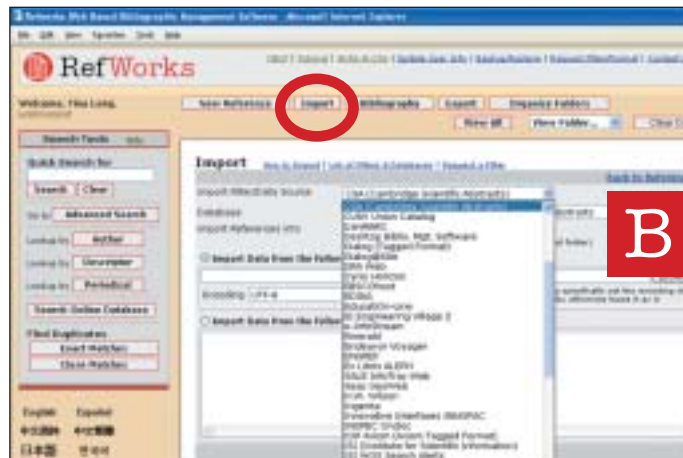
**NOTE: Other online data providers will also be adding direct export links. Check with your data service provider for more information.**

Direct export to RefWorks is available from the following online database services:

- CSA (Cambridge Scientific Abstracts) • OCLC
- OVID • ProQuest • ABC-Clio • BioMed Central
- BioOne • NISC • Ei Engineering Village 2
- Project Muse • SFX • 1Cate

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## Importing Data From Saved Files



References can be imported into RefWorks from a text file created by saving references from a number of online database services or other bibliographic managers (listed below).

1. Retrieve the results you want to export from the online service or bibliographic manager, and save them to a text file. Access your RefWorks account and click on **Import**.
2. On the subsequent menu, access the drop-down menu next to **Import Filter / Data Source** and click on the source of the data. **B**
3. Click on the **Database** drop-down menu and select the source database.
4. Click on the **Import References into** menu and designate the folder where you want the imported references to be filed. (Optional — see Organizing Records.)
5. Enter result file name into **Import Data from the following Text File** by browsing and selecting or manually entering the file name.
6. Click on **Import** at the bottom of the screen.

When the import is complete select **View Last Imported Folder** to review or customize the imported records.

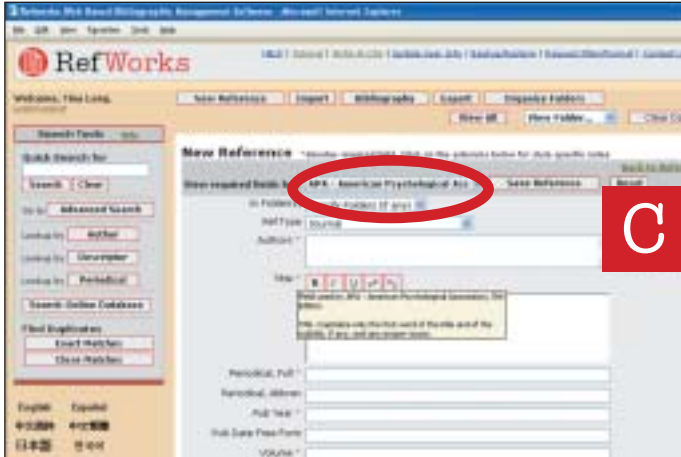
### Online Services

- |  |                                   |  |                                  |
|--|-----------------------------------|--|----------------------------------|
| • ABC-CLIO                             | • Education-Line                  | • ISI (Institute for Scientific Information) | • ProQuest Digital Dissertations |
| • BibTeX                               | • Ei Engineering Village 2        | • ISI WOS Search Alerts                      | • RIS Format                     |
| • BIDS                                 | • e-InfoStream                    | • JDream                                     | • RLG Eureka (Full Format)       |
| • BooksInPrint                         | • Emerald                         | • JSTOR                                      | • Science Direct On Site         |
| • British Library                      | • Endeavor Voyager                | • MARC Format                                | • ScienceDirect (RIS Format)     |
| • CABl                                 | • Ex Libris ALEPH                 | • MIMAS                                      | • SilverPlatter WebSPIRS         |
| • CAS SciFinder                        | • GALE InfoTrac Web               | • NCJRS Abstracts Database                   | • SIRSI Library Software         |
| • CISTI Source                         | • Geac GeoWeb                     | • NISC                                       | • TOXNET                         |
| • CSA (Cambridge Scientific Abstracts) | • H.W. Wilson                     | • NLM PubMed                                 | • TRIS Online                    |
| • Dialog (Tagged Format)               | • Ingenta                         | • NOTIS                                      | • UKMARC                         |
| • Dialog@Site                          | • Innovative Interfaces INNOPAC   | • OCLC FirstSearch                           | • VTLS                           |
| • DRA Web                              | • INSPEC Ondisc                   | • OVID                                       |                                  |
| • Dynix Horizon                        | • IOP Axiom (Axiom Tagged Format) | • ProQuest                                   |                                  |
| • EBSCOhost                            |                                   |  |                                  |
| • EDINA                                |                                   |  |                                  |

# Creating Your RefWorks Database

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## Manually Entering Records



1. Click on *New Reference*.
2. Start by selecting your output style (e.g. APA, Chicago, or MLA) and designate the type of reference you are entering (e.g. journal, book, or dissertation). Field names marked with a red asterisk (\*) are required to produce correct bibliographic references for that format and reference type. Fields not marked with a red asterisk are available for your personal reference. **C**

*Note: Click on any asterisk to view output format-specific notes about the field.*

3. Enter information in the boxes provided and click *Save* when finished.

## Converting From Other Bibliographic Management Products



RefWorks is compatible with a number of other bibliographic management products. You can easily convert your existing database into RefWorks. **D**

For details related to importing data from specific individual bibliographic management products, please refer to the online HELP section of RefWorks.

# Retrieving Records From<sup>3</sup> Your RefWorks Database

There are three search features available in RefWorks: Quick Search, Advanced Search, and Look Up Indexes.

## Quick Search

Use the Quick Search feature as a search of all fields. To produce maximum results, all search terms entered are connected by the Boolean connector OR. In addition, searches retrieve embedded terms — a search for “art” retrieves references with “heart,” “part,” etc. The results of a Quick Search are always ranked by relevancy.

1. Enter search terms in the box under *Quick Search for*.
2. Click on *Search*.
3. Results are displayed along with the search terms highlighted.

## Advanced Search



Use the Advanced Search for a very specific search of your database, choosing the field in which you want to search: Author, Title, Periodical, Descriptor, Abstract, Pub Year, Volume, or Ref ID. Connect terms by Boolean operators. The results of an Advanced Search are displayed alphabetically by author.

1. Click on *Advanced Search*. **J**
2. Enter search terms and corresponding fields into the Advanced Search menu.
3. Select which folder or sets of records to search.
4. Click on *Search*.
5. Results are displayed with the search terms highlighted.

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# Editing and Organizing Your RefWorks Database

Edit any field in an individual reference by clicking on the Edit link at the top corner of the reference.

## Adding Descriptors To Records Globally



1. Mark records.
2. Click on **Add Descriptor**.
3. Select **Add to which References** — choose from Selected, Page or All in List.
4. Type in **descriptor** term and click **OK**. **E** To enter multiple descriptors separate them with a semi-colon. For example, “descriptor;term”

## Editing Author, Descriptor Or Periodical Names Globally



1. Select Lookup by Author, Descriptor or Periodical from the Search Tools box.
2. Locate desired name and select **Edit**. **F**
3. Type new name in the **to** box and click **OK**.

## Duplicate Checking



There are two ways to locate duplicate records in RefWorks.

**Exact Matches** — checks for exact matches based upon the Author Names, Title and Year of Publication fields. **G**

**Close Matches** — checks by comparing a combination of Author Names, Title, and Year of Publication. This provides a loose comparison so it may result in a display of references that are not exact matches.

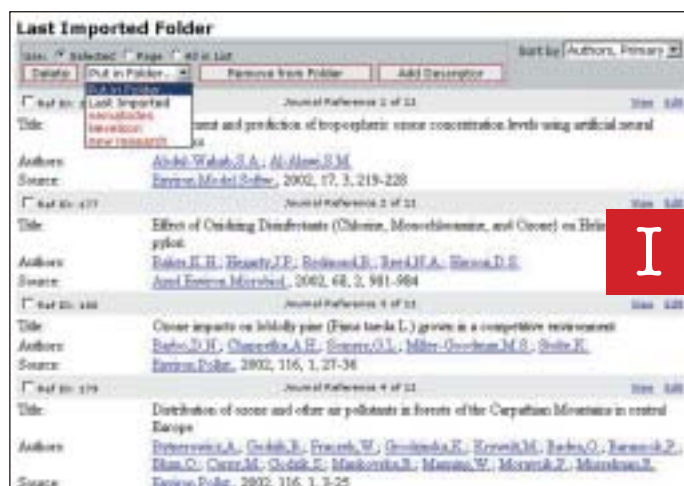
## Creating Folders



1. Select **Organize Folders**.
2. Click on **Create New Folders**.
3. Enter new folder name and click on **OK**. **H**

**NOTE:** There is no limit to the number of folders you can create within your account.

## Putting Records Into Folders



1. Do a search or look up to retrieve records to put in a folder.
2. a. **To put selected records into a folder**, check off records from the results to select, and click on **Selected**. The Selected Records feature works on a page by page basis; this means that you must add the manually selected records to the desired folder before moving to another page.  
b. **To put all the records into a folder**, click on **All in List**.
3. Select folder from the **Put in Folder** drop-down menu. **I**
4. The references will automatically be added to the folder.

**NOTE:** Records can be assigned to more than one folder.



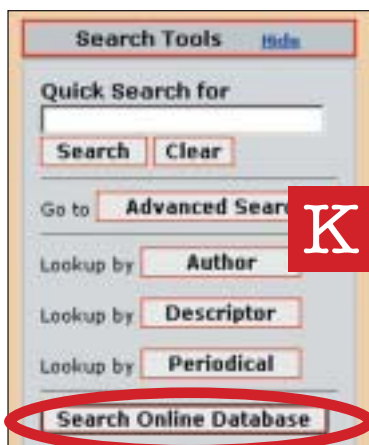
**RefWorks**  
www.refworks.com

.....  
**Technical Support**  
support@refworks.com  
+1 775-327-4105

.....  
**Order Information**  
refworksinfo@csa.com  
+1 800-843-7751 (U.S. & Canada)  
+1 301-961-6700 (Worldwide)

## Searching Online Databases Using RefWorks

You can use RefWorks as a search interface for a number of online resources. RefWorks provides access to a number of publicly-available services such as NLM's PubMed. Additionally, institutional subscribers may also provide access to subscription-based online databases through RefWorks.



1. Click on **Search Online Database** in the Search Tools menu. **K**



2. Select database from the drop-down menu under **Online Database to Search:** **L**
3. Specify the **Maximum Number of References to Download** using the drop-down menu.
4. Enter your search using the Quick Search or Advanced Search. The way these features function is determined by the specific online database being searched.
5. Click on **Search** to begin your search.
6. New window is opened; search results are displayed on-screen.
7. Import references into your RefWorks database.

## Creating Your Paper and Bibliography

Write-N-Cite is a utility allowing Microsoft Word and Internet Explorer users to run an abbreviated version of RefWorks in their word processor, allowing users to cite references in a manuscript with the click of a button. Users accessing RefWorks with Netscape or using Macintosh computers can use the One Line / Cite View function.

### Write-N-Cite Manuscript

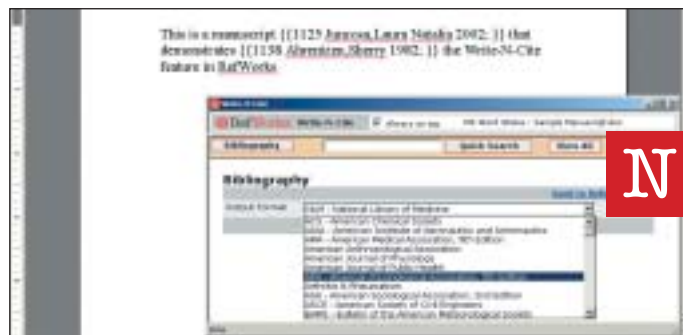


Create a paper using the RefWorks Write-N-Cite feature.

**NOTE:** In order to use this feature, you must first download the Write-N-Cite utility from the RefWorks login page. Write-N-Cite can then be launched within Microsoft Word by clicking the toolbar icon or by selecting it from the Tools drop down menu.

1. Open a new blank document in Microsoft Word.
2. Launch Write-N-Cite within Microsoft Word (see note above).
3. Put the cursor in your Microsoft Word document where the reference should be inserted; click **Cite** next to the reference in the RefWorks screen. **M**
4. Save your Microsoft Word document.

### Write-N-Cite Bibliography



1. Within Word, launch Write-N-Cite.
2. Click on **Bibliography**.
3. Select the output format. **N**
4. Click on **Create Bibliography**.
5. A new window will open with the re-formatted Microsoft Word manuscript containing the bibliography.
6. Save your Microsoft Word document.

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## One Line / Cite View Manuscript

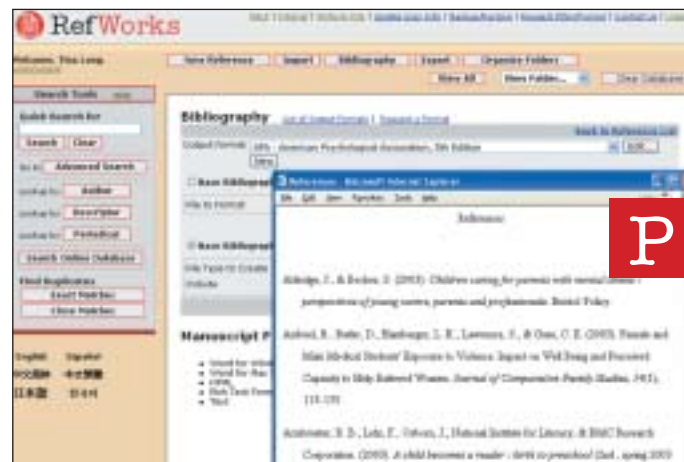


1. Click on the **Cite** link next to the appropriate reference. A Citation Viewer will appear containing the citation formatted like {{54 Johnson;}}. **O**
2. To cite a second reference in the same location just click on the cite link by any other reference. (If you are using a Macintosh, you will need to click twice — the first click will activate the RefWorks program the second will perform the Cite function.)
3. Once you have all of the references you need for a particular in-text citation, click on the **Select Citation** button.
4. Perform a Copy command or simply drag and drop the citation into your word processor document.
5. Go to your word processor, click on the document where you want the citation inserted and Paste the citation.
6. Be sure to Clear the Citation Viewer window before creating your next citation.
7. Click on the **View** link to see the entire reference and to access the Edit command if you want to make changes.

## One Line / Cite View Bibliography

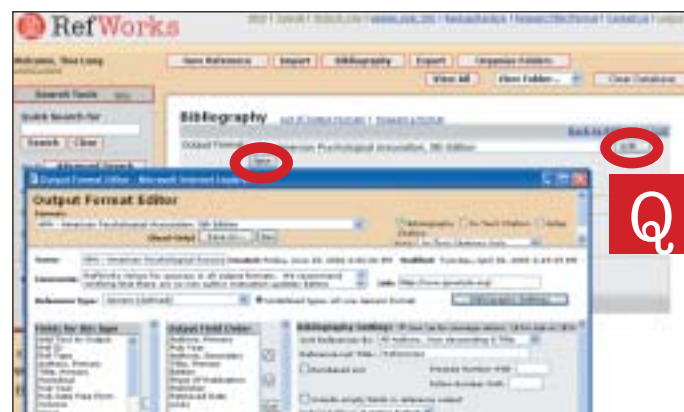
1. Save the document you have just created before formatting the paper and the bibliography.
2. Click on the **Bibliography** button from the Citation Viewer window or from within the RefWorks program.
3. Select the Output Format you need and the paper you have just created as your manuscript.
4. Click on **Create Bibliography**.

## Bibliography From a Reference List



1. Go to your RefWorks account and click on **Bibliography**.
2. Select an output format.
3. Click on **Base Bibliography on a Reference List**.
4. Click on **Create Bibliography**.
5. A new window will open with the re-formatted Microsoft Word manuscript containing the bibliography. **P**

## Editing or Creating Your Output Format



RefWorks provides more than 400 output styles to choose from. If one of these styles does not conform to your desired results, the Output Format Editor allows you to create custom output styles by either creating a completely new style or modifying an existing output style to suit your needs.

1. Click on **Bibliography**.
2. Click on **Edit** or **New**. **Q**

Access the HELP menu for additional assistance in creating or editing new bibliographic output styles.

FOOTNOTES: For all options, use the word processor's footnote formatting feature, inserting references using the "Manuscript" steps described above.