



Manual working with RefWorks

Contents

Introduction.....	2
I. Creating a database of references	3
1. Importing references.....	3
2. Entering references manually	4
3. Customising references.....	4
II. Managing your references	5
1. Folders.....	5
2. Searching your RefWorks database	5
III. Using references in Word.....	6
1. Working with references from RefWorks in Word	6
2. Customising references.....	7
4. Output Styles.....	8
IV. Extra	8
1. Sharing references.....	8
2. Output Style Editor.....	9
3. Further support	9

This manual discusses the most important aspects of working with RefWorks, from building and managing your literature database to making a document with references in your preferred output style.

Introduction

RefWorks is a citation manager, a tool to help you when doing literature searches and writing papers. A citation manager enables you to:

- collect your references in your own personal database.
- add references, manually or automatically, via the export function of databases or catalogues
- search your own literature database and organise references in different folders
- use your references for citations in Word, in any required output style

Some added advantages of RefWorks for UvA users:

- as long as UvA has a license to RefWorks you can continue to use it, even if you are no longer at UvA
- RefWorks is available via the internet, so it can be used anywhere
- You can easily share your references with others

Opening an account

To open an account you must be within the UvA domain (at UvA or at home via UvAvpn)

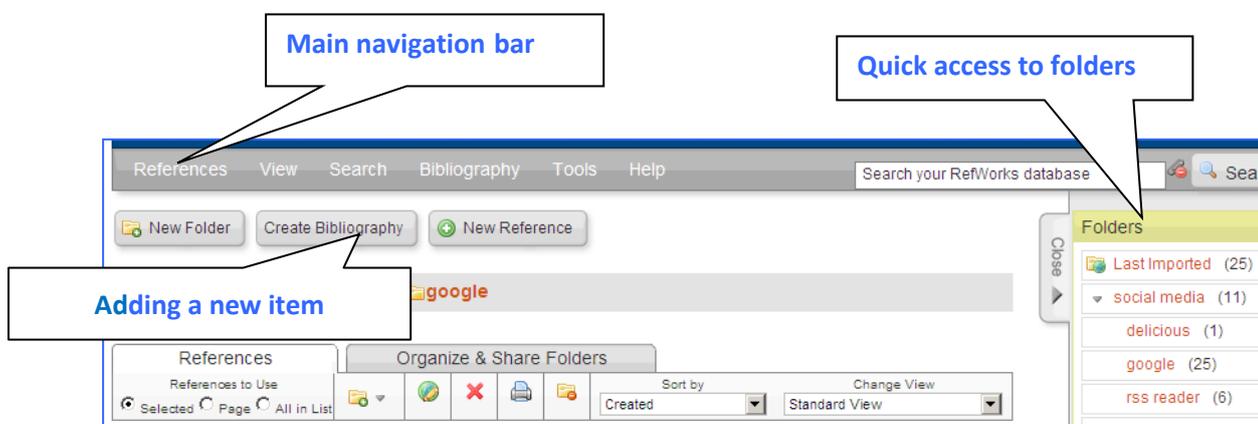
1. Go to www.refworks.com > click *Login* > *Sign up for a new account*
2. Enter the required data
3. Select your discipline or field of interest and select a user type

Note: RefWorks will send a confirmation mail with the UvA Subscriber Group Code.

Interface and navigation

Go to www.refworks.com > click *Login*

RefWorks has a number of useful quick links to frequently-used functions.



Cookies saved in Explorer sometimes cause problems for RefWorks. If this is the case, delete the browsing history via the Tools menu. Close your browser and restart it.

I. Creating a database of references

1. Importing references

Please note! When importing references you can choose between exporting to the classic version of RefWorks and the new RefWorks version. Because the new version is still in beta, the UvA will provisionally use the classic RefWorks version. Therefore, choose the left tile with the classic  RefWorks logo and tick off the box 'do not ask me this again'.

Titles may be imported directly into RefWorks from CataloguePlus, the UvA catalogue and most databases.

Importing from CataloguePlus

If you wish to import more than one title:

- perform a search and check the relevant titles to add them to your E-shelf
- open the E-shelf and select the titles to be exported
- at *Select how to save* select *Push to RefWorks > Go*

If you wish to import one title:

Details > Send to > RefWorks

When you are logged into RefWorks, you get a message that the references have been imported. Click *View Last Imported* to see the newly imported references.

Importing from the UvA catalogue

- perform a search in the UvA catalogue and check the relevant titles
- click *Export > RefWorks > Export to RefWorks > confirm by clicking OK*

Importing from a Database

- save the titles you wish to export (Save, Mark, Add)
- go to the saved titles (Show, View, Folder)
- mark the records to be imported > (Save) > select RefWorks

Example: importing from PsycInfo

- go to www.uba.uva.nl/en > click *Search CataloguePlus > Databases*
- find PsycInfo, perform a search and select some titles
- click *Export > Export to RefWorks, select Complete Reference > Export citations*

2. Entering references manually

Each publication type has its own specific data fields. A reference to a book needs other data than one to a journal article. So be careful to select the correct Ref Type.

Example: you wish to enter a chapter from a book. You have the following data:

Tree fruits by Mark Traven. In: The beekeeping book, ed. by Dorothy Wasp. Chapter 5, Boston: the Globe, 1977. p.100-120

Procedure:

- click *New reference*
- at *View fields used by* select an output format, any will do
- select Ref Type *Book, Section*
- enter authors: Surname, First name
- at *Start Page* enter the first page (p. 100) and at *Other Pages* the last page (p. 120)
- if necessary, open *Additional Fields* to see all available fields.

► When entering author names, start with the last name, end with a comma, and then enter the first name and/or initials. RefWorks considers everything before the first comma as a surname.

Enter:

Mary Adams

Robert K. Jones

Carry van Bruggen

Willem Godschalck van Focquenbroch

Patricia De Martelaere

As:

[Adams, Mary]

[Jones, Robert K.]

[Bruggen, Carry van]

[Focquenbroch, Willem Godschalck van]

[De Martelaere, Patricia]

Note the sorting of compound names, *e.g.* S. van Dulmen.

Dulmen, S. van is sorted under D... but **Van Dulmen, S.** under V.

It depends on the journal's policy which style you should use.

3. Customising references

A citation manager does not check your references, the responsibility for the correctness of the imported data always lies with you. The author name may have ended up in the wrong field or perhaps Dutch names have been imported incorrectly. From the UvA catalogue most types of publication are imported as Ref Type: *Book, Whole*.

If a reference has been imported incorrectly, it may be corrected manually via the *Edit icon*.

II. Managing your references

1. Folders

RefWorks has two default folders: *Last Imported* and *Not in Folder*. The references in *Last imported* are just that: every time you import new titles, older references are moved to *Not in folder*. It is handy to save your references in folders, so as to avoid too large a list in *Not in folder*.

Creating folders

Folder: click *New Folder* > [name] > *Create*

Subfolder: *New folder* > *Create Subfolder* > select *Parent Folder* > [name] > *Create*

Moving references

- Open the folder containing the references you wish to move.
- Select one or more or all references and drag the related square (below *References to Use*) to the target folder on the right.

The references are not removed from their original folder, but copied to the target folder.

An exception is the folder *Not in folder*.

The references from *Not in folder* are indeed removed after they have been moved to another folder.

At each reference you see the name of the folder(s) in which they are stored. If you do not see the folder name, but wish to see it, you can change the settings via the link *Customise* at the top of the screen.

Click  to delete a reference from your database. The reference is then removed from all folders. A deleted reference is stored for 30 days and can be moved back to its original folder via *View* > *Deleted References*. Select the appropriate reference and click .

2. Searching your RefWorks database

Searching for references

Use the search window on the right in the top navigation bar to search the whole database, including full-text attachments.

Go to *Search* > *Advanced* to limit your search to specific fields or folders.

The Search menu offers extra search options. For instance, you can see all author names from your database arranged in alphabetical order via the *Search* > *By author*.

III. Using references in Word

1. Working with references from RefWorks in Word

RefWorks Tab

In Word you can use your references to cite in the text or footnotes, and you can create a bibliography in a format (Output Style) of your choice. For this you need the RefWorks utility Write-N-Cite. This programme has been installed at all UvA work and study spaces. If you would like to use Write-N-Cite outside UvA, you must first install it. You will find more information in the *RefWorks Hand-out*, p. 5.

Logging into RefWorks in Word

Start Word, open the tab RefWorks and click the *Log In* button.

Select how you wish to log in:

- with the UvA group code plus your username and password.
- with the code which is available in your RefWorks account: copy the code which you find under *Tools > Write-N-Cite*.

After logging in, wait until the synchronisation is finished.

Inserting references

- place the cursor where the references are to be inserted in the text,
- open the *RefWorks* tab and click *Insert Citation > Insert New*.

The editing screen shows the folders from your RefWorks account. Open the folder which contains the reference you wish to insert. Or find a specific reference by means of the search window.

- Click the reference you wish to insert and click *OK*.

The reference appears in the document at the position of the cursor. The text is highlighted blue/grey as a sign that it contains field codes. These codes are needed to link the reference in your document to the relevant reference in your RefWorks database.

Inserting references in footnotes

- Do the same as above, up to and including the selection of the reference.
- Check the option *Make Footnote* under *Edit References* and click *OK*.

In the text there is now a footnote reference, with the actual footnote at the bottom of the page containing the inserted reference.

Creating the bibliography

You can create a bibliography of the inserted references by clicking the *RefWorks* tab and then *Bibliography options > Insert Bibliography*.

The format of the references, footnotes and bibliography depends on the *Output Style* you have selected. If you wish to choose a different format, open the *Style* menu and select another format.

In Write-N-Cite you can choose from the styles you have marked as your Favourites in RefWorks. See under par. 4 how to add more styles in RefWorks to your favourites.

2. Customising references

References may be customised via the editing screen. To open the editing screen, double click the reference you wish to customise.

Hide elements

Under *Edit References* you have a few options. You can hide elements from the reference, such as year, author name or pages.

Add elements

There are two ways to refer to a page number. Depending on your output style you can select either *Override Pages* or *Suffix*. Try them both and see the effect under *Preview Citation*. Save the changes with *OK*.

Removing a reference

To remove a reference from the text, you must select the complete reference and then press Delete. The publication concerned is also removed from the bibliography (unless the reference is also cited elsewhere in the document). The change does not become visible until you have clicked *Reapply output style*.

Please note: take care to delete the complete reference!

3. Removing field codes

To prepare a document for publication or to share it with others, the field codes must be removed. Take care to do this in such a way that the document can later still be edited with Write-N-Cite:

1. First save the document with the field codes still in it.
2. Save the document again, but this time with a different name.
3. You can now safely remove the field codes from this version of the document: click the tab *RefWorks* and then click *Remove Field Codes*. You then get a warning, but if you have already saved the coded document as a separate file, you can ignore it.

As soon as you have clicked OK, the references in the document are replaced by ordinary text.

4. Output Styles

In RefWorks hundreds of Output Styles are available. In the Write-N-Cite screen you see only the favourites you have selected in the RefWorks Output Style Manager.

Adding Output Styles to your Favourites

- in RefWorks > click *Bibliography* > *Output Style Manager*

On the left you see a list with all Output Styles, on the right under Favorites the styles selected by you. Use the search window if you quickly wish to find a particular style.

Find an Output Style

- for example: select Biology > select a style > click  to add the style to your favourites. Click *Show All* to return to the alphabetical list of Output Styles.

The effect of output styles on your references

The style of your references and bibliography depends on the Output Style which is active at the time. Select a style and click *Preview Output Style*. For example, compare the effect of the following two Output Styles:

- JAMA = numerical reference in the text, Italics in the bibliography
- Historische Zeitschrift = references with author, title, year of publication, in bibliography author in Italics

IV. Extra

1. Sharing references

RefWorks makes it easy to share references with others, even if they do not have a RefWorks account themselves.

- open the tab *Organize & Share* > click *Share folder*  > *OK*
- Adjust the settings by selecting what you wish to allow or not
 - IV. click *Save* and close the window
 - V. to enter email addresses, click the email icon after the shared folder > *Send Email*

If you no longer wish to share a folder, click *Remove Share*.

Please note

- You only give others *Read-only* access to your references.
- Anyone can open the link to a shared folder.
- The link can also be used as a URL in Blackboard. If you change the settings in RefWorks/Share, then at OpenURL select *Site defined OpenURL*. The UvAlinker then appears at your RefWorks titles in Blackboard .
- For a collaboration in which more persons must be able to add references, it is best to make a new, joint account.

2. Output Style Editor

The Output Style Editor allows you to make changes in an existing style or to create a completely new style.

In this manual we can only give a very short instruction on how to use the Output Style Editor:

- menu *Bibliography > Output Style Editor*
- select the Output Style you wish to customise > click *View*

Depending on the style you have chosen you now see one to three tabs with the parts you can customise: Bibliography, In-text Citation and Notes.

For each Reference Type (type of publication) you can select fields to add to the list Output Fields. On the right you see the specifications of the selected field. Customise it and click *Update* (below) to see the effect of your changes.

To save changes, click *Save As* and give the style a new name. The style is saved and automatically added to your Favourites.

For more information on the Output Style Editor, see the RefWorks [Help](#) and [Tutorial](#).

3. Further support

- See www.uba.uva.nl/en > Services > Writing and publishing > RefWorks for a Handout in which some extra features of RefWorks are explained.
- RefWorks itself offers good and extensive support. Via the Help menu you can find help texts and tutorials.
- If you have any problems or questions, please feel free to contact UBACoach: UBA home (www.uba.uva.nl/en) > Contact.