

# Handout Legacy RefWorks

## Starting with RefWorks

### Create an account

To create a RefWorks account you need to be within the UvA domain (at home with VPN connection).

1. Go to <http://www.refworks.com> > 'Sign up for a new account'.
2. Enter the required information (do not use your UvAnetID).

RefWorks will send a confirmation email containing your login credentials.

### Customise your account

Customise the settings of your RefWorks account via 'Customize' (top right).

- 'Reference List Options': customise the style of your references.
- Startup options > 'View Folder': if you often import references it is useful to start the folder 'Last Imported'.

## Importing references: catalogs and databases

When you import references, you have to choose between New RefWorks and Legacy RefWorks. Checkmark '*Don't ask me this again*' (at the bottom of the screen) and select Legacy Refworks.

### CataloguePlus

1. Select titles by clicking the drawing pin.
2. Click the drawing pin top right to get your list of favourites > Select the titles.
3. Click the 3 dots above the list, choose 'RefWorks'.

RefWorks opens and after you have logged in the references are automatically imported.

### Databases : exporting directly

1. Save the records you wish to import (Save, Mark, Add).
2. Go to the saved records (Show, View, Folder).
3. Checkmark the records you wish to import > (save) > select RefWorks.

### Databases: exporting via text file

1. In the database: select the records and save them as a text file (most often this is a .ris file, from PubMed a .nbib file).
2. In RefWorks : 'References' > 'Import'.
3. Select the import filter (for .ris files: RIS, for .nbib files: NLM Pubmed) and the source (the database or RIS format) of your records.

If the import filter is not mentioned, select 'RIS Format' or 'Refer Format' to import a text file.

### Importing references from Google Scholar

Activate the 'Import into RefWorks' button in Google Scholar:

1. Click the 3 lines at the top left, choose 'Settings'.
2. As a bibliography manager select 'RefWorks' > 'Save'.

A button 'Import into RefWorks' will appear with your search results.

### Attachments

You can upload full-text files (max. 20 MB per file) with your references.

1. Save the publication on your computer.
2. Open the reference > 'Edit Reference' > 'Browse'.
3. Select the file > 'Open' > 'Add Attachment'


Total storage is 100 MB. Need more? Request an upgrade via [uba.uva.nl/en](http://uba.uva.nl/en) > 'Contact'.

## Managing references in RefWorks


### Moving references to a folder


1. Use the button 'New Folder' at the top to create a new folder.
2. Open 'Not in folder' or 'Last Imported' > Select 'All in list' or 'Selected' and drag this to the new folder.

### Delete references from a folder

1. Open the folder > Select the references.
2.  = Remove from Folder > references will be moved to 'Not in folder'.

### Delete references from your RefWorks account

-  = Delete references from your account. The deleted references will be stored for 30 days on the RefWorks-server. Restore deleted items via 'View' > 'Deleted References'.

Checkmark them and push  = 'Restore'.

Delete duplicate references: 'View' > 'Duplicates'. One of the twin-results is checkmarked.

NB. Be careful to only delete references you have not yet used in a document!

### To search in specific reference-fields : Search > Advanced.

- To search in all fields: search box top right 'Search Your database'.
- To search in your attachments only: 'Search' > 'Advanced' > Search Field: Attachments.
- To browse an index, for instance Authors: 'Search' > 'By Author'.

## Sharing references

By sharing a folder you allow read-only access.

1. Right-click on the folder you want to share > 'Sharing' > 'Share folder'
2. Select from the different setting options to share the folder and press 'Save'.
3. Right-click on the folder once again > 'Sharing' > 'Email this share'.

The link only offers read-only access. The recipient of the link can not see other folders and can not make any changes to your folder.

If you want to work together with others in RefWorks, open a new, collective account.

## Using references in Word

### Installation of the RefWorks plug-in or Add-in in Word

**For Windows and Mac with Word 2016 or later Word versions:** install the **RefWorks Citation Manager (RCM)** from Word Add-ins.

In case Office does not allow to install RCM, One line/Cite view in your RefWorks account is an alternative. For Windows with Word 2016, Write-N-Cite is also an alternative.

**For Windows and Mac with previous Word versions:** Install the Plug-in **Write-N-Cite (WNC)**

**Be sure that no Word application is running!**

1. In RefWorks: 'Tools' > 'Writing Tool Add-ons' > 'Write-N-Cite'. Then download the appropriate version.
2. In Word: open the new tab 'RefWorks' and click 'Log in'. Synchronisation between RefWorks and Word will take a few moments.

**UvA-computers:** on UvA-computers the Word Plug-in Write-N-Cite is running.

### Citations, footnotes and bibliography

#### Using RefWorks Citation Manager:

- Open the tab 'RCM' in Word, open RefWorks Citation Manager, a sidebar appears. Read and close the message.
- Select a citation style: click the 3 lines at the top left of the RCM sidebar > 'Citation Style' > select the citation style in the 'Change citation style' menu. (If desired, check 'Format for footnotes').
- Go back to the references via 'References homepage'.
- To insert an in-text citation: find the reference in one of your folders in the References-menu, hover over the reference > 'Cite this'.
- To insert a citation in a footnote: click 'Insert Footnote' **in Word** to make sure that your cursor is located in a Word footnote. Find the reference in one of your folders in the References-menu of the RCM sidebar, hover over the reference > 'Cite this'.
- Edit a citation (add page number or hide author): double click the citation, edit the citation in the sidebar, 'Update citation'.
- Create the bibliography: click the 3 lines at the top left of RCM sidebar > 'Bibliography: On'.
- Delete a citation: take care to select the complete reference, then push the 'Delete' key.

### Using Write-n-Cite:

- Open the tab RefWorks tab in Word, log in.
- Select a Citation Style in the Style menu.
- To insert an in-text citation: 'Insert Citation' > 'Insert New'. Find the reference you wish to insert > 'OK'.
- To insert a citation in a footnote: as above but in the editing window, check the option 'Make Footnote'.
- Edit a citation (add page number or hide author): double click the citation, edit the citation in the Insert/Edit Citation pop-up window. Add a page number in the Suffix field, click the blue bar for a Preview > 'OK'.
- Create the bibliography: 'Bibliography options' > 'Insert Bibliography'.
- Delete a citation: take care to select the complete reference, then push the 'Delete' key. Click 'Reapply Output Style' to remove the reference from the bibliography.

### Using One line/Cite view:

- Watch the [tutorial](#) from RefWorks.

### Output Style

The Output Styles available in the Style menu in Reference Citation Manager or Write-N-Cite are the favourite styles in your RefWorks account. If you want to have other styles available in Word, first add them in RefWorks:

1. In RefWorks: 'Bibliography' > 'Output Style Manager'.
2. Select a style by moving this to the right column.
3. If you use Write-N-Cite: in Word: press 'Sync My Database'. Now the new style is available in Word.

### Versions of your document

Before sharing a document with RefWorks-references with others, save a copy of the document and rename this. If you use Write-N-Cite, remove the field codes: press 'Remove Field Codes' in the document which you send to others.