



## RefWorks 2.0

Simple. Powerful. Loved.

# RefWorks 2.0 Quick Start Guide

## Logging In

- Access [www.refworks.com/refworks](http://www.refworks.com/refworks). Enter your personal Login Name and Password. (First-time users need to sign up for a New Account following the screen prompts.)
- **NOTE:** Remote users, accessing RefWorks from off-site or from a nonregistered IP address, must either enter the "Group Code" prior to the personal Login Name and Password or log-in via the organization's proxy server or log in using other organizational credentials (Athens, Shibboleth, etc.).

## Need More Help?

### Online Tutorial

A tutorial providing explanations of various RefWorks functions is available within every RefWorks account. Use the **Help** pull-down menu to access the tutorials.

## Support

### Online

Use the Help pull-down menu to access detailed instructions, frequently asked questions, and much more.

### E-Mail

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

### Webinars

RefWorks-COS now offers a variety of complimentary training webinars. A complete listing of sessions can be found at [www.refworks-cos.com/training](http://www.refworks-cos.com/training). New dates and time are added monthly.

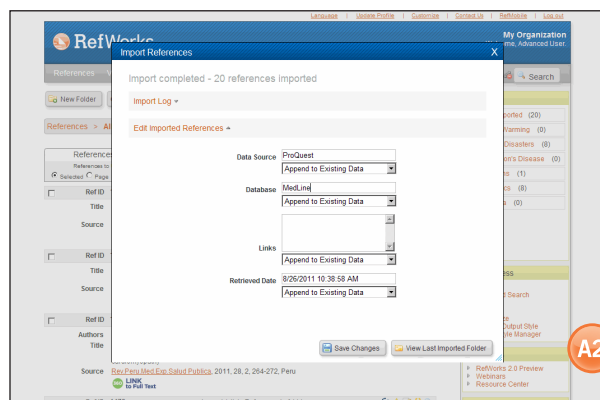
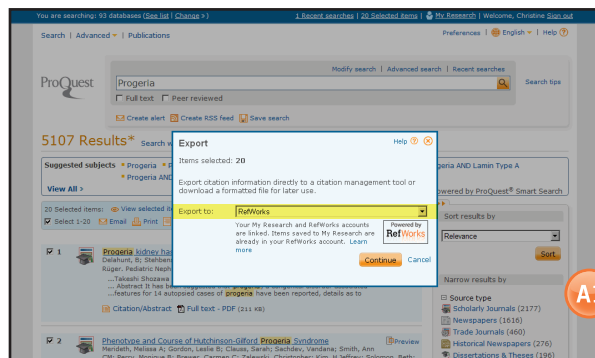
### Phone

Contact RefWorks Technical Services at +1.775.327.4105.

# Creating Your RefWorks Database

RefWorks provides a number of options for adding data to your database.

## Importing Data Directly



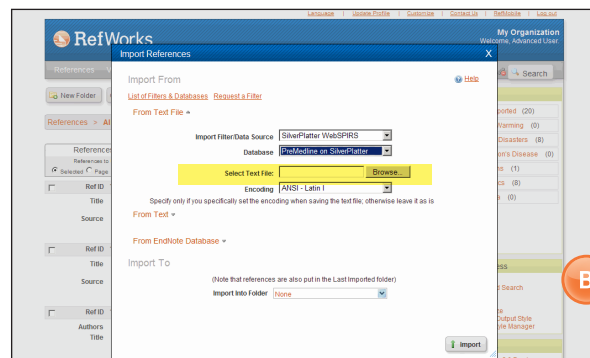
1. Under the save or export function within the online service, select or click the Save to RefWorks option. (A1)
2. If you have your RefWorks account already open, the import should automatically begin. If not, then you will be prompted to log in to RefWorks; after you login, the import will automatically begin.
3. Click the **View Last Imported Folder** to review the imported records.

**Helpful Hint:** Every reference added to RefWorks (whether imported or entered manually) is given a print or electronic designation called **Source Type**. This assists in ensuring you have all the relevant data REQUIRED in your bibliography. A default **Source Type** may have been set by your local Administrator. Users can set their own source type in the Customize area. (A2)

## Converting References from Other Bibliographic Management Products

RefWorks is compatible with a number of other bibliographic management products. You can easily convert an existing bibliographic management database such as EndNote into RefWorks. For details related to importing data from specific individual bibliographic management products, please refer to the online **Help** section of RefWorks.

## Importing Data from Saved Text Files



References can be imported into RefWorks from a text file (.txt) created by saving references from a wide variety of online services and other bibliographic management programs.

1. Retrieve the results you want to export from the online service or bibliographic manager, and save them as a text file. If the database vendor lists several different formats for saving the references, see the RefWorks Help file for further details on the appropriate selection.
2. Access your RefWorks account and click **References** from the drop-down menu; then select **Import**.
3. On the subsequent menu, access the drop-down menu next to **Import Filter/Data Source** and click the source of the data. (B)
4. Click on the **Database** drop-down menu and select the source database.
5. Click on the **Browse** button to select the text file to import.
6. Click on the **Import into Folder** drop-down menu to designate the specific folder where you want to file the imported references. By default, references will automatically be placed in the **Last Imported** folder, even if you designate an existing folder for them to go to.
7. Click on **Import**. When the import is complete, click the **View Last Imported Folder** button to review and modify the imported references.

**Helpful Hint:** An up-to-date listing of all online services and databases that are supported by RefWorks can be found on the RefWorks-COS website at [www.refworks-cos.com](http://www.refworks-cos.com).

## Importing from RSS Feeds

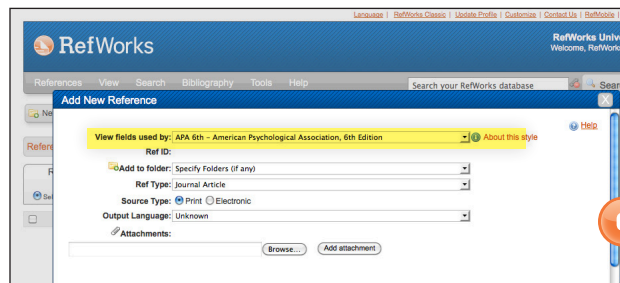
RefWorks has integrated an RSS Feed Reader so you can easily add your favorite RSS Feeds from publishers and websites, view the information and import data into your RefWorks database.

1. Locate the RSS Feed you wish to include.
2. Right mouse-click on the **RSS Feed icon or link** and select **Copy Shortcut**.
3. From within RefWorks, select **RSS Feed** from the **Search** Menu.
4. Paste the shortcut into the text bar and click the **Add RSS Feed** button.
5. Confirm the addition of the RSS Feed by clicking **OK**. Your feed results will be displayed in a new window. Select the references you wish to import into your RefWorks account and click **Import**.

# Creating Your RefWorks Database (continued)

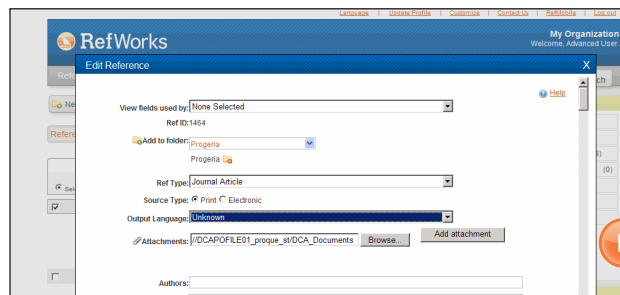
RefWorks provides a number of options for adding data to your database.

## Manually Entering References



1. Click on the **New Reference** button.
2. Select a potential bibliographic output style (e.g., APA, Chicago, MLA) under **View fields used by** to enable the AccuCite feature. (C)
3. Designate the type of reference you are entering (e.g. journal, book or dissertation) under **Ref Type**. The field names that are associated with the specific output style and reference type you chose will appear, indicating recommended information needed to produce an accurate bibliography. **These fields are not required to save the actual reference in RefWorks**. To view additional fields, click on **Additional Fields** at the bottom left of the window.
4. Enter information in the boxes provided and click the appropriate **Save** button when finished.

## Attaching Files to a Reference



You can attach files when adding a new reference manually or editing an existing reference. Attachments can be any type of computer file (PDF, TIF, JPG, GIF etc.) that you want to associate with the bibliographic information you store in your RefWorks database. For further instructions on attaching files to your references, please refer to the **Help** file.

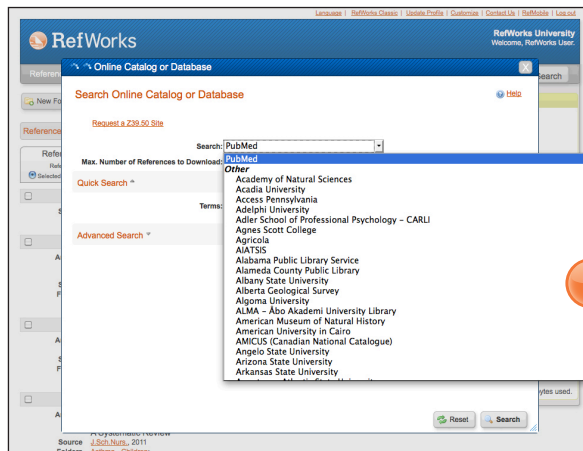
1. Select a reference in your database; click on the **Edit** button (✎).
2. Click on **Browse**. Select a file to attach. Select **Open**.
3. Click on **Add attachment**. (D)

**Helpful Hint:** The number of files that you can attach to a reference is determined by your local RefWorks administrator. The maximum size of any individual attachment is 20 MB. (The default setting for attachments in an account is 100 MB. The RefWorks administrator may increase this setting up to 5 GB per account.)

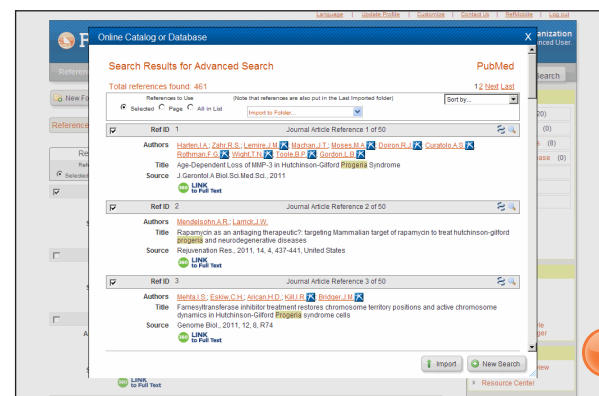
**Note:** The Attachment Feature is not available for individual subscriptions.

**Technical Services** support@refworks.com

## Importing from Online Catalogs or Databases



You can use RefWorks as a search interface for a number of online resources. (E) RefWorks provides access to many publicly available services such as NLM's PubMed as well as many universities' Online Catalogs. Additionally, institutional subscribers may also provide access to subscription-based online services (e.g., Ovid or ProQuest) through RefWorks.

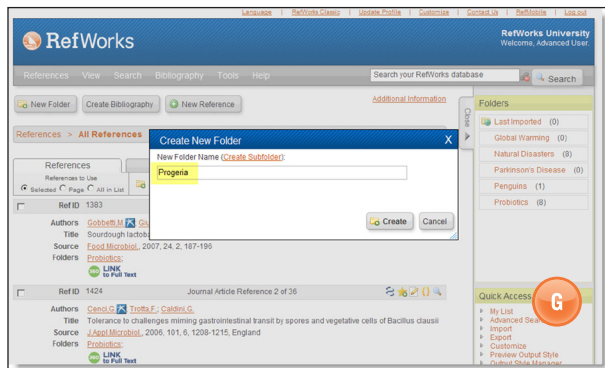


1. From the **Search** pull-down menu, select **Online Catalog or Database**.
2. Select a database from the **Search** drop-down menu.
3. Select the **Max. Number of References to Download** from the drop-down menu.
4. Enter terms in either the **Quick Search for:** or run an Advanced Search by clicking on the triangle in the **Advanced Search for:** box to enter terms.
5. Click on **Search** to begin your search.
6. Your results will be displayed. **Select** the references you wish to import into your RefWorks account and click **Import**. (F)

# Managing and Sharing Your References

RefWorks provides you with a number of tools to organize, edit, find, and view references in your database.

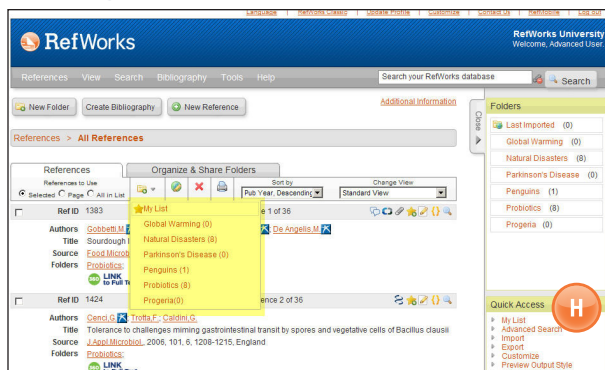
## Creating Folders and Sub-Folders



1. Click on the **New Folder** button.
2. Enter a name in the text box; click **Create.** (G)  
There is no limit on the number of folders or sub-folders you can create within your RefWorks account.
3. To create a sub-folder, click on **New Folder** button.
4. Click on the **Create sub-folder** link.
5. Select a **Parent** folder for your sub-folder and enter a name in the **New Folder Name** text box.
6. Click the **Create** button to save your sub-folder.

**Helpful Hint:** The **Last Imported** folder contains only references from your most recent data import. References from imports prior to your last import not assigned to specific folders remain available in your primary database but unfiled; unfiled references are called **References Not in a Folder** and may be seen by clicking the **Organize and Share Folders** tab.

## Putting References into Folders



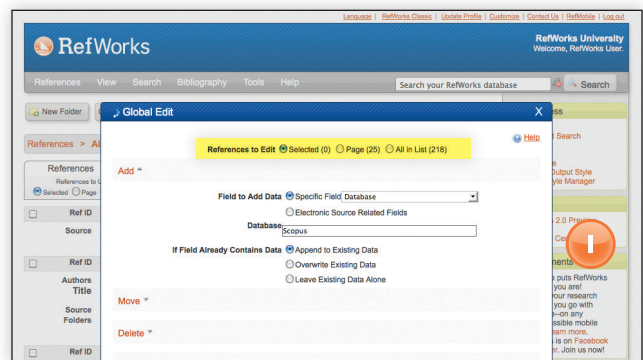
1. Mark desired references from the search results page, then click the button titled **Selected**. The selected references feature works on a page-by-page basis; this means that you must add the manually selected references to the desired folder before moving to the next page. Alternatively, you can mark **All** or all on a **Page**.
2. Click on the **Add To:** folder icon (📁) and select the appropriate folder from the drop-down menu. (H)
3. References will automatically be added to the indicated folder.

**Helpful Hint:** References can be assigned to more than one folder.

## Sorting References

1. From either the **View** pull-down menu or the **Organize & Share Folders** tab, select a folder or group of references.
2. Using the pull-down menu **Sort by**, located in the toolbar above the references, choose to view references by various fields within your database.

## Globally Editing References



1. From the main navigation area, click on the **Global Edit** button (🌐).
2. Select the appropriate option for **Reference to Use**.
3. The **Add** option is displayed by default.
4. Choose the specific field to edit from the drop-down list. (I)
5. Type in the data you want to add to the field in the text field box.
6. Select the appropriate option for handling the field - **Append to Existing Data**; **Overwrite Existing Data** (what you currently have in the field will be gone); **Leave Existing Data Alone** (if the field contains data the edit feature will skip over that particular reference).
7. Click on **Add Data**.

**Helpful Hint:** RefWorks also offers the ability to **Move**, **Delete**, or **Replace** information in records. For more information on these additional Global Edit functions, please see the **Help** file.




# Managing and Sharing Your References (continued)

RefWorks provides you with a number of tools to organize, edit, find, and view references in your database.

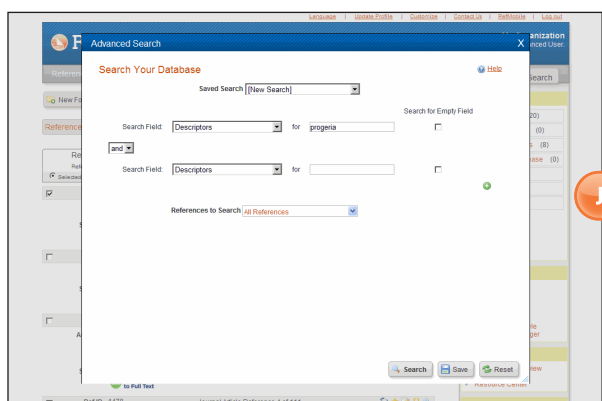
## Quick Search

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 **Search your database** box.
2. Click on **GO**.
3. Results are displayed with the search terms highlighted.

**Helpful Hint:** Only file attachments saved as .txt files or PDF files saved in .txt format are searchable. To search file attachments, make sure the option to search attachments is enabled by clicking on the paperclip icon (  ) beside the search box.

## Advanced Search

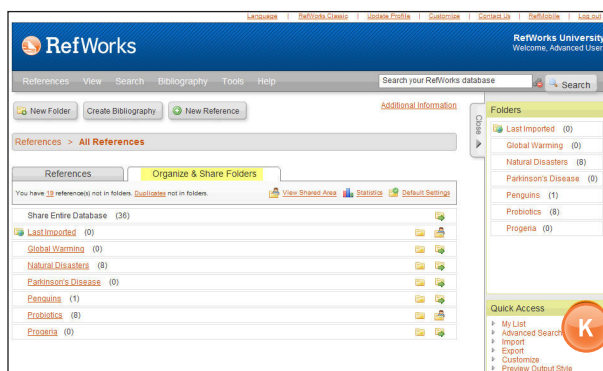


Advanced Search makes it easy to perform field-specific searches (e.g., Author, Title, Keyword), construct Boolean queries (i.e., AND, OR, NOT), and limit the search to a specific folder(s). The results of an Advanced Search are displayed alphabetically by author, with the search terms highlighted unless a customized sort setting has been applied.

1. Click on the **Search** drop-down menu and select **Advanced**.
2. Enter search terms and corresponding fields into the **Advanced Search** menu. Click on (  ) to add more fields. ( **J** )
3. Connect the terms by using the Boolean operators.
4. Select **All References** or specific folders to search.
5. Click on **Search**.




**Helpful Hint:** You now have the option to save search strategies. Search strategies can be named and saved for easy and continual retrieval.

## Sharing Your References



**Note:** RefShare must be turned on by your local RefWorks Administrator to be available. RefShare is not available for individual subscriptions.

You can share a folder of references or your entire database.

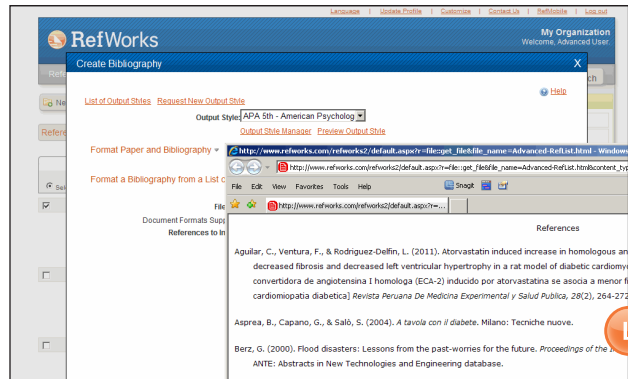
1. Click on the **Organize & Share Folders** tab from the main navigation area. ( **K** )
2. Select the folder you wish to share by clicking on its **Share** icon. (  ). To share your entire database, select the **Share** icon. Click **Share**. **Note:** Folders which have already been shared will appear with a different icon. (  )
3. The **Sharing Options** box displays allowing you to define any user restrictions you wish to set for the RefShare Recipient(s). Click **Save**.
4. To share, click on the **Shared Folder** icon and select **Email** this share (  ). A generic email template and a unique URL created for your RefShare folder will open. Insert the email address of the individual(s) you would like to share your references with. Select **Send E-Mail**.

**Note:** RefWorks users can directly export from a shared folder to their own account, if permissible. As the owner of the folder or database, you determine the control options your RefShare Recipient(s) will have in utilizing your shared references.

# Creating Your Paper and Bibliography

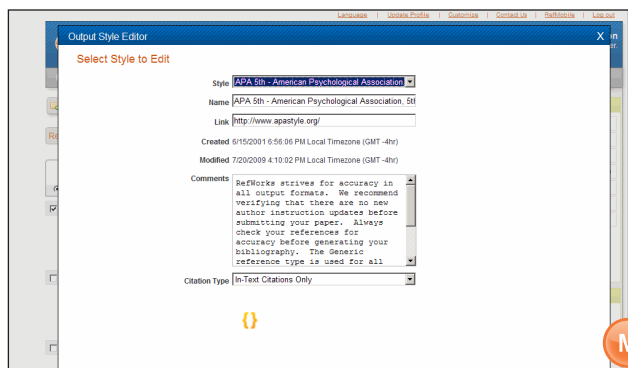
RefWorks creates bibliographies from over 3,000 output styles in seconds.

## Format a Bibliography From a List of References



1. Click on the **Create Bibliography** button.
2. Select an output format (i.e., APA, MLA, Chicago, etc.).
3. Click on **Format a Bibliography from a List of References**.
4. Select what file type to create.
5. Select to format all of your references or those references from **My List** or from a specific folder.
6. Click on **Create Bibliography**.
7. A new window will open with your bibliography. (L)
8. Save your bibliography to your computer or flash drive.

## Editing or Creating Your Output Style



RefWorks provides thousands of output styles to choose from. If none of these styles conform to your desired results, the Output Style 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.

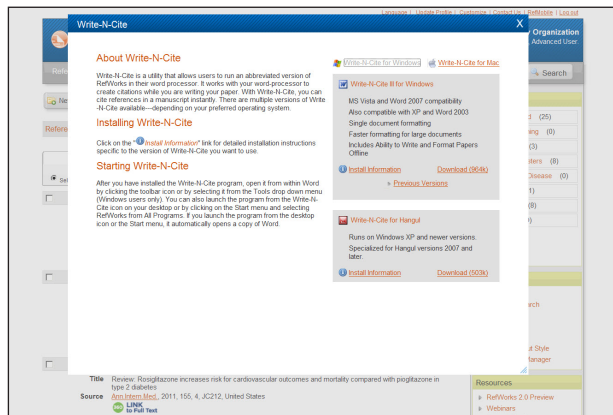
1. From the **Bibliography** pull-down menu in the tool bar, select **Output Style Editor**.
2. Select the appropriate **Style** to edit from the drop-down menu or click on the **New** button. (M)

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

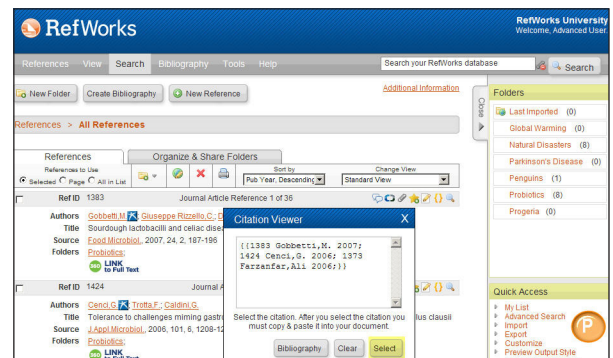
## Write-N-Cite

RefWorks Write-N-Cite is an optional plug-in that allows you to create a formatted paper with both in-text citations and footnotes.

Write-N-Cite now allows you to work on a paper and format a bibliography both on-AND off-line. To use Write-N-Cite, download the utility from the Tools pull-down menu before using. To utilize the off-line-capabilities, you must first download your database while online. For more information, please refer to the **Help** file.



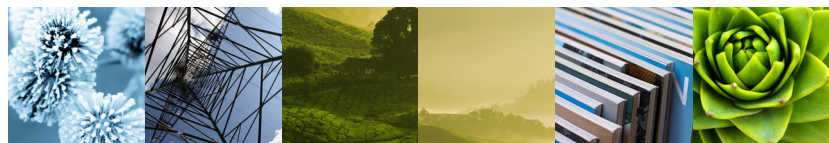
## One Line/Cite View Paper



1. Click on the **Cite** icon ( ) on the right side of the appropriate reference. A Citation Viewer window will appear containing the citation in an abbreviated format.
2. To cite a second reference in the same location just click on the **Cite** icon by any other reference. If you are using a Mac, you will need to click twice - the first click will activate the RefWorks program and 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** button. (P)
4. Simply drag and drop the citation into your word processor document. Alternatively, you can also go to your word processor, click on the document where you want the citation inserted and **Paste** the citation.
5. Be sure to clear the Citation Viewer window before creating your next citation.
6. Click on the **View** icon ( ) to see the entire reference and to access the **Edit** command if you want to make changes.

# Creating Your Paper and Bibliography

RefWorks creates bibliographies from over 3,000 output styles in seconds.



## One Line/Cite View Bibliography

1. Save the document you have just created before formatting the paper and the bibliography.
2. Click on the **Create Bibliography** button from within the RefWorks program.
3. Select the **Output Style** you need and use the **Format Paper and Bibliography** option to browse for the document.
4. Click the **Create Bibliography** button to format your paper. A new version of your paper will appear.
5. Save this version with a different name from your draft version. If you need to make changes, you must use the draft version and re-format, as you cannot re-format an already formatted document.

## Direct Exports Available From:

- ABC-CLIO
- ACS Publications
- bibliotek.dk
- BIBSYS
- BioMed Central
- BioOne
- Blackwell Synergy
- CABI
- CAIRN
- Chadwyck-Healey
- Compludoc
- CQ Press
- CSA Illumina
- CSIC
- DanBib - Danish Bibliographic Centre
- Dawson Books
- DBPIA
- Deep Web Technologies
- Dialnet
- ebrary
- EBSCOhost
- Engineering Village 2
- FIS Bildung
- Google Scholar
- GoPubMed
- HighWire
- HubMed
- IEEE
- Informit
- Japana Centra Revuo Medicina (Web)
- JSTOR
- LexisNexis Academic
- MetaLib
- Microsoft Live Search Academic
- Newsbank
- NISC
- OCLC
- OCLC PICA - ZPORTAL
- Ovid
- Project Muse
- ProQuest
- QUOSA
- RISS4U
- RLG's Eureka
- Sabine
- ScienceDirect
- Scitopia.org
- Scopus
- Serials Solutions
- SFX
- SilverPlatter
- Stat!Ref
- The R2 Digital Library (Rittenhouse Book Dist.)
- TDNet
- TicToc
- Thomson Gale via Open URL Link
- Ulrich's Resource Link
- University of California Press
- Wanfang Data Corp.
- WebFeat
- Web of Knowledge
- WilsonWeb via WilsonLink