



# 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)

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

+1 760-753-3885

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

# 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.**

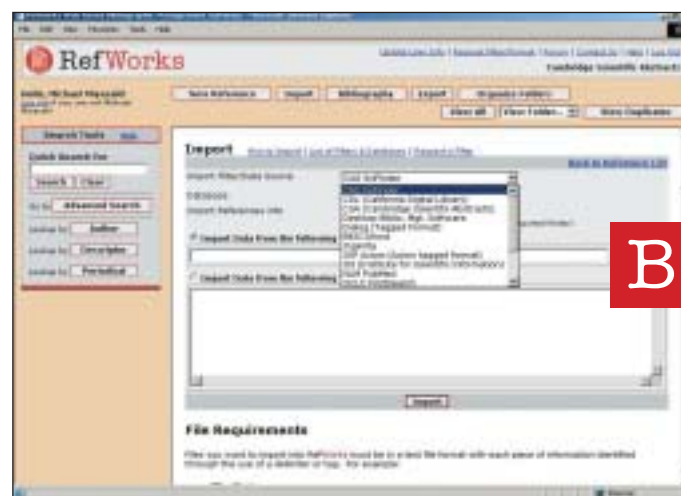
Direct export to RefWorks is available from the following online database services:

- CSA (Internet Database Service) • BioMed Central
- OCLC • OVID • ProQuest

## Manually Entering Records

1. Access your RefWorks account and click on **New Reference**.
2. Enter information in the boxes provided and click on **Save** when finished.

## 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
- BioMed Central
- CAS SciFinder
- CISTI Source
- CSA (Cambridge Scientific Abstracts)
- Dialog
- EBSCOhost
- EDINA
- Engineering Village 2
- Gale InfoTrac
- H.W. Wilson
- Ingenta
- Inspec
- IOP Axiom
- ISI
- JSTOR
- NLM Gateway
- NLM PubMed
- OCLC
- FirstSearch
- OVID
- ProQuest
- RLIN Eureka
- SilverPlatter
- WebSPIRS
- ScienceDirect
- and many more!

# 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**. **C** 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**. **D**
3. Type new name in the **to** box and click **OK**.

## Creating Folders



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

**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. **F**
4. The references will automatically be added to the folder.

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





## RefWorks

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

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+1 800-843-7751 (U.S. & Canada)  
+1 301-961-6700 (Worldwide)

# Retrieving Records From 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*. **G**
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.

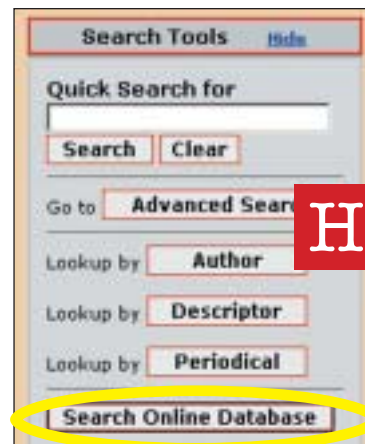
## Look Up Author / Descriptor / Periodical

Use the look up functions to access browsable indexes of author, descriptor, or periodical information.

1. Access your RefWorks account and click on *Lookup by Author*, *Lookup by Descriptor*, or *Lookup by Periodical*.
2. Use the alphabetical listing at the top to navigate to other screens. Select name / term / title from the menu displayed.
3. Results are then displayed.

# 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. **H**



2. Select database from the drop-down menu under *Online Database to Search*: **I**
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

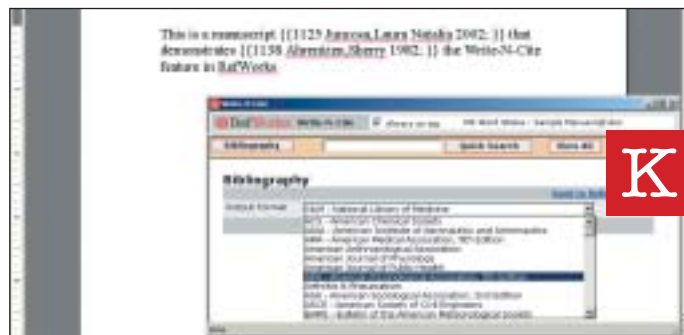


Create a paper using the RefWorks Write-N-Cite feature.

**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.

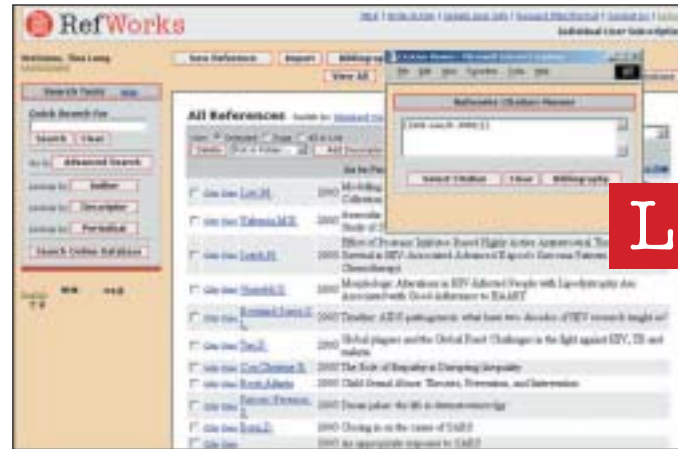
1. Open a new blank document in Microsoft Word.
2. Launch Write-N-Cite within Microsoft Word (see note above).
3. Put the cursor in your Microsoft Word document where the reference should be inserted; click **Cite** next to the reference in the RefWorks screen. **J**
4. Save your Microsoft Word document.

## Write-N-Cite Bibliography



1. Within Word, launch Write-N-Cite.
2. Click on **Bibliography**.
3. Select the output format. **K**
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.

## One Line / Cite View Manuscript

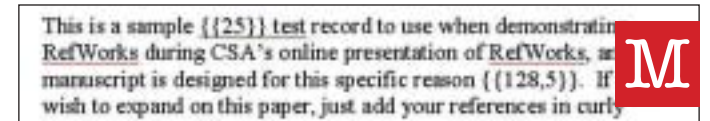


1. Click on the **Cite** link next to the appropriate reference. A Citation Viewer window will appear containing the citation formatted like {{54 Johnson;}}. **L**
2. To cite a second reference in the same location just click on the cite link by any other reference. (If you are using a Macintosh, you 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

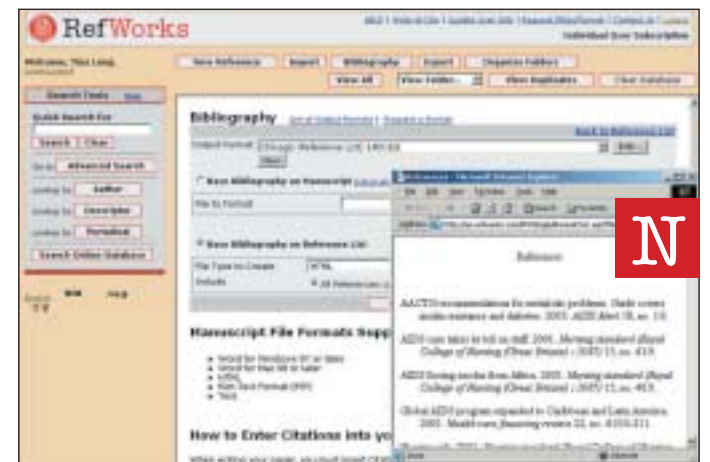
1. Save the document you have just created before formatting the paper and the bibliography.
2. Click on the **Bibliography** button from the Citation Viewer window or from within the RefWorks program.
3. Select the Output Format you need and the paper you have just created as your manuscript.
4. Click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

## Offline – Manuscript



If you create a manuscript offline, you must manually insert citations in the text where you want to cite the reference. **M** To do so, use two open curly brackets “{” followed by the Reference ID number followed by two closed curly brackets “}”. For multiple citations in the same location separate the Ref ID number with semicolons: {{34;45;23}}.

## Bibliography From a Reference List or Manuscript



1. Access the saved Microsoft Word document as described in the “Offline” section of “Creating Your Manuscript.”
2. Go to your RefWorks account and click on **Bibliography**.
3. Select an output format.
4. a. **BIBLIOGRAPHY FROM A MANUSCRIPT** — Click on **Base Bibliography on Manuscript**. Enter the manuscript file name in **File to Format** by browsing and selecting. **N**
- b. **BIBLIOGRAPHY FROM A REFERENCE LIST** — Click on **Base Bibliography on a Reference List**.
5. Click on **Create Bibliography**.
6. A new window will open with the re-formatted Microsoft Word manuscript containing the bibliography.

**FOOTNOTES:** For all options, use the word processor’s footnote formatting feature, inserting references using the “Manuscript” steps described above.