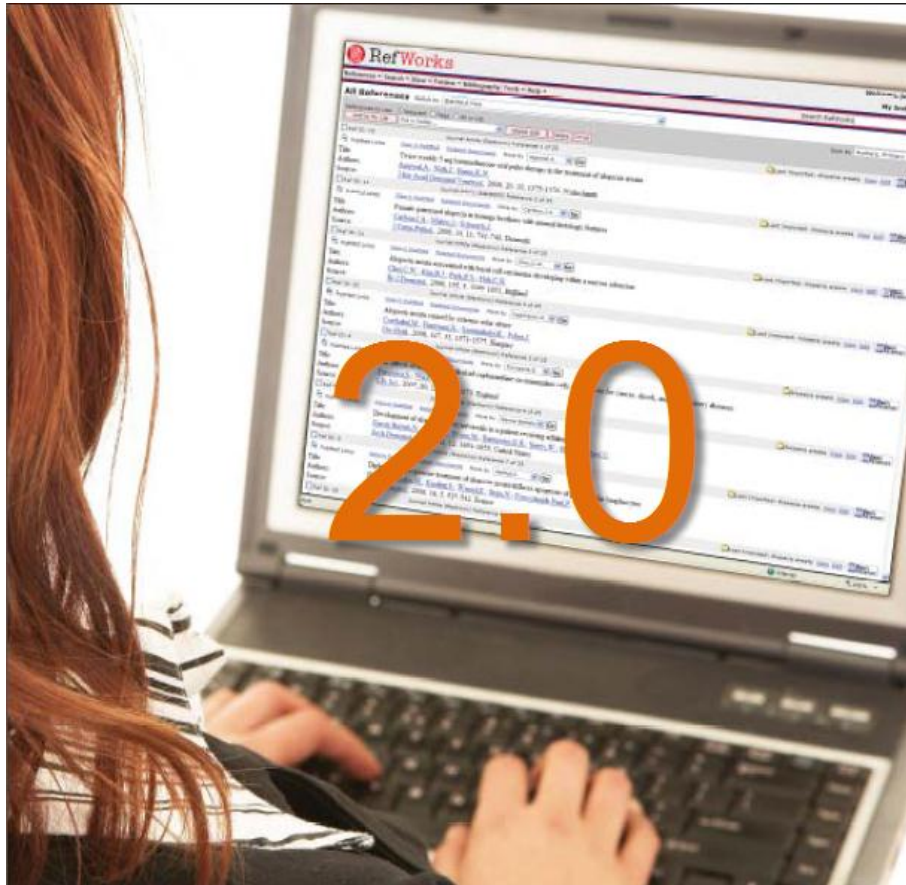




RefWorks Quick Start Guide



LOGGING IN

- Access www.refworks.com/refworks and OR Follow the links from the McDermott Library Homepage. Then enter your personal login Name and Password. (New users will need to sign up for an individual account following the prompts from the Library site).
- Note: when accessing RefWorks from off-campus or an unrecognized IP address, you may be asked for the “group code” prior to your login name.



www.refworks.com

Technical services

support@refworks.com

+1.775.327.4105

Note: These instructions are written to support RefWorks 2.0. To update your interface to the 2.0 version of Refworks, click the link in the upper right corner of your screen after you login.

Turn on the power of **RefWorks 2.0**

Welcome,

[RefWorks 2.0](#) [RefMobile](#) [Log out](#)

University of Texas at Dallas Libraries

Library | Tools | Help

Search RefWorks

Attachments [Go](#)

Creating Your RefWorks Database

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

Importing Data Directly

The image shows two screenshots from the ProQuest website. The top screenshot displays search results for 'earthquakes' with 3593 documents found. It highlights the 'Export' button in the 'Newspapers' section and the 'Export Citations' options, specifically 'Export directly to RefWorks' and 'RefWorks'. A red callout box labeled 'A1' points to these options. The bottom screenshot shows the 'Customize' settings menu, where the 'Default Source Type for Imported References' is set to 'Electronic'. A red callout box labeled 'A2' points to this dropdown menu.

1. Under the save or export function within the online service, select or click onto the save to RefWorks option. (A1)
2. If you 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.
3. Select **View Last Imported Folder** to review the imported records.

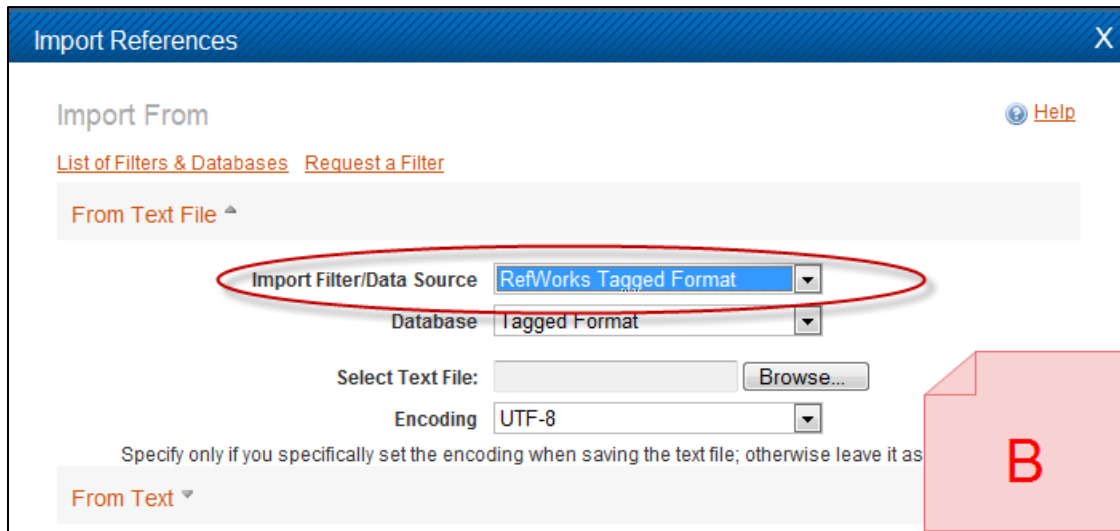
*Helpful Hint: Every reference added to RefWorks (whether imported or entered manually) is given a print or electronic designation called Source Type. This assists in ensuring you have all the relevant data **REQUIRED** in your bibliography. A default Source Type may have been set by your local Administrator.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



Import References

Import From [Help](#)

[List of Filters & Databases](#) [Request a Filter](#)

From Text File ^

Import Filter/Data Source: RefWorks Tagged Format

Database: Tagged Format

Select Text File: Browse...

Encoding: UTF-8

Specify only if you specifically set the encoding when saving the text file; otherwise leave it as

From Text v

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 to 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 **Import References Into Folder** menu and designate the specific folder where you want to file the imported references. If you do not choose a folder, the references will automatically go into a folder titled **Last Imported Folder**.
6. Enter file name into **Select Text File** by browsing and selecting or manually typing in the file name.
7. Click on **Import** at the bottom of the dialogue box. When the import is complete, select **View Last Imported Folder** 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 in the Import area by clicking on the List of Filters and Databases link.



Importing from RSS (Really Simple Syndication) 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. Launch the RSS Feed by clicking on the name link. Your feed results will be displayed in a separate window for selection and importing.

Manually Entering References

The screenshot shows the 'Add New Reference' dialog box. At the top, there is a dropdown menu labeled 'View fields used by:' which is currently set to 'MLA 7th Edition'. This dropdown is circled in red. Below it are several input fields: 'Ref ID:', 'Add to folder:' (with a 'Select a folder...' button), 'Ref Type:' (set to 'Journal Article'), 'Source Type:' (with radio buttons for 'Print' and 'Electronic'), 'Output Language:' (set to 'English'), and 'Attachments:' (with a 'Browse...' button and an 'Add attachment' button). At the bottom, there are two buttons: 'Save Reference' and 'Save & Add New'. A red callout box with the letter 'C' is positioned over the 'View fields used by:' dropdown.

1. Select **Add New** from the **References** menu.
2. Select a potential bibliographic output style (e.g., APA, Chicago, MLA) under **View fields used by** to see the fields that might be used by your chosen output style. **C**
3. Designate the type of reference you are entering (e.g. journal, book or dissertation) under **Ref Type**. Field names displayed indicate recommended information needed to produce an accurate bibliography for the selected output style and reference type. These fields are not required to save the actual reference in RefWorks, and not every reference will have information for every field provided.
4. Enter information in the boxes provided and click **Save** when finished.

Attaching Files to a Reference

The screenshot shows the 'Edit Reference' dialog box with a 'Choose File to Upload' window open. The 'Attachments:' field in the dialog is circled in red. The file explorer shows the 'Documents library' with various files. A red callout box with the letter 'D' is positioned over the 'Attachments:' field.

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.

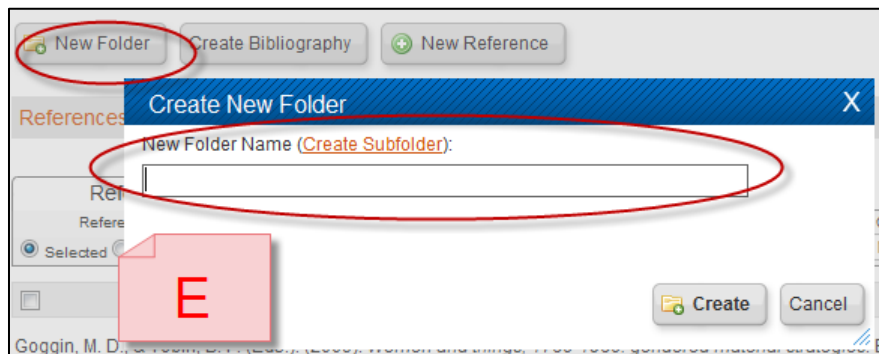
1. Select a reference in your database; click on **Edit**.
2. Click on **Browse**. Select a file to attach. Select **Open**. **D**
3. Click on **Add attachment**.

Helpful Hint: There is no limit to the number of files you can attach to a reference. The maximum size of any individual attachment is 20 MB.

Managing and Sharing Your References

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

Creating Folders



1. Click the button for **New Folder**.
2. Enter a name in **New Folder Name**; click **Create**. **E**

There is no limit on the number of folders you can create within your RefWorks account.

*Helpful Hint: The **Last Imported Folder** contains only references from your most recent data import that have not been filed in other folders. References from imports prior to your last import not assigned to specific folders remain available in your primary database but unfiled.*

Putting References into Folders



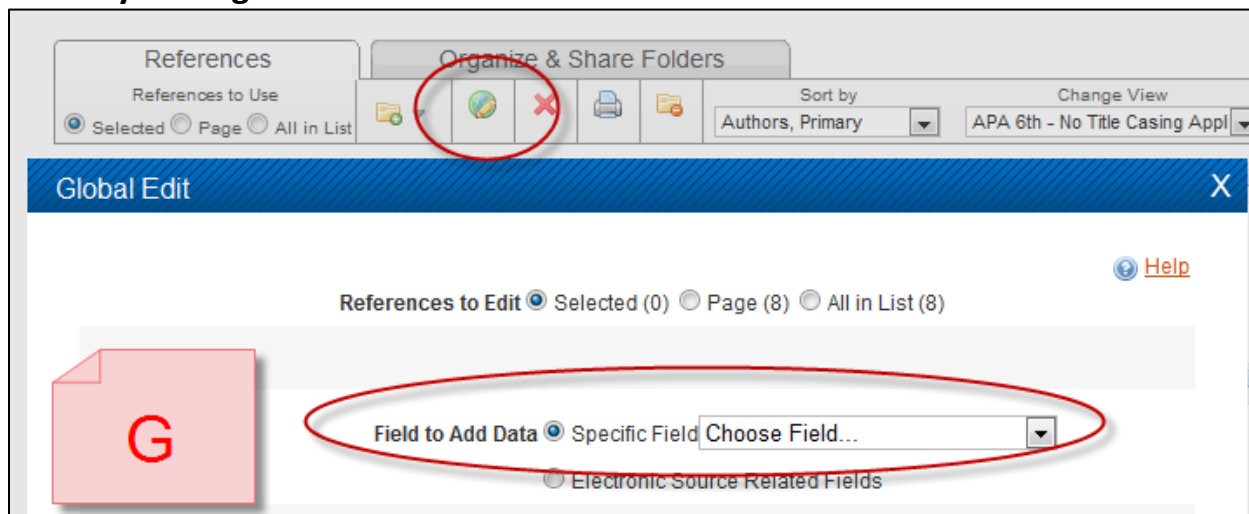
1. Use the **Search** functions to retrieve references already in your RefWorks database or choose references directly from your **Last Imported Folder** to put in a folder.
2. Mark desired references from the search results page, then click the radio button titled **Selected**. The selected references 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 in List** or all on a **Page**.
3. Select the destination folder from the **+ Folder** drop-down menu. **F**
4. 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** or **Folders** pull-down menu, select a folder or group of references.
2. Using the pull-down menu **Sort by**, located on the top right hand side of the page, choose to view references by various fields within your database.

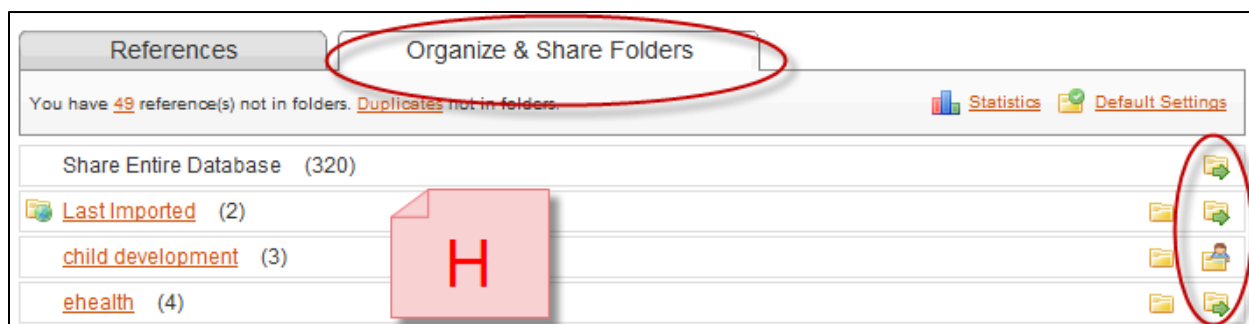
Globally Editing References



1. From the **View** pull-down menu, select **All References** or a folder of references. You can also globally edit references from search results in RefWorks.
2. Select the references you wish to edit.
3. Click on the **Global Edit** icon (circled). The **Add** option is displayed by default.
4. Choose the specific field to edit from the drop-down list. **G**
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.

Sharing Your References



You can share a folder of references or your entire database. RefShare is not automatically available for all RefWorks users.

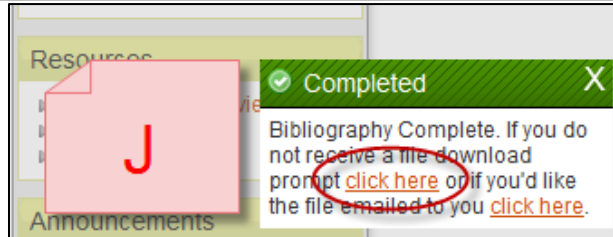
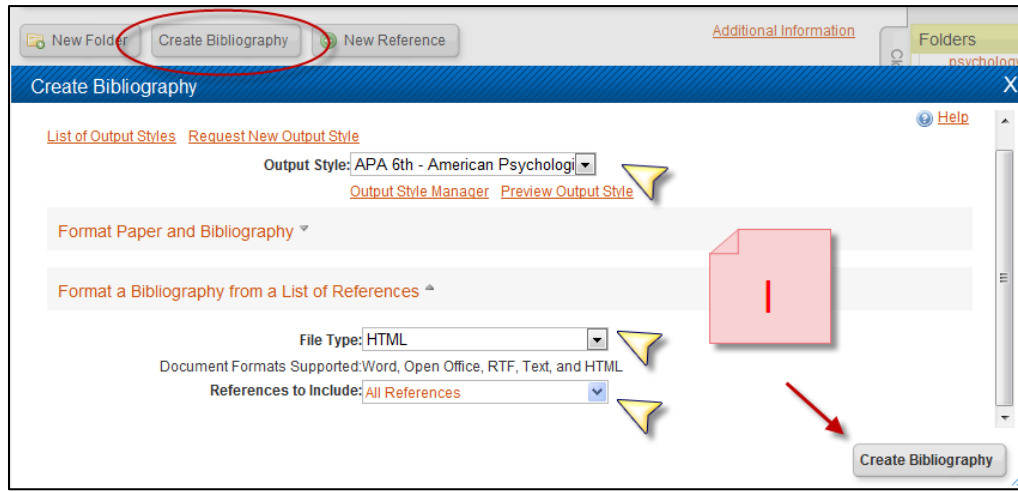
1. Click the tab to **Organize and Share Folders**. **H**
2. Click the **Share Icon** (circled) to share a particular folder or **Share Entire Database**. Click Share in the pop up box to share the folder(s).
3. Click the icon for a shared folder a second time to select desired **Shared Folder Options** which allow you to define any use restrictions you wish to set for the Share Recipient(s).
4. Click on **E-mail this share**. A new window will open with a generic e-mail template and a unique URL created for your RefShare folder. Insert the e-mail address of the individual(s) you would like to share your references with. Select **Send E-mail**.

Note: As the owner of the folder or database, you determine the options your Share Recipients(s) will have in utilizing your shared references.

Creating Your Paper and Bibliography

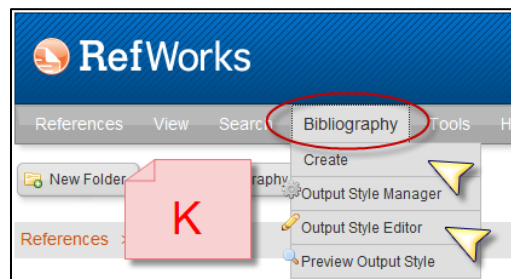
Write-N-Cite is a utility allowing Microsoft Word (and other word processor programs) users to cite references in a paper with the click of a button.

Format a Bibliography From a List of References



1. Click the **Create Bibliography** button. **I**
2. Select an output format (i.e., APA, MLA, Chicago, etc.).
3. Select what file type to create.
4. Select to format **All References** or only those from a specific folder.
5. Click on **Create Bibliography**.
6. A new window may open with your bibliography. If it does not, click the link in the message box to download it. **J**
7. Save your bibliography to your computer or disk.

Editing or Creating Your Output Style

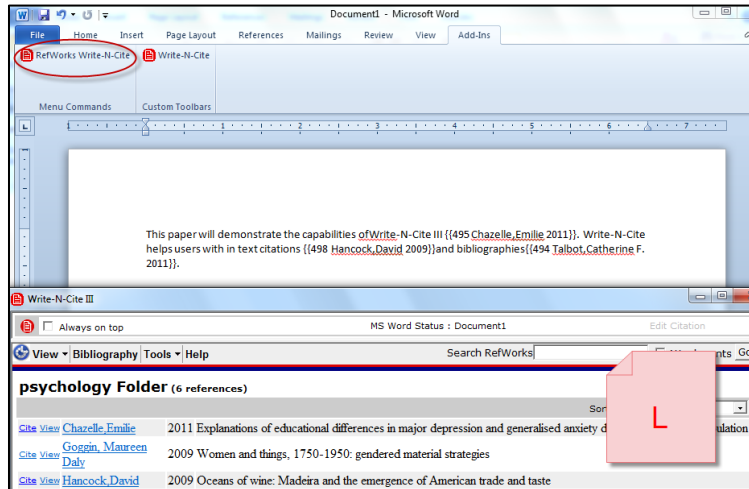


RefWorks provides hundreds of output styles to choose from. If one of these styles does not conform to your desired results, the Output Style Editor allows you to create custom output styles by either creating a completely new style or modifying an existing output style to suit your needs.

1. Click on **Bibliography**.
2. Click on **Create** or **Output Style Editor**. **K**

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

Write-N-Cite Paper



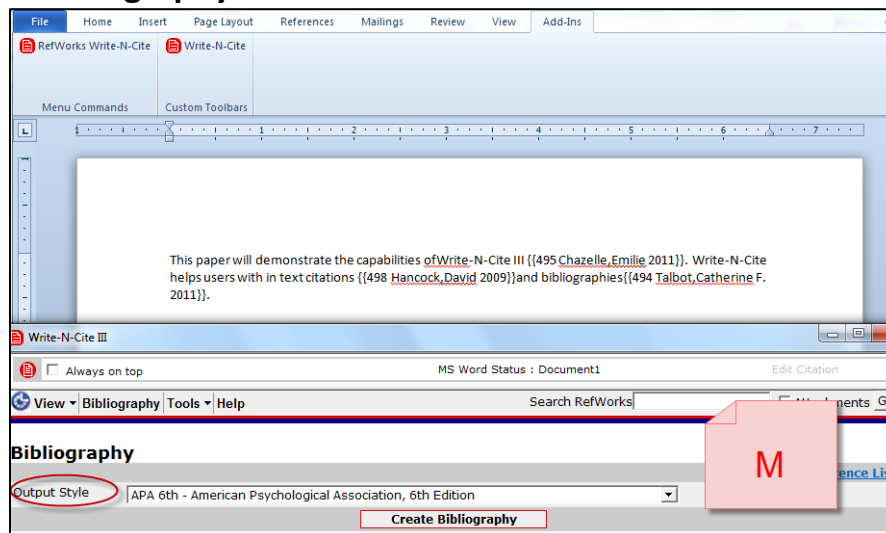
Create a paper with in-text citations using the RefWorks Write-N-Cite feature.

NOTE: *Write-N-Cite III (with off-line capabilities) is only available for Windows Users. Write-N-Cite v2.5 is available for Mac Users.*

1. Download the **Write-N-Cite** utility from the **Tools** pull-down menu.
2. Open a new blank document in **Microsoft Word**.
3. Launch **Write-N-Cite** using the button on the **Add-ins** menu in **Microsoft Word**. **L**
4. Put the cursor in your Microsoft Word document where the reference should be inserted; click **Cite** next to the reference in the **Write-N-Cite** screen. (Use the **View** menu to navigate to the particular folder you need.)
5. Save your Microsoft Word document when finished.

To create footnotes, use the word processor's footnote formatting feature, inserting references using the "Write-N-Cite steps described above.

Write-N-Cite Bibliography



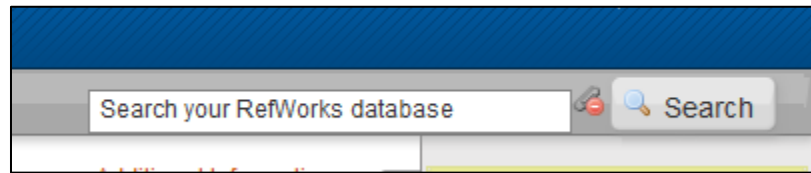
1. Launch **Write-N-Cite**.
2. Click on **Bibliography**.
3. Select the output style. **M**
4. Click on **Create Bibliography**.
5. The document will refresh to be formatted correctly and contain the bibliography.
6. Save your **Microsoft Word** document.

OFF-LINE CAPABILITIES: Write-N-Cite III now allows you to work on a paper and format a bibliography both online AND off-line. To utilize the off-line capabilities within Write-N-Cite III, users must first download their RefWorks database while online. For more information on the off-line capabilities, please refer to the **Help** file.

Finding References in Your RefWorks Database

There are three ways to search your RefWorks database: Quick Search, Advanced Search and Look Up Indexes.

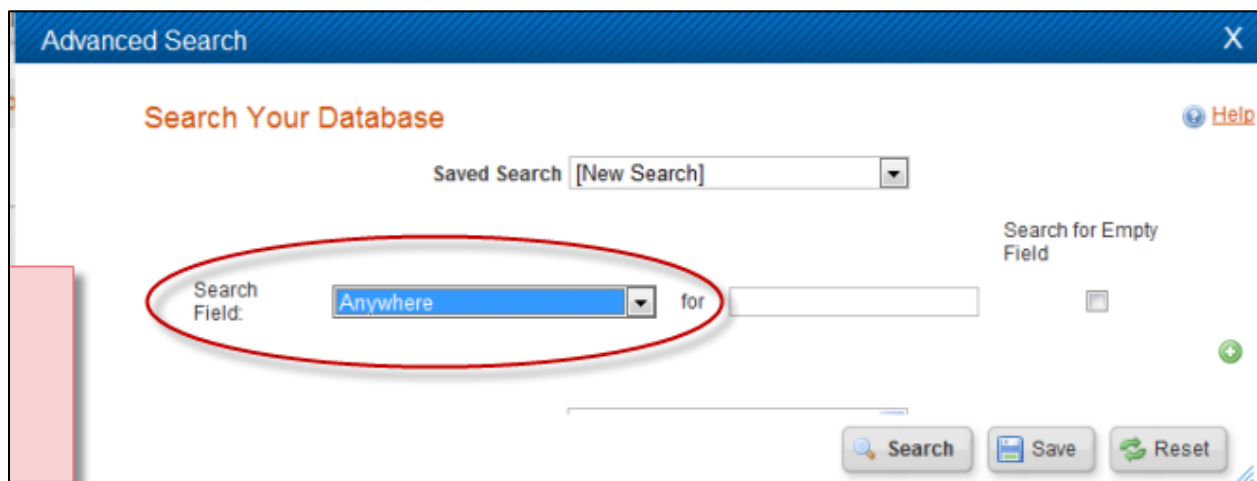
Quick Search



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

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.

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


Need More Help?

Online Tutorial

RefWorks 2.0 Fundamentals Tutorial

Start using RefWorks today! Select a topic from the list below. To obtain a print version, please click on the PDF link.

Note: Flash is needed to run the tutorial. Click [here](#) to download the Adobe Flash Player plug-in.



1. [Introduction](#) (1:18 min.) [PDF](#)
2. [Accessing RefWorks, Creating an Account, and Logging In](#) (3:30 min.) [PDF](#)
3. [Navigating Around RefWorks](#) (2:26 min.) [PDF](#)
4. [Adding References via Direct Export](#) (3:15 min.) [PDF](#)
5. [Adding References by Importing Text](#) (2:14 min.) [PDF](#)
6. [Adding References by Searching Online Catalogs or Databases](#) (3:29 min.) [PDF](#)
7. [Adding References via Manual Entry](#) (3:18 min.) [PDF](#)
8. [Organizing References with Folders](#) (4:38 min.) [PDF](#)
9. [Searching Your RefWorks Database with Quick Search](#) (2:18 min.) [PDF](#)
10. [Creating a Standalone Bibliography](#) (1:06 min.) [PDF](#)
11. [Inserting Citations and Creating Bibliographies with Write-N-Cite](#) (11:45 min.) [PDF](#)

A tutorial providing explanations of various RefWorks functions is available online. 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, administrator tools and much more.

E-Mail

Send questions or problems to support@refworks.com.

Webinars

RefWorks offers complimentary training webinars in various languages. Fundamentals and Advanced Feature sessions are available. A complete listing of sessions can be found on the RefWorks homepage. New dates and times are added monthly.

Phone

Contact RefWorks Technical Services at +1.775.327.4105.