

# Introduction to RefWorks

---

John Anderson

WCAS Writing Program  
Northwestern University  
November 12, 2002

# Overview

---

- **What is RefWorks?**
- **Writing with RefWorks**
- **Basics**
  - Creating user accounts
  - Entering information about references
  - Organizing RefWorks folders
  - Creating bibliographies
- **Advanced topics**
  - Exporting data
  - Using Write-N-Cite

# What is RefWorks?

---

- **RefWorks is a web-based bibliography manager**
  - Currently available at <http://www.refworks.com>
  - Northwestern plans to host its own RefWorks server in the near future
- **Users can create collections of references**
  - Import data from NUcat, many online databases, and other bibliographic software (such as EndNote)
  - Organize references by category or project
  - Share reference collections with others
- **Users can create formatted bibliographies from these collections**
  - Create bibliographies in all major styles (MLA, APA, etc.)
  - Export bibliographies as several document types (Word, RTF, HTML, etc.)
  - Cite references inside Word documents and generate a correctly formatted bibliography
- **RefWorks similar to EndNote, but currently lacks some of its features**
  - No direct Internet connection to databases (z39.50)

# Writing with RefWorks

---

- **With RefWorks, writers can:**
  - Format their references faster and with less effort
  - Record bibliographic information as they find it
  - Show instructors and classmates what they're doing
- **What RefWorks can do:**
  - Give writers a tool for organizing their research results
- **What RefWorks can't do:**
  - Find and evaluate sources
  - Do 100% of the editorial work of preparing a manuscript
- **What writers still need to do:**
  - Use RefWorks early and often
  - Understand quirks of importing references
  - Organize sources efficiently
  - Edit RefWorks-generated bibliographies by hand

## Creating user accounts

---

- **How do I create a RefWorks account?**
  - Go to the RefWorks website: <http://www.refworks.com>
  - Northwestern users will see an NU-specific login screen
- **What is my Login Name?**
  - RECOMMENDED: use NU netid for login name
  - Using netids will make it easier to manage user accounts when NU introduces its own local RefWorks server
  - WARNING: **DO NOT** use your netid password (security risk!)
  - NU plans to make RefWorks snap-managed, but not yet
- **Add a second read-only password to allow others to see your work**
  - Edit your account information using the “Update User Info” link
  - Inform colleagues of your login name and read-only password

## Entering information about references: overview

---

- **How do I enter information manually?**
  - Click **New Reference**, enter data in fields
- **What database search results can I currently import?**
  - NUcat
  - OCLC (Article First, WorldCat, Medline, etc.)
  - EBSCOhost (Academic Search Elite, etc.)
  - Silverplatter (MLA bibliography, etc.)
  - OVID (PsychINFO, etc.)
- **What database search results can NOT be imported?**
  - InfoTrac (EXAC)
  - ProQuest (supported by RefWorks, but ProQuest web interface does not offer option to export)
  - Lexis/Nexis

## Entering information about references: NUcat

---

- **How can I enter search results from NUcat?**
  - Click **Import**
  - Select **Endeavor Voyager** from the list of filters
  - Select **Northwestern University** (long view) from the list of databases
  - Select a text file containing the search results OR copy and paste directly into the web-based form
  - Click **Import** (below form)
- **Oddities**
  - Call number information currently stored in the “Notes” field

# Entering information about references: OCLC ArticleFirst

---

- **How can I enter search results from OCLC FirstSearch?**
  - Click **Import**
  - Select **OCLC FirstSearch** from the list of filters
  - Select **ArticleFirst** from the list of databases
  - Select a text file containing the search results
- **Oddities**
  - Export from OCLC requires saving as a text file that can be read by EndNote
  - Some publication information currently stored in the “Notes” field, not “Publisher”
  - Some databases (i.e. **WilsonSelect**) not currently available under the OCLC filter

## Entering information about references: EBSCOhost Academic Search Elite

---

- **How can I enter search results from Academic Search Elite?**
  - Click **Import**
  - Select **EBSCOhost** from the list of filters
  - Select **Academic Search Elite** from the list of databases
  - Select a text file containing the search results OR copy and paste directly into the web-based form
- **Oddities**
  - Export from EBSCOhost requires clicking the **bibliographic manager** tab in the save dialog

## Organizing RefWorks folders

---

- **How are RefWorks collections organized?**
  - All references have a unique Ref ID that is never repeated
  - Users can create **folders** to create separate, searchable sub-collections
  - Users can create **descriptors** to group sources in other ways
  - Search and sort tools are limited but helpful
- **Common actions**
  - Clicking **Organize Folders** lets users create or rename collections
  - Clicking **View All** shows all references in the collection
  - Selecting **Last imported** from **View Folder** shows most recent captures
  - Checking multiple boxes lets users move, delete, or annotate multiple references

## Creating bibliographies: all references

---

- **How do I create a formatted bibliography containing all my references?**
  - Click **Bibliography**
  - Select the preferred output format from the list
  - Select **Base Bibliography on Reference list**
  - Select file type to create
  - Select folder to use, or all references
  - Click **Create Bibliography**
  - Save new file
- **Is that it?**
  - Some editing required
    - Uppercase references
    - Unusual publication information
    - Non-print sources (e.g. interviews)

## Creating bibliographies: from a manuscript

---

- **How do I cite references in a manuscript?**
  - Include Ref IDs inside double curly-brackets: {{43}}
  - Use Write-N-Cite
- **How do I create a formatted bibliography using the references in a manuscript?**
  - Click **Bibliography**
  - Select the preferred output format from the list
  - Select **Base Bibliography on Manuscript**
  - Select file type to create
  - Select folder to use, or all references
  - Click **Create Bibliography**
  - Save new file
    - NOTE this is a modified copy of your original manuscript

## Exporting data

---

- **Why would I want to export data?**
  - To save a copy of your sources
  - To use another bibliographic software package
- **Most important reason to keep copies**
  - Prevent heartbreak when Northwestern moves to local RefWorks installation

## Using Write-N-Cite

---

- **What is Write-N-Cite?**
  - Template and macro for Microsoft Word 97 and 2000 (Windows)
- **Users can:**
  - Open a window to access their Refworks collection while writing
  - Insert references in their manuscript by clicking **cite**
  - Generate bibliographies on the fly
- **Oddities:**
  - To use the toolbar button, the template must be installed in the correct application data folder folder