

- basic functions

Aarhus University AU Library 2015

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Introduction

RefWorks is a tool that can help you manage your references. This can be very useful when working on papers, articles, assignments and theses.

RefWorks can manage a lot of different reference types; such as references for articles, books, web pages, cases etc.

In RefWorks you create a database to which you export or register your references manually. Most of the library databases give you the opportunity to export references for electronic articles directly. Book references can be exported from Aarhus University library's database (http://library.au.dk/en/) or from Bibliotek.dk (https://bibliotek.dk/eng) – the database where you search all Danish libraries' holdings.

RefWorks is a great help for you to manage your literature. It can be hard to remember what a specific article is about or why this specific article is relevant for your work. That is why you can supply all references with your own notes in RefWorks.

From your RefWorks database you can create lists with your references which you can print or save as a file (there are different file types to choose from).

RefWorks can also integrate with Word: meaning you can get the program to insert citations or footnotes directly into your text/work while writing it. All your references will look the same because you choose a style from which all your references are created. To do all this you only have to download a small program called Write-N-Cite. You have access to Write-N-Cite from RefWorks. Finally, Write-N-Cite automatically create a reference list with all the references you have been using in your text/work at the end of your text/work.

Read more about RefWorks on AU Library's website: http://library.au.dk/en/using-the-library/referencevaerktoejer/refworks/

What is a reference?

A reference is a source reference to e.g. an article, a book, a website. You always have to document where you have found a specific theory, from where you have taken a quotation, what literature you base your discussions on etc. Which style to manage your references by can be different from one field of study to another. If you are in doubt about which style to use ask your supervisor.

Below you can see different style examples:

APA 6th edition

Journal article:

Baron, J., & Delcamp, H. (2012). The private and social value of patents in discrete and cumulative innovation. *Scientometrics*, *90*(2), 581-606. doi: 10.1007/s11192-011-0532-5 In-Text Citation: (Baron & Delcamp, 2012)

Book:

Taleb, N. N. (2008). *The black swan: The impact of the highly improbable* (2nd ed.). London: Penguin Books.

In-Text Citation: (Taleb, 2008)

Harvard

Journal article:

Baron, J. & Delcamp, H. 2012, "The private and social value of patents in discrete and cumulative innovation", *Scientometrics*, vol. 90, no. 2, pp. 581-606.

In-Text Citation: (Baron, Delcamp 2012)

Book:

Taleb, N.N. 2008, *The black swan: the impact of the highly improbable,* 2nd edn, Penguin Books, London. In-Text Citation: (Taleb, 2008)

Vancouver

Journal Article:

(1) Baron J, Delcamp H. The private and social value of patents in discrete and cumulative innovation. Scientometrics 2012 FEB;90(2):581-606.

In-Text Citation (1)

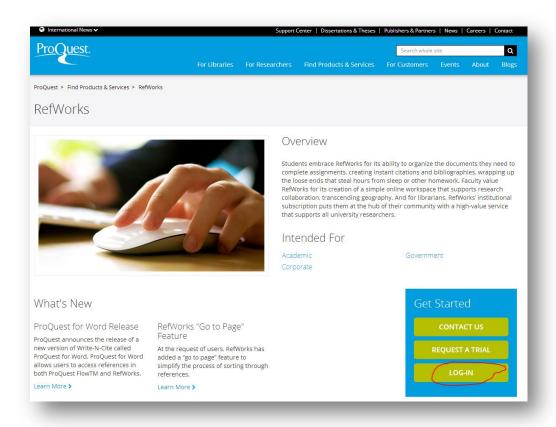
Book:

(2) Taleb NN. The black swan: the impact of the highly improbable. 2nd ed. London: Penguin Books; 2008.

In-Text Citation: (2)

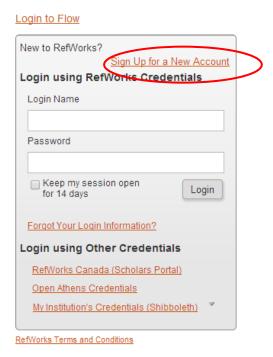
Login

When you want to start using RefWorks you have to create an account. Go to RefWorks' website: http://www.proquest.com/products-services/refworks.html. To the right you choose **Log-in**:

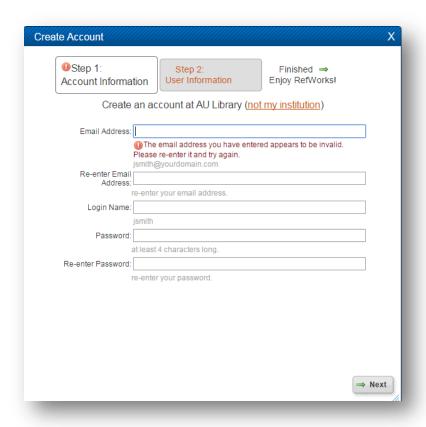


You have to be on Campus (the university), when you create your account. In this way you get access to create an account. When you have created the account with your own login and password you can use your database from wherever you are.

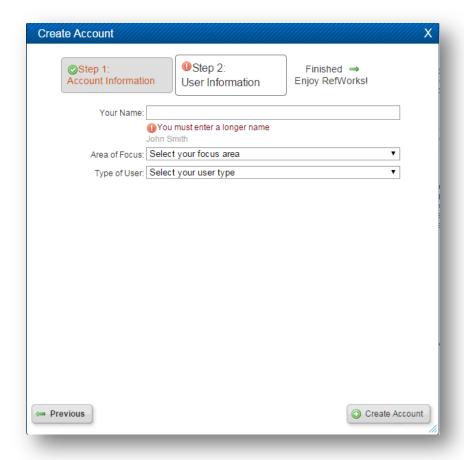
1. Click Sign up for a New Account



2. When you register you will have to do it in 2 steps. In step 1 you choose a login and password which you can easily remember. It is important that you do NOT use any & signs in your login or password:



3. In step 2 you type in your name, Area of Focus and Type of User:



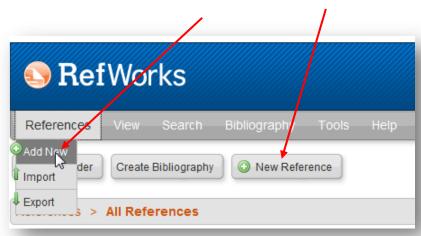
Shortly after registering you will receive an email containing your user login. It is always a good idea to save this kind of email; you might need some of the information later on.

Having registered you are able to use RefWorks from any computer - from home, when travelling etc.

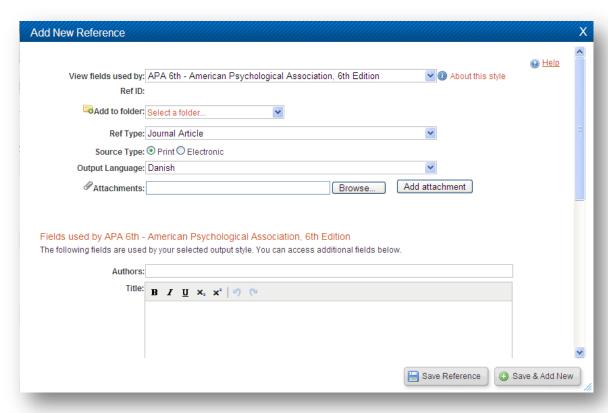
Adding references manually

Most databases give you the opportunity to export references directly into RefWorks. In this way you do not have to type in references manually. However, it is a good idea to know how to add references manually because you might have to add a reference manually at some point.

1. From **References** you chooses **Add New** – or use the shortcut



2. A blank form occurs with different fields you can fill out. If you choose a specific style from **View fields used by** you only have to fill out fields that are relevant for that specific style.



- 3. Remember to choose a reference type in the field **Ref Type**. Choose if it is a journal article, a book, a webpage etc.
- 4. You can also attach a file to your reference (**Attachments**). The file will be saved on an online server together with your RefWorks database.
- 5. You can find help on how to add references from Help

When adding references manually please note some of the following guidelines:

View Fields Used By:

If you choose a specific output style (View fields used by), e.g. APA, the fields that are relevant to fill out will be shown. That is the fields that are relevant for that specific style. In the end it is the output style that decides how your bibliography and your citations in the text will look and which data that will show. Fill out the relevant fields with the data that are available to you.

Authors:

Remember to register author names with the last name first – e.g. Jones, David (inverted form). A list of already used author names will automatically appear when you start spelling an author's name and you can simply click on one of the names from this list or spell new names yourself. If you have more than one author the names have to be separated with a semicolon.

Periodical, Full:

In this field you put in the name of the journal (sometimes also called periodical). This could be Journal of Finance e.g.

Volume:

A journal is usually published for several years and each year has its own volume number. Volume 19 is the 19th year this journal is published. In the volume field you only enter a number (the raw data).

Issue:

For each volume (each year) a journal is published in several numbers, sometimes one number pr. month. The issue number you put in the field called issue. Again it is only a number you have to fill in.

Start Page / Other pages:

A journal article has a start page and an end page (in RefWorks the end page is called Other pages). Again it is only the numbers you put into these fields.

Link:

It is possible to link to electronic resources (articles from different journal database) or different files. Der er mulighed for linkning til elektroniske ressourcer eller til filer. Vær opmærksom på, hvad du linker til i tilfælde af, at andre skal have adgang til ressourcerne/filerne. Please note what it is you are linking to and where the document can be found if you want others to be able to access the document.

Exporting references directly from different databases

Most databases give you the opportunity to export references into RefWorks directly (check out Import from Online Data Vendors: http://proquest.libguides.com/c.php?g=87178&p=559633). This is a great help since you do not have to register the references you have found manually. You can export references to your database while doing your information search.

If you are using a database that is not mentioned in the list referred to you can always try to contact your service location at AU Library to get help on how to export references in the specific database.

It is usually shown that you have the ability to export references found in a database to some sort of a reference management tool. This can be shown via a function called Export citations, Export, Citation Manager etc.

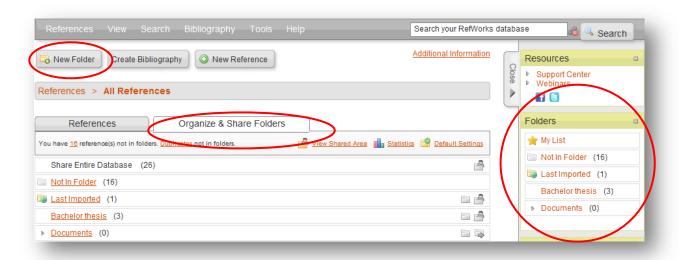
Most databases (Search, Business Source Complete, Science Direct, Wiley etc.) provide direct export of references and export of more references at one time.

Folders and Customize

Folders

In RefWorks you can work with folders for your references – that is to move copies of your references into folders which you create yourself. This is how to create folders:

- 1. Click on New Folder
- 2. If you are working with several folders you can switch between the m from the tab **Organize & Share Folders** or from the shortcut to the right.



The references that you either add manually or export directly into your RefWorks database are always put in your "main" RefWorks database. If you choose to work with folders it is only copies of references that you move into folders. If you decide to delete a folder you will always be able to find your reference

again because it has not been deleted from you "main" RefWorks database. If you want to switch from a folder view to be able to see all your references go to **References** - **All References**

Customize

You are able to customize your RefWorks database. You can e.g. customize how many references you want to be able to see per page. Go to **Customize** in the very top of the webpage – here you can change the number of references you want to be able to see.



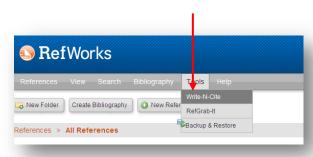
From **Reference List Options** you can change to the number of references you want to be able to see at a time.

From **User Field Options** you can change the names of the user defined fields. These fields you might want to use for your own notes and therefore it could be relevant to rename some of these fields - e.g from User 1 Field Name to My own notes.

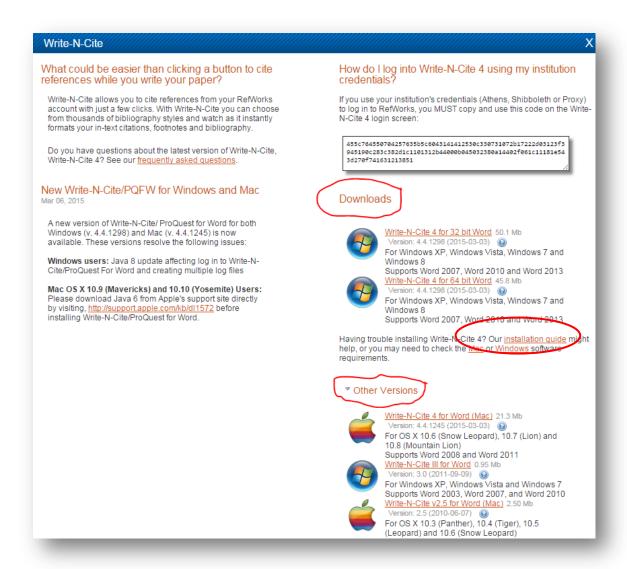
Write-N-Cite

RefWorks can manage your citations and bibliography directly in Word while writing your manuscript. All you have to do is to install a small program called Write-N-Cite.

You will find the program under **Tools**



You can read about which version of Write-N-Cite to install – it depends on your computer, your operating system and your Microsoft Office software.

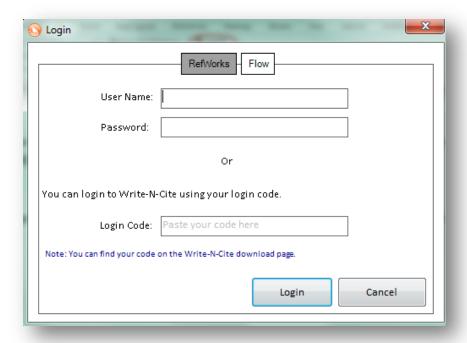


Write-N-Cite 4

If you are using Word 2007, 2010 or 2013 on a PC you need to use Write-N-Cite 4. The RefWorks tab can be found in the toolbar in Word after installing Write-N-Cite 4. Most of the RefWorks functions in the tab are grey and inactive until you log in to your RefWorks account.

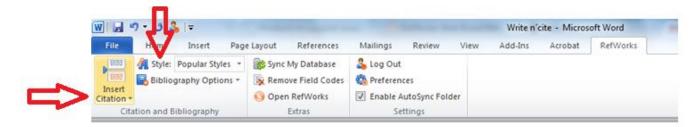


To login you need a unique code which you can find in RefWorks under **Tools**. Copy the code and paste it into the field "Login Code". Then you do not have to use your username and password.

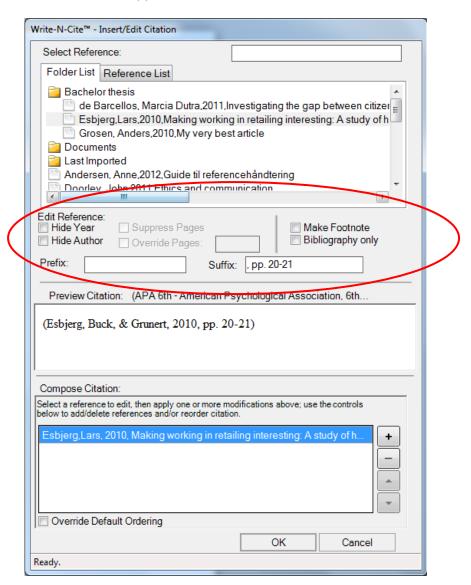


Having logged in you are able to put in citations directly from your RefWorks database to your Word document.

You need to choose an output style when you want to put citations into your document. Click **Style**. You can always change output style later if you want to use another style. Place the cursor where you want the citation to occur in your document. Click **Insert Citation** and choose the reference you want to cite. The reference will automatically show in your document.

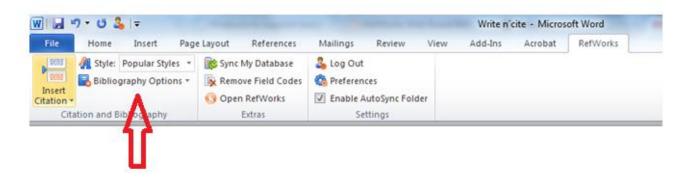


You can edit the a citation if you want to add a specific page number e.g. Double click the citation in your Word document and a new window appears. Go to **Edit Reference**:



If you want to put in text before or after the citation you type it in in either Prefix or Suffix. In the example above we have put in some text and page numbers after the citation (Esbjerg, Buck, & Grunert, 2010, pp. 20-21).

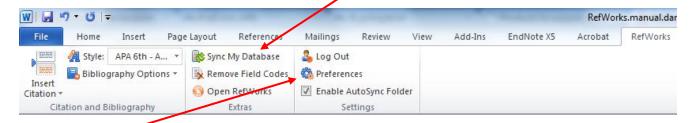
Click Bibliography Options when you want WNC to create a bibliography in your document:



You can insert a bibliography whenever it suits you. Click **Bibliography Options** and choose **Insert Bibliography**. Then the bibliography is generated in your document including references for your citations.

The RefWorks tab

Other functions worth mentioning are the possibility to synchronize WNC with your RefWorks database. It can be necessary to update using **Sync My Database**. Then you are able to see newly added references from your RefWorks database in WNC.

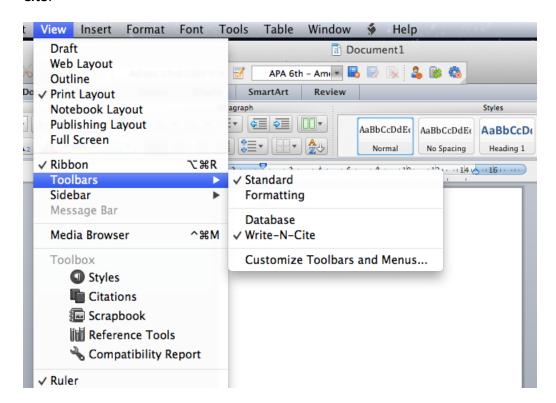


Using **Preferences** you are able to see which RefWorks database you are logged in to and you are able to convert documents created using an older version of WNC to the latest version of WNC.

MAC: Write-N-Cite 4

Write-N-Cite 4 for Mac is to be used with Word 2008 and 2011. Please remember to close your Office programs when installing WNC.

Install WNC and open Word. In Word you open WNC by choosing **View – Toolbars** and then **Write-N-Cite**:



A small toolbar opens – this is your WNC toolbar. Log in to your RefWorks account by clicking the small "picture":

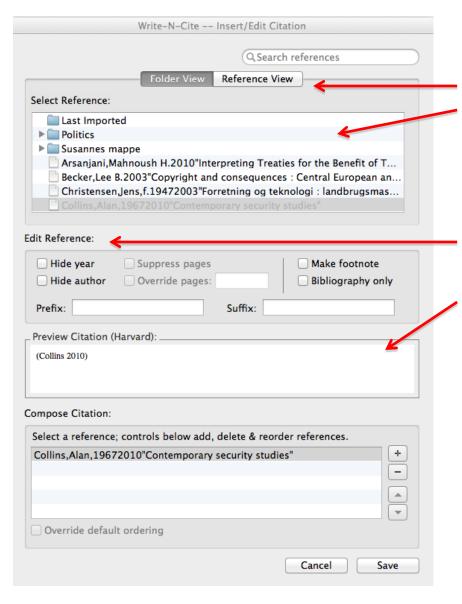


You do not have to use your username and password to log in. Instead you can use the unique code which you can find in your RefWorks database. Follow the instructions that pop up in a small window.

Place the cursor in your document where you want WNC to insert a citation. Choose "Insert citation" in the small WNC toolbar:



A new window opens and you are able to find the author or the publication you want to cite:



Here you can find your references arranged in folders (if you work with folders). You can also see all references by choosing **Reference view**.

The reference you choose can be seen in the box "Compose Citation". In the "Preview Citation" box you can see how your reference will look using a specific output style – in this case Harvard. The style can be changed – this is described next.

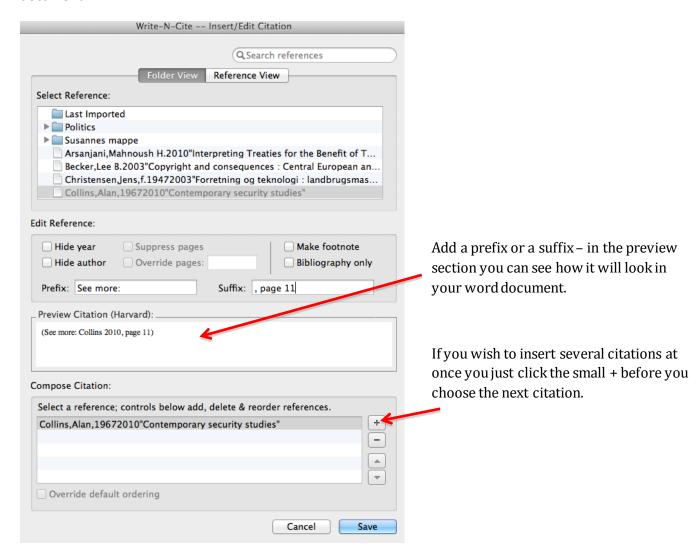
Click **Save** and the citation has been put into your document:



If you want to edit the citation you place the cursor in the citation and select **Edit citation** in the small WNC toolbar:



You can edit the citation by adding e.g. text or a page number. WNC makes sure it all is edited in your document:

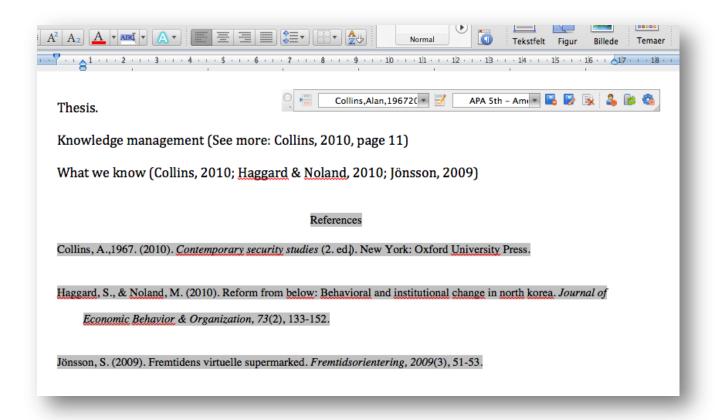


Click Save and the citations are edited in your Word document.

When you want your bibliography inserted click the icon for **Insert Bibliography**. Write-N-Cite generate your bibliography automatically according to the output style you have chosen. You can always change to another output style and also add a new style by clicking **Other Styles** in the menu.



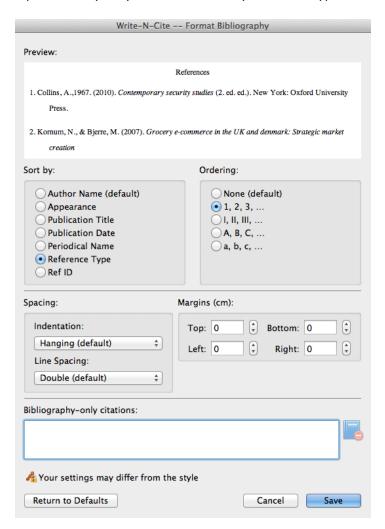
This is how citations and the bibliography could look in your document:



If you want to edit the way your bibliography looks you can do it by clicking **Format Bibliography**:



First you need to choose **Click here to unlock the style**. Then you are able to change the way your references are sorted. E.g. you could choose to get your bibliography sorted by numbers instead of alphabetically - or you could choose by reference type.



Other functions worth mentioning in the RefWorks toolbar are the possibility to synchronize WNC with your RefWorks database. It can be necessary to update every now and then so that newly added references are available through WNC. This can be done by clicking **Sync data**.



Preferences – here you can see which RefWorks database you are logged in to. You can also convert documents that have been using an older version of WNC – convert them to the latest version.

Problems installing Write-N-Cite?

If you experience problems installing WNC you can find help here: http://proquest.libguides.com/c.php?g=87178&p=559895

Bibliography

RefWorks can create a bibliography which you can save or print. For example when studying for your exams you can print a bibliography with all your own notes.

In RefWorks you can find a lot of predefined output styles. RefWorks uses these to generate bibliographies (and footnotes, in-text citations etc.) which match the demands of different publishers.

The output styles are used to define how your citations and bibliography will look.

You can reuse and edit an already existing output style if you have specific wishes/needs to the style. After editing you save the output style as a new style. In that way you do not overwrite a predefined style. RefWorks have made an excellent guide on how to edit and output style: http://www.refworks-cos.com/refworks/tutorials/

The library can also help you creating or editing output styles. Which output style to choose, is up to you to decide. You can also talk to your supervisor, maybe he or she has some guidelines for which output style to choose.

Creating a single bibliography

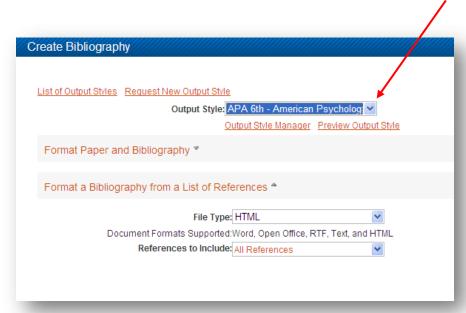
1. Mark the references you want to be included in your reference list and add them to My List



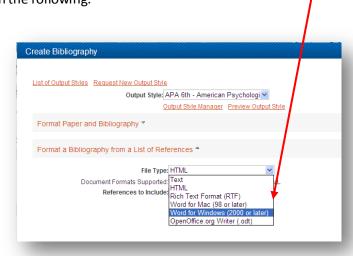
2. Click Create Bibliography and a new window opens



3. Now you have to choose how you want your references to be structured. Unfold the list of output styles. In the top you will find the styles you have used earlier (favorites). You can also access the output style manager where all output styles are listed. From here you can also add more styles to your favorites



4. Next you choose which format you want your bibliography to be generated in. You can choose between the following:



5. From **References to Include** you choose **My List** (containing the references you have marked). Then you click **Create Bibliography** (to the right) – and your bibliography is generated.

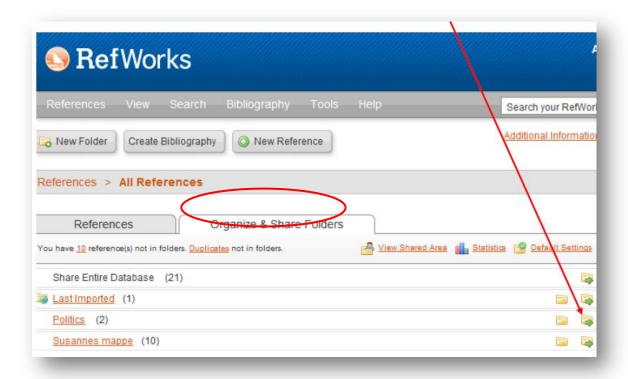
Sharing references

You can easily share your references/databases/folders with others and there are different ways to share.

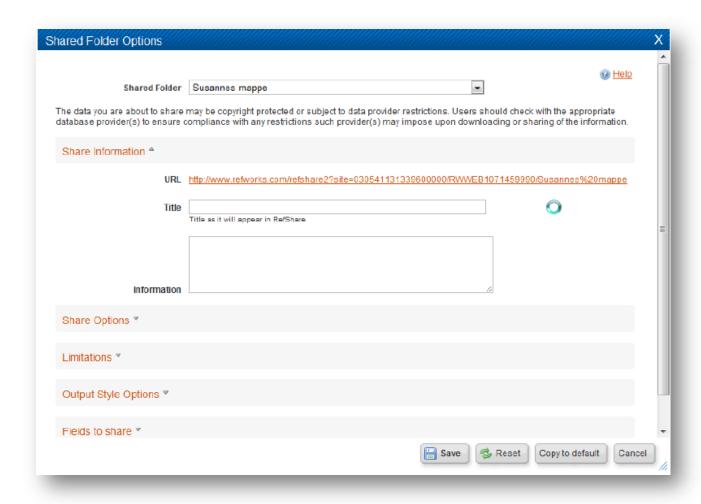
You can add a read-only password to your RefWorks database. Others can then get read-only access to your database. To set up this read-only password go to **Update Profile** in the top:



You can also share your database, specific folders or My List via the **Organize & Share Folders** tab. Click the small folder icon to the right.



A new window opens where you can choose what it is you want to share. RefWorks generates a URL that gives others access to the part you have chosen to share. From Share Options or Limitations you can add or remove different options. You choose what others can do with the references you share with them:



If you go back to the Organize & Share Folders view you can see that the folder icon has changed. Click on the icon and choose how you want to share – e.g. **Email this share**:

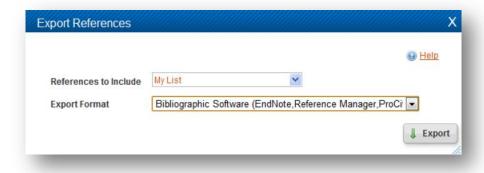


Another way to share references is to find the database/folder you want to share references from

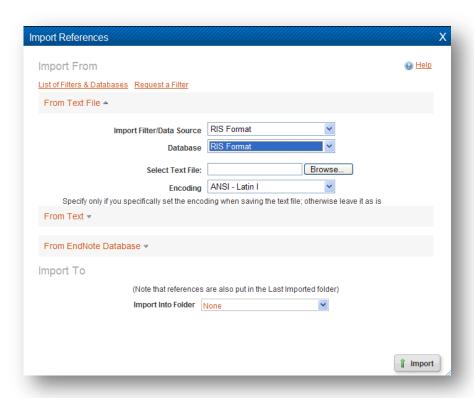
- Mark the references you want to export and add them to My List
- From References you choose Export



• Now you have to choose which format the references are to be exported in. The first format on the list *Bibliographic Software (EndNote,Reference Manager,ProCite)* is recommended if the references are to be exported into another reference tool. If you want to export references to another RefWorks database you have to choose *RefWorks Tagged Format*. Click **Export**.



• The file to export has to be saved as a txt-file. This file can be sent to the ones you want to share your references with. What they need to do is to import this file from **References – Import.** Then they choose RIS format or RefWorks Tagged format:



Shared login...

To be able to share a manuscript with others all you need is to have access to the same RefWorks database. It is possible to create a database which you can share as a group. All you need is to share the same username and password. Write-N-Cite can only format the document if all citations are from the same database.

Editing citations and changing the look of your bibliography has to be done in your RefWorks database and/or Write-N-Cite. You cannot edit citations or the look of your bibliography within your manuscript.

Need more help?

In RefWorks you can get plenty of help using tutorials and guides. Look under Help.

RefWorks Community also provides a lot of tutorials. You can find help on how to edit an output style for example: http://refworkscommunity.ning.com/page/resources

You are also welcome to contact you one of the service locations at AU Library: http://library.au.dk/en/aarhusuniversitylibraries/