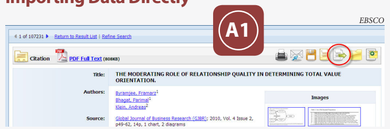
Creating Your RefWorks Database

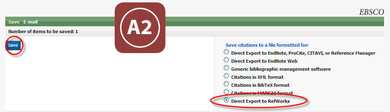
RefWorks provides a number of options for adding data to your database.

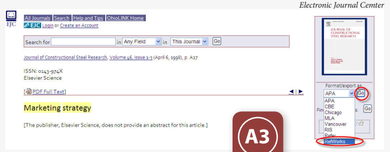
Logging In:
http://olinkserver.franklin.edu/screens/R.html
(First-time users need to sign up for an individual account following the screen prompts.)

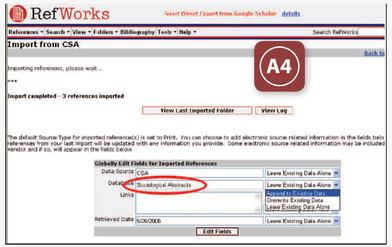
NOTE: Remote users should enter their myFranklin login information. If you are prompted for the "Group Code" it is RWFranklinU.

Importing Data Directly









1) Click on the ***Add*** folder to the right of each article citation you would like to import.
2) Click on ***Folder has items*** when you have finished adding items and are ready to export.
3) Under the ***Save*** or ***Export*** function within the online service, select or click on the option that allows you to direct export to RefWorks.

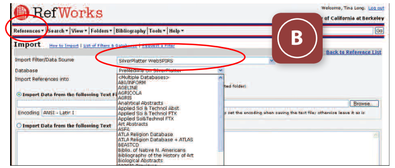
4) If you have your RefWorks account already open, the import will automatically begin. If not, then you will be prompted to the RefWorks login page; after you log in, the import will automatically begin.
5) Select ***View Last Imported*** folder to review the imported records.

Important: 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 has been set to electronic. Users can still customize the default Source Type settings under the ***Tools*** *menu,* ***Customize****.*

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

EBSCOhost (Includes Academic Search Complete, Business Source Complete, Education Research Complete, Psychology and Behavioral Sciences Collection and several others), Electronic Journal Center, the Franklin University Library Catalog, netLibrary, OhioLINK Catalog, ebrary, LexisNexis, and several more.

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 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.
4) Click on the ***Database*** drop-down menu and select the source database.
5) Click on the ***Import References Into*** 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***.
6) Enter file name into ***Import Data from the following Text File*** by browsing and selecting or manually typing in the file name.
7) Click on ***Import*** at the bottom of the screen. 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 the online services and databases that are supported by RefWorks can be found at www.refworks.com, under the link ***Import Filter List****.*

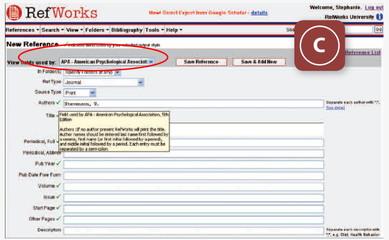
Creating Your RefWorks Database (continued)

Converting References from Other Bibliographic Management Products

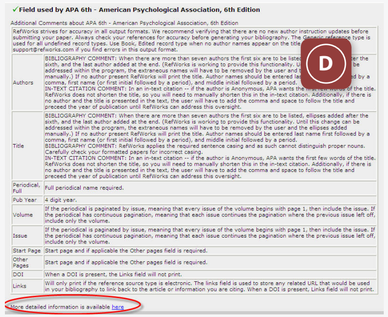
RefWorks is compatible with several other bibliographic management products. You can easily convert an existing bibliographic management database such as EndNote into RefWorks.

For details related to importing data from specific individual bibliographic management products, please refer to the online ***Help*** section of RefWorks.

Manually Entering References

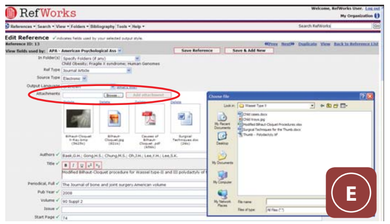


1) Select ***References*** from the pull-down menu tool bar and then choose ***Add New Reference***.
2) Start by selecting your bibliographic output style (e.g. APA, Chicago, MLA) under ***View fields used by***.
3) Designate the type of reference you are entering (e.g. journal, book, or dissertation) under ***Ref Type***. Field names marked with a green check mark (✓) 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**.
4) Enter information in the boxes provided and click ***Save*** when finished.



Helpful Hint: Click on any green check mark (✓) to view style-specific notes. You can also check for style changes by clicking on the link at the bottom of the page.

Attaching Files to a Reference

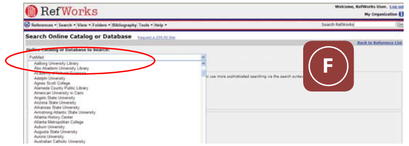


You can attach files when adding a new reference manually or editing an existing reference. Attachments can be any type of computer file (PDF, TIF, JPG, GIF, etc.) that you want to associate with the bibliographic information you store in your RefWorks database. For further instructions on attaching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

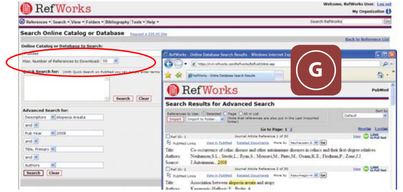
1) Select a reference in your database; click on ***Edit***.
2) Click on ***Browse*** (next to the attachment field). Select a file to attach. Select ***Open***.
3) Click on ***Add Attachment***.

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.

Importing from Online Catalogs or Databases



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 as well as many universities' online catalogs. Additionally, institutional subscribers may also provide access to subscription-based online services (e.g. EBSCO or ProQuest) through RefWorks.



Managing Your References

1) From the ***Search*** pull-down menu, select ***Online Catalog or Database***.
2) Under ***Online Database to Search***, select a database from the drop-down menu.
3) Select ***Max. Number of References to Download*** from the drop-down menu.
4) Enter terms in either the ***Quick Search for*** or the ***Advanced Search for*** box.
5) Click on ***Search*** to begin your search. A new window will open displaying your search results.
6) Select the references you wish to import into your RefWorks account and click ***Import***.

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

Creating Folders



1) From the pull-down menu ***Folders***, select ***Create New Folder***.
2) Enter a name in ***New Folder Name;*** click ***OK***.

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



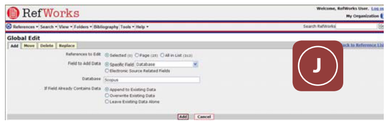
1) From the ***Search*** pull-down menu, conduct a search or retrieve references already in your RefWorks database to put in a folder.
2) Mark desired references from the search results page, then click the button titled ***Selected***. The selected references feature works on a page-by-page basis; this means that you must add the manually selected references to the desired folder before moving to the next page. Alternatively, you can mark ***All in List*** or ***All on a Page***.
3) Select folder from the ***Put in Folder*** drop-down menu.
4) References will automatically be added to the indicated folder.

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

Sorting References

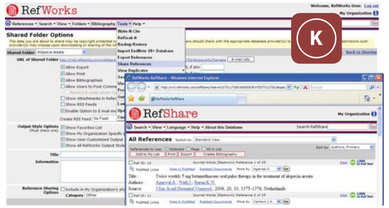
1) From either the ***View*** or ***Folders*** pull-down menu, select a folder or group of references.
2) Using the pull-down menu ***Sort by***, located at the top right-hand side of the page, choose to view references by various fields within your database.

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 ***Global Edit***.
4) Choose the specific field to edit from the drop-down list.
5) Type in the data you want to add to the field in the ***Change Field to*** 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); or ***Leave Existing Data Alone*** (if the field contains data the edit feature will skip over that particular reference).
7) Click ***OK***.

Helpful Hint: This feature is particularly useful for adding information to records imported from online databases missing key fields necessary for a specific bibliographic output style.



Viewing/Sharing Your References

When viewing all references, references in a folder, or references within search results, you can choose several different ways to display them. *Note: The display is customizable under the* ***Tools*** *pull-down menu,* ***Customize****.*

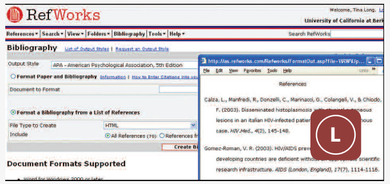
1) From the ***View*** pull-down menu, select ***All References*** or a folder of references.
2) Go to the ***Switch To*** pull-down menu and select the output style for your selected references. You may have up to six styles in the pull-down menu.

Options available:

- ***Standard View*** (includes Author, Year, and Title fields)
- ***One Line/Cite View***
- ***Full View*** (all fields within record)
- ***Three customizable output style views*** (i.e. APA, MLA, or Chicago)
- To share your references with other users, create a separate account with a different username and password. RefWorks does not limit the number of accounts you can create.

Creating Your Paper and Bibliography

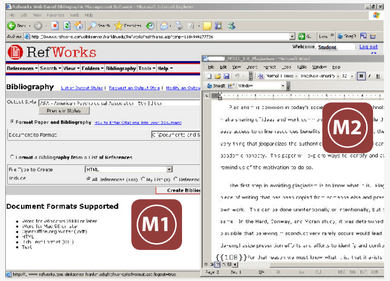
Format a Bibliography From a List of References



Quickly generate a bibliography when no in-text citations or footnotes are needed.

1) From the menu, select the ***Bibliography*** button.
2) Select an output format.
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 only those from a specific folder.
6) Click on ***Create Bibliography***.
7) A new window will open with your bibliography.
8) Confirm your citation(s) is correct and save your Microsoft Word document when finished.

Format Paper and Bibliography

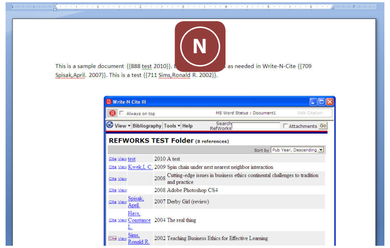


Add in-text citations and create and embed the bibliography into your paper at the same time.

1) From the menu, select the ***Bibliography*** button.
2) Select the ***How to Enter Citations into your Document*** link and follow the instructions.
3) Click on ***Format a Paper and Bibliography.***
4) Click on ***Browse*** to load your Microsoft Word document saved with in-text coding (see Step 2).
5) Click on ***Create Bibliography***.
6) Confirm that your citation(s) is correct and save your Microsoft Word document when finished.

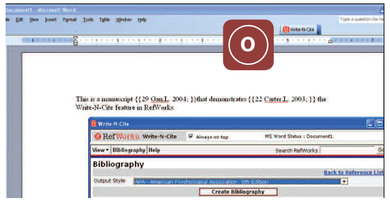
Write-N-Cite Paper

Write-N-Cite is a utility allowing Microsoft Word users to cite references in a paper with the click of a button.



Create a paper with in-text citations using the RefWorks Write-N-Cite feature. *NOTE: This utility is compatible with both Windows and Macintosh applications. In order to use this feature, you must first download the Write-N-Cite utility from the* ***Tools*** *pull-down menu.*

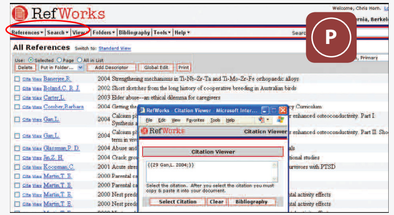
1) Open a new blank document in Microsoft Word.
2) Launch Write-N-Cite.
3) Put the cursor in your Microsoft Word document where the reference should be inserted; click ***Cite*** next to the reference in the RefWorks screen.
4) Confirm that your citation(s) is correct and save your Microsoft Word document when finished.



Write-N-Cite Bibliography

1) Launch Write-N-Cite.
2) Click on ***Bibliography***.
3) Select the output style.
4) Click on ***Create Bibliography***.
5) A new window will open with the re-formatted Microsoft Word document containing the bibliography.
6) Confirm your citation(s) is correct and save your Microsoft Word document when finished.

One Line/Cite View Paper



1) From any reference view (all references, a folder or search results), click on the ***One Line/Cite View*** link.
2) Click on the ***Cite*** link next to the appropriate reference. A Citation Viewer window will appear containing the citation in an abbreviated format.
3) 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 and the second will perform the ***Cite*** function.
4) Once you have all of the references you need for a particular in-text citation, click on the ***Select Citation*** button.
5) Perform a copy command or simply drag and drop the citation into your word processor document.
6) Go to your word processor, click on the document where you want the citation inserted and paste the citation.
7) Be sure to clear the Citation Viewer window before creating your next citation.
8) Click on the ***View*** link to see the entire reference and to access the ***Edit*** command if you want to make changes.

RefWorks RSS (Really Simple Syndication) Feeds

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) Launch the RSS feed by clicking on the name link. Your feed results will be displayed in a separate window for selection and importing.

Helpful Hint: To read the feeds you have added go to ***Search RSS Feeds****.*

Finding References in Your RefWorks Database

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 Style*** you need and use the ***Format Paper and Bibliography*** option to browse for the document.
4) Click on ***Create Bibliography.***

Helpful Hint: Make sure you insert/paste the citation correctly; there should be a space between the text and the citation.

There are three ways to search your RefWorks database: Quick Search, Advanced Search, and Lookup 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 RefWorks*** box.
2) Click on ***GO***.
3) Results are displayed with the search terms highlighted.

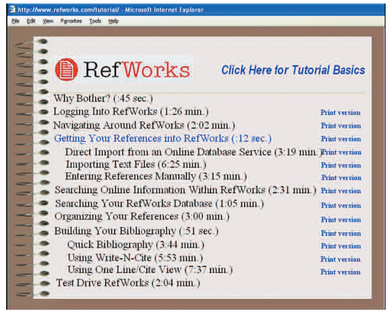
Helpful Hint: You may also use the Lookup feature located under the ***Search*** *drop-down to search records by author, descriptor, or periodical.*

Need More Help?

Online

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

Tutorials



Support



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***.

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RefWorks

Quick Start Guide Version 6.0

What is RefWorks?

RefWorks is a web-based bibliography and citation manager that allows you to create a personal bibliographic database. You can automatically import citations from many online databases into RefWorks, use RefWorks to format your bibliography, share your bibliography with others, organize your research, and format your in-text citations.



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