

An Introduction to RefWorks Citation Management System

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Stratton Taylor Library, Rogers State University

1. Creating an account, logging in, and preferences:

To create an account, users need to:

1. Click on the library's RefWorks link in our list of databases or go to www.refworks.com/refworks.
2. Click on *Sign Up for an Individual Account*.
3. Enter the appropriate information and click on *Register*.
4. After your account is created, click on RefWorks in the list of databases and log in with the user id and password you selected. Note: If you are registering or logging in from off-campus, you will need to enter our Group Code: **RWRogersSU**

The Library recommends the following settings for your account:

1. Go to "Tools" menu → "Customize"
2. It is highly recommended to set personal import preferences to Import Options = **Electronic** [for electronic journal article citations]
3. Set **References per Page** to 100 or 150.
4. Set **Output Style** to your preferred citation style. (MLA, APA, etc.)
5. Set **Startup Options** to preferred folder and sort by "author / journal / last modified," etc.
6. Set **Import Options** to "Electronic".
7. Set radio buttons to the "Yes" options (except "enable screen reader friendly text", it's not that friendly)
8. If you envision copying large amounts of text into RefWorks (as opposed to attaching files or relying on persistent URLs), go to User Field Options. Name the "User 1 Field Name" Full Text Box and Name the "User 2 Field Name" Full Text Availability.

2. Creating a Citation and folders in RefWorks

RefWorks allows users to create a citation from scratch, or to import citations from other sources. To manually create a Citation:

1. Go to "References" menu → "Add New Reference"
2. Select a folder (if desired), Reference Type (book, journal article, website, book chapter, etc.), and enter all other desired information about the source.
3. When done, click the "Save Reference" button to save the citation and return to your default view in RefWorks, or "Save and add new" to immediately add an additional citation.

Once you have created several citations, you may want to organize them into different folders. Unless a folder is selected when a reference is created, newly created references go the "References not in a Folder" area. To create Folders for your references:

1. Go to Folders→ Create New Folder. (Course# or assignment are good folder names.)
2. User-created folders will appear in red in the folder list.

3. Importing and editing Citations from Databases or WorldCat:

Most RSU databases (all databases provided by EBSCO, JStor and OCLC FirstSearch, among others) have enabled direct exporting of individual citation and lists of search results into RefWorks. RefWorks also allows citations to be imported from the WorldCat global Library Catalog. To import a reference or list of references from a typical database (directions are for an EBSCO database but will be similar in all other databases that have RefWorks export enabled):

1. Open your RefWorks account and go to the “Last Imported” folder (Folders → View).
2. In another tab or window, Search in a specific database until you find the reference or list of references you wish to export.
3. If you want to export a single citation to RefWorks, click on the title of that citation, and select the icon at the top of the citation titled “export to Bibliographic Manager”  and select RefWorks from the list of options.
4. If you want to export a list of search results, click the “add” link at the top of the results list (by the “sort by” drop-down). Repeat for each page of your results. This will send all results to a folder within EBSCO, which can then be selected (click the folders link at the very top of the page) and exported to RefWorks as described in step 3 for a single citation.
5. It is possible in EBSCO and a few other databases to import RSS feeds of searches into RefWorks. These will update your RefWorks folder contents regularly and automatically when new articles on your chosen topic are added to the database. For more information on this, consult the help section of your database/RefWorks, or contact the library for help.
6. When the export has completed, go to the “last imported” folder to see your results. Click on the “view” link to see the citation, which will include all bibliographic information, an abstract, chapter list (when applicable/available), and a persistent URL that will link back to the item’s entry in the database/catalog. Click “edit” to make any necessary changes to a record.
7. If you would like to insert the full text of an article into RefWorks, you can either copy and paste the text of a document into the “full text box” field, or attach the file itself to the record. Contact the library if you need help editing your records.
8. When you’re happy with your records, select all items in page or list, and “put in folder”... of your choice. Clear out “Last Imported” by “removing” items from that folder.

4. Creating a Bibliography:

One of the best features of RefWorks is the ability to automatically generate a bibliography of selected citations in the file format and style format of your choice. To create a bibliography:

1. Click on "Bibliography", check / edit Output Style. Select the style format of your choice. As output format for the bibliography. MLA, APA, and other common styles are listed in the drop-down box, or you can select “access output style manager” from the drop-down list to select one of over 500 citation styles from style manuals or major peer-reviewed journals.
2. Select “Format a Bibliography from a List of References “(default).
3. Check "References from folder ... [pull down menu]. You might want to create a new folder and copy the references for a particular bibliography into it. Then choose that folder to **"Create Bibliography"**
4. If the file does not pop up on its own in a few moments, click "download" and "open" to see and review the formatted bibliography.
5. After checking that everything looks right, Copy and Paste the bibliography into your Word document.

5. Final Tips:

1. Graduating students and former RSU faculty/staff can continue to use RefWorks Online Citation manager! **Accounts are only deleted after a one-year period of inactivity.** To migrate your citations to a bibliographic manager at your new institution or from a previous one, review the help section or contact the library.
2. **Proofread, proofread, proofread!!!** All RefWorks users should be aware of the “garbage in, garbage out” rule—RefWorks bibliographies are only as reliable as the data in your folders! When creating or importing records, make liberal use of the Edit and View buttons to make sure the correct Reference Type is selected for each record (book, article, etc.), there are no typos, and that all the information you will need to cite a reference or find it again is in the record.
3. **RefWorks is NOT an Excuse to throw away your style manual.** Mistakes can and do happen when RefWorks generates bibliographies (usually due to a record having the wrong reference type). Give the bibliography one last skim to make sure everything is as it should be. Professors and Peer Reviewers don't care whether you or the computer formatted your bibliography incorrectly.
4. Visit <http://www.rsu.edu/st-library/gov-info/Tutorials.asp> to find a copy of this guide, as well as to view tutorials on “Avoiding Plagiarism” and “citing sources with RefWorks”. And as always, if you have a question about this handout or more advanced features not covered here, contact the library for assistance.