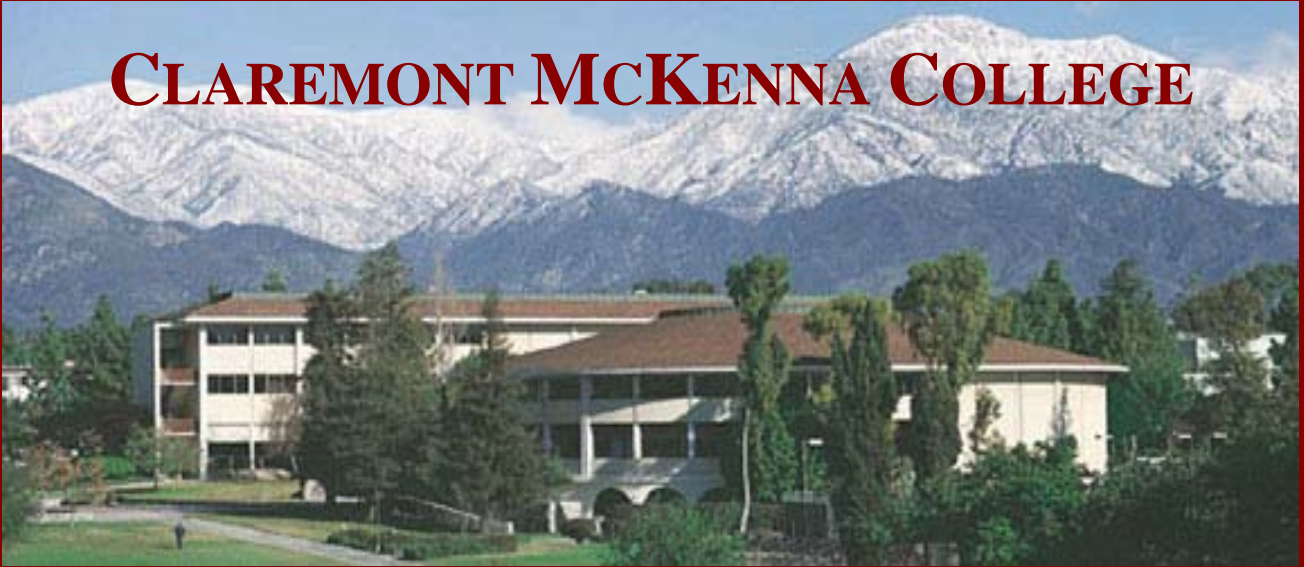


CLAREMONT MCKENNA COLLEGE



Fletcher Jones Student Peer to Peer Technology Training Program

Bibliographic Management using RefWorks

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REF WORKS

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RefWorks allows you to:

- **Create a personal database online** - Store an unlimited number of records accessible from any computer linked to the Internet. No downloading software or installation required.
- **Import references automatically from multiple databases** - Search results from a wide variety of databases can be automatically exported into RefWorks with the click of a button.
- **Organize references** - Sort and file references quickly and easily using folders, duplicate search and author, keyword and periodical indexes.
- **Format bibliographies and manuscripts in seconds** - Save hours of typing time and decreasing number of errors in creating tedious bibliographies. Easily make changes to your paper and reformat in seconds.

Who uses RefWorks?

- **Researchers** - RefWorks is the perfect tool for storing a personal database of research, sharing research with colleagues, and downloading bibliographies in multiple formats based on the needs of specific journals.
- **Students** - RefWorks provides folders to store information by class. AccuCite helps make sure that you have all the information you need to generate an accurate, concise bibliography.
- **Faculty** - RefWorks not only provides research tools for faculty, it also allows them to provide read-only access for class-related bibliographies.
- **Librarians** - RefWorks is a perfect bibliographic teaching tool. With campus-wide system, it consolidates the need to support multiple bibliographic management tools.

Why use an Internet-based bibliographic manager?

- **No special software required...** RefWorks is a Web-based service that can be used with any major Web browser on any platform
- **Accessible anytime, nearly anywhere...** Users can access Refworks any time of the day from any Internet-connected computer
- **Machine independence...** RefWorks is compatible with multiple platforms including Windows, Mac and Unix
- **Share information...** RefWorks makes it easy to disseminate bibliographies online, or to collaborate with geographically disparate colleagues to create a bibliography
- **Compatible with numerous online resources...** Users can import references quickly and easily from most major online database services, other bibliographic software packages, and also the library's catalog

- **Upgrades automatically...** All upgrades are automatically made available to the user without the need to re-load software. The upgrades are provided at no extra fee
- **Language Compatibility...** RefWorks is compatible with non-roman characters (Japanese, Arabic, Chinese)

RefWorks is easy as 1, 2, 3...

1. Build your database with wide-ranging compatibility

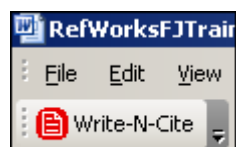
- **Import references** directly from online databases or saved text files
- **Import records** from other bibliographic management programs
- **Add references** manually

2. Manage your references

- **Organize** references with RefWorks' easy folder system
- **Easily sort and edit**
- **Search and browse** references for quick data retrieval

3. Generate bibliographies and footnotes

- **WriteNCite** – (separate download) while writing your paper, find your RefWorks citations in Word and integrate them into your bibliography
- **Choose 270 output formats** - or switch output formats at the click of a button
- **AccuCite** provides an online guide to style formatting instantly as you enter the data



Nature Style References

1. Baxter, V. & Margavio, A. V. Honor, Status, and Aggression in Economic Exchange. *Sociological Theory* 18, 399-416 (2000).
2. Michalos, A. C. & Zumbo, B. D. Criminal Victimization and the Quality of Life. *Soc. Indicators Res.* 50, 245-295 (2000).
3. Aunola, K., Stattin, H. & Nurmi, J. Adolescents' Achievement Strategies, School Adjustment, and Externalizing and Internalizing Problem Behaviors. *Journal of Youth and Adolescence* 29, 289-306 (2000).
4. Gomez, V., Perez, L. A., Feldman, L., Bajes, N., & Vivas, E. Health Risks in Women with Multiple Roles. *Revista de Estudios Sociales* 6, 27-38 (2000).

APA Style References

- Aunola, K., Stattin, H., & Nurmi, J. (2000). Adolescents' Achievement Strategies, School Adjustment, and Externalizing and Internalizing Problem Behaviors. *Journal of Youth and Adolescence*, 29(3), 289-306.
- Baxter, V., & Margavio, A. V. (2000). Honor, Status, and Aggression in Economic Exchange. *Sociological Theory*, 18(3), 399-416.
- Gomez, V., Perez, L. A., Feldman, L., Bajes, N., & Vivas, E. (2000). Health Risks in Women with Multiple Roles. *Revista de Estudios Sociales*, 6(1) 27-38.
- Michalos, A. C., & Zumbo, B. D. (2000). Criminal Victimization and the Quality of Life. *Social Indicators Research*, 50(3), 245-295.

Change
Formats
Quickly
and
Easily!



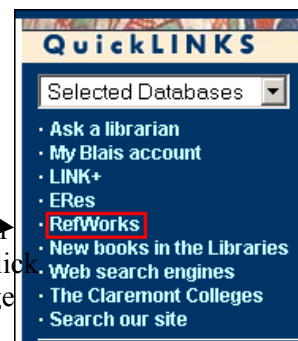
RefWorks 1: Creating Your Database

RefWorks is a web-based citation and bibliography manager that allows you to create your own personal databases by importing references from text files or online databases. You can use these references in writing papers and automatically format the paper and the bibliography in seconds.

- ▶ In the My Documents folder, create a file with your name on it.
- ▶ Open two (2) Internet Explorer sessions. **If using a popup blocker, set it to “allow” popups.** One of these browser windows will be for RefWorks; the other will be for searching databases on the Libraries’ web site.

1. Creating Your Account in RefWorks

- On the Libraries’ home page (<http://libraries.claremont.edu/>), in the QuickLinks, choose RefWorks.
- If you have used RefWorks before, log in.
- If you have not used RefWorks before or if you want to create a separate database for this session, click on *Sign up for an Individual Account*, fill in the form, and then click the *Register* button. (NOTE: if accessing your account from a non-Claremont College computer... the Group Code for the Claremont Colleges is: **RWClaremontColls**)




2. Creating Folders in RefWorks

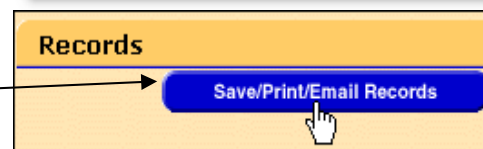
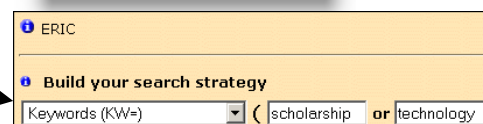
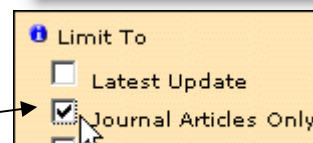
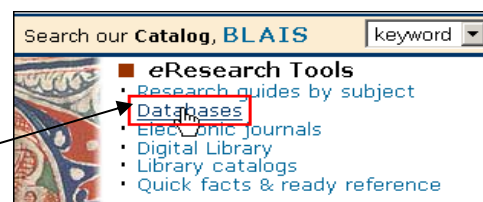
- In *Folders*, choose *Create New Folder*
- Name the folder *Scholarship*.



The four common input methods: direct import, import from saved files, import from other databases or manual keyed input.

3. Direct Import of Records

- On the Libraries’ home page, choose *Databases*. In the alphabetical list of databases, choose *ERIC*.
- Check the box for *Journal Articles Only* and search using the keywords **scholarship** and **technology**. Click *Search*.
- From the records in your search result, mark the first 5 (by placing a checkmark in the boxes)  then click on the *Save/Print/Email Records* button.

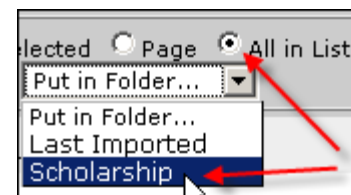


- On the *Save/Print/Email* screen, click the gray *Save to RefWorks* button.



- In RefWorks, click on *View Last Imported Folder*.

Import completed - 5 references imported **View Last Imported Folder**



- Notice the options available.
- Select *All in list*. In the *Put in Folder* menu, choose **Scholarship**. Click **OK**.

4. Importing Records into a Saved Text File

- In your RefWorks browser, in the *References* menu, choose *Import*.
- You can find basic information on importing from the *How to import* link. Look for information on the Import Filter/Data Source and the Database name. What do you learn about how to save records from H. W. Wilson databases in order to import them into RefWorks? (You may find that the RefWorks information doesn't exactly match how the database works.) To make importing easier, the Libraries have identified a set of filters relevant for many databases you will find in the list of databases on the Libraries' web site.
- Select *The Claremont Colleges* as the import filter/data source.



Import Filter/Data Source **The Claremont Colleges**

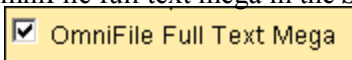
Choose the database name from the next menu. For this search, choose **OmniFile**.

Database **OmniFile (any H.W. Wilson database)**

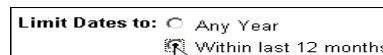
- On the Libraries' home page, choose *Databases*. In the alphabetical list of databases, choose *OmniFile*.



- Click *OmniFile full text mega* in the *Search In* area to activate the "*Limit Dates To*" option.



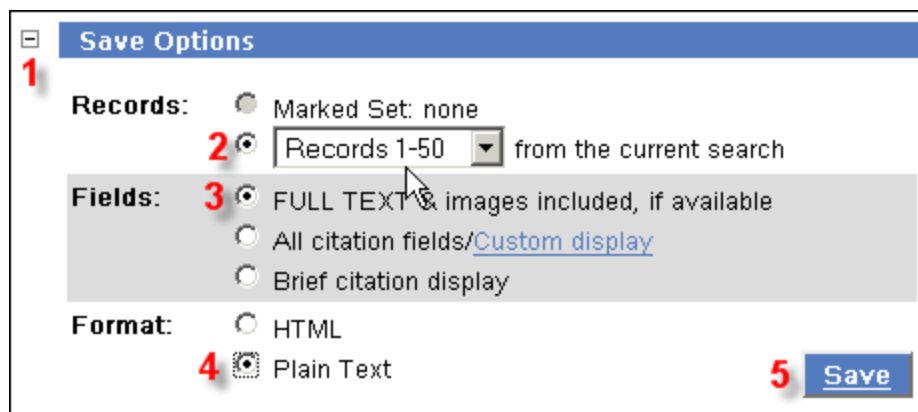
- Search using the key words **scholarship** and **technology**. In the *Limit Dates to* section, choose *Within last 12 months*. Click the *Start* button.



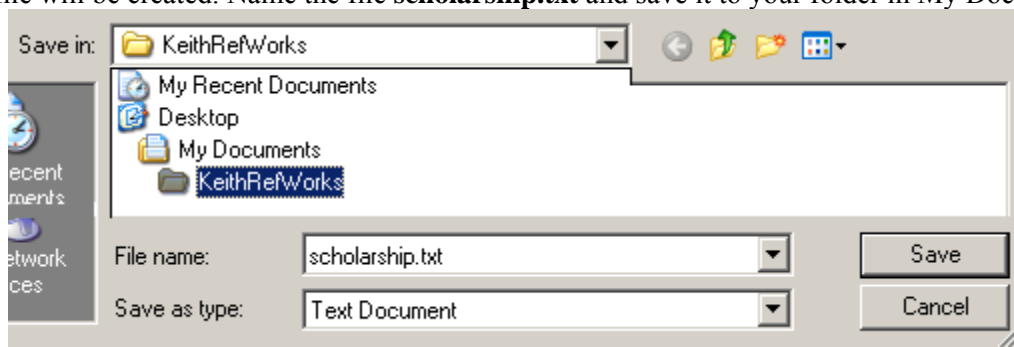
- You're going to import all these records, so just choose the *Print/Email/Save* button.
- Choose *Save options*, and select **Records: 1-50**, **Fields: FULL TEXT**, **Format: Plain text**. Then click *Save*.

Print Email Save

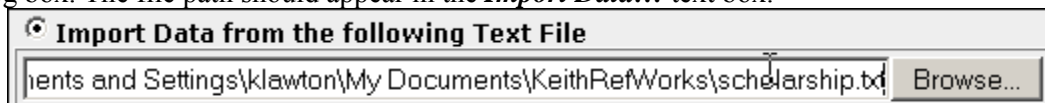
(In the left column)



- A text file will be created. Name the file **scholarship.txt** and save it to your folder in My Documents.



- Go back to RefWorks. You should still be on the import screen.
- In the **Import Filter** menu, choose The Claremont Colleges. In the **Database** list, choose OmniFile.
- Click on the **Browse** button and select the file you just saved. Click on the **Open** button in the File Upload dialog box. The file path should appear in the **Import Data...** text box.



- Click the **Import** button at the bottom of the screen.
- Leave these new references in the Last Imported folder.



Import completed - 34 references imported

5. Importing Records from Blais and Other Library Catalogs

- On the Libraries' home page, type **scholarship technology** in the Blais keyword search box.

- Click the *Save all on page* button. Then click the *Export Saved Records* button.
- On the next screen, in *Format of List*, choose **MARC** and in *Send List to*, select **Screen**, click Submit button.

Format Of List	Send List To
<input type="radio"/> Full Display	<input type="radio"/> E-Mail
<input type="radio"/> Brief Display	Mail To: <input type="text"/>
<input type="radio"/> Pro-Cite	Subject: Records exported from Blais
<input type="radio"/> End-Note	<input checked="" type="radio"/> Screen
<input checked="" type="radio"/> MARC	<input type="radio"/> Local Disk

- Select all** and **copy** the resulting screen.
- In RefWorks, choose *References > Import* and **paste** the copied information into the large textbox at the bottom of the import screen. In the *Import Filter/Data Source* menu, choose **MARC Format**.

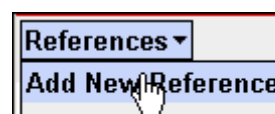
Then click the *Import* button.



- Put these new references into the scholarship folder. **Import completed - 12 references imported**
- NOTE:** You may wonder where the references that you imported from OmniFile (in section 5, above) are. They are no longer in the Last Imported folder and you didn't place them into the Scholarship folder. So they are "records/references not in a folder." In RefWorks, choose the Folder > View > Reference Not in a Folder option to see the records from OmniFile. Now move all these records to the Scholarship folder.

6. Manually Keying Records

- In RefWorks, choose *References > Add New Reference*.



Add each of the following records to your Scholarship folder by choosing **In Folders: Specify Folders: Scholarship**, then typing the necessary information into the form. Be sure to specify the appropriate **Ref Type** (**Book, Edited** for your first one, then **Journal article**, for your second one).

In Folder(s)	◆Scholarship
Ref Type	Book, Edited
Authors *	Deborah Lines Andersen

Also, you may want to use the **View required fields...** menu to select the citation/bibliography style you will use to write your paper. When you have typed in the data, be sure to click **Save Reference**.

View required fields for:	APA - American Psychological Ass	Save Reference	Reset
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Manually add these references:

Book: *Digital scholarship in the tenure, promotion, and review process*, edited by Deborah Lines Andersen, copyright 2004, and published in Armonk, N.Y. by M.E. Sharpe.

Journal article: "New Age Scholarship: The Work of Criticism in the Age of Digital Reproduction" by Sean Latham, in *New Literary History*, vol.35, no.3, pages 411-426; Summer 2004.

To delete existing text from the form and key in another reference, click **Reset**.

Reset

References Not in a Folder		
Use:	<input checked="" type="radio"/> Selected	<input type="radio"/> Page
	<input type="radio"/> All in List	
Delete	Put in Folder...	Add Descrip
<input type="checkbox"/>	Cite View M.E. Sharpe	2004
<input type="checkbox"/>	Cite View Sean Latham	2004

7. Managing Records and Folders

References Not in a Folder				
Use:	<input checked="" type="radio"/> Selected	<input type="radio"/> Page	<input type="radio"/> All in List	
Delete	Put in Folder...	Add Descriptor	Global Edit	Print

- Options for managing records include
 - viewing and deleting duplicates
 - viewing references not in folder
 - adding a descriptor or globally editing references
 - printing references in a particular style

NOTE: If you use the **Delete** option to remove a record from a folder, that record is deleted from every folder in your database. If you only want to remove it from the folder you are currently viewing but leave it in other folders where it may be valuable, use **Remove from Folder**.

- Options for managing folders include

- creating new folders
- viewing, renaming, and deleting existing folders
- sort
- search

Organize Folders	
Create New Folder	(33 references)
Last Imported	
Rename	Delete Scholarship

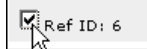

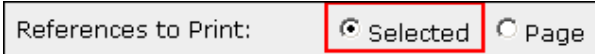


Sort by	Authors, Primary
---------	------------------

Search	View	Folders
Advanced		
Lookup by Author		
Lookup by Descriptor		
Lookup by Periodical		
Online Catalog or Database		


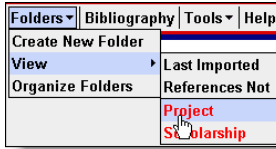
RefWorks 2: USING YOUR REFERENCES

from your RefWorks database in writing papers and formatting papers and bibliographies

1. Printing a list of references

- In your *Scholarship* folder, mark the first 6 references. 
- Click the *Print* button. 
- In *References to Print* mark *Selected*. 
- In *Output Style*, choose *APA, 5th Edition*. 
- Click *Print*. 
- If a print window opens, click *Cancel* since we're not really going to print this out right now.
- You may save the file that is created as either a **web page** or a **text file**.

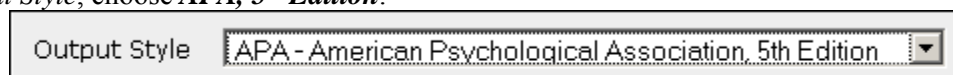
2. Creating a bibliography

- In RefWorks, create a new folder named *Project*. 
- In *Folders*, choose *View* and select your *Scholarship* folder.
- Go to the end of the first page of references, mark the last 6 records in the list, and use *Put in folder* to copy them to your new *Project* folder. Click *OK*.
- Again in *Folders*, choose *View* and select your *Project* folder. 

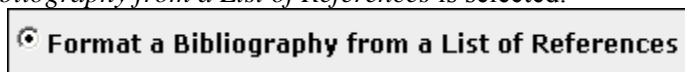
- In the menu across the top of the screen, select the option called *Bibliography*.



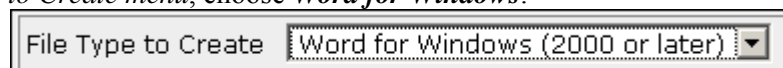
- In *Output Style*, choose *APA, 5th Edition*.



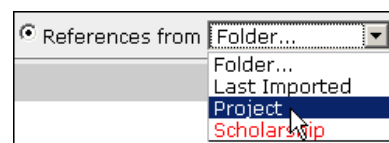
- Be sure *Format a Bibliography from a List of References* is selected.



- In the *File Type to Create* menu, choose *Word for Windows*.

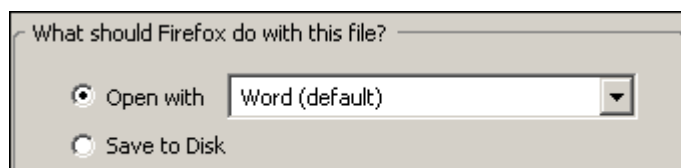


- Select *References from Folder* and choose the folder named *Project*.



- Click *Create Bibliography*. 

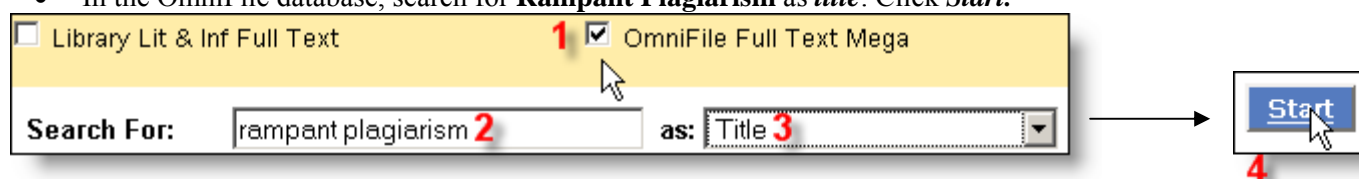
- Choose *Open With Word (default)*. This opens the document inside Word and gives it a name. You now need to do a File>Save As and save the doc into the “Your Named” folder inside of the My Documents folder.



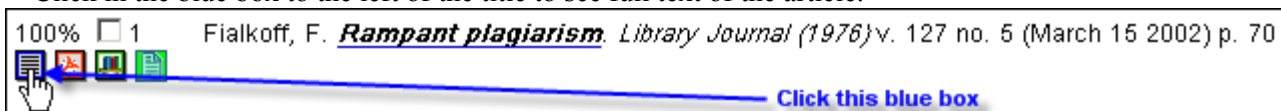
3. Inserting references into your papers

Begin by creating a text document to serve as the paper into which you will insert references.

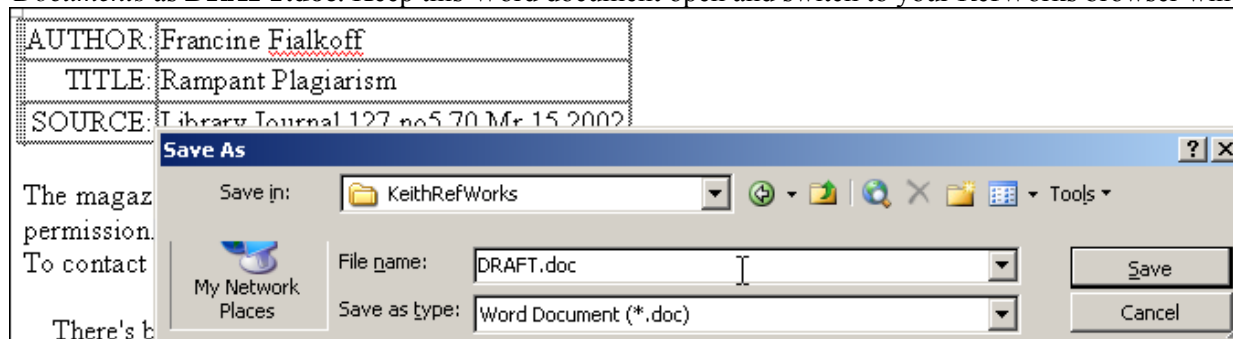
- In the OmniFile database, search for **Rampant Plagiarism** as *title*. Click **Start**.



- This search should retrieve one record.
- Click in the blue box to the left of the title to see full text of the article.

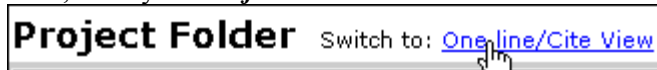


- Highlight and copy the article.
- Open MS Word; paste the text of the article into a new document, and save this document into your folder in *My Documents* as **DRAFT.doc**. Keep this Word document open and switch to your RefWorks browser window.



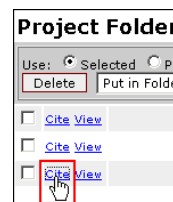
► Parenthetical/in-text citations:

- In your RefWorks browser, view your *Project* folder and choose *One line/Cite View*.

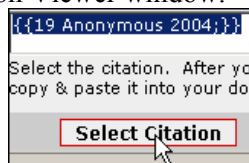


- Insert a citation to the third reference in the *Project* folder at the end of paragraph 1 in *DRAFT.doc*. Here's how:

- In RefWorks click on the *Cite* link in front of the third reference.



- In the pop-up window, click on *Select Citation*. Then use the *copy* option (Ctrl + C). Then click the *Clear* button to clear the Citation Viewer window.

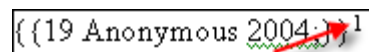
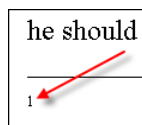


- In the document, place your cursor at the end of the first paragraph where you want to place your parenthetical citation, and then use the *paste* option (Ctrl + V).
- Choose 2 more citations and follow the same procedure to put them in other locations in the document.
- Use *Save As* to name this new version of your document **Working1**.

► Footnotes:

- To create footnotes in your paper, you must use RefWorks in combination with the footnote option in Word.
- Open Word and open the document called *DRAFT.doc*. Place your cursor at the end of the first paragraph.
- In the Word menu, choose **Insert > (Reference) > Footnote**. Select *Footnotes*, leave the Format option as it is, and click *Insert*.

- You'll see that a superscript number has been inserted in your text and a footnote number has been added at the end of the page.



- In RefWorks, view your *Scholarship* folder and choose *One line/Cite View*.
- Insert a citation to the third reference in the *Scholarship* folder after the footnote number at the bottom of the first page of *DRAFT.doc*. **Here's how:**
 - In RefWorks click on the *Cite* link in front of the third reference. In the pop-up window, click on *Select Citation*. Then use the *copy* option. Then click *Clear*.
 - In the document, place your cursor after footnote #1 at the bottom of the first page of your document and use the *paste* option.
 - Choose 2 more citations and follow the same procedure to put them in other locations in the document.
 - Use *Save As* to name it **Working2**.

4. Formatting a paper with bibliography

- In RefWorks, in the menu across the top of the screen, select the option called *Bibliography*.
- In *Output Style*, choose *APA, 5th Edition*. Choose *Format Paper and Bibliography*.
- In the *Document to Format* section, **Browse** to find either of the documents you created: *Working1* or *Working2*.
- Click *Create Bibliography*. RefWorks formats the in-text citations or footnotes and creates a bibliography at the end of your paper according to the *Output Style* you have chosen—in this case APA, 5th Edition.
- Use *Save As* to name the formatted document **Formatted-1. To view your footnotes in Word, change to “Print Layout” view.**

NOTE: ALWAYS use *Save As* to give the formatted document a new name. It's very important that the unformatted document into which you are inserting citations remain unformatted until you are completely finished with the paper. You may even want to always maintain an unformatted copy of every paper in case you want to copy and paste from one paper into another.

5. In-text citation switches

Help with special formatting for citations and footnotes is available. Choose Help > Outputting and Formatting > Overview > In-Text Citation Switches. Some Output Styles require that a specific page be included in an in-text citation. Others require that the author name be left out of the citation if the name is included in the text.

RefWorks cannot determine a specific page number for a reference or know when an author name is in the text. You can, however, manually instruct the program to exclude or include certain items in the citation through the use of in-text switches.

The switches include:

- **/y** Suppress the year field. This switch is used to hide the year field of a specific reference. Your citation should look like this, `{{1 Smith 2003/y}}` where the RefId number is 1. After formatting it would be, (Smith).
- **/a** Suppress the author field. This switch is used to hide the Primary Author field for a specific reference. Your citation should look like this, `{{1 Smith 2003/a}}` After formatting it would be, (2003).
- **/h** Hidden text. This switch is used to hide an entire citation. This switch takes precedence over all other switches. It will not only hide the reference it is attached to, but all other references in the specific citation location as well. The hidden references will, however, still be included in the bibliography. A hidden citation would look like this, `{{1 Smith 2003/h}}`. When formatted it would not appear at all.
- **/f** Following text. This switch is used to place text at the end of a specific reference citation. You could use this switch to add page numbers after the author and year information. Your citation would look like this, `{{1 Smith 2003/f p. 43}}`. After formatting it would be, (Smith 2003 p. 43).
- **/p** Preceding text. This switch is used to place text in front of a specific reference citation. All text up to the next switch or the end of the reference citation is used as the preceding text, including spaces and tab characters. Your citation would look like this, `{{1 Smith 2003/pUnpublished work by }}`. After formatting the citation would be (Unpublished work by Smith 2003).
- **/s** Cite a specific page in-text or in a footnote or endnote. The **/s** switch is an override for the page numbers stored in the database record. By applying this switch you can cite specific page numbers both in-text citation and in a generated footnote or endnote. For example, a footnote citation would look like `{{1 Smith /s43}}`. The footnote will include the page number 43 instead of the page number(s) in the reference itself.

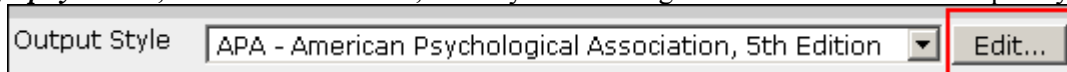
Probably the most important information is how to include *specific page numbers* in your citations. The switches you will use for this are **/f** and **/s**. They operate differently, so experiment to see which works better for the output style you are using.

Please Note: Switches work differently with each database. You should experiment and test these switches with the databases of your choice.

6. Editing an output style

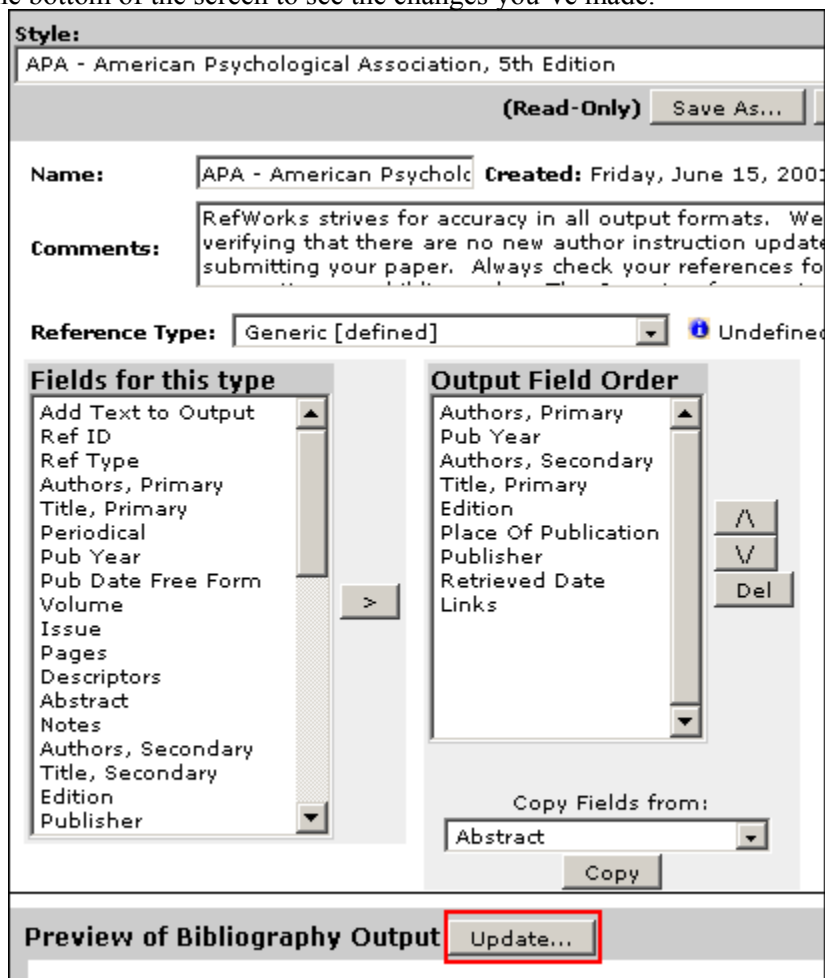
There will be times when the output formatting will not be exactly as you want it or the style you are using doesn't include the particular type of reference you are citing. In that case you can edit the output style to accomplish appropriate formatting for your needs.

- On the **Bibliography** screen, click the **Edit** button, which you'll find right after the name of the output style



you've chosen.

- There are MANY options to consider as you're editing or creating an output style. Use the preview window at the bottom of the screen to see the changes you've made.



End of RefWorks Training

Acknowledgements/Resources:

“Thank you” to Gale Burrow (Honnold/Mudd Library) – for providing text copy and RefWorks Workshops.

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RefWorks: <http://www.refworks.com>

RefWorks Quick Start Guide: <http://www.refworks.com/refworks/help/Refworks.htm#QuickStartGuide.pdf>

RefWorks Help: <https://www.refworks.com/Refworks/help/Refworks.htm>

RefWorks Online Tutorials: <http://www.refworks.com/tutorial/>