

REFWORKS STEP-BY-STEP



UNIVERSITY OF MINNESOTA
LIBRARIES

<http://www.lib.umn.edu/refworks>

A. SETTING UP AN ACCOUNT

1. Go to <http://www.lib.umn.edu/refworks/>
2. Click on **Set up a New RefWorks Account**
 - If you are connecting from off-campus, you will be asked to login with your U of MN ID & password at this point
3. Fill out form, click on **Register**
 - Note: Your password should not be the same as your U of MN password. Try to make the password easy to remember, since it can difficult to retrieve if you forget. Write it down!
4. Congratulations, you now have a RefWorks account!
5. You should already be logged in to RefWorks after registering, if not, log in.

B. ADDING REFERENCES TO REFWORKS

Manually creating a new reference

1. Go to **Reference** Menu
2. Click on **Add New Reference**
3. Choose the citation style that you need to use under the **View required Fields for** drop-down menu. This will show the required fields for data entry for a particular style.
4. Under the **In Folder(s) menu**, select your folder.
5. In the **Ref Type** drop-down menu, choose the reference type that you will be entering.
6. Enter the information from your reference in the appropriate fields.
7. Click on **Save Reference** at the top of the page.

Adding references using RefWorks' search feature

You can use this feature to search an online catalog or *free* databases, such as MNCAT or PubMed directly from RefWorks. This is the best way to add materials from MNCAT into your RefWorks database; however, for some databases, you might have better luck searching in the native interface and exporting these citations to RefWorks.

1. Click on **Search Online Catalog or Database** in left navigation bar
2. Find University of Minnesota, MNCAT Catalog in first drop-down menu
3. Type in your search in the Advanced Search boxes at the bottom of the menu.
 - Note that this type of search works best for specific titles. If you need to search MNCAT by keyword or subject heading, import the citations using the guide at <http://www.lib.umn.edu/refworks/import/MNCAT.pdf>
4. A new window will appear with the search results. Mark the citations you wish to import by clicking the check box next to each citation.
5. At the **Import to folder** pull-down menu, select the appropriate folder to save these citations.
6. Select the appropriate folder and click **Import**.
7. The citation(s) are now copied into RefWorks.

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Direct Export from U of M Databases

Many databases now have a “Direct Export” function, which allows you to get your citations from the database to RefWorks with the click of a button. There is a list of these databases available at: <http://www.lib.umn.edu/site/refind.phtml>. Often, this tool can be found on the “Saved Records” page or the “Export” page.

There are instructions for direct export for specific databases at: <http://www.lib.umn.edu/refworks/import/>.

Save and Import from U of M Databases

While many databases have a Direct Export function, some do not. If the database that you are using does not have a Direct Export feature, you can save your search results as a text file and manually import them into RefWorks. Each database has a different way to save and export your references. Use the online guide for instruction for a specific database, located at: <http://www.lib.umn.edu/refworks/import/>

In RefWorks:

1. Login to your RefWorks account
2. Go to **References** and click on **Import**.
3. Select the name of the database from which you are importing data
4. Keep the radio button selected under **Import data from the following Text File**, select **Browse** to locate the file you saved from your search, then choose **Open**
5. Click the **Import** button
6. Your citations will now be imported from MNCAT into your RefWorks database into the **Last Imported Folder**. You may now move them in the folder of your choice

C. MANAGING YOUR INFORMATION IN REFWORKS

Creating folders in RefWorks

1. Click on **Organize Folders** in the Folders Menu at the top of the screen.
2. Click on **Create New Folder**
3. Name your folder(s) and click **OK**

Putting references in folders:

1. Go to **Folders>View** menu and click **Last Imported**
2. Select those items you'd like to move into a particular folder
3. Choose the **Put in Folder** menu and select the appropriate folder
4. Click **OK** to confirm

Adding descriptors to references:

1. Go to the folder you would like to work with
2. Click on **Add Descriptor**
3. Under **Add to Which References**, choose **All in List** or as many as is appropriate
4. Under **Descriptor to Add**, type in your descriptors
5. Click **OK (3 times)**

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Searching RefWorks with the Lookup function:

1. You can search for your references in RefWorks by author name, descriptor heading or by periodical title
2. For example, go to **Search** and then click **Lookup by Periodical**.
3. Browse through the list of periodicals, click on the periodical name you are interested in
4. You will then see the reference(s) associated with that title

Sorting your references by journal name

1. Click on **View Folder** and choose a folder
2. Choose **Sort by Periodical Full** (if you can not see the box on the right-hand side of the screen you will need to hide the search tool, by clicking on the Hide link in the Search Tools section)

Performing a global edit

1. Click on **Lookup Descriptor** and find the descriptor you'd like to change
2. Next to it click on **Edit**
3. Change it to a **new descriptor**
4. Click on **OK (3 times)**

D. APPLYING TO YOUR PAPER

Create a stand-alone bibliography

1. Click the **Bibliography** button
2. Choose an **Output Format**, for example **MLA**
3. Check **Format a bibliography from a list of References**.
4. From the **File Type to Create** menu choose **Word for Windows (2000 or later)**
5. Check **Reference From** and choose folder from menu
6. Click **Create Bibliography**

USING WRITE-N-CITE: DOWNLOAD PLUG-IN

Write-N-Cite is available for Windows (98, ME, NT, 2000, XP) and Macs (OS 10.3 and above). Further technical specifications are available at: http://www.refworks.com/Refworks/help/Refworks.htm#Using_Write-N-Cite.htm .

1. Login to RefWorks
2. Near the top center of the screen under the tools menu click on the **Write-N-Cite** link
3. Read instructions
4. Click on **Click Here** to download the plug-in
5. Click **Save** if another window appears (save to desktop)
6. Close RefWorks. You will automatically be logged out
7. For PC users:
 - o Find the RefWorks plug-in on the desktop (**wncinstall.exe**) and click on it. Follow the instructions; click the buttons and Write-N-Cite will install itself using the installation wizard.
 - o When asked to restart your computer, click **OK**
- For Mac users:
 - o The download should un-stuff and the disk image should open automatically. If not, open the file **archive.sitx**, and then open the file **Write-N-Cite 1.0.dmg**.
 - o Copy the application into the applications folder
8. You have successfully installed the Write-N-Cite plug-in
9. After the computer restarts open Microsoft Word and you will see the red Write-N-Cite button on the tools bar

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Adding references to a new paper using the Write-N-Cite feature

1. Open Microsoft Word
2. Start working on your paper
3. When you get to a point in your paper where you need to enter a parenthetical reference, click on the **Write-N-Cite** icon, then login to RefWorks
 - o Note: Off-campus users will be asked to login with the **U of M Group Code** first before logging into RefWorks. Access the U of M Group Code via the **Need the U of M Group Code** link at:
<http://www.lib.umn.edu/site/refworks.phtml>
 - o **Mac users:** Launch the Write-N-Cite application located in the Applications folder.
4. Check the **Always on top** box. This keeps the **Write-N-Cite** window on top of the Word document.
5. Go to the **View Folder** pull-down menu on the right-hand side. Open your folder
6. On your Word document, place the cursor between your last letter and the end punctuation. Add a space between the two.
7. Choose any citation from your folder and click on the link called **Cite**
8. Continue writing your paper and using the **Cite** link.
9. Save this document. This is your master document. You will create a final version from this.
10. On the Write-N-Cite toolbar, click on **Bibliography**
11. Under **Output Format**, choose **the appropriate format**. Click on **Create Bibliography**
12. You will notice that a new Word document has been created with the word 'Final' in front of the name you previously assigned to it. There is also an unformatted version of your paper in Word. You may choose to save both versions of your paper for future editing changes and reformatting.

E. EXPORTING ALL YOUR REFERENCES

Use this to save a copy of all your RefWorks references on your computer or to import these into bibliographic management software such as EndNote or ProCite.

1. Click on **Export References**
2. Under Include, select the **References From** button, and then select your folder
3. Choose **RefWorks Tagged Format** as the export format
4. Click on **Export to Text** File button
5. A new window will open with these citations in RefWorks tagged format, you can now use the browser's Save As to save this as a text file in the location of your choice
6. You can also email this file to yourself, close the text file window and return to RefWorks. You will see a link called E-Mail to send the file to your email program.

F. REFGRAB-IT

RefGrab-it captures bibliographic information from a web page, giving you the option to move that data into your RefWorks account. To download RefGrab-It:

Windows Users (Internet Explorer)

1. In Internet Explorer, make sure **Links** is selected and displayed (View, Toolbars, Links).
2. Drag and drop the **RefGrab-It** link to the links area of your browser toolbar. If you are unable to drag and drop the link, make sure your toolbar is unlocked (View, Toolbars, deselect Lock the Toolbars).
3. You may get a security challenge telling you that you may be adding something that is unsafe. Please say "yes".

REFWORKS STEP-BY-STEP (CONTINUED)



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Note: If you do not want the RefGrab-It link in your toolbar, you can simply add it to your Links folder in the IE Favorites area.

1. To do this, right-mouse click on the RefGrab-It link and select, **Add to Favorites**.
2. Locate the Links folder and select it. You should see RefGrab-It in the Name area. Click on **OK**. When you want to use RefGrab-It, just select Favorites, Links, RefGrab-It.

Windows Users (Firefox)

1. In Firefox, make sure your bookmarks toolbar is selected and displayed (View, Toolbar, Bookmarks Toolbar).
2. Drag and drop the [RefGrab-It](#) link to your personal toolbar.

Netscape: RefGrab-It is not currently compatible with this browser.

Mac Users: (Firefox & Netscape)

1. Drag and drop the [RefGrab-It](#) link to your browser toolbar.

Get help & more information
<http://www.lib.umn.edu/refworks/>

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