

# University of Maryland College Park

## Introduction to RefWorks

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### Access RefWorks

1. Go to the library home page
2. Click on “How Do I?”
3. Click on “RefWorks” (under *...cite research & create a bibliography?*)
4. Click on “Log in to RefWorks”
5. You should now be at the RefWorks log in page.

### Create Your RefWorks Account

1. If you already have a RefWorks account, please log in now.
2. If you do not have a RefWorks account, go on to steps 3-4.
3. Click on “Sign up for an Individual Account”
4. Enter your name, a username and password of your choice, your email address, and select “Type of User” and “Area of Focus.”
5. Click “Register.”
6. You now have a RefWorks account. Please remember your username and password for future logins.

### Customize Your RefWorks Account

1. Go to Tools → Customize
2. Under “Import Options”
  - a. Select “Electronic” for **Default Source Type for Imported References**
  - b. Select “Yes” for **Show Option for Global Edit of Electronic Source Related Fields After Import**
  - c. Click “Save”
3. Now that you have changed the default source type to “Electronic” you will be prompted for the date and the database name when importing citations so that the “retrieved by...” portion of your citation will show up in your reference list.

### Import a Citation from a Database with a Direct Export Feature

1. Open a new Browser window.

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2. From Research Port, go to *Business Source Premier (or any other Ebsco database)*.
3. Perform a search on a topic of your choice.
4. “Add to folder” at least five records.
5. Go to the folder (click “Folder has items”).
6. Click the checkboxes next to your items.
7. Click “Export.”
8. Select the radio button which says: **Direct Export to RefWorks**
9. Click “Save.”
10. Enter the Database name.
11. Click “Edit Fields.”
12. Click “View Last Imported Folder.”

### Save Your Imported Records to a Folder

1. Click on **Folders → Create New Folder**.
2. Enter a Folder Name of your choice, and click OK.
3. Click on **View → Folder → Last Imported**.
4. Select the citations you want to move by clicking the checkbox next to each record, or select the radio button for **All in List**.
5. Select your folder name from the “Put in Folder” dropdown box.
6. You will receive a dialogue box asking if you are sure – click OK.
7. You have now saved your citations to a new folder.

### Import a Citation from a Database without a Direct Export Feature

1. From Research Port, go to *Emerald*.
2. Perform a search on a topic of your choice.
3. Select at least 5 records by clicking on the checkbox next to the record.
4. Next to **Session Marked List** click “Add to my list.”
5. Click OK.
6. Click on “Marked List” on the left side of the page.
7. Click “Select All” to select all of the records you added to your list.
8. Click “Download ASCII” to save your records to a delimited text file.
9. Copy the text in the file (CTRL-A, CTRL-C).
10. Go to your RefWorks window.
11. **Click on References → Import**
12. Next to **Import Filter/Data Source**, select “Emerald.”
13. Click the radio button next to **Import Data from the Following Text**

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14. Paste in the text that you saved from step 9.
15. Click “Import.”
16. In the box which says **Globally Edit Fields for Imported References** add the database name: *Emerald*.
17. Click “Edit Fields.”
18. Click “View Last Imported Folder”
19. Save your results to a new folder.

### Import a Book Citation from catalogUSMAI

1. From within RefWorks, click “Search” then “Online Catalog or Database.”
2. Choose “University of Maryland.”
3. Do a “Quick Search.”
4. Select a book.
5. Click “Import.”
6. Delete the Database name and date retrieved, and click “Edit Fields.”
7. View “last imported folder” and save to a folder.

### Create a Reference List/Bibliography

1. Click **Bibliography**.
2. Select the radio button next to: **Format a Bibliography from a List of References**.
3. Next to **Include**: choose a folder.
4. Choose your **Output Style**.
5. Click “Create Bibliography.”
6. Your reference list will pop up in a new window.
7. Check for accuracy.

### Format Documents Using Write-N-Cite

1. Open Microsoft Word
2. Click the Write-N-Cite icon in the toolbar.
3. Minimize Write-N-Cite (and UNcheck “always on top”).
4. Begin typing your paper.
5. When you get to a place where you need to insert a citation, maximize Write-N-Cite, and click “cite” next to the citation you want to insert.
6. Repeat two or three times, adding at least three citations.

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7. Save your Word document.
8. From within Write-N-Cite, click on **Bibliography**.
9. Choose your **Output Style**.
10. Select **Create Bibliography**.
11. Click OK.
12. Your document should now be formatted with the correct in-text citations, and a reference list.

### **Information on Downloading Write-N-Cite and using Remotely:**

1. From within RefWorks click on **Tools → Write-N-Cite**.
2. Follow the download instructions.
3. From your computer's Start Menu select Programs > RefWorks > WNC Proxy Configuration Utility. Where it asks for the proxy server URL, enter the following (as one long string): <http://proxy-um.researchport.umd.edu/login?url=https://www.refworks.com/Refworks/?WNC=true>
4. Click OK.

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### Other RefWorks Features to be tried on your own:

#### Edit Citation Information/Make Notes within a Citation

1. Open RefWorks and log in.
2. Choose any record you have saved in any folder by clicking the checkbox next to the record.
3. Click "Edit."
4. Change some information in one of the fields.
5. Click "Save Reference."

#### Globally Edit Citations

1. Open RefWorks and log in.
2. Click "Global Edit."
3. Choose the field you want to edit.
4. Enter the new information next to: **Change Field To**
5. Select a radio button next to: **If Field Already Contains Data**
6. Enter the new information.
7. Click "OK."

#### Search within your RefWorks Database

1. Open RefWorks and log in.
2. Go to **Search → Advanced**.
3. Enter a keyword descriptor in the box "Descriptors."
4. Click Search.
5. Go to **Search → Online Catalog or Database** (note you will only be searching the catalog).
6. Perform a search on a topic of your choice.
7. Save records to your folder.

#### Link to Articles from within RefWorks

1. From within RefWorks, go to your folder where you saved your citations.
2. Click on the gold "find it" button next to any of your citations.
3. If your article is available in full text in any of the library databases you will be taken to the article.

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### Format In-Text Citations Using One-Line/Cite View

1. From within RefWorks, change **Switch to:** to “One-Line Cite/View.”
2. Open Microsoft Word
3. Begin typing your paper.
4. When you get to a place where you need to insert a citation.
5. Open the RefWorks window.
6. Click “cite” next to the citation you want to insert.
7. In the **Citation Viewer** click **Select Citation** then **CTRL-C** to copy.
8. Click **Clear**.
9. Go to the Word document and **CTRL-V** to paste.
10. Repeat two or three times, adding at least three citations.
11. Save your Word document.
12. From within RefWorks, click on **Bibliography**.
13. Select **Format Paper and Bibliography**.
14. Click **Browse** to find your paper.
15. Click **Create Bibliography**.
16. Your reference list will pop up in a new window.
17. Check for accuracy.