

Managing Your Citations With RefWorks

(Note: this guide is closely modeled on one created by the University of Michigan that is available at <http://www.lib.umich.edu/knc/howto/citation/refworks.pdf>)

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What is RefWorks?

RefWorks is a bibliographic management service used for storing and organizing citations and formatting bibliographies. It is similar to EndNote, ProCite, and Reference Manager but is Web based. This means that your citations and the RefWorks system are stored on the RefWorks server; you can add to your database and use it with Microsoft Word from any computer that has Internet access.

Creating and Accessing your RefWorks Account

**RefWorks User Login
for
University of Pennsylvania
Library**

New to RefWorks?
[Sign up for an Individual Account](#)

Log-in Name

Password

[Forgot your log-in?](#) [Athens Users](#)

Not your Organization?
[Login using your Group Code](#)

On Campus

To access or set up a RefWorks account from a computer on campus, you can go to <http://www.refworks.com/refworks/>. RefWorks will recognize the Penn IP address and the RefWorks User Login for University of Pennsylvania Library window will appear. Select Sign up for an individual account or log in if you already have one.

Off Campus

If you are off campus you'll need to go through the Library web by searching for RefWorks in the E-Resource Locator search box at www.library.upenn.edu and clicking on the RefWorks link. You'll be asked to authenticate with your PennKey and password, and the RefWorks User Login for University of Pennsylvania Library window will appear. Select Sign up for an individual account or log in if you already have one.

Creating Your Account

In the New User Information for University of Pennsylvania Library screen, enter your name, login name, password, e-mail address, type of user, and area of focus then select *Register*. Once you've registered, a confirmation will be sent to your e-mail address.

**New User Information
for
University of Pennsylvania Library**

(All fields are required)

Your Name:

Login Name:

Password:

Re-enter Password:

E-Mail Address

Type of User
Select a User Type ▼

Area of Focus
Select a Focus Area ▼

[Back to RefWorks Login](#)

The RefWorks Window

Add & Import Records

Search Franklin

Create & Manage Folders

Control Citation Styles & Create a Bibliography

Search for records in RefWorks

References ▾ | Search ▾ | View ▾ | Folders ▾ | Bibliography | Tools ▾ | Help ▾ Search RefWorks

nerve Folder Switch to: Standard View ▾

Use: Selected Page All in List
Put in Folder... ▾ Remove from Folder Add Descriptor
Global Edit Delete Print

Sort by Authors, Primary ▾

Ref ID: 31 Journal Reference 1 of 19 [View](#) [Edit](#)

Title: Epilepsy and neuroprotection: an illustrated review. [Review] [112 refs]
Authors: [Arzimanoglou, A.](#); [Hirsch, E.](#); [Nehlig, A.](#); [Castelnau, P.](#); [Gressens, P.](#); [Pereira de Vasconcelos, A.](#)
Source: [Epileptic Disorders](#), 2002, 4, 3, 173-182

Ref ID: 33 Journal Reference 2 of 19 [View](#) [Edit](#)

Title: Celiac disease, bilateral occipital calcifications and intractable epilepsy: mechanisms of seizure origin
Authors: [Bernasconi, A.](#); [Bernasconi, N.](#); [Andermann, F.](#); [Dubeau, F.](#); [Guberman, A.](#); [Gobbi, G.](#); [Olivier, A.](#)
Source: [Epilepsia](#), 1998, 39, 3, 300-306

Ref ID: 34 Journal Reference 3 of 19 [View](#) [Edit](#)

Title: Neurocysticercosis: focus on intraventricular disease
Authors: [Cuetter, A.C.](#); [Garcia-Bobadilla, J.](#); [Guerra, L.G.](#); [Martinez, F.M.](#); [Kaim, B.](#)
Source: [Clinical Infectious Diseases](#), 1997, 24, 2, 157-164

Short Record

View or Edit Complete Record

Search for Full Text

Entering Citations into RefWorks

Once your account has been established, you will be ready to begin populating your RefWorks database with citations. There are a number of ways to enter citations into RefWorks, including manually entering citations, importing citations from online databases, and using the Search Online Database feature.

Manually Entering Citations

To enter a citation into RefWorks, select **Add New Reference** under the **References** menu. The New Reference screen will appear. First, select a format from the *View Required Fields for:* pulldown menu. If you are unsure which format to select, the default is perfectly acceptable. Next select a folder for your citation from the *In Folder(s)* pulldown menu, and the citation format (book, journal article, etc.) from the *Ref Type* pulldown menu. Enter your citation. Separate multiple authors and descriptors by semicolon, and enter authors with the last name first. When you're finished entering the information, click the *Save* button. You then have the option to Duplicate, View, or go Back to the Reference List.

Direct Export from Electronic Resources to RefWorks

Rather than manually enter citations, you also have the option to import citations directly from many online databases (FirstSearch, ProQuest, etc.). A list of databases that have the Direct Export function and instructions for using them is available at <http://hdl.library.upenn.edu/1017/15010>.

After you activate the Export feature, the RefWorks window will come to the front of your screen, and you'll see a message indicating that the references are being imported and when the import is complete.

Import from CSA

Importing references, please wait...

Import completed - 3 references imported

[View Last Imported Folder](#)


[View Log](#)

Once you have imported the records you can view them in the Last Imported Folder, add keywords, and organize them into folders.

Saving Citations from Electronic Resources as Text and Importing into RefWorks

While many databases do have the Direct Export feature, some do not. Many of these other databases have the option of saving your citations as a text file on your computer and importing them into RefWorks. Use the information at <http://hdl.library.upenn.edu/1017/15010> to determine whether a database allows this and to see instructions as to how it is done.

Once you've saved your citations into a text file on your computer, go to RefWorks and select **Import** under the **References** menu. The Import screen will appear.



Back to Reference Lis

Import Filter/Data Source University of Pennsylvania Library

Database MEDLINE [OVID]

Import References into nerve
(Note that references are also put in the Last Imported folder)

Import Data from the following Text File

C:\Documents and Settings\Administrator\Desktop\Export1.txt Browse...

1. Select University of Pennsylvania Library as the *Import Filter/Data Source*.
2. Select the database from which you saved your citations as the Database.
3. If you want, specify the folder within RefWorks to which the citations will be imported.
4. Be sure that *Import Data from the following Text File* radio button is selected.
5. Click on the *Browse* button to navigate to your text file and select it.
6. Scroll to the bottom of the screen and select *Import*.

Online Database to Search:

University of Pennsylvania

Max. Number of References to Download: 50 ▼

Quick Search for: (Quick Search results are based on all fields)

Search **Clear**

Advanced Search for:

Descriptors ▼

and ▼

Authors ▼

and ▼

Title, Primary ▼

and ▼

Pub Year ▼

Search **Clear**

Search Online Databases

The Search Online Database feature allows you to search library catalogs from within RefWorks. Go to the **Search** menu and choose **Online Catalog or Database**, and the [Search Online Databases](#) screen will appear. Select the library catalog to search from the pulldown menu, indicate how many references to download at one time in the *Max. Number of References to Download* pulldown menu, enter your search terms, and click *Search*.

Using Quick Search with Franklin

In the *Online Database to Search* pulldown menu, select **University of Pennsylvania**. Enter your terms into the *Quick Search* field. RefWorks will automatically put an OR between your terms. If you enter the phrase “Art Smith”, it will search for the terms “Art” OR “Smith” across all fields in a citation. If you want to use AND to join terms, you’ll need to use the Advanced Search area of the screen and select *Any Field* from the pulldown menus.

Using the Advanced Search with Franklin

The Advanced Search allows you to search for authors, titles, subject headings, publication years, as well as build Boolean searches.

Authors = Search for author name. Enter “Jane Smith” or “Smith, Jane.”

Descriptors = Subject search. Enter a word or phrase, such as “Animal intelligence.”

Title = Title search. Enter the complete title or the beginning of the title “Catcher in the.”

Pub Year = Publication year. Enter the year as four digits – 1938.

Any Field = Searches across all fields. You can use the Boolean operators (AND, OR, NOT) in the pulldown menu to combine terms.

Once you have your terms entered, click on the *Search* button. Your results will appear in a new RefWorks window.

Search Results for "agatha christie"

Use: Selected Page All in List

[Import](#) [Import to Folder...](#) (Note that references are also p

Ref ID: 1 Book, Whole Reference 1 of 50

Book Title: The 8:55 to Baghdad

Authors: Eames, Andrew

Source: 2005, 403, Overlook Press, Woodstock, NY

Using the checkbox feature to select citations and the *Import* button, you can move your citations to your RefWorks database. If you select a specific folder from the *Import to Folder* pulldown menu, you can place your citations directly to a particular folder.

PennText Links in RefWorks for Finding Full-Text

PennText Links in RefWorks

In the upper right corner of your citation, you may see a button labeled *PennText*. If you click on this button, you will link to the University Library PennText menu.

Ref ID: 1 Book, Whole Reference 1 of 50 [View PennText](#)

Book Title: The 8:55 to Baghdad

Authors: Eames, Andrew

Source: 2005, 403, Overlook Press, Woodstock, NY

PennText Link

Title Beyond the Country House: Historic Conservation as
Source European journal of cultural studies [1367-5494] Dec
 yr: 2004 vol: 7 iss: 4 pg: 403

Full-text services available from *PennText at Penn Library*:

- [OCLC FirstSearch ECO](#) 

Check for Print Full-text in [Franklin \(Penn's Online Catalog\)](#)

If the Library does *not own this title* you may request a copy from [Penn Library Interlibrary Loan](#)

Click for Full-Text online.

Click to check for print copies.

Click to request from another library.

Creating Folders for Citations

RefWorks allow you to create folders to organize your citations. To create a folder, go to the **Folders** menu and select **Create New Folder**. Type the name of your folder in the *New Folder Name* field and click on the *OK* button. You can create an unlimited number of folders within your RefWorks account. You can also place the same reference in more than one folder.

Copying Citations to Folders

As outlined above, you can create folders for your citations. To move your citations into folders, use the checkbox feature next to the citation to select it. Go to the *Put in Folder* pulldown menu and select the folder in which you want to place the citations. A javascript message will appear that asks “Are you sure you want to put the 2 selected references in the [Selected] folder?” Click *OK*. You’ll then see a message indicating that your citations have been successfully put in the folder. You may need to click *OK* again.

Searching for Citations in Your RefWorks Database

The *Search RefWorks* field on the top right side of the screen searches across your RefWorks database. It looks in all fields, including the abstract and custom fields. All search terms are connected by the Boolean connector AND. It also searches for embedded terms, i.e., if you search for “art” you will retrieve references with “heart”, “part,” etc. **Advanced Search** (located under the **Search** menu) allows you to limit your search to specific fields (author, title, abstract, etc.), select Boolean operators (and, or, not), as well as select the folders you wish to search.

Advanced Search in Your RefWorks Database

BUILD YOUR SEARCH STRATEGY

Fields and Values to Search for

Descriptors

and

All Authors

and

All Periodicals

and

Start Year

Search:

All References

OR

Only References in:

gentrification

keeper

nerve

RLG

\$6880-04 Tankōsha. Henshūkyoku	(1)
(Ed	(2)
)	(2)
20 Kroc Foundation	(1)
A	(1)
Abbot,George	(1)
Acharya,Amitav	(1)
Adams,C.	(1)
Aelian,Claudius	(1)
Aldenkamp,AP	(1)
Altman,J.	(1)
Alvarez-Tejerina,J.	(1)
Andermann,F.	(1)
Aneja,S.	(1)
Anghelescu,Ion	(2)
Arellano,Ignacio (ed.and prologue)	(2)
Armbrecht,H.	(1)

Global Edit and Look Up Features

RefWorks also has a Lookup feature that allows you to browse by author, descriptor, and periodical title. Click on the **Search** menu and choose **Lookup by Author, Descriptor or Periodical** and the browse window will appear. Use the entry and edit links to view the citation and make global changes.

Adding Descriptors

You may want to add your own descriptors to your citations. Mark the relevant citations or decide to add a descriptor to every record in a folder and click the *Global Edit* button. The Global Edit screen will appear. On this screen choose 'Descriptor' as the field to edit, add a term to the 'Change Field to:' box and click 'OK.'

Providing Read-Only Access

You can provide read only access to an account that you have already created by using the 'Update User Information' function in the **Tools** menu to create a read-only password. Individuals who have their own RefWorks accounts will be able to use their login name and the read-only password to search your database, export data and create bibliographies. They will not be able to edit references, import references or change folders.

Update User Information
(All fields are mandatory)

Your Name:
Nick

Login Name:
okrent

Password:

Re-enter Password:

E-Mail Address:
okrent@pobox.upenn.edu

To provide read-only access, enter a password below.

Read-only Password:

Read-Only Access

RefWorks allows you to provide read-only access to your database. By creating and sharing a Read-only password, others will be able to search your database, export data, and create bibliographies but will not be able to edit or import references or change folders. To make your database read-only, go to the **Tools** menu, then **Settings**, and then choose **Update User Info**. Enter a read-only password and click *Update*. With your login name and read-only password users will be allowed to access your database in read-only mode

Using RefWorks for Group Research Projects

RefWorks is a great tool for group research projects. By creating an account to share, you and your group members will be able to add citations from anywhere you have Internet access. Here are some steps and tips to help you to use RefWorks efficiently as a group.

Create a Separate Account for the Group

You create a group account the exact same way you create an individual account, by selecting *Sign up for an Individual Account* from the main RefWorks screen. When creating your account, choose a **Login Name** and **Password** that will make sense to the members of your group. For example, pick something that has the class or project name in it, like "arteducation" or "biochemlab4." Share the login and password with your group members.

Use Folders to Organize Citations

To facilitate organization amongst group members, create folders to store your citations. You could create folders for different topics and/or a folder for each person working on the project – whatever works best for your group. Citations can display in multiple folders. To

create a folder, select **Create New Folder** under the **Folders** pulldown menu. Type the name of your folder in the New Folder Name dialog box and click on the *OK* button.

Create Consistent Vocabulary Using Descriptors

Use descriptors to create a consistent vocabulary across your RefWorks database. This will make it easier for you to search and retrieve relevant citations within your RefWorks database. If you've imported citations from a number of online library resources, different terms may be used to describe a similar thing. For example, the words "juvenile" and "child" both may be used to describe kids, but your group may always want to use the word, "child." To change all occurrences of "juvenile" to "child," go to the **Search** menu and select **Lookup by Descriptor**. Here you'll see all the different descriptors online resources use to describe the content of an article. If you wanted to change every occurrence of the descriptor 'juvenile' to 'child,' select the Edit link to the right of the term 'juvenile' and in the To field enter 'child.' Changes will be made globally across your account.

Select an Account Manager

Select someone from your group to periodically check for duplicates, make sure citations are in the proper folders, etc.

Backing-up Your RefWorks Database

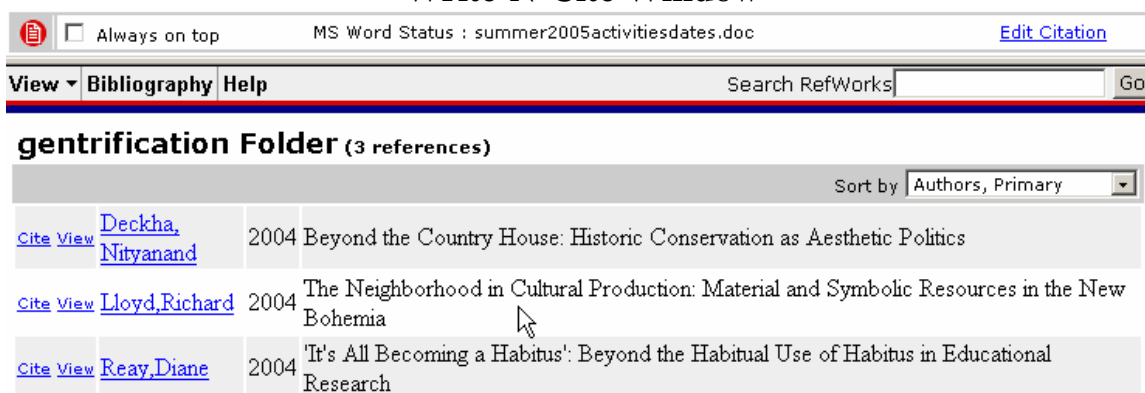
You can backup your citations on your computer by using the Backup/Restore feature. Go to the **Tools** menu and select **Backup/Restore**. You'll then be presented with the option to *Include References* and/or *Include Output Styles*. Click on the *Perform Backup* button. A copy of your database will be downloaded to your computer.

Inserting References into Word Documents

Using Write-N-Cite to Add References

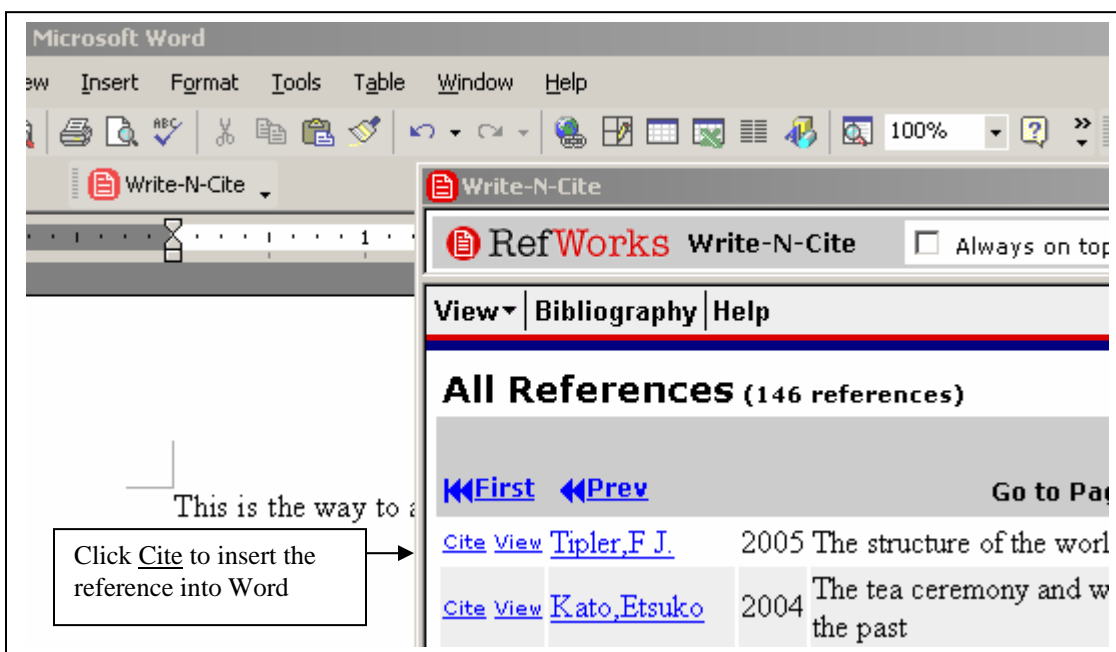
You can use RefWorks's Write-N-Cite function to insert references within Word. To use Write-N-Cite you will need to download a small utility program from this site: <http://www.refworks.com/Refworks/WNCDownload.asp>. Once the download is complete you can open it in Word by clicking the toolbar icon or by selecting it from the Tools drop down menu. Click on the Write-N-Cite icon in Word to open the Write-N-Cite window.

Write-N-Cite Window



The screenshot shows the Write-N-Cite window with the following content:

- Window title: MS Word Status : summer2005activitiesdates.doc
- Menu: View | Bibliography | Help
- Search: Search RefWorks [] Go
- Folder: **gentrification Folder (3 references)**
- Sort by: Authors, Primary
- Reference 1: [Cite View Deckha, Nityanand](#) 2004 Beyond the Country House: Historic Conservation as Aesthetic Politics
- Reference 2: [Cite View Lloyd, Richard](#) 2004 The Neighborhood in Cultural Production: Material and Symbolic Resources in the New Bohemia
- Reference 3: [Cite View Reay, Diane](#) 2004 'It's All Becoming a Habitus': Beyond the Habitual Use of Habitus in Educational Research



The screenshot shows Microsoft Word with the Write-N-Cite window open. A callout box points to the 'Cite' link in the reference list. The callout box contains the text: "Click Cite to insert the reference into Word".

The Write-N-Cite window shows:

- Window title: RefWorks Write-N-Cite
- Menu: View | Bibliography | Help
- Folder: **All References (146 references)**
- Navigation: <<First <<Prev Go to Page
- Reference 1: [Cite View Tipler, F J.](#) 2005 The structure of the world
- Reference 2: [Cite View Kato, Etsuko](#) 2004 The tea ceremony and w the past

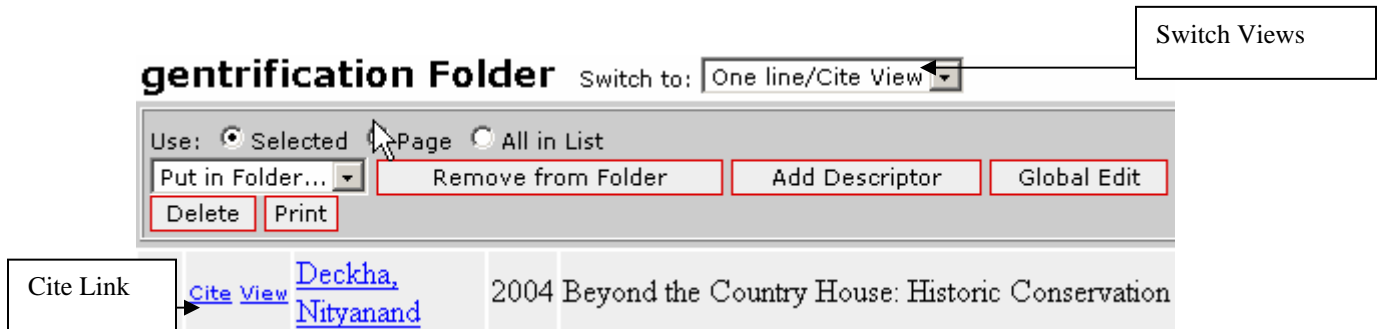
Click on the [Cite](#) link to the left of an entry to insert it as a reference in the Word document. The reference will appear in the standard RefWorks style until the Bibliography is formatted (see the 'Formatting' section).

This is the way to add citations in RefWorks {{101 Tipler, F J. 2005; }}.

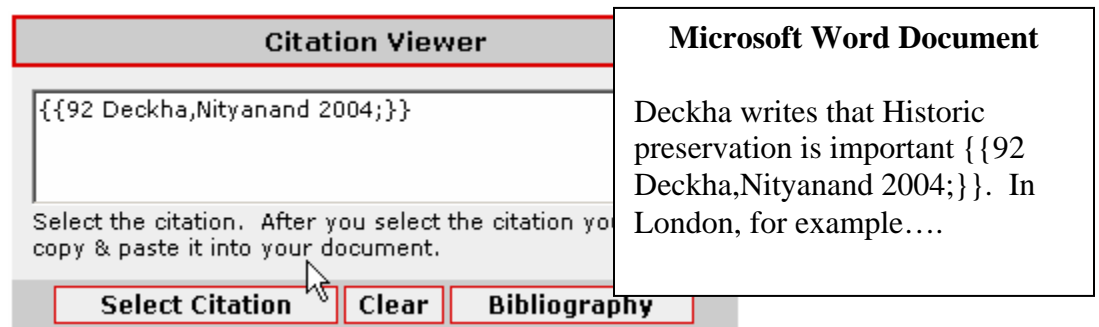
Using the One Line/Cite to Add References

You can insert citations into a document and format bibliographies using the One Line/Cite View Manuscript as long as you use one of the compatible web browsers: Netscape 6.0 and above, Internet Explorer 5 and above, Mozilla 1.2.1, and Safari. Check the RefWorks website for the latest information about browser compatibility (<http://www.refworks.com>).

To cite a reference in your paper, you'll need to switch to the One Line/Cite View in RefWorks as in the Switch to dropdown menu as shown in the first image on the next page.



Click on the Cite link next to the appropriate reference. A Citation Viewer window will appear containing the citation formatted like `{{92 Deckha, Nityanand 2004;}}`. Once you have all of the references you need for a particular in-text citation, click on the *Select Citation* button. Drag and drop the citation into your word processor document or copy the citation and paste it in the Word document. Be sure to clear the Citation Viewer window before creating your next citation.



Editing Unformatted Citations

Once you have added a RefWorks citation to the word document you can edit it to:

- suppress (hide) an entire citation
- suppress (hide) the author
- suppress (hide) the year
- add text before the in-text citation

- add text after the in-text citation
- add a specific page number (overriding the page number in your RefWorks record). This feature only works if the output style you plan to use has page numbers in the in-text citation or footnote.

To edit a citation position the cursor within that citation and then enter the Write-N-Cite tool and click on the ‘Edit Citation’ link in its top right corner. This will open the citation editor. After you have completed your editing click ‘Save to Word’; the changes will then appear in the RefWorks citation in the Word document

Citation Editor

Target output Style APA - American Psychological Association

Preview

(Plato and the christians. passages from the writings of plato1957)

Hide the entire citation

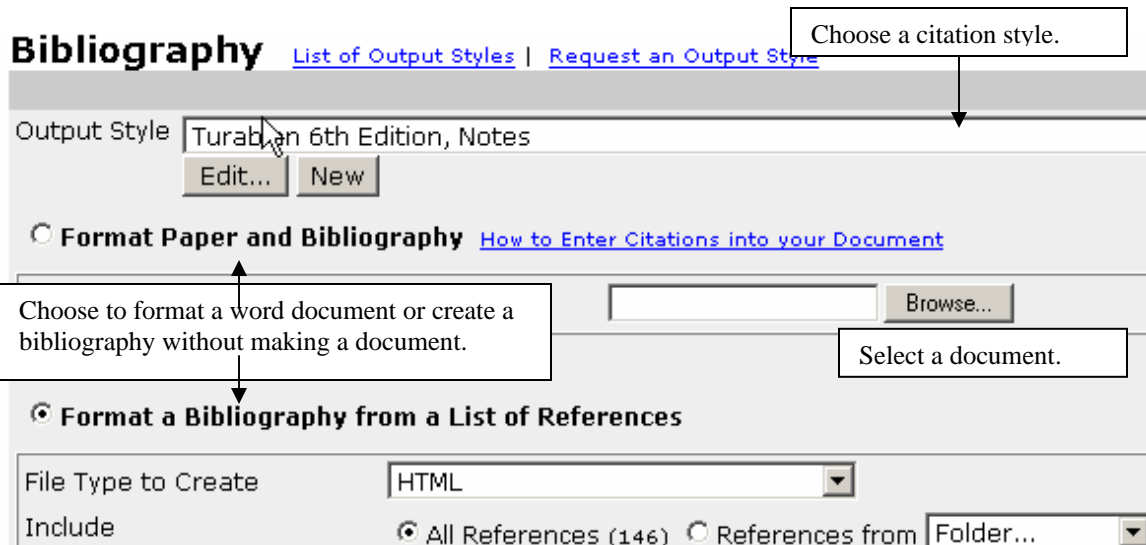
Suppress Authors	Suppress Year	Text Before	Text After	Specific Page	Reference	
<input type="checkbox"/>	<input type="checkbox"/>			15	Anonymous	1957 Plato and the Christians. Passages from the writings of Plato

Save to Word **Cancel** **Help**

Formatting your Document and Creating a Bibliography

Creating a Bibliography

Save the document you have just created before formatting the paper and the bibliography. Click on the *Bibliography* button from the Citation Viewer window or the **Bibliography** menu from the main RefWorks window. Select the *Output Style* (APA, MLA, specific journal), select the *Format Paper and Bibliography* button, and use the *Browse* button to navigate to your manuscript. Click on *Create Bibliography*. The formatted document will be downloaded to your computer and it may have an .asp extension. If the formatted manuscript does not open, go to Word and open the manuscript from within Microsoft Word. You can now save and edit the manuscript.



Creating a Bibliography From a List of References

In RefWorks, you can create a bibliography from a list of references without creating a manuscript. This reference list may contain your entire database or only references from a specific folder. Click the *Bibliography* button from the Citation Viewer window or the **Bibliography** menu from the main RefWorks window. Select the appropriate format from the *Output Style* pulldown list. Click *Format a Bibliography from a List of References*. Under *File Type*, select the file format you wish to create (Text, HTML, RTF (Rich Text), Word for Windows (97 or later), or Word for Mac (98 or later). Under *Include*, select *All References* or *References from <folder name>*. Click *Create Bibliography*. The file will be downloaded to your computer. Save the document and edit as needed.

Help with RefWorks

If you have particular questions about RefWorks or would like to make an appointment to meet with a librarian for assistance, send a request for assistance to the Library to <mailto:library@pobox.upenn.edu>.