



## RefWorks course handout

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# 1. Starting RefWorks

## With RefWorks

- your references are always accessible via the internet
- you can import references from a catalogue, database, citation manager or via RSS
- you can arrange, search, deduplicate, manage or share references
- you can use references for in-text citation and to create a bibliography in any format

## Opening an account

To open an account you must be within the UvA domain (at UvA or at home with UvAvpn)

1. Go to [www.refworks.com](http://www.refworks.com) > click *Login* > *Sign up for an Individual Account*
2. Enter the required data (use your UvA e-mail address)
3. Select your discipline or field of interest and select a user type

Note: RefWorks will send a confirmation mail with the UvA Subscriber Group Code.

You need the group code if you wish to log in from outside the UvA domain.

## Customizing an account

- Customize the settings of your RefWorks account via *Customize* (top right)
- Reference List Options : customize the style of your references
- Startup Options > View Folder : if you frequently import references, it may be useful to select *Last Imported*

## Logging in

- Log in with the user name and password of your RefWorks account
- Outside the UvA domain, log in with your UvA group code first

## 2. Exporting references to RefWorks

### CataloguePlus

1. Checkmark the relevant titles > open E-Shelf
2. Mark articles to export > select *Push to RefWorks* > *Go*

RefWorks opens and after you have logged in the references are automatically imported.

### UvA Catalogue

1. Checkmark the relevant titles > click *Export* > *Export to RefWorks*
2. Click OK (to export to RefWorks)

RefWorks opens and after you have logged in the references are automatically imported.

### Database export directly<sup>1</sup>

1. Save the records you wish to import (*Save, Mark, Add*)
2. Go to the saved records (*Show, View, Folder*)
3. Checkmark the records you wish to import > (save) > select RefWorks

RefWorks opens and after you have logged in the references are automatically imported.

### Database via text file

1. In the database: select the records and save them as a text file
2. In RefWorks : *References* > *Import*
3. Select the import filter and the source (the database) of your records

If the import filter of the database is not mentioned, select the 'RIS Format' or the 'Refer Format' to import a text file

<sup>1</sup> For the procedures of specific databases see: [www.uba.uva.nl/en](http://www.uba.uva.nl/en) > click Services > Searching > Demos and manuals > RefWorks: exporting titles

### 3. Importing references into RefWorks

#### Google Scholar

Activate the button 'Import into Refworks' in Google Scholar:

- Go to Google Scholar > open *Scholar Preferences*
- At Bibliography Manager select : *Show links ... RefWorks > Save preferences*

Your search results in Google Scholar now have the button 'Import into RefWorks'.

Click this button to import a reference into RefWorks.

#### Endnote

1. *References > Import > From EndNote Databases*
2. Select your EndNote Library > *Import > View last imported*


#### Full-text attachments



You can import full-text files as an attachment to a reference<sup>1</sup>:

1. Open the reference > click *Edit Reference > Browse*
2. Select the file > *Open > Add Attachment*

#### Sharing

Share a folder with others, *i.e.* give others read-only access to a folder:

1. Open the tab *Organize & Share Folders* > click  at the appropriate folder > *OK*
2. Select your settings > *Save*


Click  to invite someone by e-mail to share the folder. Click  to stop sharing it.

Note: the person you share the folder with cannot add references. If you want people to add references, you can open a new, collective account.




<sup>1</sup> You are allowed max. 20 MB per attachment, per personal account 100 MB. This may be increased on request. Please contact [UBAcoach](#).

## 4. Managing references in RefWorks

### Folders

- Making a new (sub)folder : *New Folder (Create Subfolder > select Parent Folder) > name > Create.*
- Moving references from Not in Folder to another folder:
  1. View > Not in folder > Select the references to be moved
  2. Tab Folders: open scrollmenu  > select a folder

### Deleting references

References deleted from a folder by clicking  (*Remove from Folder*) are placed in 'Not in folder'.  
References deleted by  (*Delete*) may be retrieved for 30 days via *View > Deleted References*.  
Checkmark the title and click  (*Restore*).

### Searching your folders

- Click *Search > Advanced*. You can search one or more fields (click the green circle with the white + to add fields) and combine these with an *operator* from the drop-down menu
- Searching the full-text attachments: *Search > Advanced > Search Field: Attachments > enter your search term(s)*. If necessary select *From Selected Folder(s) > checkmark folder(s) > Search*
- Searching with the use of the index: *Search > Author, Periodical, Descriptor (i.e. the same fields as used in your references)*
- Double references: *View > Duplicates*. One of the results is always checkmarked.

### Bibliography

If you just wish to make a bibliography from your references (for in-text citations, see p. 5)

1. In RefWorks : *Bibliography > Create*
2. Select the Output Style and the File type
3. Select the references for the bibliography (*All references* or from a specific Folder)
4. Click *Create Bibliography > Open the file and save it to your computer*

## 5. Entering references in Word: Write-N-Cite

### Installing Write-N-Cite and activating it in Word

Installing: click the button *Tools > Write-N-Cite* in your RefWorks account and click *Download Now*.  
In Word: open the new tab *RefWorks* and click *Log in*. Log in with the UvA group code and your personal log-in data or use the special log-in code which you'll find in your RefWorks account under *Tools > Write-N-Cite*.

### Citations, footnotes and Bibliography

- Citations in the text: put the cursor where you wish to insert a citation. Open the tab *RefWorks* and select *Insert Citation > Insert New*. Find the reference you wish to insert, click *OK*.
- Footnote: as above, but check the option *Make Footnote* in the editing window.
- Bibliography: click the tab *Refworks > Bibliography options > Insert Bibliography*.

### Output Style

The *Output Styles* you can choose from in the *Style* menu (tab *RefWorks*) are the favourite styles in your RefWorks account. If you would like to have other styles available in Word: add the styles via *Bibliography > Output Style Manager* in your RefWorks account.

Changes in your RefWorks account become available in Word on clicking the tab *RefWorks* in your document and then *Sync My Database*.

### Customising references

Customising a reference: double click the reference you wish to customise; select the required changes in the editing window and confirm with *OK*.

Removing a reference: take care to select the *complete reference*, then click *Delete*.