



The Lamar Soutter Library

University of Massachusetts Medical School

<http://library.umassmed.edu>

Using RefWorks

Contents

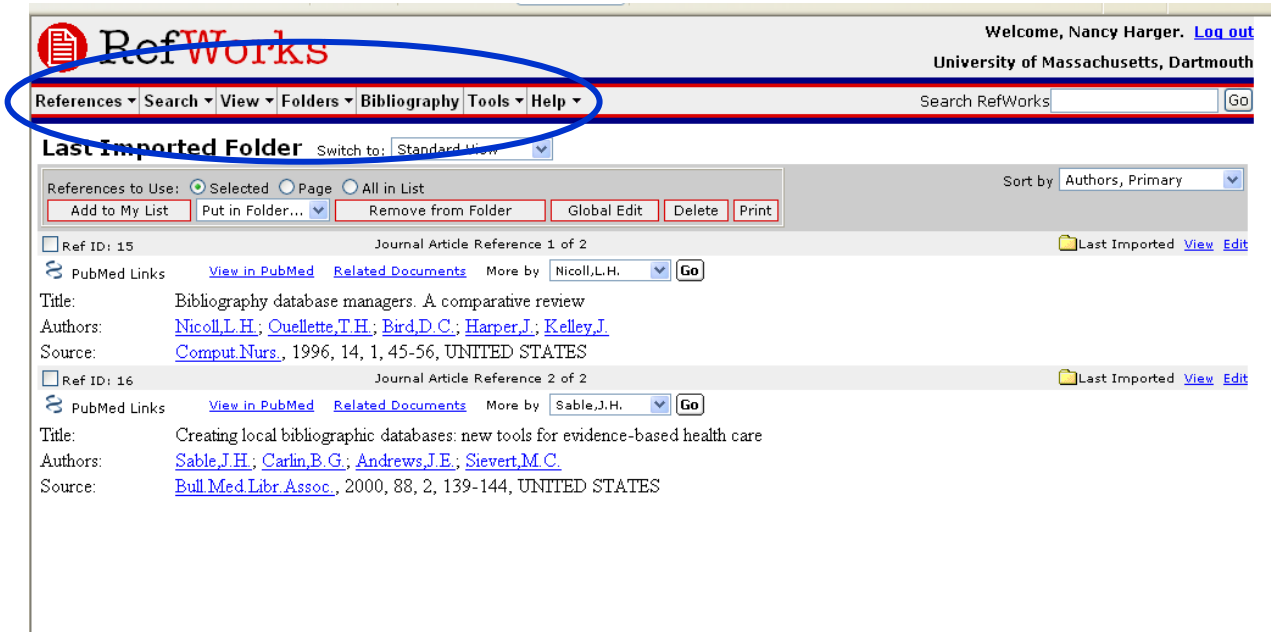
Registering for an Account.....	2
Building your RefWorks Bibliography.....	2
Entering references manually:	2
Importing references:.....	3
Getting references from an Online Catalog or Database:	3
Getting references directly from a Database:	3
EBSCO:	4
OVID:	4
Importing Text Files:	4
PubMed.....	5
Moving References from Endnote to RefWorks.....	5
Moving References from RefWorks to Endnote.....	6
Writing your Paper:	10
Write-N-Cite:.....	11
One Line One Cite:.....	12
Folders	12
Other Options and Notes:	13

RefWorks is a Web-based product that you can use to create your own personal bibliographic database, either by importing references from online databases or by entering them manually. You can then use these references in writing papers, and you can automatically format and reformat the paper and bibliography in different styles in just seconds. RefWorks can be used in Windows, Macs, or Unix. RefWorks works in much the same way as EndNote, ProCite and similar reference management products, but because it is Web-based you can access it anytime and anywhere you have Web access.

Registering for an Account

UMass has an institutional subscription. You must be a student, staff, or faculty of UMMS/UMMHC—check with the Library Service Point at 508 856-6099 or refstaff@umassmed.edu for directions to register for an account.

Circled portion below indicates what you will be using to navigate:



The screenshot shows the RefWorks web interface. At the top, there is a navigation bar with the following items: **References**, Search, View, Folders, Bibliography, Tools, and Help. The **References** item is circled in blue. To the right of the navigation bar is a search box labeled "Search RefWorks" with a "Go" button. Below the navigation bar, the "Last Imported Folder" section is visible. It includes a "Switch to:" dropdown menu set to "Standard View". Below this, there are radio buttons for "Selected" (selected), "Page", and "All in List". There are also buttons for "Add to My List", "Put in Folder...", "Remove from Folder", "Global Edit", "Delete", and "Print". The "Sort by" dropdown is set to "Authors, Primary". Two references are listed:

- Ref ID: 15 Journal Article Reference 1 of 2
PubMed Links: [View in PubMed](#) [Related Documents](#) More by: [Nicoll,L.H.](#) [Go](#)
Title: Bibliography database managers. A comparative review
Authors: [Nicoll,L.H.](#); [Ouellette,T.H.](#); [Bird,D.C.](#); [Harper,J.](#); [Kelley,J.](#)
Source: [Comput.Nurs.](#), 1996, 14, 1, 45-56, UNITED STATES
- Ref ID: 16 Journal Article Reference 2 of 2
PubMed Links: [View in PubMed](#) [Related Documents](#) More by: [Sable,J.H.](#) [Go](#)
Title: Creating local bibliographic databases: new tools for evidence-based health care
Authors: [Sable,J.H.](#); [Carlin,B.G.](#); [Andrews,J.E.](#); [Sievert,M.C.](#)
Source: [Bull.Med.Libr.Assoc.](#), 2000, 88, 2, 139-144, UNITED STATES

Building your RefWorks Bibliography

Start with the first button along the top, **References**, then “**Add New Reference**” from the drop down box:

Entering references manually:

- Select an **Output Style** under **View fields used by**, then **Access Output Style Manager**; a long drop-down list is provided. Choices include general styles such as APA and AMA, and those of specific journals such as *Nature* and the *New England Journal of Medicine*. Selecting one does *not* lock you into that style forever; you will be able to change styles and reformat your papers at will.
- Choose the type of reference you are entering – there is a drop-down list including journal, conference proceedings, web page and more. The default is **Journal** but the fields for other types will be different, so be sure to select the right one.

- Note that some fields are marked with a ✓. If you click the ✓, it will show you more information about “fields used by...”. On the right there are also explanations of required formats for some entries; sometimes there is also a link giving details about the appropriate format for the style you have chosen.
- Enter information manually or by cutting and pasting.
- Place the new reference directly into a folder if you have any set up, but it is not obligatory. You can set up folders and move references into them at any time.
- Once you have entered all the information, click on **Save Reference** at the top. It will save and reappear with a number. If something is entered incorrectly, it will tell you.
- To enter more references, click on **References – Add New Reference** in the toolbar along the top.

Importing references:

Along the top click on **Import** under **REFERENCES**:

- **Import instructions**—provides instructions for importing references into RefWorks from specific databases.
- **List of Filters and Databases** is a list of the databases that support Direct Export to RefWorks.
- **Request a Filter** - if you find a database or journal that is not supported, you can suggest that it be added.

Getting references from an Online Catalog or Database:

- **Search – Online Catalog or Database** (*You can search PubMed here which is easier than importing a text file*); scroll to the desired database. Use either **Quick** or **Advanced Search** to find references, and select any you want to add to your bibliography by putting checks in the **Ref ID** boxes. Click **Import**. If desired, choose the folder into which to import the references. RefWorks will ask if you want to import the references; once you click **OK** it will import them and you can close the search window.
- You should ALWAYS check to be sure the reference(s) were imported correctly! Do this by choosing **View Last Imported Folder**. If it didn't work, go to the online **Help - Checking for Errors**.

Getting references directly from a Database:

An option that may be available in some online databases is **Direct Export**.

EBSCO:

For Direct Export:

1. Conduct a search.
2. Click on the **Add** folder icon to the right of any results you want to save.
3. Click on the **Folder has items** link, above the **Results List** on the top of the screen.
4. Click on **Export**.
5. Click the radio button in front of **Direct Export to RefWorks** to initiate a direct export.

Note: Uncheck the **Remove these items from folder after saving option**, if you want items to remain in the folder after performing the export function.

7. Click the **Save** button to begin the direct export.
8. Your records should appear in the **Last Imported Folder**.

OVID:

For Direct Export:

1. Select the references you want to export.
2. Under **Results Manager** on the left, select **Complete Reference** in the **Fields** section.
3. Select the **Direct Export** under **Results Format**.
4. Click the **Save** button.
5. Select **Export Citations to RefWorks** and **Continue**.
6. The export will open **RefWorks** if it is not already open and automatically import the references.
7. Your records should appear in the **Last Imported Folder**.

Importing Text Files:

PubMed

There are two ways to import files from PubMed. The method immediately below is the easiest.

1. Select **Search** in the bar at the top.
2. Select **Online Catalog or Database**.
3. Then **Online Catalog or Database** to search, choose **PubMed** from the drop down box.
4. Construct a **Quick Search** or an **Advance Search** and when the download is complete, put a check in the box for the references that you would like to import.
5. Click **Import**.

OR:

1. Go directly to **PubMed** and perform a search in PubMed, then mark the references you want to export.
2. Change the **Display option** from Summary to **MEDLINE**.
3. In the **Send To drop-down**, select **Text**. A window opens with just the references in MEDLINE format.
4. Select **Save As** from your browser and select **Text** as the Save As file type.
5. Save file to desktop (or to where you can find it easily).
6. Log in to **RefWorks**.
7. Select **References/Import** from the toolbar.
8. Select **NLM PubMed** as the data source and as the database.
9. **Browse** to find the text file you saved to your computer.
10. Click **Import**.
11. Your records should appear in the **Last Imported Folder**.

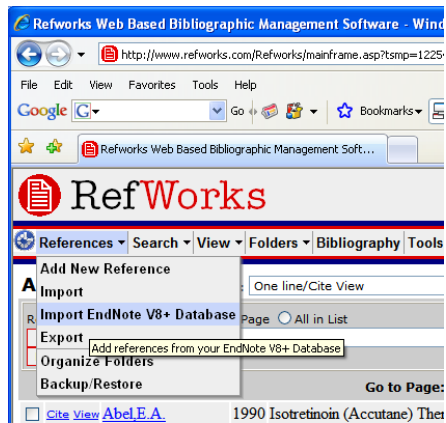
Moving References from Endnote to RefWorks

RefWorks has a feature that will allow you to upload your library from EndNote (versions 8 and newer) directly into RefWorks.

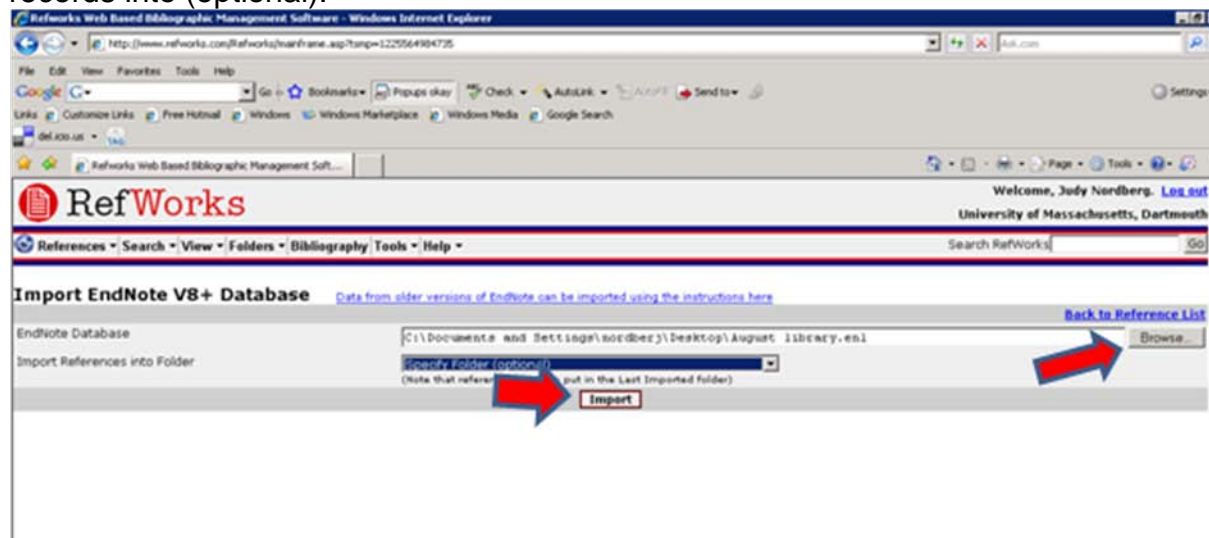
Note: If you want to import a large number of references, it is recommended that you

import no more than 2500 records (or 3MB of files) at a single time.

Log into your RefWorks account, and from the **References** menu select **Import EndNote V8+ Database**.



Browse for and select your EndNote library (.enl). Specify a folder to import your records into (optional).



Click on **Import** at the bottom of the Import window. The progress in importing is measured by * for each reference imported. RefWorks will notify you when the import is complete. Your records should automatically appear in the **Last Imported** folder.

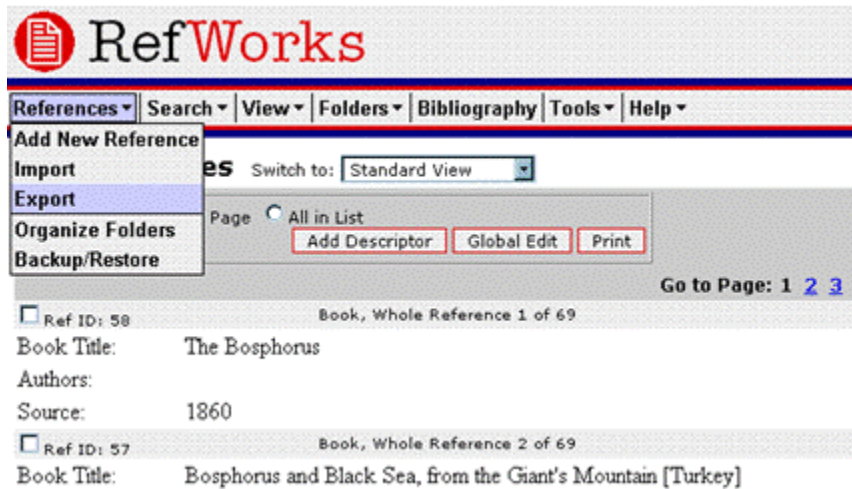
Moving References from RefWorks to Endnote

<http://www.endnote.com/support/Faqs/Import/faq13.asp>

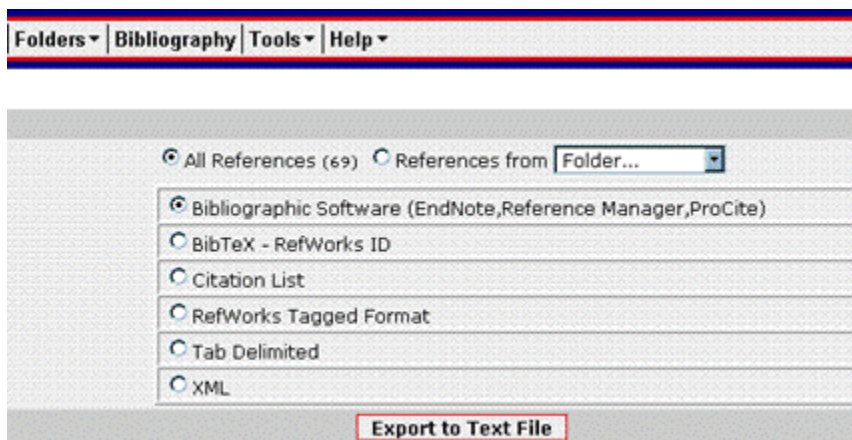
How can I transfer references from RefWorks into EndNote?

1. Creating a formatted text file in RefWorks

a. In your RefWorks account, go to the **References** menu and choose **Export**.



b. Select the references you want to export (e.g., **All, or by folder**), verify the **Bibliographic Software** button is selected and click the **Export to Text File** button.



c. The next screen confirms the export is processing.

Export

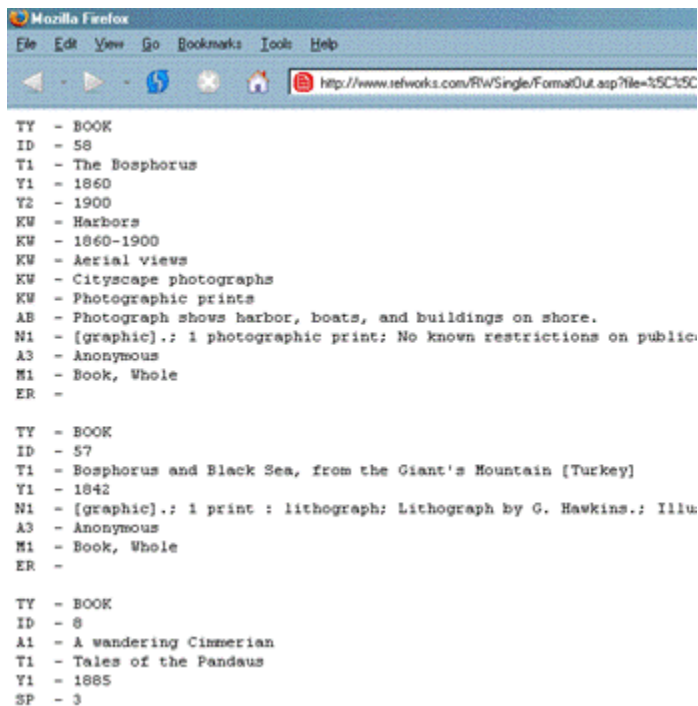
Exporting references, please wait...

69 references were exported.

Your exported references should download automatically. If they don't, [Download it](#)

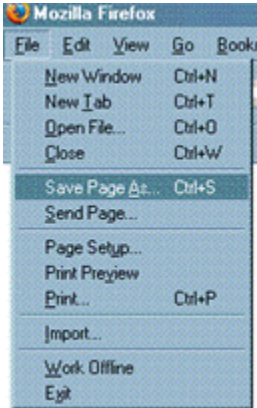
Download not working? [E-Mail it](#) to

d. A new Web browser window opens with your references presented in a structured format. If the references do not appear in a new Web browser window automatically, click the *Download It* link.



e. Save your references to a text file on your desktop by selecting the **File menu and Save As**.

Note: remember where the file is located for importing into EndNote.



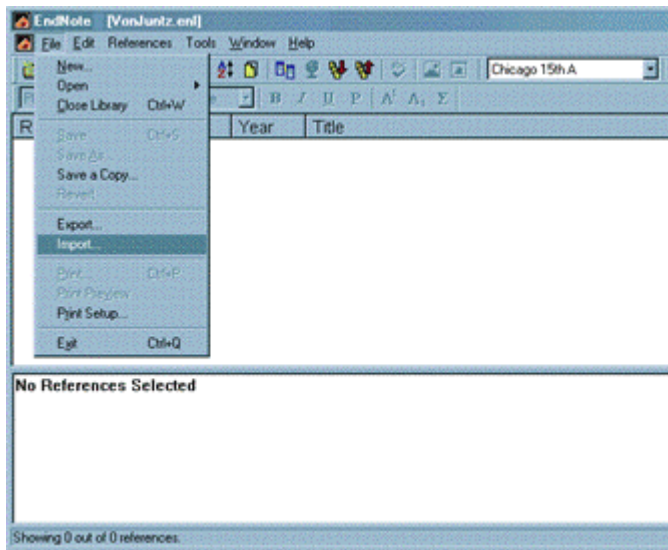
f. Now you are ready to import your references to EndNote.



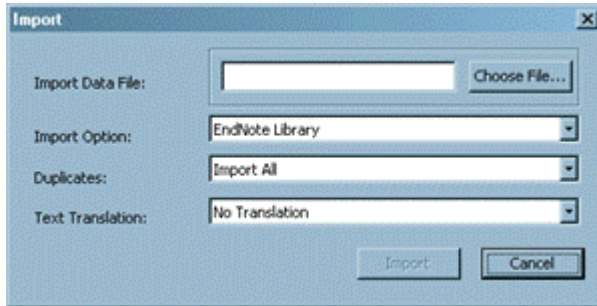
2. Import the text file into EndNote

a. Create a new EndNote library, or open an existing one to import the text file.

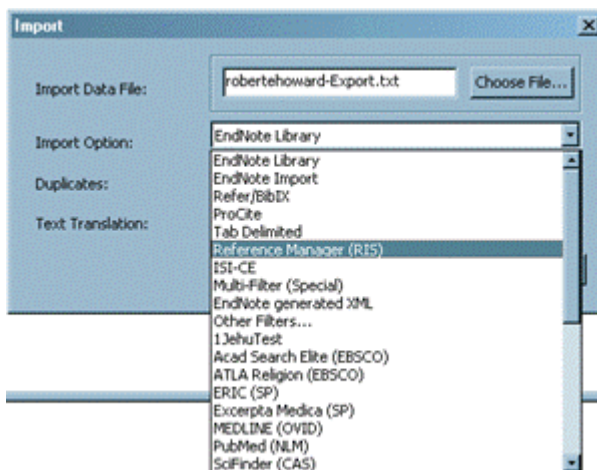
b. From the EndNote **File** menu, choose **Import**.



c. Click the **Choose File** button to locate the file saved from your RefWorks account.



d. On the Import Option drop-down list, choose “**Reference Manager (RIS)**.” The selections for Duplicates and Text Translation do not require adjusting unless your operating system is using a language setting other than English.



e. Click on the **Import** button. EndNote will present your references in a library window. **You can view all references in a library by selecting the *References* menu and *Show All References*.**

Writing your Paper:

There are two ways to insert references from your RefWorks bibliography into a paper. The simplest is using **Write-N-Cite**, a tool that you download. **Write-N-Cite** then resides in your Microsoft Word Tools, and you use it whenever you want to insert a citation. When you are all done, you format your paper and its bibliography in the Style you choose (APA, JAMA, Nature, etc.) and it is formatted into a new document. You can

save the new document, but you should also save the original so you can edit it or reformat it in a different Style if desired.

Write-N-Cite:

- First, download the Write-N-Cite tool; Under the **Tools** tab, choose **Write-N-Cite**. The download screen will come up; click on the link and the Write-N-Cite utility will be installed on your computer. It doesn't take long as it isn't very big, and having it will simplify writing and formatting papers.
- (Note: If you are working here in the library on a UMass computer, you can install **Write-N-Cite** temporarily, or you can put it on your H: drive.)
- Open your Word document. At the point where you want to insert a citation, open **Write-N-Cite** by selecting it from Word's **Tools** drop down menu. Log in to RefWorks.
- Your entire RefWorks bibliography will open. Here's where having Folders is handy. Choose **View**, and then select the appropriate folder.
- Scroll to the desired citation and click on **Cite**.
- The citation will be in double curly brackets `{{ }}` with just the number of the reference in your RefWorks bibliography and the author's last name and first initial. This coding is what gives RefWorks the flexibility to reformat your paper in different styles at will.
- Keep **Write-N-Cite** open as you continue to write your paper, inserting references as needed.
- When you are finished with your paper, save it and close it. Close **Write-N-Cite**. Go back to RefWorks and click on the **Bibliography** tab along the top.
- Choose **Format Paper and Bibliography**.
- **Browse** to choose the paper.
- Click **Create Bibliography** at the bottom.
- RefWorks will process your paper in the format you chose. You may need to download it – just click as directed – and the paper will open in a separate window. You can also save or email it.
- Note that your paper is saved in a different version than the original – it will be titled *final-[your title]*. This preserves your original so you can continue to edit

and reformat it at will. You can save the new version, or you can just close it and keep working on the original.

- To change the style of your paper, simply choose a new style from the drop-down menu on the Bibliography page and proceed as above. Presto!

One Line One Cite:

If you really don't want to download the Write-N-Cite tool, you can insert references directly from RefWorks.

- From your RefWorks Bibliography, or from the appropriate folder in your Bibliography, click on **Switch to: One line/Cite View**. You will then be looking at your references in a slightly different interface.
- On the left there will be a box for selecting the reference; then there are links to *Cite* or *View*. Click on **Cite**.
- A box will come up with the selected citation(s) in a *Citation Viewer*. Click **Select Citation**.
- Now you must copy and paste the citation into your paper.
- If you want to insert more than one citation, you need to click on **Cite** for each one, then copy and paste the entire list into your document.
- When you are finished, you can format the paper and bibliography as above.

Folders

Folders make it easy to organize your RefWorks bibliography. To set up folders:

- In the toolbar at the top, click on **Folders – Create New Folder**.
- Give your folder a name and click **Okay**.

Now you can put existing references into your folder(s), or you can add them to folders as you import them. Also, you can **Organize Folders** and **Rename** them, **Delete** them or **Clear** them. You can also look at their contents by just clicking on the number of references in the folder. **Organize Folders** is also found under **References**.

Note that there is a **Last Imported** folder; this contains the last references you imported even if you put them directly into a folder. You should always check this folder after you import any references.

RefWorks also tells you how many references you have altogether and how many, if any, are not in folders. If you decide they should be in folders, click on *X reference[s] is[are] not in a folder*. It will take you to those reference(s) and you can choose **Put in Folder** in the gray bar – the drop-down menu shows you your folders and you can choose the appropriate one.

Other Options and Notes:

1. A new tool is **RefGrab-It**, which allows you to directly import information about a website into your RefWorks account. Find it under **Tools – RefGrab-It** and download it (it's a very small program). It puts an icon in your toolbar; simply click the icon whenever you are in a website that you want to add to your RefWorks account and it will capture the bibliographic information. If you then decide to import the data, you can simply click to do so automatically if your RefWorks account is open; otherwise it will ask you to log in. If there is an ISBN number, PubMed ID or DOI on the web page, RefGrab-It will automatically search various web resources to get supplemental information that may be of interest. RefWorks may also locate RSS feeds related to that web page.
2. Whenever you are looking at references, note that you have several choices in the gray bar: **Delete; Put in Folder; Add Descriptor; Global Edit;** and **Print**. You can do this to just the references you **Select** by clicking in the little box at the top left of each reference, next to its ID number; or you can choose the whole **Page**; or **All in List**, which means all the references in the list you are currently viewing (e.g., in a folder).
3. Another option is to find and eliminate duplicates. RefWorks isn't very good at sorting out duplicates when you first import them, so you will want to check occasionally. Under **View** in the gray toolbar, choose **Duplicates** and then either **Exact Match** or **Close Match**. Choose **Close Match**; it will show you all probable duplicates and you can select the better reference and delete the other. (Usually the references will be exactly the same, but sometimes one may have more detail than the other.)
4. Note that whenever you delete a reference, its number disappears and will not be reused. Therefore, reference ID numbers do not reflect the actual number of references in your database (unless, of course, you never delete any). However, RefWorks always tells you exactly how many references you have, so you can just look at that number. It appears on every reference; e.g., "Journal Reference 152 of 172," so you know you have 172 total references in your database).
5. You can easily **Search** your database. In the toolbar along the top, click on **Search**, then choose **Advanced** (which allows you to search by fields or in folders); **Lookup by Author, Descriptor, or Periodical**; or you can **Search by Online Catalog or Database** and limit your search to the source from which you got the reference(s).

*If you have any questions about using RefWorks, email
refstaff@umassmed.edu*