

# REFWORKS STEP-BY-STEP

[HTTP://WWW.LIB.UMN.EDU/INDEXES/REFWORKS](http://www.lib.umn.edu/indexes/refworks)



UNIVERSITY OF MINNESOTA  
LIBRARIES

## A. SETTING UP AN ACCOUNT

1. Go to <http://www.lib.umn.edu/indexes/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 be 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. Login to RefWorks. Go to the **Search** menu at the top of the screen
2. Select **Online Catalog or Database** in left navigation bar
3. Find University of Minnesota, MNCAT Catalog in first drop-down menu
4. 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 guides at <http://www.lib.umn.edu/indexes/refworks/refimport>
5. 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.
6. At the **Import to folder** pull-down menu, select the appropriate folder to save these citations.
7. Select the appropriate folder and click **Import**.
8. The citation(s) are now copied into RefWorks.

<http://www.lib.umn.edu/indexes/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/indexes/refind>. 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/indexes/refworks/refimport>.

### *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/indexes/refworks/refimport>

#### **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 into the **Last Imported Folder** within RefWorks. 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)**

### *Searching RefWorks with the Lookup function:*

1. You can search for your references in RefWorks by author name, descriptor heading or by periodical title

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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 select the format of your choice
5. Check **Reference From** and choose folder from menu
6. Click **Create Bibliography**

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## USING WRITE-N-CITE: DOWNLOAD PLUG-IN

### Windows Users:

#### *Write-N-Cite III for Windows*

[Click here to download Write-N-Cite III for Windows.](#) (964k).

This version includes:

- MS Vista and Word 2007 compatibility
- Also compatible with XP and Word 2003
- Single document formatting
- Faster formatting for large documents
- Includes Ability to Write and Format Papers Offline

Current WNC for Windows users can use WNC III on old documents, however, the documents must be converted to a WNC III format which can be done within WNC III.

Installation information is available here (link to: [http://www.refworks.com/refworks/help/Refworks.htm#Installing\\_Write-N-Cite.htm](http://www.refworks.com/refworks/help/Refworks.htm#Installing_Write-N-Cite.htm) )

Information on working with Write-N-Cite III is available here (link to: [http://www.refworks.com/refworks/help/Refworks.htm#Using\\_Write-N-Cite\\_for\\_Windows\\_III.htm](http://www.refworks.com/refworks/help/Refworks.htm#Using_Write-N-Cite_for_Windows_III.htm) )

#### *Write-N-Cite v.2 for Windows*

[Click here to download Write-N-Cite v.2 for Windows.](#) (336k).

This version includes:

- Two document formatting (draft and final versions)
- Compatible with XP and Word 2003 and lower

Installation information is available here (link to: [http://www.refworks.com/refworks/help/Refworks.htm#Installing\\_Write-N-Cite.htm](http://www.refworks.com/refworks/help/Refworks.htm#Installing_Write-N-Cite.htm) )

### Mac Users:

#### *Write-N-Cite v.2.5 for Mac*

[Click here to download Write-N-Cite v.2.5 for Mac.](#)

This version includes:

- Microsoft Word for Mac 98 and up (including Word 2008) compatible
- Mac OS X version 10.3 or later (including Leopard)

Installation information is available here (link to: [http://www.refworks.com/refworks/help/Refworks.htm#Installing\\_Write-N-Cite\\_for\\_Mac.htm](http://www.refworks.com/refworks/help/Refworks.htm#Installing_Write-N-Cite_for_Mac.htm) )

Information on working with Write-N-Cite v.2x for Mac is available here (link to [http://www.refworks.com/refworks/help/Refworks.htm#Using\\_WriteNCite\\_for\\_Mac.htm](http://www.refworks.com/refworks/help/Refworks.htm#Using_WriteNCite_for_Mac.htm) )

## 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
  - 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/indexes/refworks>
  - **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.

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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.
10. On the Write-N-Cite toolbar, click on **Bibliography**
11. Under **Output Format**, choose **the appropriate format**. Click on **Create Bibliography**
12. Your paper should now be formatted in the style. PC users who installed Write-n-Cite version 3.0 will have a single version of their Word document after formatting. Mac and PC Write-n-Cite version 2.5 users will have two versions of their Word document (titled: Final-[Your document name here].) Formatting changes can be made directly to the single PC version, while WNC 2.5 users should save both versions of their paper in Word for future updating.

#### 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".

**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.

## REFWORKS STEP-BY-STEP (CONTINUED)



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### 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/indexes/refworks>