

The University of Delaware Library




A. Setting Up An Account

1. Go to RefWorks on the Library Databases page (<http://www2.lib.udel.edu/database/refworks.html>)
2. If you are connecting from off-campus, use the Proxy sign-in. [click on the blue bar on the Library's home page "UD off-campus users click here ...", enter your UDeNet ID & password. Go to the RefWorks page.]
3. Select: **Sign up for an Individual Account**
4. Fill out the form; click **Register**
5. You now have a RefWorks account! You will receive an e-mail confirmation.
6. You can access your account from the Library Databases page (<http://www2.lib.udel.edu/database/refworks.html>) or by going to the RefWorks Subscriber Log-in webpage (<http://www.refworks.com/Refworks/>)

You can set up more than one account (example: an account for a group project with all members having the same password).

B. Adding References To RefWorks

Direct Export from Library Databases

Many databases 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 on "RefWorks at the University of Delaware" (<http://www2.lib.udel.edu/database/docs/refworks.html>). In your RefWorks account, click the blue information dot on the top banner to access this page. 

The exporting feature is easy to spot in the database; there may be a RefWorks icon on the results list or RefWorks may be an option under "Saved Records" page or the "Export" page.

Save from Library Databases and Import Into RefWorks

If the database you are using does not have a Direct Export feature, you can save your search results and then import them into RefWorks. Consult "RefWorks at the University of Delaware" (<http://www2.lib.udel.edu/database/docs/refworks.html>) for instructions on saving and exporting from a specific database.

Then go to RefWorks and login to your RefWorks account

1. From the top menu, highlight **References** and click **Import**
2. In the box **Import Filter/data source**, click the drop-down menu and select the name of the appropriate data source (often it will already be selected)
3. In the box **Database**, click the drop-down menu and select the name of the appropriate database
4. Optional: choose a folder to import the references into
5. Keep the radio button selected under **Import data from the following Text File** and select **Browse** to locate the file you saved from your search, then select **Open**
6. Click the **Import** button
7. Your citations will now be imported to your RefWorks database in the Last Imported Folder or the folder you selected

Adding References Using the “Search Online Catalog or Database” Option

This method works for DELCAT and other Z39.50 compatible databases.

1. From the top menu, highlight **Search** and click **Online Catalog or database**
2. Click the drop-down menu and select a database. Example: University of Delaware - DELCAT
3. Type your search term(s) in one of the search areas and click **Search**. Recommend: Advanced Search
4. A new window will open with your RefWorks search results. Select the references you wish to import and click **Import**. If another window opens, click **OK**
5. Your citations will now be imported to your RefWorks account in the Last Imported Folder

Manually Adding A Reference

1. From the top menu, highlight **References** and click **Add New Reference**
2. Click the drop-down menu in the **View fields used by** box. Select the citation style of your choice. The required fields for the style will be indicated by green checkmarks.
3. In the box **In Folder(s)**, select the folder you wish to save the Reference to
4. In the box **Ref Type**, click the drop-down menu and select the appropriate reference type, for example: “journal”
5. Enter the information from your reference in the appropriate fields
6. Click **Save Reference** (or click **Save & Add New** if you are entering more references)

C. Managing Your Information in RefWorks

Creating, Deleting, and Renaming Folders in RefWorks

1. To create: from the top menu, highlight **Folders** and click **Create New Folder**. Type a name for your folder and click **OK**
2. To delete: from the top menu, highlight **Folders** and click **Organize Folders**. Click “delete” next to the appropriate folder name
3. To rename: from the top menu, highlight **Folders** and click **Organize Folders**. Click “rename” next to the appropriate folder name, enter a new name in the **New Folder Name** box, and click **OK**

Putting References in Folders

1. From the top menu, highlight **Folders, View**, click **Last Imported** or **References Not in a Folder**
2. Check the references you'd like to move to a folder. [Or select the radio button for “Page” or “All in List”]
3. In the **Put in Folder** box, click the drop-down menu and select the appropriate folder
4. Click **OK**

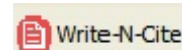
Adding Notes to References

1. Go to the reference and click **Edit**
2. You can add comments to the field called Notes. Click **OK**. [Or you can add comments to any of the five “User Defined” fields. These fields can be used to record comments from group members.]

Other features: Sort a folder (by author, publication date, or other). Edit a Reference. Global Edit. Search (within your RefWorks database).

D. Download WRITE-N-CITE

1. Login to your RefWorks account
2. From the top menu, highlight **Tools** and click **Write-N-Cite**
3. Download the plug-in appropriate for your operating system
4. Click **Save** if another window appears
5. Close RefWorks
6. Open (install) the downloaded file
7. When you open Word, the red Write-N-Cite button will appear on the toolbar



F. Adding References to a Paper Using Write-N-Cite

The Master Document

1. Open Microsoft Word and save your document – this is your master document
2. Select Write-N-Cite from the Word toolbar; it will open to the RefWorks login page in a new window. Check the **Always on top** option.
3. Login to your RefWorks account. (If you are off-campus, use the Proxy sign-in.)
4. In the Write-N-Cite window: from the top menu, highlight **View**, then **Folder** and select your folder from the drop-down menu
5. In the Word window: continue writing your document. When you are at the point in your paper where you need to enter a parenthetical (or in-text) reference, click the link called **Cite** next to the appropriate citation. You will see a placeholder inserted into your Word document – double curly brackets with the RefWorks ID, first author name, and publication date. Example: {{17 Brown,Leslie 2007;}}
6. Continue writing your paper and using the **Cite** link
7. Save your document

The Final Document

1. In the Write-N-Cite window: click **Bibliography** on the toolbar
2. In the **Output Format** box, click the pull-down menu and select the appropriate citation style. Click **Create Bibliography**.
3. RefWorks will create a new Word document with the word 'Final' in front of the filename you assigned to your document
4. Review the “final” document. If everything is satisfactory then this is your final document and you should save it; if not close it without saving. Then go back to your master document. You can create a new “final” document when you need it.

Always go back to your *master document* when you need to continue your work.

G. RefGrab-It

RefGrab-It captures bibliographic information from a webpage: the webpage itself or items on the page. It can “grab” ISBN, PubMed ID, DOI, and RSS feeds. When you use RefGrab-It, a temporary results page will open in a new window. You can view the information and decide if you want to import the data.

To use RefGrab-It, you must add it (download it) to your browser toolbar or bookmarks/favorites list. In RefWorks, from the top menu, highlight **Tools** and click **RefGrab-It**.