



REFWORKS WORKSHOP

A hands-on workshop presented by McMaster Library





What is RefWorks?

- RefWorks is an online reference management and bibliography creator service.
- It is **free** to all McMaster students and faculty!



What does RefWorks do?

- Creates a personal database online
- Imports references automatically from various databases, online catalogues and online source.
- Organizes and manages your references
- Formats bibliographies, footnotes, endnotes, and in-text citations



Agenda

- Create/ access a RefWorks account
- Put references into your *RefWorks* database
- Organizing and managing references
- Search the RefWorks database
- View, sort, and print references
- Edit references
- Check for duplicates
- Share references with *RefShare*
- Create a document with a bibliography and in-text citations, footnotes and endnotes



Find RefWorks at <http://library.mcmaster.ca>



Inspiring Innovation and Discovery

MUGSI

Quick Links

Faculty & Staff Directory

Search

McMaster Libr

McMaster Home

Research

Using the Libraries

Collections

Teaching Support

Abc

library^{BETA}
.mcmaster.ca

Popular Links

- Course Reserves
- Book a Study Room
- My Account/Book Renewal
- RACER (Interlibrary Loan)
- RefWorks
- Request Forms
- Login to LibAccess

Library Catalogue

Find Articles

e-Journals

Subject Guides

Find books, journal titles, online resources and other materials in all four campus libraries and affiliates.

Anywhere

Go

Ex: einstein relativity
"active learning"

Go to: [Classic MORRIS](#) | [Other Library Catalogues](#) | [Center for Research Libraries Catalogue](#)

[Library News](#)





Accessing RefWorks from home...

**RefWorks User Login
for
McMaster University**

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

Log-in Name

Password

[Forgot your log-in?](#)

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

To use RefWorks off-campus, log on to **LibAccess**,

OR ...

Log in with McMaster's group code:

RWMcMasterU



Login OR sign up for an account

RefWorks User Login for McMaster University

New to RefWorks?

[Sign up for an Individual Account](#)

Log-in Name

Password

[Forgot your log-in?](#)

Not your Organization?

[Login using your Group Code](#)

Login



(All fields are required)

Your Name:

Leslie Taylor

Login Name:

letaylor

Password:

••••••••••

Re-enter Password:

••••••••••

E-Mail Address

letaylor@mcmaster.ca

Type of User

Graduate Student

Area of Focus

Business

[Back to RefWorks Login](#)

Register



Import References Into RefWorks using:

- An online catalogue or database within RefWorks
- McMaster's Library catalogue
- A database
- Manually from any resource
- *RefGrab-it from a web page*

(Or from text files. See: Help >> RefWorks Basic >> Importing Text Files)



Import References From an Online Catalogue

- Search online library catalogues from institutions worldwide then import references

Go to: **Search>> Online Catalogue or Database**

- Import references directly from online catalogues and databases into RefWorks

Ex. Go to <http://library.mcmaster.ca>>> perform search>> click title of item>> click RefWorks logo



Import References From a Database

- Several online database service providers have a built-in RefWorks 'direct import' feature

For a complete list of RefWorksDirect McMaster databases visit:

<http://library.mcmaster.ca/articles/results/refworksdirect>



Business Databases That Support Direct Import to RefWorks

Business Source Complete-

- One reference: **Export>> Direct export to RefWorks>> Save**
- Multiple references: **Add>> Folder >> select and click Export>> Direct export to RefWorks>> Save**

Canadian Business and Current Affairs (CBCA)- select [Export](#)

Canadian Periodical Index (CPI.Q)-select

LexisNexis Academic- select



Manually Entering References into RefWorks

- Some business databases **do not** support direct import into RefWorks
- Another way to get references into RefWorks is to enter them manually

Go to: **References >> Add New Reference**



Capturing Data from a Webpage with *RefGrab-It*

- Automatically import data from a web page into your RefWorks database
- Works with your browser
To download, go to **Tools**>> **RefGrab-It**
- Reads web pages; cannot read PDF files

*More info: Go to **Help**>> **Tutorial**>> **RefWorks Advanced**>> **Capturing data from a web page***



Organizing and Managing Your References

- Newly imported references are automatically placed in the *Last Imported Folder*
 - **View**>> **Folder**>> **Last Imported**
- Then they are placed in *References Not in a Folder*
 - **Folders**>> **View**>> **References Not in a Folder**
- You can create folders to organize references by assignment, topic, etc.
 - **Folders**>> **Create New Folder**



Organizing and Managing Your References (cont.)

▪ **Place references in folders:**

- Select references you wish to add and choose a folder from the **Put In Folder** drop-down menu.

Delete from folder:

- Select references>> click **Remove from Folder**.

** References will remain in your database.*

Delete from database:

- Select references>> click **Delete**.

Reference go to **Folders>> View>> Deleted references.*

They will be completely removed from your database in 30 days.



Searching and Lookups

- **Find a reference:** Type one or more words (e.g. author's name or part of title) in the **Search** box in the top right corner.
- **Advanced Search:** search your database by author, title, year of publication, etc.
- **Lookups:** alphabetical indexes of the fields in each record. Lets you locate records, and make sure certain fields of information are consistent throughout your references



Viewing, Sorting, and Printing References

In your database, you can:

- Change the way you **view** individual references
AND Change the **sort** order in which your references appear
- Go to **Tools** >> **Customize**
- **Print** your references in various citation styles
- Select references >> **Print** >> select output style



Editing References

- The **Global Edit** feature allows you to modify a single field across a number of references
 - Select references >> **Global edit** (note “Electronic Source Related Fields” for electronic sources).
- **Edit single reference:**
 - select “Edit” link in top right corner of reference entry



Checking for Duplicates

- If you are importing references from a variety of sources, you may have imported some of the exact same data
- Checking for duplicates saves yourself confusion later

Go to **View >> Duplicates >> Exact Match**
OR Close Match



Sharing Your References with RefShare

- Lets you share a folder or your entire database with others

Go to **Folders** >> **Share folders** >> **Share Entire Database** OR **Share Folder**

- McMaster has a shared area where you can post references and view those of others

Go to **View** >> **RefWorks Shared Area**



Creating a Bibliography

- Click **Bibliography** then refer to **References to include** section (e.g. all references, folder, My List [which is a temporary folder])

Or...

- Format a paper with a bibliography *and* in-text citations using **Write-N-Cite**



Write-N-Cite

- Write-N-Cite is a small utility that must be downloaded to your computer
Go to **Tools**>> **Write-N-Cite**>> Follow the instructions to download
- Write-N-Cite is already downloaded on all public PC's in the Library



Write-N-Cite (cont.)

- Open a blank Word document
- Open Write-N-Cite.
- Type a sentence, and then click the **Cite** link beside the reference you wish to cite. A citation placeholder will appear in the body of your paper.
- To edit the citation, select **Edit Citation** in Write-N-Cite window



Write-N-Cite (cont.)

- SAVE your paper to your computer.
- After you have saved your paper, click the **Bibliography** button in Write-N-Cite. Select an output style and click **Create Bibliography**.
- A new document with the citations and bibliography will be downloaded to your computer.
- **Important!** Check the formatting of the citations and bibliography for any errors or missing information.



Formatting Footnotes and Endnotes

E.g. when using *The Chicago Manual of Style*

- In RefWorks, click **One line/ Cite View** in the *Switch to* pull down menu.
- In Word (2007) select References, then Insert Endnote (* or Insert Footnote)
- Select **Cite** beside a reference in RefWorks.
- In the pop-up window, select and copy the citation placeholder into your Word document.



Formatting Footnotes and Endnotes (cont.)

- Save word document and click the **Bibliography** button on the citation viewer or on the *One line/ Cite View* page.
- Select an output style – e.g. *Chicago 15th edition Notes & Bibliography*
- Click the button beside **Format paper and bibliography**
- Select your document from the *Browse* window and click **Create Bibliography**
- RefWorks will create a new document that will include the formatted endnotes or footnotes and bibliography. Its name will be *final-[name of your original document]*.



Before handing in your paper...

- Check bibliography and in-text references for missing information and formatting problems.
 - Make corrections directly in the document OR make changes to the record in RefWorks.
- * You still need to understand the elements of the citation style you wish to use.*



RefWorks **HELP!!**

- Click the **Help** menu in RefWorks for tutorials and detailed help guides
- Ask the Research Help staff at the Library
- Contact me:
Robyn Hall, Co-op Student, Innis Library
rhall@mcmaster.ca