

Welcome to this introduction to RefWorks class. My name is Tom Keays. I'm a science librarian here at SU (Syracuse University) and I can be found most days at the SciTech Library over in Carnegie.

Over the next hour or so, I'm going to try to give you a good understanding of what the program is designed to do and how you can use it to improve your research productivity.

RefWorks Introduction to RefWorks Citation Support page - http://library.syr.edu/cite/ () Marsters, John Marshall (1847) College Papers- Vol. XV Mentioned in Order of Exercises - English Oration, letter of E.T. Channing, Ang. 13, 1847, 921 College Papers- Yol. XV-2nd Series Mentioned in Report of the Trastees of the Loan Fund, Dec. 29, 1847, 276-277: College Papers- Vol. XVIT-Zud Series . Mentioned as substitute during absence of Thtor Francis V. Child, 128: Letter Dec. 3. 1849. to President Sparks - accepting temporary appointment as Inter during absen of Mr. Child. 141: Payment to, for teaching Elecution to Divinity Students for teaching Polit. Economy and Constr. W.S., 301: Certi 251: layment to tication of the Steward, July 16, 1850 n LL. B. degree, 311: admithed to the Bar in his State before entering Harvard haw School, 312: ) Letter, July 30, 1800

Researchers at some point find that, in order to cope with a large array of information that they are assembling, that they need to be diligent in collecting and recording information about their sources. Most researchers eventually hit upon some system that lets them record complete and accurate bibliographic information about the articles and books that they have read for purposes of finding them again in the future and for citation purposes.

Note cards are a common system that lets individual references be filed together in whatever order is needed to associate them with similar works and to provide a ready mechanism for using them when it comes time to write up their research. Note cards can also be used to transcribe the reader's notes and observations regarding the works.

New students in the iSchool are generally required to transcribe citations by hand following the APA (American Psychological Association) style manual to introduce them to the principles of creating citations against a set of rules and, probably more importantly, to make the aware of the potential pitfalls of sloppy work.

At the doctoral level, you should already be competent in these skills. So, while manually transcribing citations is by no means an unnecessary skill, it is persnickety and tedious work, prone to errors and, ultimately, much less productive than using digital tools to capture, organize, and format bibliographic references for you.



Most of the research indexing and abstracting tools for searching the literature of a subject discipline have gone digital and are accessed via the web. There may be occasions where transcribing citations by hand still makes sense in some circumstances. However, in doing any amount of research, you would be wise to use some sort of software designed to manage bibliographic information.

Many faculty and students in the iSchool are familiar with the bibliographic management tool known as EndNote or similarly featured software such as ProCite or Reference Manager. All of these provide a way to capture bibliographic information from an electronic source -- usually a research database or an e-journal -- via some sort of export functionality in the database.

EndNote has a very usable interface and has a lot of high-level features for searching and organizing references. However, it is a commercial product that must be installed on a single workstation or additional licenses purchased for use on multiple computers. Even if you generally have your laptop close to hand 95% of the time, there will be occasions when you won't have it -- perhaps using a computer in a library, an internet café, a friend's or parent's house, etc. -- and you'll need to resort to some other means of recording references for later retrieval and use.

Wouldn't it be useful if your bibliographic database were always accessible regardless of where you are doing your research? Since most research databases are accessed via the web, wouldn't it be more productive if your bibliographic management system were also on the web too?



Once you move from the citation collection phase and enter into the process of writing up your research, RefWorks is still one of the tools of choice.

Write-N-Cite is a free accessory program that you download from RefWorks to your workstation. Once you are logged in, it acts as the conduit for citing references from RefWorks into your paper. You do this by placing your cursor in your Word document at the point where a citation needs to go. Then click the Cite link next to the appropriate citation displayed in Write-N-Cite to embed a citation marker into your paper.

By clicking the Bibliography button, Write-N-Cite transforms the citation markers into full citations that follow whatever style you specify ... and it simultaneously generates a full bibliography of your cited works at the end of your paper.



OK. That's the nutshell overview of our session today.

In our class we will learn how to:

- •Get help via Library Citation Support pages
- •Sign up for an individual RefWorks account
- •Add citations to RefWorks from databases
- •Organize citations within RefWorks
- •Add citations from RefWorks to a paper
- •Format citations in a paper (create a bibliography with Write-N-Cite)
- •Cite webpages using RefGrab-It bookmarklet

Any questions before we begin?



The first step is to create a new RefWorks account. The easiest way to do that is vial the library's Citation Support page at http://library.syr.edu/cite/

Even if you already have an account, the Citation Support page for RefWorks provides a url for accessing RefWorks that will work both on- and off-campus. Because RefWorks is a subscription service that the library provides to SU users, it uses the same proxy authentication server that our databases use for off-campus access. If you are off-campus, you first verify that you are an eligible user by providing your NetID credentials.

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0	© 2007 Ref <del>Works</del> . All rights reserved.	

When you click the RefWorks login link from the Citation Support pages, you will be presented with a log in form.

Note, it says RefWorks User Login for Syracuse University Library. If this login screen says anything else or asks for a Group Code, then you need to check that you have are using the proxied url -- this sort of error comes up when you bookmark the RefWorks url on-campus and then find it isn't working when you are off-campus.

If you don't have an account or want to create another account -- you can create as many accounts as you need at anytime -- click the "Sign up for an Individual Account" link.



When you click the "Sign up for an Individual Account" link, you are taken to a registration page. All the fields are required, but take special care to remember your User Name and Password and to make sure your email address is accurate in case you forget either of these and need to have the system send them to you.

Note, passwords are stored in RefWorks unencrypted, so system administrators will be able to view them in clear text. You may not want to use a password that you use for other accounts.



Next, if you are a using a newly created account (or at least one that has no citations stored in it), you will see a "Getting Started" welcome screen.

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Authors:	Varghese,M.		
Source:	Cataloging & Classification Quarterly, 2008, 46, 3, 281-304, Haworth Press, Bingham	nton NY, United States	

Alternatively, if you have used RefWorks before and have saved some citations, you will probably see a screen more like this one.

Let's get started exploring how to use RefWorks.



The first method we'll look at is typing in citations by hand.



RefWorks has a ubiquitous menu bar at the top of each work area on the page that gives you access to all its features pretty much from every screen you view.

The first menu item is headed up as "References" and when you click it, it displays a dropdown menu of further options.

The first entry in this menu is "Add New Reference".

[Note: the instructor has the opportunity while we're exploring the "References" menu to also mention the "Import EndNote V8+ Database" option.

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When you click the "Add New Reference" item, an entry form is displayed. It is very web 1.0 -- no Ajax features that you probably now expect from using sites like Google Docs, Flickr, etc.

In RefWorks, click the "Save Reference" button frequently as you edit to ensure that nothing gets lost. Saving does not take you away from this input screen. You generally have to click a link to view your citation or to return to a list of citations. This will make more sense after we explore the "View" and "Folder" menus in more detail.

If you select a style option from the "View fields used by" (for example, APA), then the fields required or recommended by that style will be check-marked in the display form. No field is required by RefWorks, but if you leave fields blank, it may introduce errors and typographic artifacts in your citations at the point you begin using them in your papers. Enter as much information as you have and be prepared to backfill if you later find that you are missing elements required by a given style.

Note also that if you change your "Ref Type" -- say from Journal to Conference Paper -- that you might lose information you have entered if you haven't saved your work first.



[See note in slide 12 to mention the "Import EndNote V8+ Database" option in the "References" menu. The instructor may want to mention this before presenting the material on this slide.]

While we're still looking at the "References" menu, we'll next examine how to import references from a text file.

Note that most of the options in the "References" menu area pertain to bringing in references into RefWorks that you have generally already identified and captured.



Select "Import" from the "References" menu.

In our example, we will be using the library catalog, SUMMIT <summit.syr.edu> as our bibliographic database source. In the case of importing citations from a text file, it is important to choose settings that match the database you using. Chose"Syracuse University Library" as the Import filter option and "SUMMIT Catalog (Endeavor)" as the database.

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Now open SUMMIT in a new window or tab and do a search. [In the example, I've done a keyword search on "frbr".]

Select two of the title options by check-marking the boxes in the left column of the results.

Then, scrolling to the bottom of the page, make sure that the "Selected on Page" radio button is selected and that the "Download Format" is set as "Full Record".

Click the "Format for Print/Save" button.



Clicking the "Format for Print/Save" button brings up the formatted text version of the SUMMIT records for the citations that you check-marked on the results screen.

Note that each field has a clearly delineated field label -- e.g., "Title:", "Author:", "Published:", "Subjects", etc. -- and that each field is separated by an empty line. In this way RefWorks, by using the corresponding filter for this data format, can parse each record and import them cleanly as bibliographic entries.

To deliver these citations to RefWorks, you need to either save the page as a text file or simply highlight and copy the text for pasting into RefWorks.

Because RefWorks requires meticulously formatted export formats and a corresponding filter to decode them, it cannot therefore parse citations stored in a given style as, say, a bibliography stored in a Word document. Some third-party tools are on the horizon that may address this problem but, for now, you may have to enter them into RefWorks manually.

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	Import	

I'm assuming that you've copied the formatted text from the SUMMIT page and have pasted it into the "Import Data" text box at the bottom of the "Import" page.

[Alternatively, if you saved it as a text file, browse to the file where you saved it.]

Now, click the "Import" button.

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As citations are imported into RefWorks, a progress message is displayed followed by a line of asterisks -- one for each citation you are importing -- and when the job is complete, a "View Last Imported Folder" button will display.

Click the "View Last Imported Folder" button.

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	Book Title:	FRBR : a guide for the perplexed		
	Authors:	Maxwell, Robert L.		
	Source:	2008, 151, American Library Association, Chicago		
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Now we're in the "Last Imported" folder.

We'll explore folders a bit later, including how to create new folders of your own, but for now, just keep in mind that the "Last Imported" folder is one of the system structures that RefWorks itself provides. Specifically, this folder is a staging area that almost every citation, except those entered manually, passes through. As new citations enter the "Last Imported" folder, previous citations are bumped out.



Exporting citations via direct export from a research database Is the most common ways that you get references into RefWorks.

Note that we'll need to leave the "References" menu of RefWorks to do this. In fact, we'll leave RefWorks entirely and initiate the export process from outside -- e.g., a research database such as "LISA".

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From the library's database main menu, find and launch "LISA : Library and Information Science Abstracts" and do a search.

Examine the results of your search and check-mark at least three of the records. Any will do for this exercise.

[For this example, I've searched on "frbr" and narrowed the results set to "Peer-reviewed journals".]

Now (optionally) click the "Marked Records" link at the upper left of the page to view all your marked records on one screen.

To initiate the export, click the "RefWorks" icon/button.

[Not all CSA databases have this "RefWorks" icon; just those provided by SU rather than SUNY/ESF. If it is lacking, instead click the "Save, Print, Email" link and then look for the "RefWorks" icon at the bottom of that page of options. Other database vendors have similarly worded export options, with the more obvious choices involving some variation of "Cite" or "Export".]

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Caveat: Exporting won't work if your browser is set to block pop-up windows. Since the export windows generally are opened using javascript, your browser will interpret these as pop-ups, even if you initiated them by clicking.

In IE, just "Turn Off Pop-up Blocker" from the "Pop-up Block" option of the "Tools" menu.



In Firefox and other Mozilla browsers, the process is a little more complicated.

Select "Options..." from the "Tools" menu.

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This will open an "Options" window.

Select the "Content" tab and uncheck the box next to "Block pop-up windows" and click "OK".

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Now that pop-up blocking is disabled, continue on...

When the click the "RefWorks" icon, you are taken to a page that confirms you intention.

Click the "Export to RefWorks" button at the bottom of the page.

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View Last Imported Folder View Log	

When you click the "Export to RefWorks" button, a new RefWorks window or tab opens in your browser (even if RefWorks is already open in another window or tab). The overuse of multiple windows is one of the annoying and confusing things about RefWorks.

The progress bar will track citations as they are imported into RefWorks. When it is done, a final tally displays.

Click the "View Last Imported Folder" button.

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Title:	FRBRization of a library catalog: better collocation of records, leading to enhanced search, r	etrieval, and display	
Authors:	Dickey, Timothy J.		
Source:	Information Technology and Libraries, 2008, 27, 1, 23-32, American Library Association, C	Chicago IL, United States	
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Title:	Relevance of a classified catalog in the FRBR perspective and a proposed model with ISBD as key attribute	Description and faceted class number	
Authors:	Varghese, M.		
Source:	Cataloging & Classification Quarterly, 2008, 46, 3, 281-304, Haworth Press, Binghamton N	VY, United States	

The "Last Imported" folder now shows the references we marked and exported from the "LISA" database.

This is a good time, while your database search results are still available for comparison, to examine your imported results and make sure that RefWorks hasn't messed anything up.

[In this example, the record authored by Adams has the journal name mis-entered. This is actually an error from "LISA", but it still needs to be fixed. Demonstrate using the Edit link to fix the entry.]



Once you have a set of references in your RefWorks database, you may eventually want to start putting them in folders by topic. This is not necessary, but is an expedient for browsing large databases.

Next we'll see how to create new folders and how to put citations into folders.

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Title:	A note on the use of GPS collars to monitor wild ma	aned wolves Chrysocyon brachyurus (Illiger 1815) (Mammalia, Can	idae)
Authors:	Coelho, C.M.; de Melo, L.F.B.; Sabato, M.A.L.; Riz	el,D.N.; Young,R.J.	
Source:	Appl Anim Behav. Sci., 2007, 105, 1-3, 259-264, F [mailto:nlinfo-f@elsevier.nl], [URL:http://www.elsev	Elsevier Science B.V., P.O. Box 211 Amsterdam 1000 AE Netherla ier.nl/]	ands,
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[Explore the "View" and "Folders" menus. Show the options that are shared by both (redundant) and those that are unique.]

Choose "Create New Folder" from the "Folders" menu.

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In the "Create New Folder" window, assign a name and click "OK".

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A confirmation dialog box will display.

However, although a new folder has been created, no reference have been added to it.

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Select a few references or click the "Page" or "All in List" radio buttons.

Choose the appropriate folder from the "Put in Folder..." select menu.

Note that your folders will display in red and system folders display in black.

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Choose "Organize Folders" from the "Folders" menu.

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The "Organize Folders" window lists all the folders. It is an excellent way to get an overview of the structure of your RefWorks account and the distribution of citations in the various folders.

Your folders are colored red and the "Last Imported" system folder is black. You can rename, empty (clear), and delete your folders. You can empty, but can not otherwise change the "Last Imported" folder.



The last method is really only truly useful for researchers who regularly search the PubMed biomedical database. In the case of PubMed, there is no direct export option and the export via text file option is somewhat non-intuitive.
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Select "Search" > "Online Catalog or Database".

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Check-mark some records from the results page -- an external single-purpose RefWorks results window.

Click "Import".

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Optionally choose a folder to initiate the import process.

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Results are sent back the the parent window.

Caveat: it probably won't pop to the front or even give an indication that it is working unless you carefully observe the "loading..." status in the tab or window. Another small interface annoyance to be aware of.

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View the "Last Imported" folder as usual to see the results.

Assign to folders if you haven't already.



This last section deals with using Write-N-Cite to:

- •Add references to a paper (Microsoft Word document only)
- •Format the reference list using a citation style that you choose

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Write-N-Cite is a free program that you download and install to your workstation. Although it is a stand-alone program, it acts as a specialized web browser with one purpose: to import citations stored in your RefWorks account into a paper you are writing at the point at which you need them and then, creating a corresponding bibliography of cited references at the end of your paper.

To download it, go to "Tools" > "Write-N-Cite".



This opens a "Download Write-N-Cite" overview page.

Computers in this cluster have Write-N-Cite pre-installed.

But you will need to download a copy of Write-N-Cite to your workstation or laptop when you return to your office or home.

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	Configuration Utility (instructions provided below). After running the utility, when you launch Write-N-Cite you will be prompted to authenticate your affiliation with Syracuse University (Enter 10 digit SU ID # and last name).	^
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Note, for laptop users who work off-campus, you additionally need to configure Write-N-Cite to use Ezproxy.

Instructions for doing this are in the library's Citation Support pages for RefWorks.

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Ideally, you access the Write-N-Cite Configuration Utility from the Start Menu of Windows. But in locked down cluster computers, this option may missing.

Instead, navigate to Write-N-Cite Configuration Utility via Program Files > RefWorks.

When you launch the Write-N-Cite Configuration Utility, a dialog box opens.

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°	• Enter the following URL: http://libezproxy.syr.edu/login?url=https://www-refworks-com.libezproxy2.syr.edu/Refworks/?WNC=true • Click OK Mac Users: <ul> <li>• Activate Write-N-Cite</li> <li>• Select Preferences from t</li> <li>• Select the Proxy option</li> <li>• Enter the following URL:</li> <li>• Enter the following URL:</li> <li>• Intp://libezproxy.syr.edu/login?url=https://www-refworks-com.libezproxy2.syr.edu/Refworks/?WNC=true</li> <li>• Restart Write-N-Cite for this proxy configuration to take effect.</li> </ul>	

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If, after adding the proxy url into the config tool, you are seeing a screen that asks for your Group Code rather than the screen above (or if you're off-campus, the Ezproxy login screen), then you may have to fix the url. A common error is to append an extra white space after the url or to chop off a bit of it. Try again, being a little more careful.

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When you are logged into Write-N-Cite, use the "View" menu to navigate to the appropriate folder (if necessary).

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Using Write-N-Cite is quite intuitive.

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Note that the RefWorks citation marker is not a real citation. It is just a RefWorks ID number surrounded by two curly brackets.

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At the end of the process -- or even periodically to check your progress -- click the "Bibliography" button at the top of the Write-N-Cite page.

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The "Bibliograph" page has a list of Output Styles in a select menu.

[In the example, we first will use "Nature" as an output style.]

The style list is generated by styles that you put in your "Favorites" folder back in RefWorks. You can add or delete styles from your "Favorites" in RefWorks at any time and refresh the list in Write-N-Cite by clicking the "Bibliography" button again.

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Once an output style is selected, click the "Create Bibliography" button at the bottom of the screen.



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Using "Nature" output style, we see superscripted numbered references in the body of the paper and numbered references in the end of page bibliography. The bibliography is correctly headed as "References" in the "Nature" style format.

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Generating a bibliography in APA style involves parenthetical notes in the body of the paper and hanging indented references in the bibliography. Note that the bibliography is ordered by the primary author's name rather than by the order they appear in the paper (which is how "Nature" handled it).



Lastly, we'll look at RefGrab-It, a bookmarklet (javascript microprogram) that launches from the browser toolbar to process page content in the web browser.

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That's all folks!

What else should I go over that you wished I had?

Thanks for inviting me here. I hope the session was worth your while.