

RefWorks Basics - Step-by-Step

Getting Started

1. Setting up an account

- Go to <http://www.RefWorks.com/RefWorks/>
- Click on **Sign up for an Individual Account**
- Fill out form, click on Register
- Congratulations, you now have a RefWorks account!
- You should already be logged in to RefWorks after registering, if not, log in.

2. Creating folders in RefWorks

- Click on **Folders tab**
- Click on **Create New Folder**
- Name your folder(s) and click **OK**

Adding References

There are two ways to add reference: manually and by direct import or export from a database. Each database handles the import/export process differently, so if you have trouble with the process, you can always enter a reference manually.

1. Manually create a new reference

- Click on **References tab**
- Click on **Add New Reference**
- In **View fields used by** menu, select your style guide
- Under **In Folders** menu, select **your folder**
- In **Ref Type** menu, select the type of source
- Enter the information from your reference in the appropriate fields.
- Checked fields are “required,” but you **may** leave them blank.
- Click on any green check or ‘See Detail’ link to see specific information on how to enter data into that field.
- Click on **Save Reference**

2. Import/export from a library database, directly

Each library database comes from a “vendor.” These vendors have a certain way of allowing you to move references into RefWorks. Below are the instructions for importing citations from the most commonly used databases from EBSCOhost and from IUCAT.

A. Importing citations from **EBSCOhost databases**

In EBSCOhost

- Do a search (search only one database at a time)
- Click on **Add** folder icon for each citation you want to add

- Select **Folder has Items** icon at the top of the page
- Select the article by clicking in the box
- Select **Export**
- Select **Direct Export to RefWorks...** and **Save**

In RefWorks

- An Import screen will automatically load. Click on **View Last Imported Folder**

B. Importing citations from IUCAT

Searching the IU Catalog in RefWorks to find sources isn't very efficient because RefWorks searches all IU Libraries. However, once you have a book that you want to include in your bibliography, you can search IUCAT in order to have it import the citation rather than entering it manually.

In IUCAT within RefWorks

- Click on **Search tab**
- Select **Online Catalog or Database**
- Search** for your book
- Select** item to be imported by clicking in the box
- In **Import to Folder** menu select the folder to place the reference in

Create a Bibliography

- Click on the **Bibliography tab**
- Choose an **Output Style**, for example **MLA 6th Edition**
- Choose **Format a Bibliography from a List of References**
- From the **File Type to Create** menu choose **WORD for Windows (2000 or later)**
- Select **References From** and choose folder from menu
- Click **Create Bibliography**

Additional Recommendations

- In WORD, check your bibliography carefully for correct content for your style and proof for proper spacing, punctuation and capitalization.
- Save your bibliography to your computer or a disk; don't completely depend on the online availability of your RefWorks account.
- There are many more things you can do with your RefWorks account. For more advanced use and assistance, these help guides are available:

Refworks Quick Start Guide:

<http://www.refworks.com/Refworks/help/Refworks.htm#QuickStartGuide.pdf>

Refworks Tutorial:

<http://www.refworks.com/tutorial/>