

RefWorks Basic script

In this video tutorial, I will show you the basics of how to use RefWorks. When you first log in to your RefWorks account, your screen will look like this. We need to bring in citations.

If you're searching **OneSearch** and you find relevant sources, you can click the "Save" bookmark icon next to each search result. Use the "Saved" link in the sidebar menu to see the things you've saved.

If you want all of the saved sources to be exported to RefWorks, click on the first checkbox to select all the records. You can also select each record by clicking on the checkbox beside the title of each source. After either of those steps, click the export button. Choose **Export to RefWorks**, which will open your RefWorks account in another window. Choose **Import**.

Now that you have citations in your library, the first place to check is last imported, which always shows what you have brought in most recently to your RefWorks account.

Next, click on My Folders and choose to add a folder, then pick a name for your folder.

Now that you have a folder, you can bring your recently imported sources into it. Go back to the last imported and check the box of the most recently imported sources. On top of the menu bar choose **Assign**. Click the box beside the folder you want to move them to and press apply.

Now, you can see that there are two sources in that folder. If you have a PDF of an article, then you can upload it to your RefWorks as well. Simply click on the **Add** button in the top menu bar, choose the upload document, and then select the PDF you want to upload. This will go right into the folder you are currently in. Both of these ways to put citations in your RefWorks account are not perfect.

You will need to edit them to be sure they are correct for your citation style. Start by changing your display to citation view and choosing the style you will be using. By clicking the gear icon, you can choose between different styles.

Now, you will see there are highlighted question marks and caution symbols. These are telling you that there is information possibly missing from your citation. In order to edit a citation, first click on the resource you want to edit. In the upper right corner of the right-side box that appears, click on the pencil icon. This will allow you to edit the citation.

Here, you can edit the title, issue number, editors, and any other fields you might need to update.

Make sure to always check the reference type. This will tell the system what type of source it is so it can be formatted correctly. The URL is usually a UPEI only link that should not be in the citation, so remember to delete it or replace it with the correct link. After you are finished, press save.

To add a citation manually, you will need to click **Add** and then create a new reference. You will see the same options as when editing an already existing citation, and you'll have to fill in the necessary blanks from the information on your source.

When you are working on a paper or project, there are two ways to create your Bibliography or Works Cited page. For a less complicated project, you can use RefWorks to copy and paste a list of sources:

- On the top menu bar, press **Create Bibliography**, and choose create Bibliography again.
- Ensure that the right citation style is chosen, and then click copy to clipboard so you can paste it into the end of your paper.

If you are working on a longer paper or project, you may want to use the RefWorks extension in Google Docs or the RefWorks app in Microsoft Word. They are both called "RCM." Here is an example of how RCM works in Google Docs:

- After logging in to your RefWorks account, choose the citation style and the folder you want to use.
- As you write your paper, you can select a source to insert an in-text citation.
- When the Bibliography setting is turned on, a Bibliography or Works Cited list will be added to the end of your document. It will include citations for all the sources you've used RCM to cite in your paper.

For more information about RCM, follow our links to RefWorks's training videos and documentation.

If you need more help, AskUs at the service desk, phone us at (902)-566-0583, send an email to reference@upei.ca, or use the chat tool on the library website.

We are here for you.