

Starting with RefWorks

An introductory workshop explaining and demonstrating how to set up a small database of references and use them in preparing a document using MS-Word

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2010

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Slide 1

What is metadata?

- Information about a variety of media in all formats, including films, videos, books, journals, realia
- Software has been developed to manage the organisation, storage and retrieval of metadata

1

Slide 2

Then what?

- The software can be used to prepare metadata, including bibliographic and other forms of citation, allow citations of the metadata to be retrieved and displayed, or inserted, into documents in a variety of formats, to suit the needs of the writer
- The software is generically known as a Personal Bibliographic Manager (PBM)

2

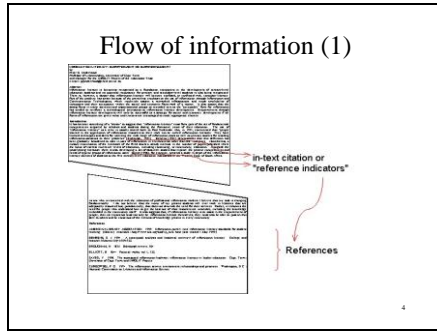
Slide 3

What can the software do?

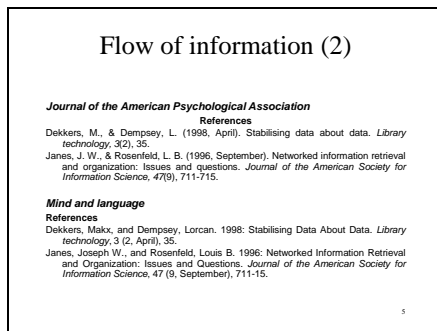
- Helps you keep, organize and find notes about items you have read or viewed
- Prompts you to record details of each publication
- Presents the bibliographic data for the items you have selected in the reference style you have chosen
- Assists in the creation, maintenance and sharing of metadata and bibliographic databases such as a record of personal, or departmental, publications
- Promotes searching of publicly-available databases and catalogues and private files to which the user has access

3

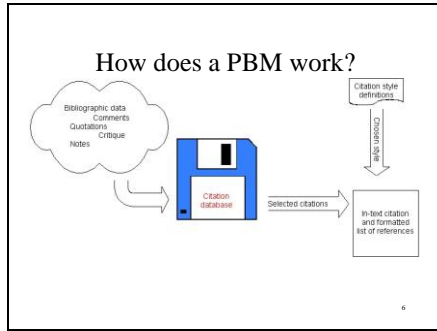
Slide 4



Slide 5



Slide 6



Slide 7

Other uses

- Location list of materials (library, personal collection, database record, web address)
- "Items to be consulted" checklist
- Reading list for students
- Subject bibliographies
- Lists sorted into various orders (chronological, by journal title, etc.)
- Notes for future research and publications

7

Slide 8

What is available?

There are several proprietary software packages:

ProCite
EndNote Plus
Reference Manager
Citation
RefWorks

and several free, "open source" packages or extensions to other software, such as Zotero (a Mozilla Firefox extension).

For a regularly-updated list, try:
Wikipedia contributors, 2010, "Comparison of reference management software," *Wikipedia, The Free Encyclopedia*,
http://en.wikipedia.org/wiki/Comparison_of_reference_management_software [accessed 19 May 2010].

8

http://en.wikipedia.org/wiki/Comparison_of_reference_management_software

Slide 9

RefWorks



- Web-based: available from within UCT, and from outside using the UCT EZProxy on the ICTS or UCT Libraries site
- RefWorks enables researchers to organize and manage their research data.
- RefWorks allows users to access their databases from any Web-connected source.
- RefWorks offers a tool which provides users with a quick and easy way to share their research via the Web, allowing users the ability to provide feedback and create bibliographies, further enhancing collaborative research.


www.refworks.com

9

<http://www.refworks.com>

Slide 10

Setting-up an account from within the UCT network
www.refworks.com
or via EzProxy: <http://login.ezproxy.uct.ac.za/>
Choose [Sign up for an Individual Account](#)



The screenshot shows the 'RefWorks login center' registration page. It includes a header with the RefWorks logo and navigation links. The main content area contains a registration form with fields for 'First Name', 'Last Name', 'Email', 'Institution', and 'Password'. There are also checkboxes for 'I agree to the RefWorks Terms of Service' and 'I agree to the RefWorks Privacy Policy'. A red 'Sign Up' button is at the bottom right of the form.

10

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

EZProxy: <http://login.ezproxy.uct.ac.za/>

Slide 11




The screenshot shows the RefWorks account setup page. It features a 'Welcome to RefWorks' message and a 'Get Started' button. Below this, there are sections for 'Your RefWorks account' and 'Your RefWorks profile'. The 'Your RefWorks profile' section includes a 'Profile Information' table with fields for 'First Name', 'Last Name', 'Email', 'Institution', and 'Country'. There is also a 'Profile Information' section with a 'Save' button.

11

Slide 12

First steps in learning



The screenshot shows the 'First steps in learning' page. It features a 'Congratulations!' message and a 'Getting Started' section. The 'Getting Started' section includes a 'Start Here!' button and a list of steps: 'Step 1: Register your library from your address', 'Step 2: Register your library from your address', 'Step 3: Register your library from your address', and 'Step 4: Register your library from your address'. There is also a 'Need additional assistance getting started with RefWorks?' section with a 'Click here for help' link.

12

Slide 13

Terms

- “Bibliography”: comprehensive list of materials in a subject area
- “List of works cited” or “Reference list”: list of items consulted and included in the paper

“RefWorks” (and most PBMs) can be used to arrange and produce both

13

Slide 14

Initial considerations (1)

Location of database

- Web storage provides security because of “mirroring” of the site contents and automatic backup
- Flash stick provides portability but is vulnerable to damage or loss
- Hard disc provides speed of access but is limited to one computer
- Network file provides speed of access, but may limit access from off-campus – use NetStorage:
<https://srvslsadm001.uct.ac.za/netstorage/>

Whichever method, keep a back-up and save the data regularly

14

NetStorage:
<https://srvslsadm001.uct.ac.za/netstorage/>

Slide 15

Initial considerations (2)

One datafile or several?

- depends on the range and interconnectedness of the topics upon which one researches and writes
- one datafile provides a unified list of items that depends upon the assignment of apposite and discriminating keywords for effective retrieval
- several datafiles allow for specialisation but rely upon personal memory to provide the links
- may be useful to develop a datafile for a particular project and then selectively add the item records to a “master” datafile

15

Slide 16

Initial considerations (3)

Source of keywords for describing items

- selection from text
 - reflects changing and developing terminology
 - may be highly specific
 - may be subject to "fashion"
- own invention
 - reflects own perception of subject and associations between ideas
- thesaurus or other term list (e.g. *APA thesaurus*, *MEDical Subject Headings [MESH]*)
 - some journals may require keywords from a published list – try the American Society of Indexers "List of online thesauri and authority files": <http://www.asindexing.org/site/thesonet.shtml>

16

Online thesauri:

<http://www.asindexing.org/site/thesonet.shtml>

Slide 17

UNESCO thesaurus
<http://databases.unesco.org/thesaurus/>

- provides a "controlled vocabulary" that is internationally-accepted
- covers fields of education, culture, natural sciences, social and human sciences, communication and information
- linkages between terms
 - broader terms (BT)
 - narrower terms (NT)
 - related terms (RT)
- but will not reflect very recent changes of vocabulary or new concepts and may not provide the level of detail needed for all research areas

Early childhood education [1390]

Terme francis: Education de la petite enfance

Terme anglais: Education de la petite enfance

Русский термин: Образование дошкольного

SN from birth to the age of 6; it refers to all aspects of a child's development.

BT 3. Educational systems and levels

BT Early childhood care and education

BT Primary education

BT Pre-school education

BT Educational level [1369]

NT Child care [126]

NT Day nurseries [17]

NT Child rearing [1262]

BT Early childhood [171]

BT Family education [126]

BT Nursery schools [174]

BT Parents education [126]

17

UNESCO thesaurus:

<http://databases.unesco.org/thesaurus>

Slide 18


“Write-N-Cite”

- *RefWorks* (and most PBMs) integrate with commonly-available word-processing packages (MS-Word) so that they can be used from within the word processed document
- Allows selection of citation or note and insertion of “access keys” that will later be turned automatically into reference indicators and references formatted in the style selected

18

Slide 19

A good start and good habits!

- Use the *RefWorks* tutorial from within *RefWorks*
Help | Tutorial
- Make *accurate and complete* notes and records as you read
- Transfer these to *RefWorks*
 **Back-up your data regularly**

19

Slide 20

Metadata: basic components

Information for unambiguously locating the item

- person(s), or organisation(s), intellectually-responsible for it
- title and subtitle
- date of publication
- location and extent

Some items need an elaboration of these basic components. *RefWorks* provides a "template" to prompt for the information; each template is specific to a type of item.

20

Slide 21

Locating metadata

Journal articles
"Bibliographic strip" at foot of page(s)
Afr. J.Lib,Arch.&Inf.Sc.Vol. 19,No. 2 (2009) 155 - 163
Contents page, front or back covers

Monographs
Title page for author/title information
Back of title page for publishing information

Web and other electronic resources
Head and foot of "home" page
Web address is usually displayed by the browser
Use **View | Source** to see "metadata"
Some browsers (e.g. Mozilla Firefox) have a "right-click" option to display metadata

21

Sources of help

RefWorks tutorials: Help | Tutorials (various)
Help | Help pages

UCT Libraries: RefWorks guide developed by Jen Eidelman (Science & Engineering)
<http://libguides.lib.uct.ac.za/refworks>

Centre for Information Literacy:
cil-refworkshelp@uct.ac.za

22

Guide to RefWorks:
<http://libguides.lib.uct.ac.za/refworks>

Centre for Information Literacy:
cil-refworkshelp@uct.ac.za

RefWorks can be accessed from within the UCT network or, using EZProxy, from locations outside the UCT network. Thus, any bibliographic information stored on RefWorks is accessible anywhere one has access to the Internet. It is also possible to work with Write-N-Cite off-line and develop RefWorks databases off-line. Neither are easy nor pleasant experiences! For further details, contact Peter Underwood (Peter.Underwood@uct.ac.za) directly.

RefWorks continues to be available to you after you have left UCT *provided UCT continues with its group subscription*. If UCT notifies RefWorks of its intention to discontinue the subscription, an e-mail warning will be sent to your most recently registered e-mail address with instructions about how to download your RefWorks database and options for obtaining a personal subscription. It is possible to import RefWorks records into other PBMs.

If you have been using another PBM, it is possible to import records from it to RefWorks; in some circumstances this can be quite problematic and some experimentation is advised. For further details, contact Peter Underwood (Peter.Underwood@uct.ac.za) directly.

If you wish to use Write-N-Cite from home, it is necessary to configure MS-Word to work with RefWorks. Login to RefWorks through EZProxy, then choose Tools | Write-N-Cite. This will lead you to a page from which you can download the Write-N-Cite “add-on” for MS-Word. You will need to select the version appropriate for your computer (Windows or Mac); download the version you have chosen and save it *in a location that you can remember*, such as the Desktop or a flash stick. Make sure that Word is closed. Locate the saved file, click on it and it should begin the installation routine. Then,

1. From the Windows **Start Menu** select **Programs** and **RefWorks**.
2. Select the WNC Proxy Configuration Utility and right-mouse click on it (do not double click it) and click on **Run As**
3. Select **Administrator** in the **User Name** drop-down
5. Click OK. A new small window should open. In the Proxy Server URL, type
<http://ezproxy.uct.ac.za/login?url=http://www.refworks.com/Refworks/?WNC=true>
Type this carefully and check it. Many of the problems with Write-N-Cite occur because the proxy URL address has been entered incorrectly at this stage.
6. Click OK.

RefWorks often displays results in “popup” windows. Some browsers are set to block popups. If you are experiencing difficulties with RefWorks features, such as Write-N-Cite, the first point to check is the browser configuration for this feature. For Mozilla Firefox, check Tools | Options | Content, where Block popup windows should be *unticked*. For Internet Explorer, check Tools: a drop-down menu will offer the option of *turning-off* the popup blocker if it is set.

RefWorks: Guided practical on developing records

The following worksheets, will guide you through the methods for adding, editing and importing records to a RefWorks database.

If you have *not* already set up a RefWorks account, please do this now following the instructions below; otherwise, move to the next page

Open either Firefox or Internet Explorer web browser

Go to the web address www.refworks.com

Select the “Login” tab



From the next screen, choose

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

[Do not, at this stage, type anything into the Log-in name and Password boxes]

The next screen invites you to provide details of name, your userid and password, and other details. Please note that the userid and password that you choose do **not** need to be the same as your UCT network userid and password (if you are security-conscious it is best if they are different from other userids and passwords that you use). Click on “Register” and the task is complete.

1 Creating a Personal database in RefWorks

The first task (if you have not already done it) is to create your Personal database. This is the space in RefWorks that is reserved for your records. A Personal database consists of one or more folders in which your records are stored. If you have already done this, please move on to the next page.

Directions

Observe on the screen: The various links to “Help” pages – useful if you wish to check how various functions work, at a later stage.

Congratulations!
You have successfully set up your RefWorks account. As a new user to the service, we recommend you view the online [Tutorial](#) before getting started.

Getting Started

Step 1:

- Importing data directly from online databases
- Importing data from saved text files
- Importing records from other bibliographic management programs
- Adding references manually

Step 2:

- Using Write-N-Cite
- Using One Line/Cite View

Step 3:

- From your reference list
- From your paper

Need additional assistance getting started with RefWorks?

- Help
- Tutorial
- F.A.Q.s
- Contact Us

Observe on the screen: The “menu” bar



Do: Select Folders, then from the pop-down menu, Organize Folders.

Organize Folders

Observe on the screen: At this stage, only one folder will be displayed, called “Last Imported”. It is used as a temporary store for any records that you import from another PBM or from any external databases, such as the UCT catalogue.

Do: Select “Create New Folder”; you will be prompted for a name: this might be the topic of a paper you are writing, your dissertation or other research topic. Click on “OK”.

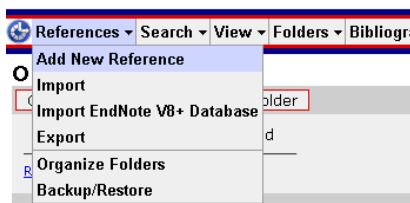
My folder is called “Training” – notice that buttons for renaming and deleting it have appeared. The “Last Imported” folder is a “default” system folder and cannot be deleted. There are no records in the database – but we shall swiftly change that!


2 Adding records manually to a Folder

Now we can begin to enter metadata for items we wish to record in the RefWorks database.

Directions

Do: On the Menu bar, Click on “References” and then select “Add New Reference”



Observe on the screen: The “input” screen. By default, RefWorks has already made some choices for you – but these can be changed by using the various drop-down menus, distinguished by 

A screenshot of the 'New Reference' input form. At the top, there is a dropdown menu for 'View fields used by:' set to 'None Selected', and two buttons: 'Save Reference' and 'Save & Add New'. Below this are several fields: 'In Folder(s)' with a dropdown menu, 'Ref Type' set to 'Journal Article', 'Source Type' set to 'Print', 'Output Language' set to 'Unknown' with a 'What's this?' link, and an 'Attachments' section with a 'Browse...' button and an 'Add attachment' button. The 'Authors' field is empty. The 'Title' field has a rich text editor toolbar with buttons for Bold (B), Italic (I), Underline (U), and two icons for mathematical symbols (x² and x₂). The 'Periodical, Full' field is also empty.

Do: Click on the menu for “View fields used by:” by default this will be set to “None specified” but the drop-down menu offers choices covering various citation styles, including some that are set-up for UCT purposes. By selecting one of these, the fields of the input form will be limited to displaying only those used by the chosen citation style; *unless you already know that you will only ever use this style*, leave this option set to “None specified”. Leaving it set to the default means that you are not limited when wishing to add data that might be necessary in some citation styles but not others.

Do: Clicking on “In Folders” displays the names of any folders you have set up. Choose one of these (except “Last Imported”) as the destination for your record.

Do: Clicking on “Ref Type” displays the various types of input form that are available: selecting one limits the fields displayed to those usually required for the chosen medium. The list includes a “Generic” input form which can be used for any item that does not fall within the types displayed. It is always possible to change the “Ref Type”, even if you are in the middle of inputting a record or, even, after it has been saved. For the moment, leave it set to “Journal Article”.

Observe on the screen: “Source Type” – Refworks allows a user to differentiate between documents that are available in print *and* electronic forms from those only available in electronic forms. Leave this set to “Print” unless dealing with the latter.


Observe on the screen: “Output language” – a drop-down menu allows one to select a specific language for creating multi-language bibliographies. Of the South African languages, English, Afrikaans, Xhosa, sePedi, Sesotho and Zulu are included. Further details of this facility may be seen by selecting [What's this?](#). The language chosen should reflect the language used for creating the entry in RefWorks. Either leave this unchanged or select “English” from the drop-down menu.

Observe on the screen: “Attachments”. This feature allows one to add an electronic file of up to 20MB to the record you are creating – for example, a PDF copy of the article for which you have created a record or research notes. Having *created and saved* a record, clicking on the Browse button allows the relevant file to be selected from the computer you are using.

Now, let’s add some data

For this part of the exercise, we are going to create a record for a journal article, “Utilisation and prevalence of mixed methods research in library and information research in South Africa 2002-2008”, written by Patrick Ngulube, Koketso Mokwatlo and Sipho Ndwande, in the South African Journal of Libraries and Information Science, volume 75, issue 2 of 2009, pages 105-116.

Observe on the screen: The “Authors” field. Names of authors, if they follow the style of “forenames, surname” should be entered with the surname first, followed by forenames or initials, with as full details as you have available. This is an important detail because some citation styles require the fullest form of names, whilst others shorten forenames to initials. RefWorks will adjust each record when it is used in writing or preparing a bibliography to suit the particular citation style chosen for output; however, it cannot supply missing details!

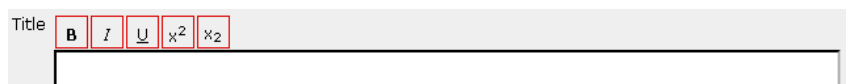
Do: Click in the “Authors” field box and make sure the “insertion” cursor is displayed 

Do: Type in the names of the first author: surname, forename, then a semicolon and a space and the second author’s surname, forename, then a semicolon and a space and the final authors surname, forename.

Authors Ngulube, Patrick; Mokwatlo, Koketso; Ndwandwe, Sipho

Notice how, as you begin typing-in a name, a drop-down list appears. At present this will be blank but, once some records have been entered into the database, this list (the “Term Assistant”) will include the names we have already entered for other records and we will be able to select these, thus ensuring that names are entered consistently. There are other fields that include similar features. If you find this feature annoying, it can be turned off by selecting Tools | Customize | Reference Edit Options and deselecting “Enable Term Assistant”.

Do: Position the cursor in the Title field.



Observe on the screen: The font effect controls positioned just above the input box. These can be used to **embolden** text, *italicise*, underline, and add ^{superscripts} and _{subscripts} to the title as it is entered. For the moment, do not select any effect: this ensures that what is typed in appears as “normal”.

Do: Type in the title

Utilisation and prevalence of mixed methods research in library and information research in South Africa 2002-2008

Check the spelling carefully! Notice that it is not necessary to surround the title with quotation marks, nor should one end the title (or any field in RefWorks) with a full-stop – if these are required in a particular citation format, RefWorks will supply them at the output stage. If there is a subtitle, separate it from the main title with a colon.

Do: Move to the “Periodical, Full” field and enter the title of the journal

South African journal of libraries and information science

Notice how initial capital letters are used only for proper nouns – if the citation style chosen at the output stage requires initial capitals for each substantive word, RefWorks will adjust the title accordingly. However, RefWorks cannot replace capital letters with minuscules, so it is always best to “decapitalise” unless you know

that you will always be using an output style requiring full capitalisation. The Term Assistant also makes another appearance: as more records are added, the titles of journals already recorded will appear and can be selected to maintain consistency.

Observe on the screen: The next field, “Periodical, Abbrev”. Some disciplines use shortened forms of journal names, called CODENS (Condensed Names), often to be found on the cover of the journal. No entry is needed in this field for our specimen record.

Do: Move to the “Pub Year” field. Add the date 2009. The year should always be input as four digits because this is the format used in most citation styles. “Pub Date Free Form” (the next field) is used for date information such as month, season or day. For this record, leave this blank.

Do: in the next field (“Volume”), add the volume number 75 and in the “Issue” field, the issue number, 2. In the “Start Page” field, add the opening page number for the article, 105, and in the “Other Pages” field, the end page 116. If recording an article that has a broken sequence of pages (for example, 102-109, 112-114, 116), input the first page number into the “Start Page” field, and add the sequence to the “Other Pages” field (109, 112-114, 116).

Do: The next field, “Descriptors” is for you to add suitable descriptive keywords or keyphrases that will serve as “subject markers” when you wish to search your Personal database to find records. descriptors are separated by semicolons. For this example, add evaluation of research; mixed methods research; research design.

Observe on the screen: this completes the minimum amount of information necessary to produce a citation in an acceptable format. Take a moment to look at the remaining fields: there are designated fields for information such as an abstract, notes (often used if there are significant aspects of the publication, such as contact information for the authors, and personal notes which might comprise your own observations about the content of the article. Further down, there are several “User” fields, which may be used as desired. There are also fields designated for information from subject-specific sources such as PMID (PubMed Identifier) and PMCID (PubMed Central Identifier). The DOI field is used to record a Digital Object Identifier, which is a permanent electronic address for articles and other media; not all items have DOI but, if they are available, it is good practice to include them. A web address can be recorded in the URL field, towards the bottom of the form, also. Note that web addresses are evanescent, whereas a DOI is intended to be permanent.

Do: scroll to the top of the form and click on “Save & Add New” (the button is also available at the bottom of the form). This prompts RefWorks to save the record and display a new input form.

Now let’s add two more records. One is for a book (so, from the Ref Type field menu select “Book, Whole”). The authors are Theo Bothma, Erica Cosijn, Ina Fourie and Cecilia Penzhorn; the title is “Navigating information literacy: your information society survival toolkit”. The second edition was published in 2008 by Pearson Education (South Africa), in Cape Town. It contains 196 pages. The International Standard Book Number (ISBN) is 978 177025 2219 and we decide to use the single descriptor “information literacy”.

Notes: selecting “Book, Whole” changes the fields included in the form to suit this medium. The Edition should be shown as 2nd; the number of pages as 196.

Remember to use the “Save & Add New” button!

The third record to input is a web page written by J. R. Whiteman (his forenames are not known), called “How to be an outstanding service employee”. It was first published in 1999 and its web address is <http://www.surveytools.com>. You looked at this web page on 13 July 2009.

Notes: for “Ref Type”, select “Web Page”. Once again, the fields change to prompt for information that is especially relevant to this medium. There is nothing we can do with the lack of forenames (unless you wish to

do some web searching to locate them!), so the name of the author must be given as Whiteman, J. R. Nothing is known about the history of updating the page, so we must assume that 1999 is the information to put into the “Last Updated, Year” field. The “Accessed, Year” field is for the year (2009) on which we looked at this web page and the “Accessed, Month/Day” field should then have July 13 added. Add the web address to the Uniform Resource Locator (URL) field and “human resources” as a descriptor.

This time, because we have finished inputting records use the “Save” button. To check that the records have been saved, Select View | Folder | Name of the folder you have set up (the name should appear in red). The records should be displayed in the “Standard view”, the “Full View” or “One line/Cite View” – use “Switch to:” to select the view that you prefer for checking what you have input.

END OF EXERCISE ON INPUTTING RECORDS

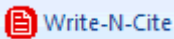
3 Using Write-N-Cite

This exercise assumes you have set up a folder in your Personal database and added the example records used on the previous pages.

Write-N-Cite runs from within the Microsoft Word processor, providing a link between what you are writing and your RefWorks Personal database. To use it, you must ensure that the Write-N-Cite “add-on” has been installed in the Word version you are using: it has already been added to *most* versions used at UCT. If it is not present (for example, on the version you use at home), you will need to install it, as directed on page 8 of this handout.

Do: Start Word and, for recent versions, click on “Add-Ins” (for earlier versions, try View | Toolbars; the results will not precisely conform to that given below but you should be able to see a RefWorks or Write-N-Cite icon). This should reveal two icons – one in the “Menu Commands” and the other in the “Custom Toolbars”.

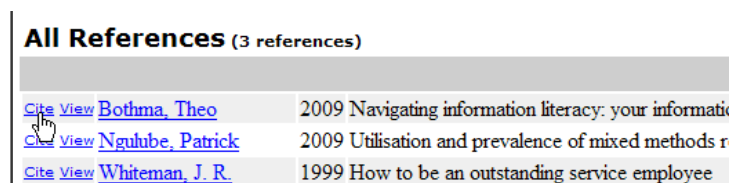


The presence of both indicates that the version of Word has been configured to work with RefWorks. Click on  and this will switch on the RefWorks link and allow you to login to RefWorks (via EZProxy, if you are working from outside the UCT network; note that you may receive a pop-up window informing you that the site certificate is untrusted – you may safely ignore this and select “Proceed”). Write-N-Cite will open and you will see all the references you have included in your Personal database displayed. You may, if you wish, restrict the view to the contents of a single folder – select this from View | Folder and choose the folder you require. Minimise Write-N-Cite or move it somewhere convenient on the screen.

Do: In Word, open a new document and type some text. We are going to insert the references we have created in the RefWorks Personal database. Here is some text, as an example:

A recent study of information literacy techniques identifies the importance of applying research techniques

At this point, I want to insert a reference to the Bothma book so, from the Write-N-Cite screen, I select “Cite”:



This creates a temporary citation marker, defined by the double curly braces, and a link to the selected reference in the folder I have selected. The number 2 in the citation marker is the record number in the folder. The citation marker will not look “normal” yet because there is another, later, stage to complete.

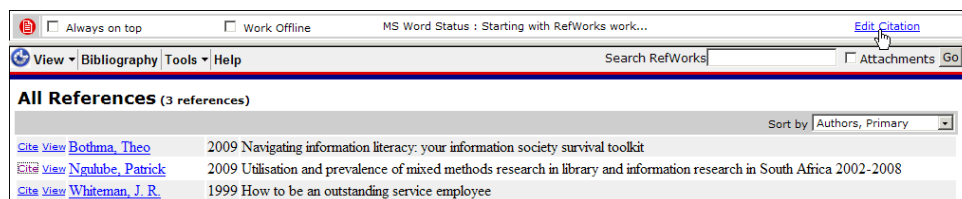
A recent study of information literacy techniques identifies the importance of applying research techniques {{2 Bothma, Theo 2009}}

Note: it is most important *NOT* to edit anything within the curly braces – doing so destroys the integrity of hidden codes that manage the link to RefWorks and may result in damage to the text you are writing. This can *sometimes* be repaired by highlighting the complete citation, deleting and re-making the citation.

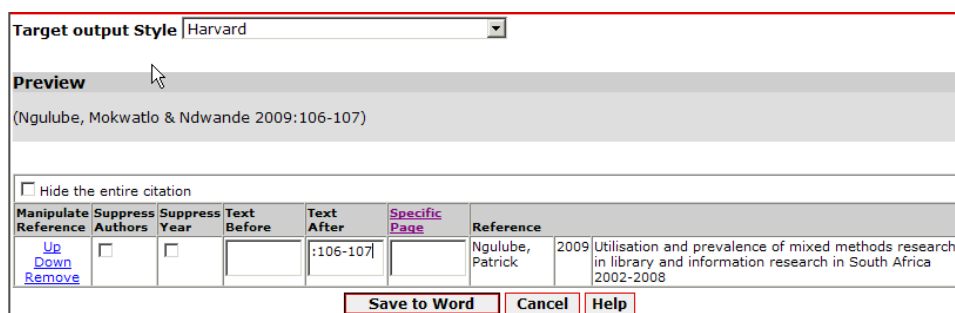
Do: Continue with writing the text until you come to another point where a citation needs to be inserted.

A recent study of information literacy techniques identifies the importance of applying research techniques {{2 Bothma, Theo 2009}}. In a review article, Ngulube and others confirm that mixed modes of research have been most prevalent in South Africa {{1 Ngulube, Patrick 2009}}

Here, I have inserted the citation marker for the Ngulube article but I also want to refer in the citation to a specific set of pages within the article. *Make sure that the cursor is still within the temporary citation marker* and, from the Write-N-Cite window select the “Edit Citation” button from the top right-hand corner of the screen:



This opens the Citation Editor and allows me to adjust several aspects of the citation, including adding in the specific page number(s). Notice how this has been done – I have used the “Text After” box and added :106-107, despite the fact that there is also a “Specific Page” box! This is because only certain citation styles include page numbers in citation indicators as a default (MLA is such an example); for the rest, use the “Text After” box.



Notice, also, that I have selected Harvard as the “Target output Style” – this gives me an opportunity to check the formatting of the citation marker in the Preview window. It will not show the page numbers I have selected – that comes later, but I can see them in the temporary citation marker. Continuing with the text:

A recent study of information literacy techniques identifies the importance of applying research techniques {{2 Bothma, Theo 2009}}. In a review article, Ngulube and others confirm that mixed modes of research have been most prevalent in South Africa {{1 Ngulube, Patrick 2009/f:106-

107;}}. Whiteman {{3 Whiteman, J. R. 1999/a;}} provides a contrasting view of the role of the researcher.

For the Whiteman entry, I have used another feature of the Citation Editor – the ability to suppress parts of the reference information in the citation marker. I chose “Suppress Authors”.

Do: Save your document. Now, from the Write-N-Cite window, click on **Bibliography**. From the “Output Style” list select “Harvard” (NOT Harvard UCT) and then click on “Create Bibliography”.



After a short time (the elapsed period will vary with the number of citations in your paper to be processed), a confirmatory message should appear and the Reference list in your paper should be visible in the Word document.

A recent study of information literacy techniques identifies the importance of applying research techniques (Bothma et al. 2009). In a review article, Ngulube and others confirm that mixed modes of research have been most prevalent in South Africa (Ngulube, Mokwatlo & Ndwande 2009:106-107). Whiteman (1999) provides a contrasting view of the role of the researcher.

Bothma, T., Cosijn, E., Fourie, I. & Penzhorn, C. 2009, *Navigating information literacy: your information society survival toolkit*, 2nd edn, Pearson Education (South Africa), Cape Town.

Ngulube, P., Mokwatlo, K. & Ndwande, S. 2009, "Utilisation and prevalence of mixed methods research in library and information research in South Africa 2002-2008", *South African journal of libraries and information science*, vol. 75, no. 2, pp. 105-116.

Whiteman, J.R. 1999, , *How to be an outstanding service employee*. Available: <http://www.surveytools.com> [2009, July 13] .

Notice that there are a few small adjustments you may wish to make: adding “References” as a heading before the Reference list, tidying-up the spacing and extraneous comma in the Whiteman reference and suppressing the hyperlink for the URL (right-click on the URL and select “Remove hyperlink”), and so on. It is always wise to check the finished paper carefully and, although it is possible to “fine-tune” RefWorks to remove these small irritations, it takes a lot of time and experimentation. Sometimes the simple approach is easier.

Write-N-Cite and RefWorks contain many other features, options and means of simplifying the task of working with references. This workshop has been introductory: to gain greater competence, make use of the tutorials, Help pages and UCT sources of assistance.

Having created some entries, before logging-off, it is wise to take a security backup of the data you have created.

Do: Select “Export” from the References tab in RefWorks and from the drop-down list, select RefWorks Tabbed format as the Export Format. To save *all* references, select the “All References” radio button. Click on “Export” and you will, following a pause, be given the opportunity to select a storage location – which could be a flash stick, hard drive location or network drive.