
RefWorks Online – reference and citation management

Heather Carine*

There once was a simple way to manage the archive of material collected during your university years. You wrote a paper, cited a few references, typed up your bibliography, and then threw the essay and articles into a box. After a couple of house moves, the box found its way to the bin.

Then along came reference management systems, such as EndNote. EndNote is a marvellous desktop program for students and academics to store the details of articles to which they are referring in their academic papers; they can also add footnote citations and produce a bibliography in the appropriate format.

RefWorks is the next development in reference management systems. Users who want to bookmark journal articles from academic publishers and open access web content for referencing don't need to switch between a bookmarking tool and a referencing program, as RefWorks offers both facilities in a web-based format. RefWorks specialises in bibliographic reference management and, according to its website, there are over 700 organisations around the world using its reference management system.¹

RefWorks is also available as an individual subscription for US\$100 per annum. For researchers and writers, RefWorks is a very useful tool for storing links and details to journal articles and web resources for past, present and future projects; it is also a tremendous aid in the finicky task of citing and referencing in the correct bibliographic format.

This review will focus on the RefWorks individual subscriber option, which has most of the features available to institutional subscribers, with the exception of sharing references and linking to attachments.

REFWORKS COMPARED TO SCHOLARLY BOOKMARKING TOOLS

RefWorks is similar to social bookmarking tools, such as Connotea and CiteULike – they are all web-based tools for bookmarking academic web resources, including journal articles from academic publishers, and open access resources. Being web-based, RefWorks is able to offer the same flexibility as Connotea and CiteULike; users can bookmark online articles and web resources at times that are convenient to them and when they are away from their workplace or academic institution.

However, Connotea and CiteULike are sites for storing and sharing links, and cannot be used for citing references during the writing process, or for creating a bibliography of cited materials. The records from Connotea and CiteULike need to be exported to a reference management system to complete the tasks of citing and creating a bibliography. (Liz Edols reported on the features of Connotea and CiteULike, in the October 2006 issue of *Online Currents*).²

REFWORKS FEATURES

Bookmarking references

Getting started with RefWorks is very straightforward, with the assistance of clear instructions from the help file, and online guided tutorials. I was able to import bibliographic records from Version 4 of EndNote to RefWorks in about ten minutes, with two attempts.

To create a database of bibliographic records from scratch, like other bookmarking services, the user can either import directly from online databases, or manually add references. RefWorks currently

* Heather Carine is a freelance business researcher with her own business, Carine Research. She is also the Information Services Manager at Hunt & Hunt, a national law firm.

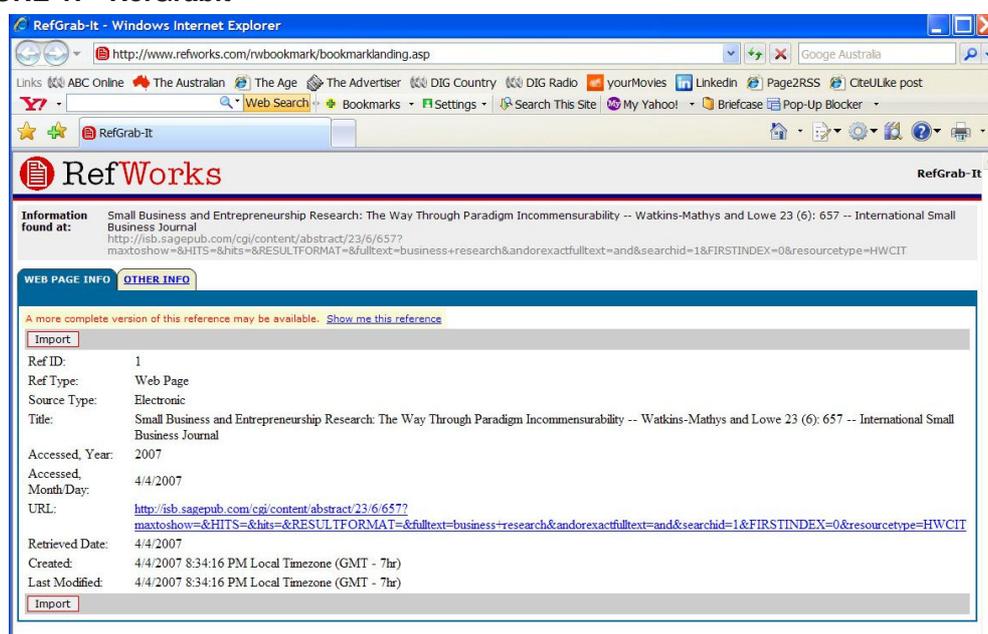
¹ See RefWorks website at http://www.refworks.com/content/about_us.asp (viewed 29 March 2007).

² Edols L, "Scholarly Bookmarking Tools: Connotea and CiteULike", (2006) 21(2) OLC 47.

works in collaboration with online information service providers, including CSA, BioOne, EBSCO, Elsevier, HighWire, HW Wilson, ISI, OCLC, Ovid and ProQuest.

The online publishers that are supported provide options to export records to RefWorks. This requires exporting, saving to a file, and then importing into RefWorks in the required format. It's a bit fiddly. Fortunately, there is also a download tool called RefGrab-It, that adds a button to the user's favourite web browser, enabling a one click approach to importing references from online journal databases and web resources. Initially, the user is directed to the basic import record but, if more bibliographic record details have been made available by the publisher, the user can choose to import the basic or detailed record. RefGrab-It overcomes the need to go through several steps to export and then import citations into reference management systems, which was the frustrating element of reference management that lead Richard Cameron to develop CiteULike's one click approach for bookmarking citations for academic articles.³

FIGURE 1: RefGrabIt



RSS feeds can be easily imported into RefWorks, by simply copying the RSS feed address and pasting it into the RefWorks RSS feed reader. All relevant fields will be imported, and users can elect whether or not to import the record into their reference database.

Detailed bibliographic records

The wide range of options for recording detailed bibliographic records is a key feature of RefWorks. Over thirty different reference types are supported, from artworks, bills/resolutions, music scores, and personal communication, through to the expected books (sections, edited, whole), electronic and print journal sources and websites. Each reference type has a customisable input form, eg DVDs have fields showing director and distributor/studio.

³ See CiteULike, Frequently Asked Questions, online at <http://www.citeulike.org/faq/all.adp> (viewed 30 March 2007).

FIGURE 2: RefWorks input options

Searching and browsing for records

The simplest search is a “catch all” search across RefWorks, using the search box located in the top toolbar. References can also be stored in various folders, and searches can be restricted to selected folders.

There are simple look-up options, including look-up by author, descriptor and periodical. Look-up by periodical will retrieve a hypertext-linked list of records from various periodicals, showing, for example, the records from the *Harvard Business Review*.

Advanced search allows the user to search on any field in a bibliographic record – there are over 50 different fields to choose from to use to narrow your search fields. Searches can also be combined with Boolean options – and/or/not choices – with any of the range of bibliographic record fields.

Citing references

At the referencing end of the writing process, there is a simple one click solution for adding citations, using RefWorks “Write-N-Cite” feature. Write-N-Cite is a small download program that adds a button to the user’s Word toolbar. Clicking on Write-N-Cite brings up a list of references categorised in various folders. The user simply clicks on “cite” to add a citation to his/her paper.

There is a bit of screen switching required if the user is researching, bookmarking and citing at the one time, ie while using RefWorks and Write-N-Cite together.

Creating the final bibliography is simply a matter of selecting the output style, such as Harvard or Chicago, and clicking on “Create Bibliography”. Too easy!

INDIVIDUAL SUBSCRIBER RESTRICTIONS

There are a few restrictions for the individual subscriber option, compared to the features available to institutional subscribers, including linking to attachments and sharing the references via RefShare.

Individual subscribers are not able to add links to files as attachments. This prevents an individual subscriber being able to add links to scanned or PDF copies of articles, which they may have residing on their personal computer.

RefShare, which turns RefWorks into a shared bookmarking and reference management system, is only available to institutional subscribers. Using RefShare, users can share their entire RefWorks database, or restrict access to certain folders.

OVERALL

An individual subscription to RefWorks is nice solution for researchers and writers who don't have access to a reference management system provided by a university. Users are able to retain their collection of interesting articles that they have referred to in the past, and to continue adding to the database of references, as their interest in other topics grows. Ref Works also provides valuable assistance when it comes to citing and creating a bibliography.

Researchers and writers alike will benefit from the investment of US\$100 per year and two to three hours of time to become a skilled user of RefWorks.

RefWorks is distributed in Australia by CSA; contact Kevin Serpanchy, tel (03) 8645 0351; or email: kserpanchy@csa.com.