

ITCS and Writing Center Thesis Workshop: RefWorks and Microsoft Word

September 2006
Tauseef Rahman '07

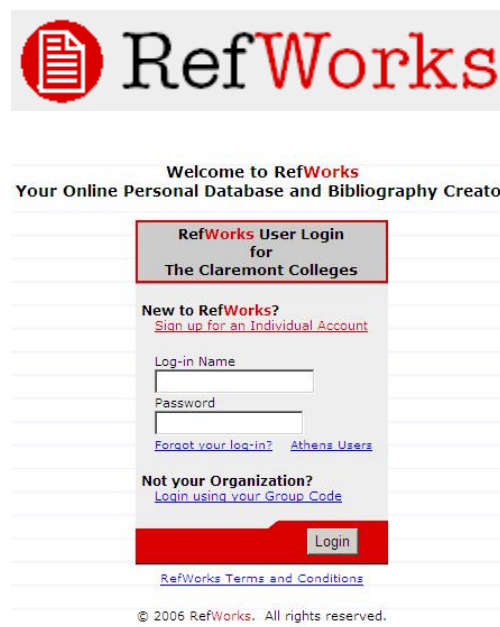
Introduction

RefWorks is an online database which lets you store and sort reference sources, and ultimately export them to a bibliography of your choice of style. It integrates well with several online databases, and allows you to manually input references.

Account Creation

Begin by creating an account by **navigating** to the logon page at www.refworks.com/refworks. **Click** the 'Sign up for an individual Account' link and fill in the required fields. The email address used does not need to be your school email address. *Note: if you are accessing RefWorks using a computer outside the Claremont Colleges, use the following group code: RWClaremontColls.*

Once an account has been created, return to the logon page and sign in.



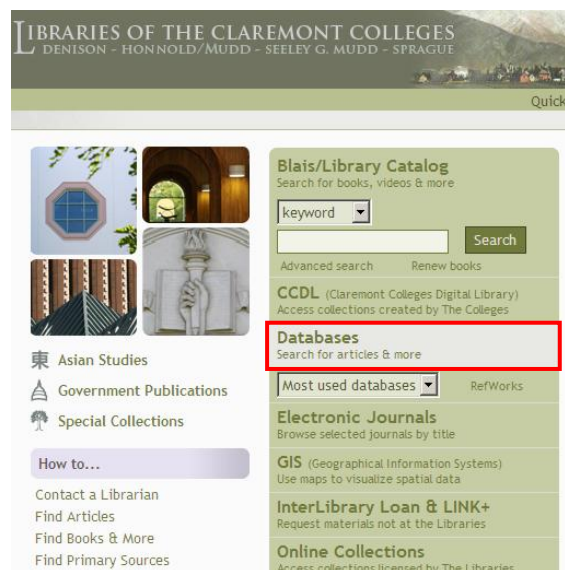
Navigating RefWorks

RefWorks is navigated using drop-down menus which are located at the top of the page. **Create** a folder by hovering over 'Folders' and clicking 'Create New Folder.' You can create as many folders as is necessary; one for each semester, class, or paper. Let's label this Thesis.

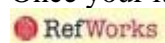


Libraries of the Claremont Colleges Databases

Navigate to the libraries of the Claremont Colleges at www.libraries.claremont.edu and **click** on the



'Databases' link in the middle of the page. Most databases offer an option to export references to RefWorks with a click of a button or two. **Select** a database of your choice such as the 'MLA International Bibliography' under the 'Literature & Language' link. Perform a **search** and **select** as many items as you would like.

Once your items have been selected, **click** the  button, which will prompt you to perform a final selection and export.

Note: pop-up blockers may be an issue when exporting, so please change your settings accordingly.

All Publication Types 2 Books 1 Dissertations 1

Mark or Clear all on page | Update Marked List | Save, Print, Email | **RefWorks** Sort by: Most Recent First Go


◀ Previous 1 Next ▶ Record # Go

1. [Robert Frost and the Challenge of Darwin](#)
[Faggen, Robert](#)
 Ann Arbor, MI: U of Michigan P, 1997. xii, 363 pp.
[View Record](#) | [Get this item](#)

Database:
 MLA International Bibliography
 Descriptors:
[American literature](#) | [1900-1999](#) | [Frost, Robert \(1874-1963\)](#) | [poetry](#) | (and) [prose](#) | (treatment of) [nature](#) | [More...](#)

Manually Entering References

Should the option to export to RefWorks be unavailable, there are options to **import** from text files which databases may export to [References | Import]. If this is unavailable, a new reference can be created [References | Add New Reference]. The option to select which citation style to use is available and can be found under the 'View fields used by:' drop-down menu.

 **RefWorks** New Release - [details](#)

References ▾ Search ▾ View ▾ Folders ▾ Bibliography Tools ▾ Help ▾

New Reference ✓ indicates fields used by your selected output style.

View fields used by: **AER - American Economic Review**

In Folder(s) Specify Folders (if any) ▾

Ref Type Journal ▾

Source Type Print ▾

Authors ✓

Title ✓ **B** *I* U x² x₂

Periodical, Full ✓

Periodical, Abbrev

Pub Year ✓

Managing References in RefWorks

Once items have been exported to RefWorks, you can manage them by **viewing** the last imported folder [Folders | View | Last Imported]. Alternatively, you can view all unsorted references [Folders | View | References Not in a Folder]. Here you can **select** the items using the checkboxes and using the 'Put in Folder...' dropdown option. Once you have sorted your references, you can **view** the folder of your choice using the 'Folder' drop-down menu.

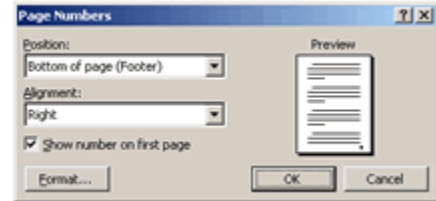
Generating a Bibliography

Once all references have been sorted, **click** 'Bibliography' in the navigation bar. **Select** the Output Style of your choice. **Select** second radio button 'Format a Bibliography from a List of References,' and select from the drop-down menu the 'File type to create.' **Select** either 'All References' or 'References from Folder...' drop-down menu. After making the selections **click** the 'Create Bibliography Button' at the bottom of the page.

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Headers, Footers, and Page Numbers

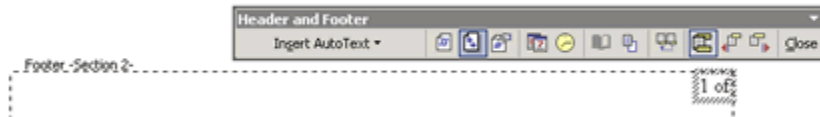
Click **Insert > Page Numbers**. You can choose the position and alignment of the page numbers. Once the page numbers are inserted, **double click** either the Footer or Header (depending on where you inserted the page numbers). Alternatively, click on **View > Header and Footer**.



The Header and Footers toolbar appears. This allows you to edit the contents and formatting of the footer or header. You can insert images by copying and pasting. The format of the page numbering can be edited. You can insert text showing the total number of pages.

Click the text box that says '1'. **Type** 'of'. Then insert the number of pages that are in the document

by **clicking** the second button on the toolbar (highlighted in blue below), which inserts the total number of pages. It will then read '1 of 1'.



Tracking changes and commenting

When editing or revising documents, it may be useful to note the changes made, and who

made them. **Double-clicking** the gray 'TRK' text in the Word status bar enables the Track Changes Reviewing feature.



Alternatively, **right-click** on the toolbar and select

'Reviewing.' You can enable/disable Track Changes by using the button second from the right (highlighted in blue). **Hovering** the mouse over the tracking bubble shows who made the proposed changes.




*'Reviewing.' You can
second from the right*

Educational Technology Services,
3/21/2006 4:56 PM:
Formatted

Formatted: Font: Italic

Styles

When formatting a document which repeats formatting, it is useful to use the Styles and Formatting panel. It can be accessed by **clicking** the  button on the toolbar. Alternatively, select Styles and Formatting under the Format drop-down menu.

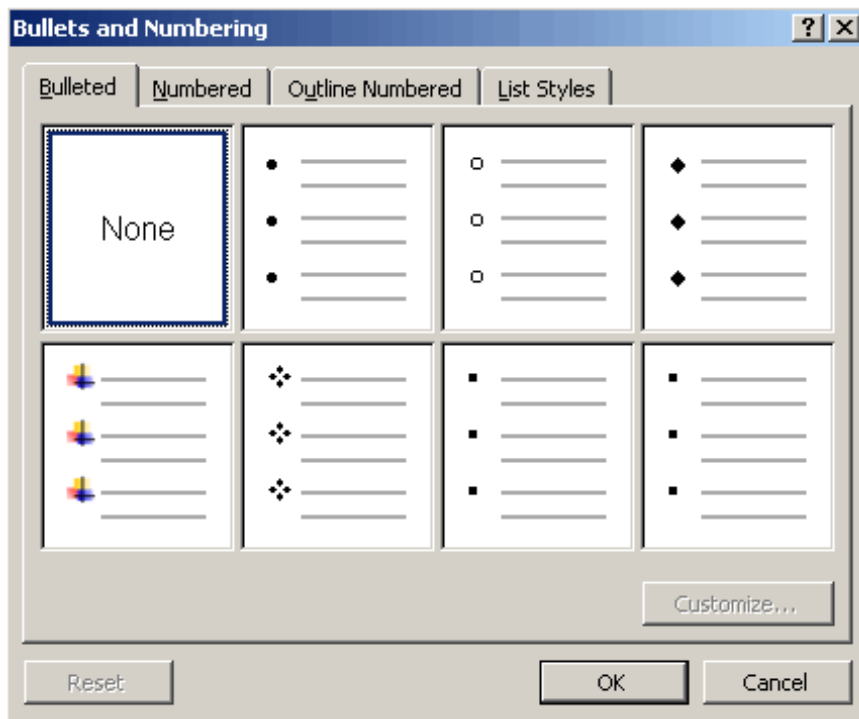
This allows you to manage the styles which are in use on the page. In the example given to the right, there are styles for Heading 1 and Heading 2, which reflect the formatting in use.

If one wishes to italicize all Heading 1, one can **hover** over it, **click** on the arrow, and modify it. This will update all the text on the page which uses that particular style.

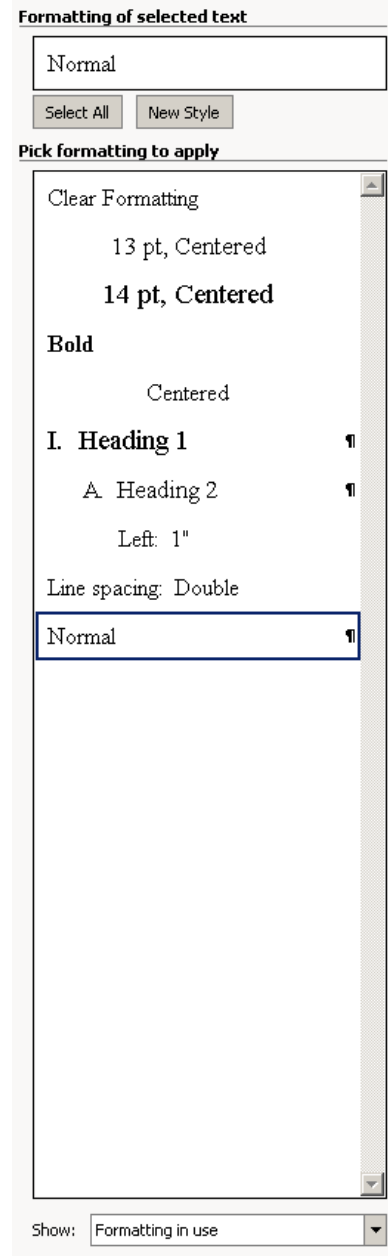
When a document gets more complicated with several headings, captions, pull-out quotes, and other formatting, it is useful to use the Styles and Formatting panel from the beginning.

Customizing bullets and numbering

When creating bullet-point lists or a numbered outline, it may be useful to customize its formatting and the characters/symbols it uses.



There are also options to set the bullet position in from the page, and the indentation of the text.



Click **Format > Bullets and Numbering**, which allows the customization of several aspects. On the 'Bulleted' tab, select a style and then press **Customize** in the bottom right corner of the window. This allows you to set the bullet font,

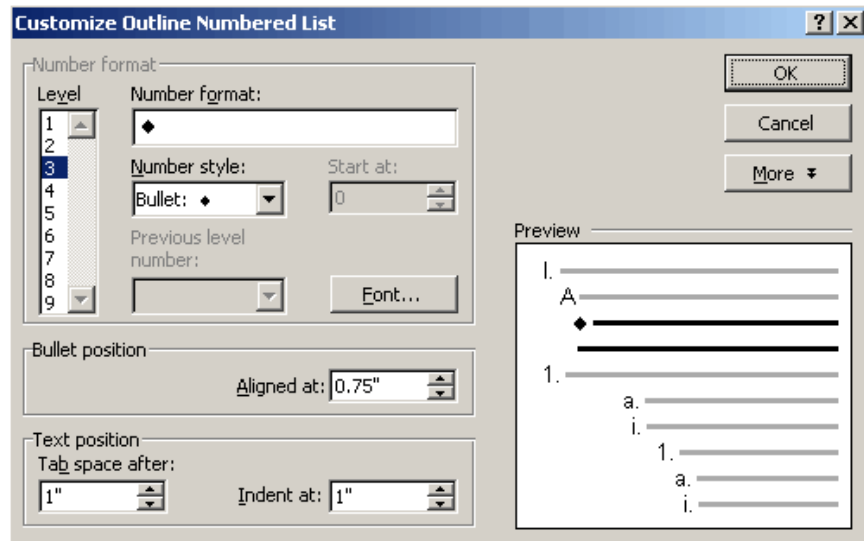
The 'Numbered' tab allows you to set the style and positioning much like for a bulleted list.

The 'Outlined Numbered' tab is useful for outlining thesis chapters and sections. Each level can be individually customized with its own number style, and its indentation. The 'Bullet position' and 'Text position' settings control the alignment for different sections.

For example, if you want Chapter titles can be formatted to have a large indentation for example, say, 2". On the other hand, chapter section titles can be formatted to be aligned to the margin, or Aligned at 0"

It is important to use the Outlining toolbar. **Right click** on the toolbar and select 'Outlining.' Select the text which you wish to

promote or demote (increase level, decrease level) in the outlined numbered list. This is useful for editing chapter/section titles. **Clicking** the Update TOC refreshes the listing.

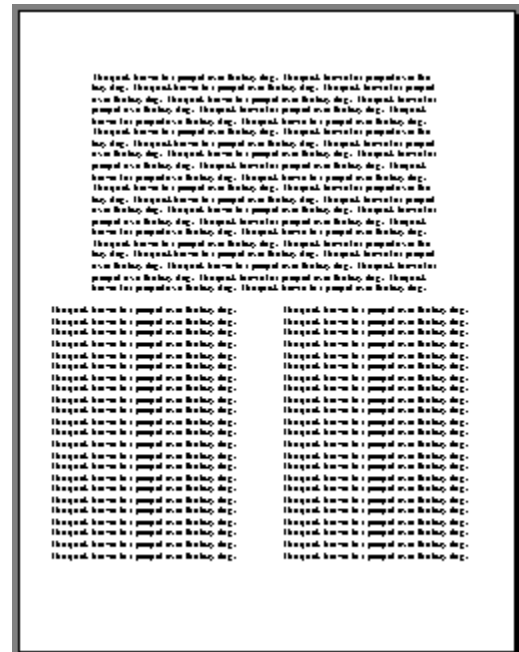


Breaks

Apart from the commonly used page breaks, it is possible to use different breaks to help structure the document. Under **Insert > Break**, the 'Section break types' provides options to manipulate the header and footer contents separately.

Consider a 'Next page' section break for a new chapter which allows you to change the footer to read 'Chapter 2' instead of 'Chapter 1.'

A continuous break, for example, allows you to treat the section before and after the break like two separate pages on the same page. The example above shows a section break where the bottom section was formatted to use two columns, and the page margins were changed to 0.5\"/>

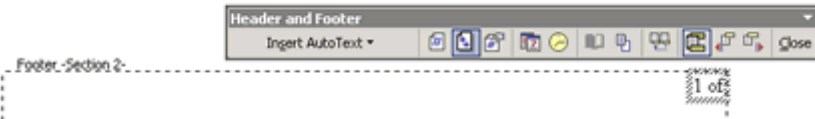


Section footers and page numbers

When working on a long document, such as thesis, it may be necessary to have different page numbering (such as for an appendix, or table of contents) and different text in the footer.

In order to achieve this, after creating a Section break discussed above, click **View > Header and Footer**.

This will bring up the toolbar displayed below. The icon button that is the third from the right allows you to toggle the link to the previous section. When the button is highlighted, the current section connects to the previous section's footer (text, page numbering, images are the same).



Outlining and table of contents

By combining the tools provided by the Styles and Formatting Panel and the Outlining toolbar discussed above, it is possible to create a table of contents for the document. Click **Insert > Reference > Index and Tables**.

The following window appears. Select the appropriate tab. The Table of Contents allows you to define what formatting to use and how many levels to include (ie, should you include the chapter section titles or not).

