USING REFWORKS FOR
CITATION MANAGEMENT

WINTER

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AGENDA FOR TODAY'S WORKSHOP

1. Introduction

2. Citation Management Using Refworks

3. Comparison of Legacy and new RefWorks

4. Common problems and some tips

5. Exercise for you: *Master RefWorks In 20 Challenge*

6. Questions and Wrap-up

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TELL US ABOUT YOURSELF

1. About the Co-Instructors

2. What is your name and area of study?

3. What do you know about citation management?

4. What are your main concerns about RefWorks?

5. Other concerns about citation management?
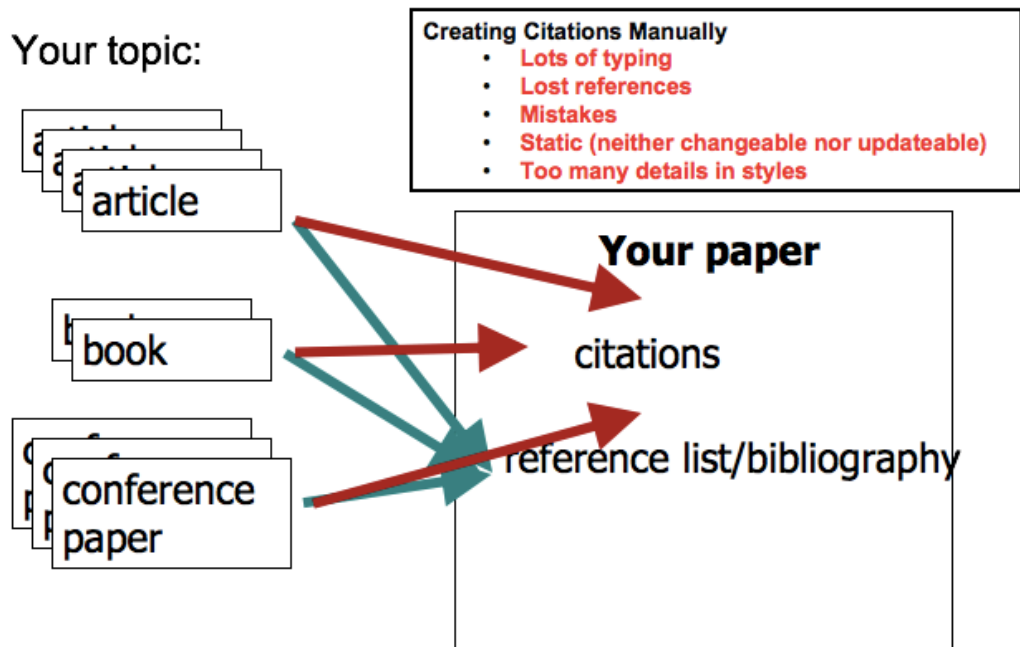
SERVICES AT THE RESEARCH COMMONS

WORKSHOP
- Citation Management (RefWorks, Mendeley, RefWorks
- Dissertation Thesis Formatting
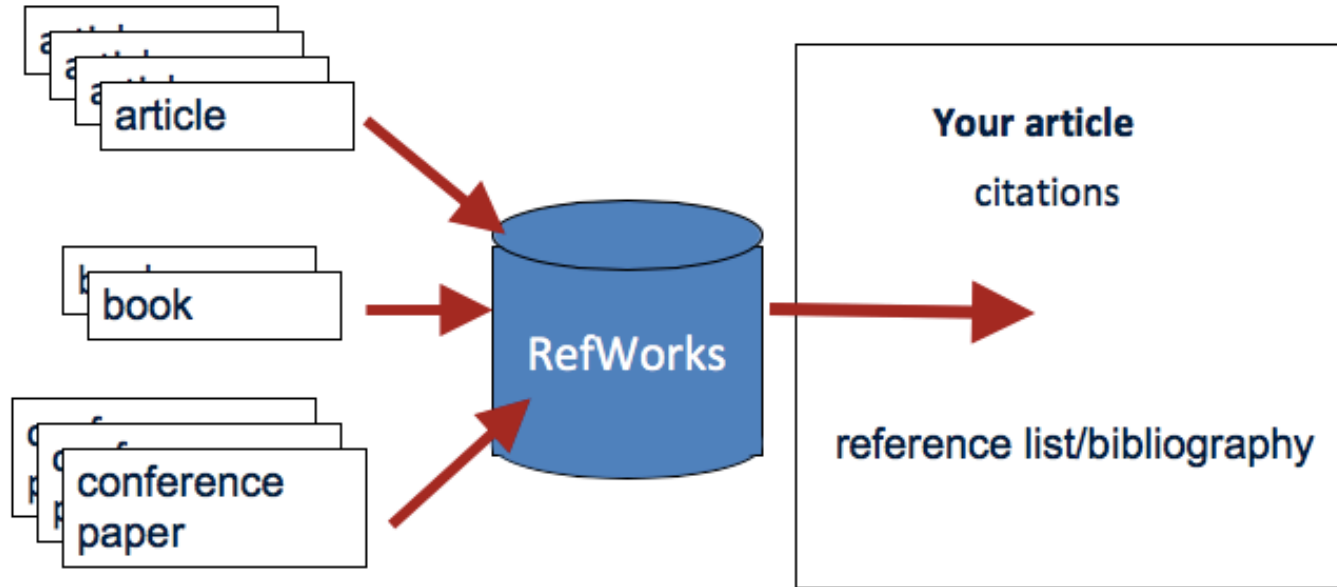- Data analysis software support (NVivo, SPSS)
- Digital Core Skills & GIS

ONE-ON-ONE CONSULTATION
(in person, over Zoom, or by e-mail)

WHAT IS THE PROBLEM?

Your topic:

article

book

conference paper

Creating Citations Manually
- Lots of typing
- Lost references
- Mistakes
- Static (neither changeable nor updateable)
- Too many details in styles

Your paper

citations

reference list/bibliography

REFWORKS AS A SOLUTION

WHAT YOU CAN DO? – 4 IMPORTANT FEATURES

Collect references from different sources

Organize your database (annotate, rate, tag)

Cite and generate bibliographies.

Share references and collaborate with colleagues

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CITATION MANAGEMENT TOOLS

	Zotero	Mendeley	Endnote	RefWorks
Price	Free	Free	$299 (or $100 student version)	$100 (or free to UBC student)
Free space	300 mb (2 GB ~$1.67/month)	2 GB ($4.99 /month ~ 2GB) (costs for private groups)	1 GB	2GB
PDF annotation and reader	No (plug ins)	Yes	Yes	No
Snapshot	Yes	No	Yes	No
Retrieve PDF citation data	Yes	Yes	Yes	No
Full Text PDF search	Yes (should be activated)	Yes	Yes	No
Mobile	3rd party provider for Android and iPhone	iPhones and iPads and 3rd party providers for Android	mobile-optimized sites	mobile-optimized sites

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CITATION MANAGEMENT TOOLS COMPARISION

	RefWorks	Mendeley	EndNote Desktop	RefWorks
Personal Profile	Yes	Yes	Yes	No
Private group	Unlimited (groups & members)	Only one group with a maximum of 3 members. (a 5 member group plan is $49 /month)	Unlimited group using EndNote Web	Sharing collections with up to 10 people
Public group	Unlimited	Unlimited	No	No (but the URLs are sharable)
Social network (follower & following lists)	Yes	Yes (has a like button)	No	No
Collaboration newsfeed	Yes	Yes	No	No
Group page and discussion forum	Yes	Yes	No	No

INSTALLATION AND SET-UP

Download and install RefWorks:

❑ Download and install MS world plugin

❑ Add the browser extension (for standalone version)

Set up your RefWorks account:

❑ Set your RefWorks account

STEP 1 – COLLECT AND ADD REFERENCES

To capture and add references, import:

- ❑ Directly from Google Scholar
- ❑ From the Library search / Summon
- ❑ From online article databases

Some citations may need to be manually added

- ❑ PDFs can also be added (manually)

STEP 2 – ORGANIZE YOUR LIBRARY

- ❑ Create folders and subfolders
- ❑ Add notes, tags, and comments
- ❑ Add an attachment (PDF or Image)

STEP 3 – CITING AND GENERATING BIBLIOGRAPHIES

❑ Add in-text citations and bibliography in MS Word
❑ Add in-text citations and bibliography in Google Doc
❑ Citation in an email and presentation
❑ Select preferred citation style

STEP 4 – SHARE REFERENCES AND COLLABORATION

To share and collaborate:

❑ Create a Group folder and share your documents

COMMON PROBLEMS THAT COME UP WITH REFWORKS

- [ ] Incompatible plugin

- [ ] RefWorks toolbar doesn't appear

- [ ] Debugging broken documents

- [ ] Communication error or non-responsive plugin buttons

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REMINDER: REFWORKS IS NOT PERFECT

- Remember, RefWorks is a helpful tool but not perfect. Ultimately it is up to you to make sure all of your citations are formatted correctly.

- Double check your bibliography! Make sure all relevant and correct information about each source has been added and entered properly.

SOME PRACTICE -- MASTERING REFWORKS IN 20 STEPS

- An activity for you to master RefWorks
- Please contact us for the answer key

THANK YOU!

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