

**Step-by-Step  
Instructions  
for  
Importing References  
into  
RefWorks**

# READ THIS . . . BEFORE YOU BEGIN

Previously in APA citation style, when you cited an article you had retrieved from an electronic database, you had to name the database in your reference citation, e.g., “Retrieved from CINAHL.” Now however, it is requested that you cite the **DOI** (digital object identifier) for that document in your reference citation instead, IF it is available.

A DOI is a unique alphanumeric character string assigned to documents by a registration agency to identify content and provide a persistent link to its location on the Internet. The publisher assigns a DOI when your article is published and made available electronically. All DOI numbers begin with the number **10** and contain a prefix and a suffix separated by a slash. It looks like this: **doi: 10.1097/NNA.0b013e3181d40e4f**

The DOI is typically located on the first page of the journal article.

Some databases will automatically export the DOI into RefWorks along with the citation. Some will not and you need to make an effort to locate the DOI yourself and appropriately insert it in the citation as indicated by the instructions you will find throughout this guide.

If you are unable to locate the DOI in the document, you can usually find it at this web site: <http://www.crossref.org/guestquery/>

Here is an example of a reference citation with a DOI:

Wilens, T.E. & Biederman, J. (2006) Alcohol, drugs, and attention-deficit disorder. *Journal of Psychopharmacology*, 20, 580-588. doi: 10.1177/0269881105058776

Note that older articles will frequently not have been assigned a DOI. For those documents, you do not provide the name of the database in your citation. Instead, you are required to provide the URL of the specific journal publisher’s homepage.

For example, if your article came from the *Journal of Nursing Administration*, and there is no DOI for that particular article, you would provide URL link for the homepage of the Journal of Nursing Administration at the very end of your citation. Example:

Jones, A.T. & Smyth, R.W. (1987). Treating burn victims. *Journal of Nursing Administration*, 42, 207-214. Retrieved from <http://journals.lww.com/jonajournal/pages/default.aspx>

**If the journal has been discontinued, or if it is another type of document (e.g., report) for which there is no DOI, you must provide the URL for the database provide, e.g., Retrieved from <http://www.eric.ed.gov>**

**There are a few housekeeping issues to keep in mind  
to avoid problems down the road .....**

1. Make sure you have created a folder in RefWorks to put your citations in. Go to **FOLDERS** in the toolbar. Click on **CREATE NEW FOLDER**.
  
2. Make sure all of your popup blockers are turned OFF. Go to **TOOLS.....POPUP BLOCKER.... TURN OFF**.
  
3. RefWorks offers a huge selection of citation output styles from which to choose. You want to select **APA 6<sup>th</sup>** edition. Here's how to set that up:
  - a. Login to RefWorks
  - b. In the toolbar at the top, go to **BIBLIOGRAPHY**.
  - c. Hit the dropdown menu next to **OUTPUT STYLE**
  - d. Click on **ACCESS OUTPUT STYLE MANAGER**. A list will open.
  - e. Find **APA 6<sup>th</sup> – American Psychological Association, 6th Edition**
  - f. Click on **ADD TO FAVORITES**
  
4. Some students encounter difficulties importing references from EBSCO. This is a “Trusted Site” issue with your particular computer. Follow these instructions to eliminate that problem:
  - a. You will need to add these two URLs to your Trusted Sites.
  - b. Go to **TOOLS** in your toolbar.
  - c. Scroll down to **INTERNET OPTIONS**
  - d. Click on the second tab at the top, named **SECURITY**.
  - e. In the white box, click on the green checkmark labeled **TRUSTED SITES**.
  - f. Click on the word **SITES**.
  - g. In the box that says **“Add this web site to the zone”**, you need to type in the following: **\*.refworks.com** (note the asterisk AND the period)
  - h. If the box that says **“Require server verification.....”** has a checkmark in it, uncheck it!!!
  - i. Hit **CLOSE**
  - j. Click on the word **SITES** again.
  - k. This time type in the following: **\*.ebSCOhost.com**
  - l. If the box that says **“Require server verification....”** has a checkmark in it, uncheck it!!!
  - m. Hit Close
  - n. Close out of your browser.

## Exporting References from EBSCO databases

1. Make sure you have created a folder in RefWorks into which you will put your citations!
2. Go to a database in EBSCOhost and conduct your search.
3. Click on **ADD TO FOLDER** located under the reference you wish to import.
4. To the right of the list of articles you will see **FOLDER HAS ITEM** in a gold box with your selected reference listed. Under that, you will see **FOLDER VIEW**. Click on it.
5. Put a checkmark in the box to the left of each reference you want to import.
6. Click on the icon with the lime green arrow (**EXPORT**) located on the right side of the page.
7. Checkmark the box saying **REMOVE THESE ITEMS FROM FOLDER AFTER SAVING** and put a dot in the circle next to **DIRECT EXPORT TO REFWORKS** (last on list).
8. Click **SAVE** (located to the left). This should launch you into RefWorks. Log in to your account if it doesn't log you in automatically.
9. You should now read on the screen that the importation of your references has been completed. Click on **VIEW LAST IMPORTED FOLDER**.
10. Look over to the far right and click on the blue **EDIT** button. The screen will refresh.
11. Make sure the **VIEW FIELDS USED BY** says **APA 6th**.
12. Under that, in the **IN FOLDERS** field, click on the dropdown menu and indicate which folder you want this article exported into.
13. Under that, in **REF TYPE**, make sure it says **JOURNAL ARTICLE**.
14. Under that, in **SOURCE TYPE**, make sure it says **ELECTRONIC**.
15. Scroll down the page. If nothing is filled in in the **DOI** field, make an effort to locate this information and fill it in yourself. (See instructions on the second page of this guide.)
16. If there is no DOI assigned to this article that you can locate, you must provide the URL for the journal publisher's homepage. You can locate this simply by Googling the title of the journal. You need to put that URL in the **DATABASE** field like this: Retrieved from <http://www.journalpublishershomepage.com>. Be sure to type in the words "Retrieved from" first before you type in or paste in the URL.
17. Go to the top of the page and click on **SAVE REFERENCE**. Log out of RefWorks.

## **Exporting References from the InfoTrac databases.**

1. Make sure you have created a folder in RefWorks into which you will put your citations!
2. Select a database from InfoTrac and conduct your search.
3. Put checkmarks in the boxes to the left of the articles you are selecting.
4. Go to the top of the screen and look for **MARKED ITEMS** in the gold toolbar. Click on **MARKED ITEMS**.
5. Put a checkmark in the box beside the articles you want to import.
6. On the top right side of the page, you will see five small icons. Click on the middle icon that looks like a floppy disc (Citation Tools).
7. Go to the section named **EXPORT TO THIRD PARTY SOFTWARE**. Check **RefWorks**. Hit **EXPORT**.
8. This should launch you into RefWorks. Log in to your RefWorks account.
9. You should now read on the screen that the importation of your references has been completed. Click on **VIEW LAST IMPORTED FOLDER**.
10. Look over to the far right and click on the blue **EDIT** button. The screen will refresh.
11. Make sure the **VIEW FIELDS USED BY** says **APA 6th**.
12. Under that, in the **IN FOLDERS** field, click on the dropdown menu and indicate which folder you want this article exported into.
13. Under that, in **REF TYPE**, make sure it says **JOURNAL ARTICLE**.
14. Under that, in **SOURCE TYPE**, make sure it says **ELECTRONIC**.
15. Scroll down the page. If nothing is filled in in the **DOI** field, make an effort to locate this information and fill it in yourself. (See instructions on the second page of this guide.)
16. If there is no DOI assigned to this article that you can locate, you must provide the URL for the journal publisher's homepage. You can locate this simply by Googling the title of the journal. You need to put that URL in the **DATABASE** field like this: Retrieved from <http://www.journalpublishershomepage.com>. Be sure to type in the words "Retrieved from" first before you type in or paste in the URL.
17. Go to the top of the page and click on **SAVE REFERENCE**. Log out of RefWorks.

## Exporting References from PubMed

1. Go to RefWorks ([www.refworks.com](http://www.refworks.com)) and log in. Make sure you have created a folder into which you want to import your citations. Minimize the screen.
2. Now go to PubMed ([www.pubmed.gov](http://www.pubmed.gov)) and conduct your search.
3. Put a checkmark in the box to the left of each reference that you want to import.
4. Go to the **SEND TO** box (upper right) and click on the drop down menu arrow. Click on **FILE**. New choices will open beneath that. For **FORMAT** click on **MEDLINE**. For **SORT BY** click on **RECENTLY ADDED**. Click on **CREATE FILE**.
5. The screen will refresh and ask you if you want to open or save the file. Click **OPEN**.
6. A text file will open up. Hold down your **<CONTROL>** button and hit **A**. That will highlight everything on the page.
7. Hold down your **<CONTROL>** button and hit **C**. That will make a copy of everything on the page. Now go up to the top right of the screen and minimize the page.
8. Open up the RefWorks page that you minimized at the beginning of these instructions. Look at the toolbar at the top of the page. The first word is **REFERENCES**. Move your cursor to it and scroll down to **IMPORT**. Click on it.
9. The first thing on the page under the large word **IMPORT** should be **the IMPORT FILTER / DATA SOURCE** box. If **NLM PUBMED** isn't showing in that box, scroll through the alphabetical list provided and click on it.
10. Underneath **IMPORT FILTER / DATA SOURCE** you will see **DATABASE**. The box to the right of it should say **PUBMED**.
11. Next is **IMPORT REFERENCES INTO FOLDER**. From the dropdown menu select the folder you wish this reference to be imported into.
12. Now you will see a dot in the circle next to **IMPORT DATA FROM THE TEXT FILE**. You do NOT want the dot there. You want it in the circle next to **IMPORT DATA FROM THE FOLLOWING TEXT**. Click on that empty circle to move the dot.
13. Your cursor should be blinking in the blank white box. Hold down your **<CONTROL>** button and hit **V** which will copy your references into that box.
14. Click on **IMPORT**.
15. You should now read on the screen that the importation of your references has been completed. Click on **VIEW LAST IMPORTED FOLDER**.
16. Look over to the far right and click on the blue **EDIT** button. The screen will refresh.

17. Make sure the **VIEW FIELDS USED BY** says **APA 6<sup>th</sup>**.
18. Underneath the **IN FOLDERS** field you will see the name of the folder you selected a moment ago. Leave that field alone.
19. Under that, in **REF TYPE**, make sure it says **JOURNAL ARTICLE**.
20. Under that, in **SOURCE TYPE**, make sure it says **ELECTRONIC**.
21. Scroll down the page. If nothing is filled in in the **DOI** field, make an effort to locate this information and fill it in yourself. (See instructions on the second page of this guide.)
22. If there is no DOI assigned to this article that you can locate, you must provide the URL for the journal publisher's homepage. You can locate this simply by Googling the title of the journal. You need to put that URL in the **DATABASE** field like this: Retrieved from http:www.journalpublishershomepage.com. Be sure to type in the words "Retrieved from" first before you type in or paste in the URL.

Go to the top of the page and click on **SAVE REFERENCE**. Log out of RefWorks.

## Exporting References from ERIC

1. Make sure you have created a folder in RefWorks into which you will put your citations!
2. Go to the ERIC database and conduct your search.
3. Click **ADD** located to the upper right of each citation you wish to import. The word will change to **ADDED**.
4. Once you have selected all of your citations, look for the **CLIPBOARD** icon on the upper right hand side. The number of items you have selected will be indicated. Click on it.
5. The page will refresh. Under **RECORDS ADDED TO MY CLIPBOARD**, click on **EXPORT CITATIONS**. A new window will open.
6. Select **CITATION MANAGER FILE**. Click on the box marked **DOWNLOAD**.
7. You will be asked **“DO YOU WANT TO SAVE THIS FILE?”** Click on the **SAVE** button.
8. A **“SAVE AS”** box appears. Designate where you would like this file saved (example: to your Desktop.) The **FILE NAME** will say **“CITATION.”** Change that to something meaningful to you. The **SAVE AS TYPE** will say **.ris DOCUMENT. \*\*\* DO NOT CHANGE THE FILE TYPE!!!\*\*\***
9. Click on **SAVE**.
10. A **DOWNLOAD COMPLETE** message will appear. Click on the **CLOSE** button.
11. Close out of ERIC and go into **RefWorks** ([www.refworks.com](http://www.refworks.com)).
12. Click **LOGIN** on the left side of the page and log in to your account.
13. Look at the toolbar at the top of the page. The first word is **REFERENCES**. Move your cursor to it and scroll down to **IMPORT**. Click on it.
14. The first thing on the page should be an **IMPORT FILTER / DATA SOURCE** box. Scroll down to select **ERIC – EDUCATION RESOURCES INFORMATION CENTER**.
15. Next on the page should be **DATABASE**. It should say **ERIC**.
16. Next you should see **IMPORT REFERENCES INTO FOLDER**. Click on the dropdown menu arrow and select the correct folder for your citation(s).
17. Now you will see a dot in the circle next to **IMPORT DATA FROM THE FOLLOWING TEXT FILE**. There will be a blank white box beneath it, and to the right

of the box you will see **BROWSE**. Click on the word **BROWSE** and look for your saved file. When you find it, double-click on it and it will be loaded into the white box.

18. Click on **IMPORT** at the bottom of the page.
19. You should now read on the screen that the importation of your references has been completed. Click on **VIEW LAST IMPORTED FOLDER**.
20. Look over to the far right and click on the blue **EDIT** button. The screen will refresh.
21. Make sure the **VIEW FIELDS USED BY** says **APA 6th**.
22. Under that, in the **IN FOLDERS** field, click on the dropdown menu and indicate which folder you want this article exported into.
23. Under that, in **REF TYPE**, make sure the correct document type is indicated, e.g., journal article, report, dissertation. If you don't know what that document is, the abstract in ERIC should tell you.
24. Under that, in **SOURCE TYPE**, make sure it says **ELECTRONIC**.
25. Scroll down the page. If nothing is filled in in the **DOI** field, make an effort to locate this information and fill it in yourself. (See instructions on the second page of this guide.)
26. If there is no DOI assigned to this article that you can locate, you must provide the URL for the journal publisher's homepage, if it is a journal article. You can locate this simply by Googling the title of the journal. You need to put that URL in the **DATABASE** field like this: Retrieved from http://www.journalpublishershomepage.com. Be sure to type in the words "Retrieved from" first before you type in or paste in the URL.
27. If it isn't a journal article and/or you cannot locate a DOI for this item, you must type in "Retrieved from http://www.eric.ed.gov" in the **DATABASE** field.
28. Go to the top of the page and click on **SAVE REFERENCE**. Log out of RefWorks.

## Importing References from GOOGLE SCHOLAR

1. Make sure you have created a folder in RefWorks into which you will put your citations!
2. On the main search page for Google Scholar (scholar.google.com), click on **Scholar Preferences** to the right of the search box. Scroll down the page to **Bibliography Manager**. Put a dot in the circle titled **SHOW LINKS TO IMPORT CITATIONS TO** and in the dropdown menu click on **RefWorks**. Click on **SAVE PREFERENCES** at the bottom of the page.
3. Conduct your search.
4. Each record displayed will have a link beneath it titled **IMPORT INTO REFWORKS**.
5. Click on that link under the article of your choice and you will be launched into **RefWorks**. Log in to your account.
6. Once you log in, you are automatically brought to the **EDIT** view of that reference citation with the fields already filled in.
7. The first box (**VIEW FIELDS USED BY**) is asking what citation style you want to use. If **APA** isn't already showing in that box, then scroll down to find **APA 6<sup>th</sup>** and click on it.
8. The next box (**IN FOLDER**) is asking you what folder this reference should be filed in. Click on the name of the correct folder.
9. The next box (**REF TYPE**) wants you to indicate exactly what type of reference it is, e.g., a journal article, a web page, a book, a dissertation. Identify what your reference is and click on its type.
10. Now you will need to select a **SOURCE TYPE**. Click **ELECTRONIC**.
11. Scroll down the page. If nothing is filled in in the **DOI** field, make an effort to locate this information and fill it in yourself. (See instructions on the second page of this guide.)
12. If there is no DOI assigned to this article that you can locate, you must provide the URL for the journal publisher's homepage. You can locate this simply by Googling the title of the journal. You need to put that URL in the **DATABASE** field like this: Retrieved from http:www.journalpublishershomepage.com. Be sure to type in the words "Retrieved from" first before you type in or paste in the URL.
13. Go to the top of the page and click on **SAVE REFERENCE**. Log out of RefWorks.

## Adding References Manually into RefWorks

1. Go to RefWorks ([www.refworks.com](http://www.refworks.com)) and log in to your account. Make sure you have created a folder into which you will put your citations!
2. Look at the toolbar at the top of the page. The first word is **REFERENCES**. You're your cursor to it and scroll down to the first thing on the list: **ADD NEW REFERENCE**.
3. A template will open up for you to fill in the blanks manually.
4. The first box (**VIEW FIELDS USED BY**) is asking you what citation style you want to use. If APA isn't showing in that box, scroll down to find **APA 6th** and click on it.
5. The next box (**IN FOLDER**) is asking you what folder this reference should be filed in. Click on the correct folder.
6. The next box (**REF TYPE**) wants you to indicate what the reference is, e.g., a book, a journal article, a web page, etc. Click on the correct type. The page will refresh, indicating what fields you need to fill in for that particular reference type in **APA** format.
7. Now you will need to select a **SOURCE TYPE**. Did you locate this item in print (such as a book) or did you find it electronically? (Odds are, if you are entering this reference manually, you have this document in print format and should click on **PRINT**.)
8. There will be a green check mark next to the fields that you should try and fill in. If you can't fill them all in, that's OK. Just provide what information you can.
9. When you're done filling in the template, go back to the top of the page. If you are going to be adding more references manually, click on **SAVE & ADD NEW**. If you are done manually adding references, click on **SAVE REFERENCE**.
10. Log out of **RefWorks**.