

Creating an Output Style with Annotations

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Getting Started

Before you begin creating your output style with annotations, you will need to decide which field you want to use for your annotations.

A few suggestions for fields to use are:

- Notes field
- Abstracts field (although data vendors often import information into this field)
- Any of the User Defined fields

You can use any field that RefWorks offers – the key is to make sure that field is available for every reference type, otherwise some of your records may not print with your annotation.

Modifying an Output Style

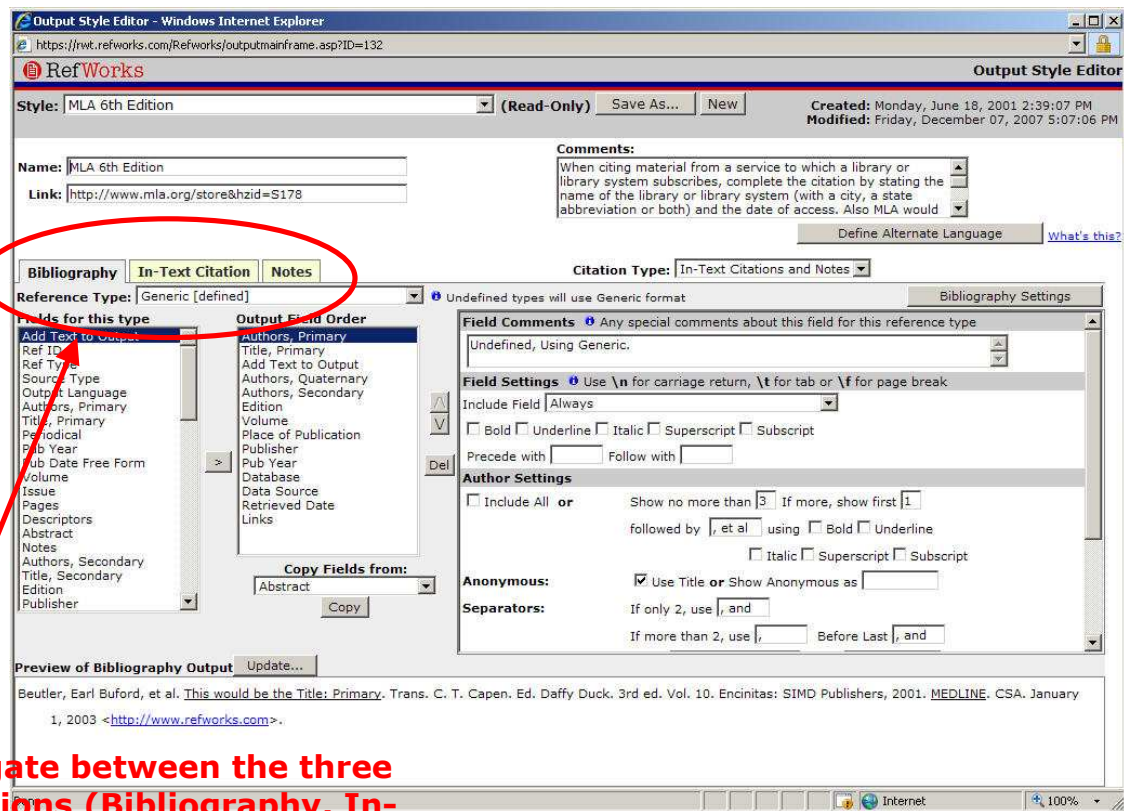
The easiest way to create an annotated output style is to modify one of our existing styles using the Output Style Editor. To locate the Output Style Editor:

1. Select Bibliography from the menu bar in Refworks.
2. Locate a style you wish to modify and select that style
3. Click on the edit button to the right of the output style drop-down. This will launch the output style editor.

The screenshot shows the RefWorks web interface in Microsoft Internet Explorer. The browser address bar shows <http://www.refworks.com/Refworks/mainframe.asp>. The main navigation bar includes 'References', 'Search', 'View', 'Folders', 'Bibliography', 'Tools', and 'Help'. The 'Bibliography' menu is highlighted with a red circle and a callout box that says '1. Select Bibliography from the menu bar.' Below the navigation bar, the 'Bibliography' section is active, displaying a list of output styles. The 'APA - American Psychological Association, 5th Edition' style is selected and highlighted in blue. To the right of this list, there are 'Edit...' and 'New' buttons. The 'Edit...' button is circled in red with a callout box that says '3. Click on the edit button to launch the Output Style Editor.' Below the list of styles, there are several sections for configuring the output style, including 'Format', 'Document to', 'File Type to', 'Include', and 'Document'. A callout box that says '2. Choose an output style to modify.' points to the selected style in the list.

The Output Style Editor has three main sections – in-text citations, bibliography and notes (footnote or endnote). You have to set up each section that is appropriate for your desired output. The output style editor always opens to the bibliography section.

Here's how the output style editor looks when you first open it:



You navigate between the three main sections (Bibliography, In-Text Citations, Notes) of the output style editor here.

Depending on the output style you have chosen, your primary focus will be on the Bibliography section and/or the Notes section (if you are modifying a style that uses footnote or endnotes).

4. Before you start to modify the style, we suggest renaming it (it cannot be the same name as the original) and saving it. To rename a style:
 - In the area that says **Name** (located just below the output style drop-down), type in your new name
 - click the **Save As** button located under the output style drop-down.

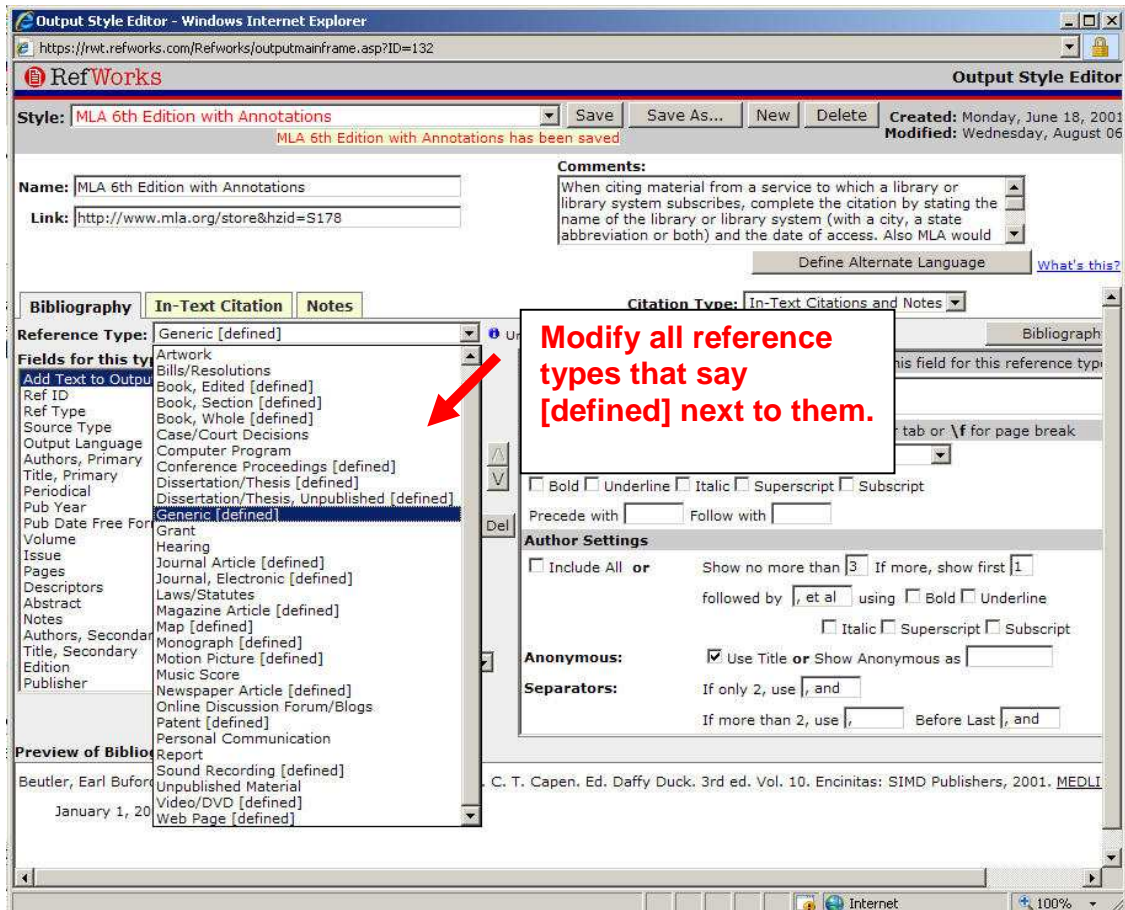
Your new style will now appear in the output style drop-down in red lettering (note: Not all browsers support the display of colors in the drop-down.) Only you will see this style in your personal account.

First time, select Save As, after that, just use Save.

Rename style here

5. To modify a style you will:

- Select the first defined reference type from the **Reference Type** menu. Defined reference types are used in your bibliography. The **Generic** reference type is the default and is used when the output style is not defined for a particular reference type.



- From the **Fields for this Type** menu, choose the field(s) you wish to add. For this example, we'll use the User 1 field. Scroll down the list to see all the fields available.

1. Select the field for your annotation

2. Move the field to the Output Field Order box.

- Click on the field you just moved over in the **Output Field Order** box. The **Field Settings** and **Field Comments** appear on the right hand side. The Field Settings allow you to include punctuation and spacing for your field.

For example, if you want your annotation to start on a new line below your bibliography entry, with a blank line in between, enter `\n\n` in the **Precede with** box.

- You can preview how your new style will look by clicking on the **Update button** at the bottom of the screen.
- If you like what you see, continue by selecting another **Reference Type** to modify. Repeat until you have done all the **Reference Types** that say [defined] after them.
- When you are done editing all the reference types, click on the **Save** button at the top to save your changes.

4. Click the Save button to save your work.

The screenshot shows the RefWorks Output Style Editor interface. At the top, the 'Save' button is circled in red. Below it, the 'Field Comments' section is highlighted with a red box. In the middle, the 'Update...' button in the 'Preview of Bibliography Output' section is circled in red. At the bottom right, a large white box with a red border contains the instruction '2. Add any spacing or punctuation here.' with an arrow pointing to the 'Field Comments' area. On the left, a box with the instruction '1. Select your newly added field.' has an arrow pointing to the 'Output Field Order' list. Another box with the instruction '3. Preview your changes by clicking on the Update button.' has an arrow pointing to the 'Update...' button.

You now have an annotated output style to use in creating your annotated bibliography!

If you have any questions about using the output style editor or creating a custom output style, please contact support@refworks.com.