



## Administrator Ready Reference Guide

### Customizing an Output Style

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## **Customizing an Output Style**

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# Customizing an Output Style

## Overview

Creating your own output style can seem like a daunting task – however, if you follow these steps, you will find that with a little practice, it is a fairly straight forward process.

One key is good Instructions to Authors (which you have no control over!). The more detailed, the better.

Also, it's always easier to start with an existing style and modify it to suit your needs (when possible).

The best way to learn how to modify a style is to “play” with one. Follow the instructions on the following pages and just practice...You'll be a pro in no time!

So, get ready, get set – GO!

## Getting Started

1. Before you begin creating a style, you need to locate the Instructions to Authors for the journal style you want to create (or have any manual ready for the larger styles).

Sometimes, these instructions are difficult to find. We suggest you first do a web search (using your favorite search engine) for the journal you are interested in. Once you locate the journal's website (or the publisher's website), scan the webpage for any of the following terms (this is just a partial list):

- Manuscript Submission
- Author Information
- Instructions to Authors
- For Authors
- Author's Guide

2. Once you have the instructions, read through them carefully. The information you need may be in various sections of the instructions. Some things to look for:

- line spacing for the references– which may or may not differ from the spacing of the manuscript
- should the bibliography start on a new page?
- is there a heading for the bibliography page?
- in-text citations or footnotes and how should those appear? (How many authors should display, how should the names appear, etc.)
- how should the bibliography list be printed (usually in numeric order or alphabetically)

3. After you have read through the instructions, you are ready to look for an existing style to modify. You can do this using the Output Style Preview Utility (Tools, Preview Output Styles) or by simply opening the Output Style Editor (Bibliography, Edit button -- to the right of the output style drop-down).

The Output Style Preview Utility is the easiest way to see both in-text citations and bibliography entries for many reference types all on one page, so we recommend using this tool to locate the style to modify. Since there are many styles to browse through, we suggest trying to find an existing style that may be in the same "area" you are interest in (i.e., Medicine, Humanities, Management, etc.). Also, deselect the option to use your references when previewing output styles. Instead, use our default information to see the most complete definitions of every reference type for each style.

**Option to use your references as samples,  
or RefWorks' data as samples.**

The screenshot shows the RefWorks Output Style Preview Utility interface. At the top, there is a navigation bar with the RefWorks logo and the title 'Output Style Preview Utility'. Below this is a 'Preview' section with a dropdown menu set to 'Chicago 15th Edition (Notes & Bibliography)'. A checkbox labeled 'Use References from your account' is circled in red, with a red arrow pointing to it from the text above. Below the preview section, there are three sample text blocks: 'Abstract', 'Artwork', and 'Bills/Resolutions'. Each block contains 'Bibliography', 'In-Text Citation', and 'Notes' information. The 'Abstract' section shows a sample citation for 'Beutler, Earl Buford, C. Stempien, K. E. Schneider, S. G. Maybo III, Eileen P. Campbell, M. Dunie, and Tina Long'. The 'Artwork' section shows a sample citation for 'Beutler, Earl Buford, C. Stempien, K. E. Schneider, S. G. Maybo III, Eileen P. Campbell, M. Dunie, and Tina Long'. The 'Bills/Resolutions' section shows a sample citation for 'Capen, C. T. This would be the Title: Primary. 10. 1 sess. Journal of Irreproducible Results, no. 3, This would be the identifying phrase(June 19, 2001): 190-199, http://www.refworks.com (accessed January 1, 2003)'. The browser window title is 'Output Style Preview Utility - Microsoft Internet Explorer' and the address bar shows the URL 'http://www.refworks.com/Refworks/OSPreviewer.asp?format=313&selected=0&sampleD=true'.

#### Output Style Preview Utility

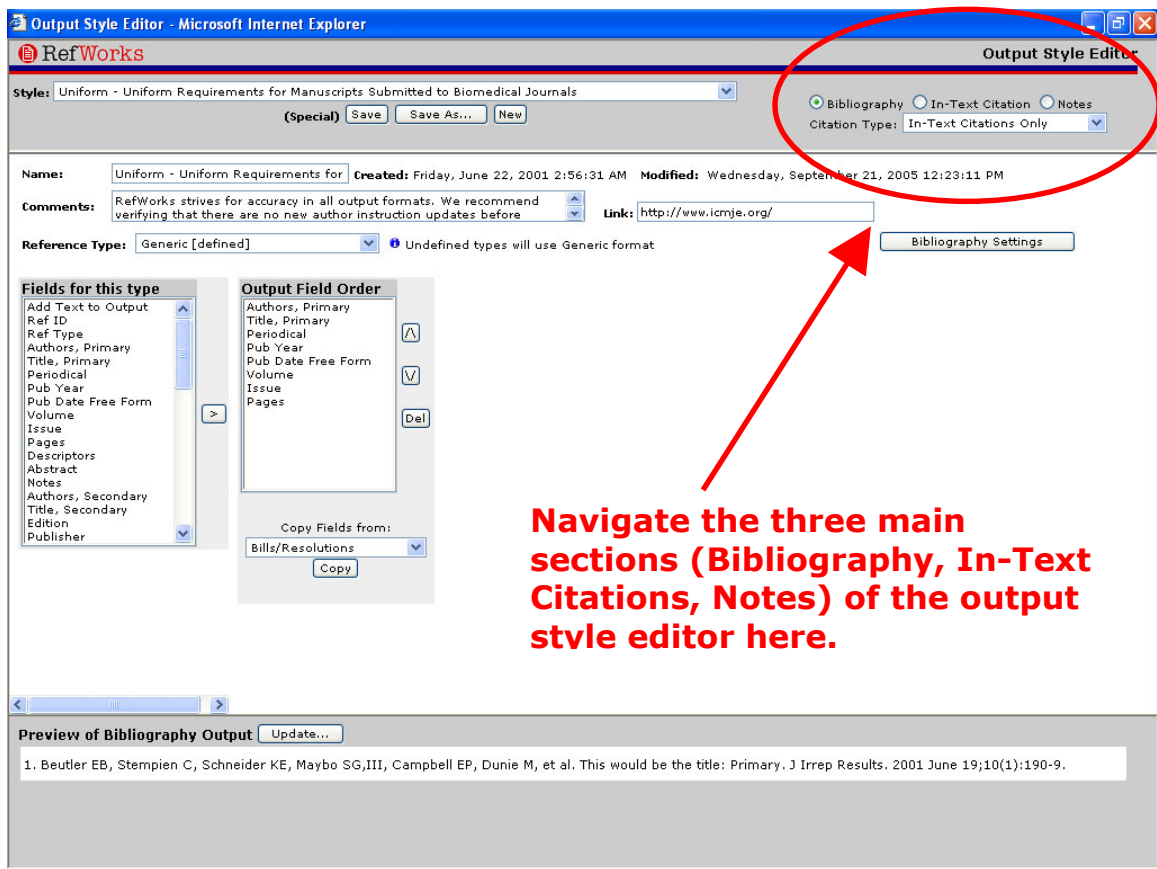
4. Once you have found a style to modify, you will need to access the Output Style Editor to make any modifications. To do this, go to the **Bibliography** area. Select the output style you wish to modify from the drop-down and click the **"edit"** button to the right of the drop-down. This will launch the Output Style Editor.

## Modifying an Output Style

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.

**Tip:** The RefWorks online help has detailed information on each of these three sections (check the section called Using the Output Style Editor). We suggest you read through the help files for a thorough understanding of all the options available to you.

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



**Navigate the three main sections (Bibliography, In-Text Citations, Notes) of the output style editor here.**

You can access each of the three sections here. For each of the three sections, there are two components:

- **The Settings:** There are overall settings for the Bibliography, the In-Text Citations and the Notes that determine line spacing, headings, sort order, etc. You determine the settings for each area as necessary.
- **The Format:** Each of the three areas (Bibliography, In-Text Citations and Notes) can have defined formats where you decide exactly which fields of information are used, the order of the fields, as well as any punctuation, spacing and text attributes for every reference type you need to have for your final output (i.e., a book, a journal, a web page, a dissertation, etc.).

All of these items need to be considered when creating or modifying a style.

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

The screenshot shows the RefWorks Output Style Editor interface. Red arrows point to various elements with labels:

- Reference Type drop-down**: Points to the dropdown menu at the top left.
- Rename style here**: Points to the **Name** field.
- Format**: Points to the **Fields for this type** and **Output Field Order** sections.
- Settings**: Points to the **Bibliography Settings** button.
- Citation Type**: Points to the **Citation Type** dropdown menu.
- Preview**: Points to the **Preview of Bibliography Output** section at the bottom.

1. Before you start to modify the style you have found, we suggest renaming it (it cannot be the same name as the original) and saving it. In the area that says **Name** (located just below the output style drop-down), type in your new name and click the **Save As** button located under the output style drop-down..
2. 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.

Now that you have located a style and renamed it, you are ready to modify it to meet your needs.

- Remember, there are two components to each style -- the Settings and the Format. You will need to check and/or modify any or all settings and defined formats to suit your needs.

To modify a style you will:

- Check the **Citation Type** to make sure it is appropriate for your output style.
  - For In-text citations with a bibliography at the end of the paper, select **In-Text Citations Only**.
  - For Notes at the bottom of each page or at the end of your document, select **Notes Only**. This feature works with your Word Processing software's footnote/endnote feature.
  - For a combination of in-text citations and footnotes, select **In-Text Citations and Notes** (also includes a bibliography if needed).
- Check the **Settings** (determine the overall layout and spacing and whether in-text citations are numeric). **Note:** In-text citations that are author-date are defined similarly to Formats (below). You will select fields and apply punctuation. Numeric in-text citations do not require any fields to appear in the **Output Field Order** column.

To access each of the Settings areas, you first select which section you want, then click on the Settings button and finally, create the settings.

The screenshot shows the RefWorks Output Style Editor interface. The window title is "Output Style Editor - Microsoft Internet Explorer". The RefWorks logo is in the top left. The main area is divided into several sections:

- Style:** Uniform - Uniform Requirements for Manuscripts Submitted to Biomedical Journals. Buttons: (Special) Save, Save As..., New.
- Citation Type:** Bibliography (selected), In-Text Citation, Notes. Citation Type: In-Text Citations Only.
- Name:** Uniform - Uniform Requirements for. Created: Friday, June 22, 2001 2:56:31 AM. Modified: Monday, October 03, 2005 3:26:02 PM.
- Comments:** RefWorks strives for accuracy in all output formats. We recommend verifying that there are no new author instruction updates before. Link: http://www.icmje.org/
- Reference Type:** Generic [defined]. Undefined types will use Generic format. **Bibliography Settings** button.
- Fields for this type:** A list of fields including Add Text to Output, Ref ID, Ref Type, Authors, Primary, Title, Primary, Periodical, Pub Year, Pub Date, Free Form, Volume, Issue, Pages, Descriptors, Abstract, Notes, Authors, Secondary, Title, Secondary, Edition, Publisher.
- Output Field Order:** A list of fields including Authors, Primary, Title, Primary, Periodical, Pub Year, Pub Date, Free Form, Volume, Issue, Pages. Buttons: Copy Fields from: Bills/Resolutions, Copy.
- Bibliography Settings:** Use \n for carriage return, \t for tab or \f for page break. Sort References By: In Order They Are Cited. Reference List Title: References.  Numbered List. Precede Number With: [text box]. Follow Number With: [text box].  Include empty fields in reference output. Indent Setting: None. Line Spacing: Double. For consecutive works by the same author(s) list all author names as usual. Precede Each Reference With: [text box]. Follow Each Reference With: [text box].
- Preview of Bibliography Output:** Update... 1. Beutler EB, Stempien C, Schneider KE, Maybo SG,III, Campbell EP, Dunie M, et al. This would be the title: Primary. J Irrep Results. 2001 June 19;10(1):190-9.

Three red arrows point to specific elements with text labels:

- 1. Choose Section** points to the "Bibliography" radio button.
- 2. Click on Settings button** points to the "Bibliography Settings" button.
- 3. Create Settings** points to the "Numbered List" checkbox.

- Check the **Formats**. Formats are created for each reference type example that is provided in the instructions to Authors. At a minimum, you MUST create a Generic format. To see which formats have been defined already, click on the reference type drop-down (located just above the Output Field Order box) and wherever you see **[defined]** next to a reference type, this is what the output style is using. At the bottom of the output style editor, you will see a preview pane. Changing the reference type from the **Reference Type** drop-down located above the **Fields for this Type** and **Output Fields Order** boxes will change the preview pane.

Reference type types that do not say [defined] next to them use the Generic format.

Remember, detailed information on formats and settings for each of the three sections (Bibliography, In-Text Citation and Notes) is available in the online help.

**Tip:** Make sure your final reference type format matches the examples in the Instructions to Authors . Look for the proper order of the elements, as well as punctuation and text attributes (bolding, italicizing and underlining) where appropriate.

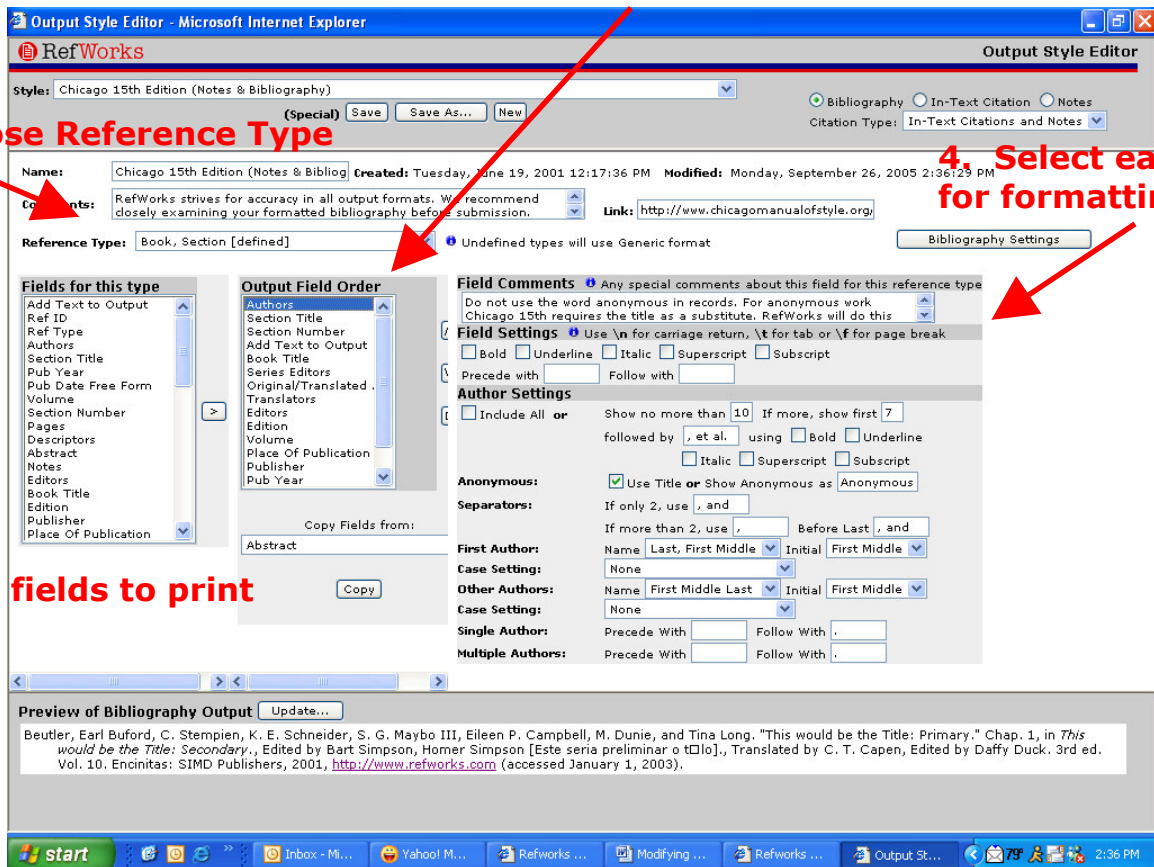
Click on any of the individual fields in the Output Fields Order box to change any established formatting. Each field will have its own **Field Settings** that you can modify. You can also use the up and down arrow buttons or the **del** buttons to change the order of the fields or remove a field completely. For details about the individual **Field Settings**, see the online help.

**3. Place fields in proper order.**

**1. Choose Reference Type**

**4. Select each field for formatting.**

**2. Select fields to print**



3. Once you have checked and modified your settings, make sure to save your changes. To locate your new style, click your browser's refresh button or click on the **Bibliography** button in RefWorks to load the updated output style selections. We suggest you generate a trial bibliography using your new style in the **Bibliography** area of RefWorks or view your style in using the **Output Style Preview Utility** (click on the **Preview Styles** button in the **Bibliography** area). Make sure you have references in your RefWorks database that will produce good results (i.e., complete records in a variety of reference types!)
4. Check the formatted citations and references. To make any further changes, locate the name of your output style in the **Bibliography** area of RefWorks and click on the **Edit** button.

## Sharing A Style With Others

Once you've created a style, how do you share it with other users? Well, There are two options for sharing output styles:

- Share one-to-one
- Post for all users in an institution.

### Sharing One-to-One

Any user can use the Backup feature (Tools, Backup/Restore) to export an output style (or styles) and email the style to other users (who would then use the Restore feature to put it in their account).

The screenshot shows the RefWorks web interface in Microsoft Internet Explorer. The browser title is "Refworks Web Based Bibliographic Management Software - Microsoft Internet Explorer". The address bar shows "http://www.refworks.com/Refworks/mainframe.asp". The RefWorks logo is visible at the top left, and the user is logged in as "Stephanie". The navigation menu includes "References", "Search", "View", "Folders", "Bibliography", "Tools", and "Help". The "Backup/Restore" section is active, with the "Backup" radio button selected. Below this, there are two columns of checkboxes for "Select Output Styles to Backup". The first column includes "Academy of Management Review SF" (checked), "Advances in Physiology Education SF" (checked), "AJP - Art and Circulation SF", "BAM - Bulletin of the American Meteorological Society SF", "BibTeX - RefWorks ID\*2", "BibTeX SF", "Canadian Journal of Forestry", and "IEEE - Institute of Electrical and Electronics Engineers, Hari". The second column includes "MLA 6th Edition my way", "Nurse Practitioner Journal", "Organization Science 2", "Organization Science 3", "SF APA, Annotated with Abstracts - American Psychological Association, 5th Edition", "sf Chicago 15th Edition (Notes & Bibliography)", "Uniform", and "Veterinary Dermatology". A "Perform Backup" button is located at the bottom of the form. Three red arrows point to the "Backup" radio button, the "Advances in Physiology Education SF" checkbox, and the "Perform Backup" button. Red text annotations are placed next to these arrows: "1. Choose Backup option", "2. Check styles to share.", and "3. Click Perform Backup button to save .zip file to your computer."

### Posting an Output Style for All Users in an Institution

The RefWorks Administrator can post a style for all users in their subscription to access. This is done in two parts – using the Master Administration account and the Administrator tool.

If you create your custom output style in the Master Administration account, you are one step ahead of the game. If not, use the Backup/Restore feature to move an output style into your Master Administration account.

