

# REFWORKS – EDITING AN OUTPUT STYLE USING THE OUTPUT STYLE EDITOR

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## 1. Introduction

The **Output Style Editor** in RefWorks allows you to create custom output styles by either creating a completely new style or modifying an existing output style to suit your needs.

An Output Style is any combination of in-text citations, notes (footnote or endnote) and a bibliography. You have to set up each section that is appropriate for your desired output.

There are two major components to every output style:

- **Settings:** There are 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.
- **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.

Before you begin to define or modify a style, we suggest locating the *Instructions to Authors* or *Style Guide* for the particular journal, publication or style format. This should provide you with the information you need to create your output style, as well as some sample references. In some cases, you may need to write the publisher of the journal or publication as the instructions will not provide you with enough detailed information to make sure your style is correct.

Here are some tips to help you:

- Go to the journal or publication's website and locate the **Instructions for Authors** (may also be called **Author's Guide**).
- In many situations, a publication's output style is based on one of the standard styles (i.e. *MLA*, *Chicago*, *APA*, *Uniform Requirements*, *CBE*, etc.). If your style is based on a style we currently have, then you need only to copy it by saving it with a new name. Even though some journals will say they are based on another style, they may have made some minor changes which you will need to make in your new style.
- Check any examples in the **Instructions for Authors**. These reference examples are what you will use to define and check your output against.
- Modifying a current style in RefWorks is the easiest way to create a custom style.

## 2. Modifying an Existing Output Style

The first thing you need to do is locate an existing output style that most closely matches the style you want.

**Note:** You cannot make changes to output styles that are site-wide (the name appears in black text). You can copy a style by saving it with a unique name (that will appear in red text) and then you can make changes. These *personal styles* will only appear in your RefWorks account.

Mac users will see the red text if using *Safari, Mozilla and Netscape*, but not with *IE 5.x*.

### Locating an Existing Output Style

1. Click on the **Bibliography** menu.
2. You will see the **Output Style** area at the top of the page – click the **Edit** button to the right of the style choices. This opens the **Output Style Editor**.
3. **Browse** the existing styles in the **Format** drop-down list at the top of the screen. A preview of a generic reference is displayed at the bottom of the screen. This will aid you in locating a style to modify.
4. Once you have found a style you want to use, you must rename it (the name cannot be the same as the original) in the area that says **Name**.
5. Click on the **Save As** button located under the **Format** drop-down box.
6. Your new style will now appear in the **Format** drop-down list in red lettering. Only you will see this style in your personal account.
7. Now that you have located a style and renamed it, you are ready to modify it to meet your needs.

### Style Components

There are two components to each style – the **Settings** and the **Format**. You will need to check all the settings and styles to make sure they are exact or similar to what you need.

To modify a style you will:

1. Check the Citation Type
2. Check the Settings
3. Check the Formats

#### 1. Checking the Citation Type

In the middle of the **Output Style Editor**, there is the **Citation Type** drop-down menu. The default **Citation Type** is **In-text Citation Only**. You have 3 options for the **Citation Type**, 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).

#### Checking the Settings

Check the output style settings by clicking on the tabs displayed in the middle, left of the output style editor.

Your style will have a combination of settings: **Bibliography** settings, **In-Text Citation** settings or **Notes** settings (this is determined by your selection in the **Citation Type** drop-down). Click on the **Settings** button for each section and check the information.

### Checking the Defined Formats

1. As you check each of the appropriate settings, you can also check the defined *Formats for the Bibliography*, the *In-Text Citations* and the *Notes* (as applicable to your output style).
2. Preview each formatted reference type that has been defined by selecting that type from the **Reference Type** drop-down menu located above the **Fields for this Type** and **Output Fields Order** boxes. Each reference type that has been set up for the output style will say (defined) after it. You can view it in the **Preview** area at the bottom of the screen. Make sure the formatted reference type 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.
3. Click on the appropriate link for detailed information on how to define a reference type for a *Bibliography*, *In-Text Citation* or *Notes*.

**Note:** In the Bibliography or Notes formatting, every output style **MUST** have at least a generic reference type defined. The generic reference type is used as a default and will be used by any reference in your database that does not find its appropriate reference type. You can modify the generic style, but we do not recommend deleting it. We recommend defining each reference type that you store in your database. This also applies to In-Text Citations when text information is included in the citation style.

If the In-Text Citation format requires numeric values only, then there will not be any defined reference types.

4. Click on each the individual fields in the **Output Fields Order** box to change any established formatting. 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.
5. You can add overall style comments or notes to yourself in the **Comments** area located below the name of your style. Do not include carriage returns in your comments.
6. You can also include a link to a web page (perhaps to the *Instructions to Authors* or *publication* website) in the **Link** area. Make sure you include the entire URL including the *http://*
7. Once you have checked and modified your settings and saved your changes, generate a trial bibliography using your new style in the **Bibliography** area of RefWorks.
8. Check the formatted citations and references. To make any further changes, locate the name of your output style in the Bibliography area and click on the **Edit** button.

### 3. Creating a New Output Style

You have the ability to build an output style in its entirety (i.e. not copying an existing style).

**Tip:** Before starting, make sure to have the **Instructions to Authors** available.

To create a new output style:

1. Go to the **Output Style Editor** by clicking the **Bibliography** button.
2. Click **Edit** to open the Output Style Editor.
3. To create a new output style, select **Create a New Output Style** from the **Style** list.
4. In the **Name** box, type the name of the new style and click **Save**.
5. You can add comments or notes to yourself in the **Comments** area located below the name of your style. Do not include carriage returns in your comments.
6. You can also include a link to a web page (perhaps to the *Instructions to Authors* or *publication* website) in the **Link** area. Make sure you include the entire URL including the *http://*

#### Style Components

There are two components to each style – the **Settings** and the **Format**. You will need to check all the settings and styles to make sure they are exact or similar to what you need.

To modify a style you will:

1. Check the Citation Type
2. Check the Settings
3. Check the Formats

#### Determining the Citation Type

The **Citation Type** is selected from a drop-down box in the middle area of the output style editor.

- 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). Determine your **Citation Type** from the drop-down box in the upper right-hand corner.

#### Establishing the Settings

Define the overall output style settings by clicking on the **Bibliography**, **In-Text Citations** and/or **Notes** tabs and clicking on the **Settings** buttons. These settings determine spacing, sort order and other information. Your style will have a combination of settings: Bibliography settings, In-Text Citation settings or Notes settings (this is determined by your selection in the Citation Type drop-down). Click on the **Settings** button for each section you need and select the appropriate setting information.

#### Defining the Formats

1. You will need to define each reference type needed for your **bibliography format**, **in-text citation format** and/or **notes** format (or as provided in the *Instructions to Authors* examples). You must tell RefWorks exactly which fields to include and how each field should appear (e.g. *Journal Name* should be included and must be italicized. Every space, period,

comma, etc. must be defined. We recommend that periodically you update the preview section to be sure you are moving forward correctly.

**Note:** In the Bibliography or Notes formatting, every output style style **MUST** have at least a generic reference type defined. The generic reference type is used as a default and will be used by any reference in your database that does not find its appropriate reference type. You can modify the generic style, but we you are not recommend to delete it. It is recommended that you define each reference type that you store in your database. This also applies to In-Text Citations when text information is included in the citation style.

If the In-Text Citation format requires numeric values only, then there will not be any defined reference type formats.

1. Preview each reference type that has been defined by selecting that type from the **Reference Type** drop-down located menu above the *Fields for this Type* and *Output Fields Order* boxes. Each reference type that has been set up for a particular format will say (defined) after it.
2. Once you have created your various settings and formats and saved your changes, generate a trial bibliography using your new style in the **Bibliography** area of RefWorks.
3. Check the formatted citations and references. To make any further changes, locate the name of your style in the **Bibliography** area and click on the **Edit** button.