



Ready Reference Guide

Modifying an Output Style

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Modifying an Output Style

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Modifying 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* (something over which you have no control). The more detailed the instructions, 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 “experiment” 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

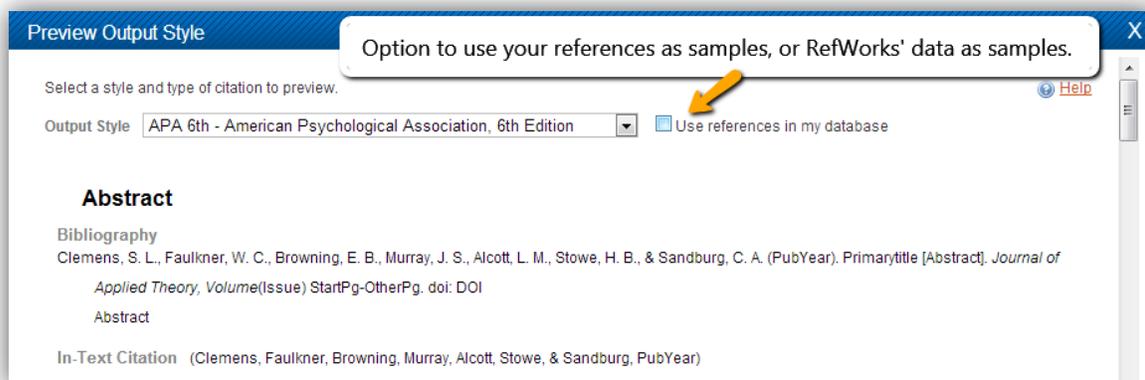
1. Before you begin creating a style, you need to locate the **Instructions to Authors** for the journal style you want to create (or have any manual ready for the larger styles).

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** (Bibliography > Preview Output Style) or by simply opening the **Output Style Editor** (Bibliography > Output Style Editor).

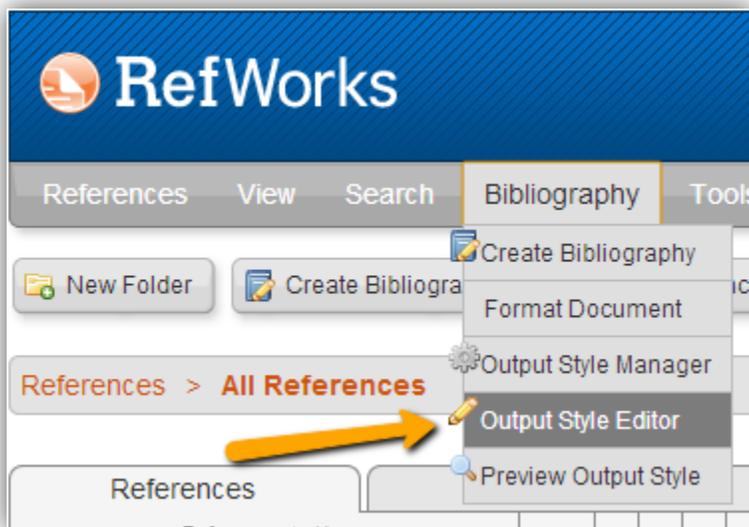
The **Output Style Preview** is the easiest way to see both in-text citations and bibliography entries for many reference types all on one page, so we recommend using this tool to locate the style to modify.

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.



Output Style Preview

- 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** menu and select the **Output Style Editor** entry.

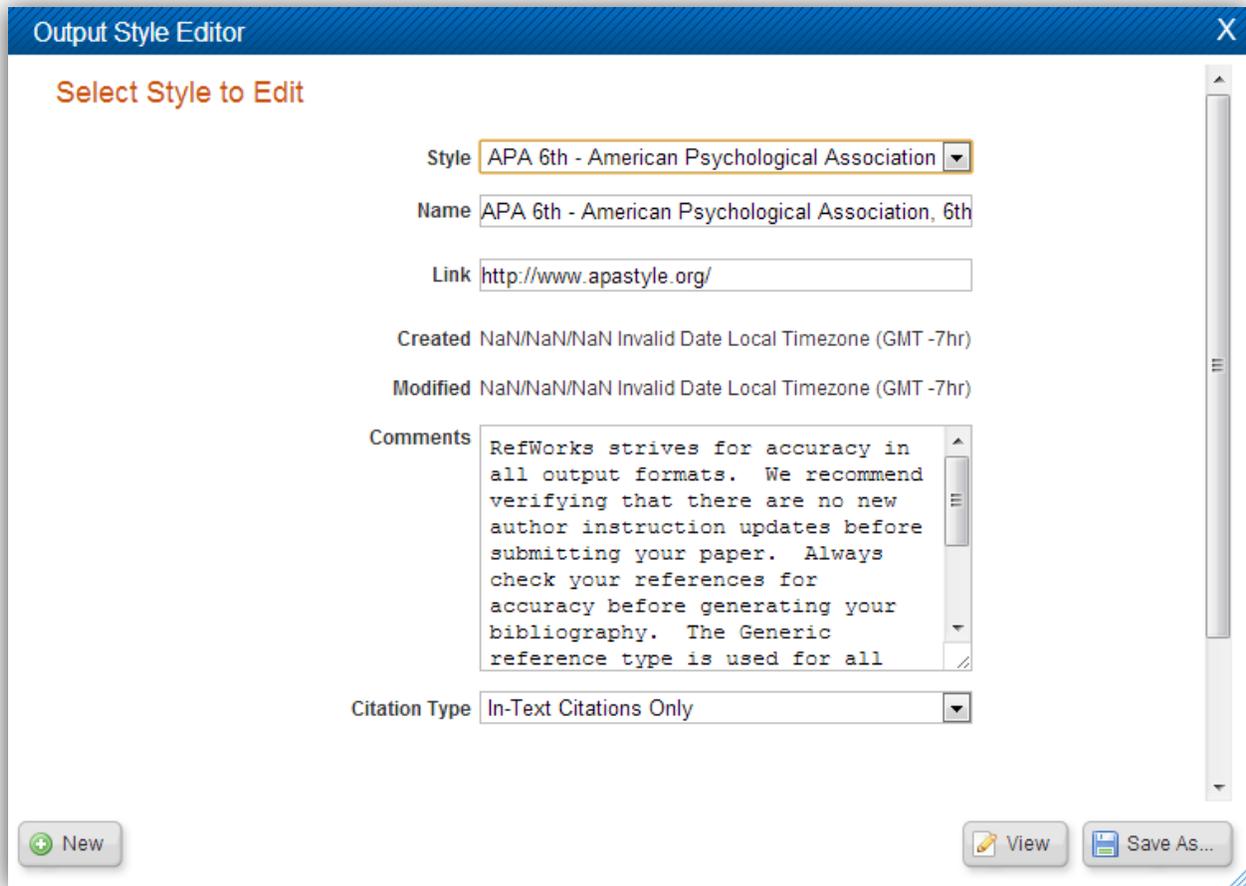


Modifying an Output Style

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.

*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.*

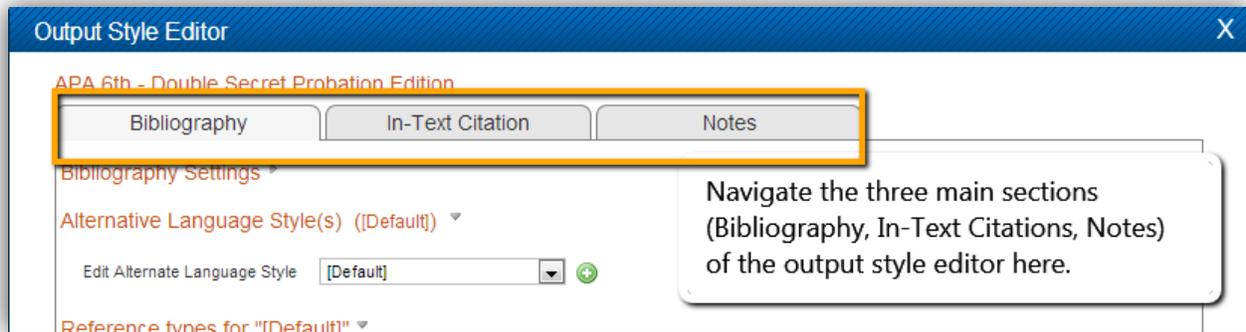
Here's how the output style editor looks when you first open it:



Before modifying the style, you will need to rename it (it cannot be the same name as the original) and save it. In the area that says **Name** (located just below the output style drop-down), type in a new name and click the **Save As...** button in the lower right of the window. This creates a copy of the RefWorks style you may modify.

Also note the presence of the **Citation Type** drop-down menu which lists the three types of citation formats the style may use:

- 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 notes, select **In-Text Citations and Notes** (also includes a bibliography if needed).



Each style can be comprised of up to three basic sections. In most cases, only two will be used – **Bibliography** and **In-Text Citation**.

You may access each of the three sections by clicking on the appropriate tab (shown above). The output style editor will open to the bibliography section by default.

For each of the three sections, there are two main components:

- **Settings:** These are the 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.
- **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.

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.

Familiarize yourself with the following illustration and the different areas highlighted. Also take note of the **Reference types for...** list and the **Preview of Bibliography Output** at the bottom of the window.

Output Style Editor X

APA 6th - Double Secret Probation Edition

Bibliography | In-Text Citation | Notes

Bibliography Settings Settings

Alternative Language Style(s) ((Default))

Edit Alternate Language Style [Default] +

Reference types for "[Default]" Reference Type list

Reference Type: Generic [defined]
Abstract [defined]
Artwork
Bills/Resolutions [defined] i Undefined types will use Generic format

Fields for this type

- User 4
- Add Text to Output
- Ref ID
- Ref Type
- Authors, Primary
- Authors, Secondary
- Authors, Tertiary
- Title, Primary
- Title, Secondary
- Title, Tertiary
- Descriptors
- Pub Year
- Pub Date Free Form
- Periodical
- Volume
- Issue
- Pages
- Other Pages
- Edition
- Publisher

Output Field Order

- Authors, Primary
- Pub Year
- Authors, Secondary
- Title, Primary
- Original/Translated Title
- Authors, Quaternary
- Edition
- Place of Publication
- Publisher
- DOI
- Links

Copy Fields from:

Abstract Copy

Format

Field Comments i Any special comments about this field for this reference type

If no author is present RefWorks will print the title. Author names

Field Settings i Use \n for carriage return or \t for tab

Include Field: Always

Bold Underline Italic Superscript

Subscript

Precede with Follow with

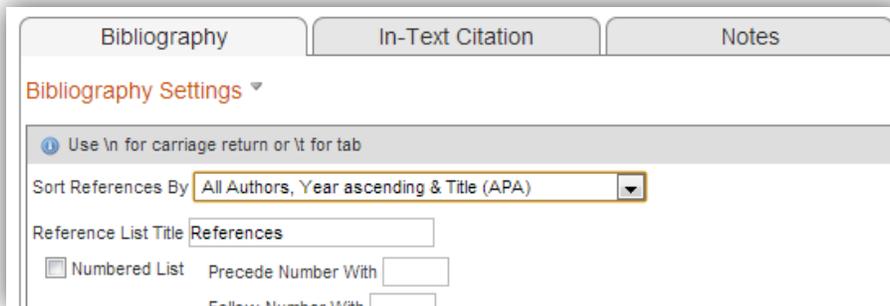
Preview of Bibliography Output Update...

Clemens, S. L., Faulkner, W. C., Browning, E. B., Murray, J. S., Alcott, L. M., Stowe, H. B., & Sandburg, C. A. (PubYear). In Emerson R. W., Yeats W. B. and Frost R. L.(Eds.), *Primarytitle* [OriginalForeignTitle] (H. D. Thoreau, E. E. Dickenson Trans.). (Edition ed.).

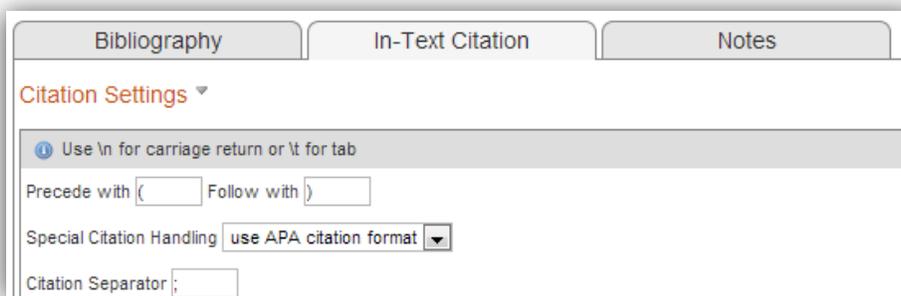
Preview Back Delete Save Save As...

To modify the style you will:

- Check the **Settings** of the style to determine the overall layout and spacing and whether in-text citations are numeric) To access each of the **Settings** areas, you first select which section you want by clicking on the appropriate tab, then click on the **Settings** heading.



The screenshot shows the 'Bibliography Settings' panel. At the top are three tabs: 'Bibliography', 'In-Text Citation', and 'Notes'. The 'Bibliography' tab is selected. Below the tabs is the heading 'Bibliography Settings' with a dropdown arrow. A help icon and the text 'Use \n for carriage return or \t for tab' are visible. The 'Sort References By' dropdown menu is open, showing 'All Authors, Year ascending & Title (APA)'. Below this is a text input field for 'Reference List Title' containing the word 'References'. There is a checkbox for 'Numbered List' which is unchecked, and two text input fields for 'Precede Number With' and 'Follow Number With'.

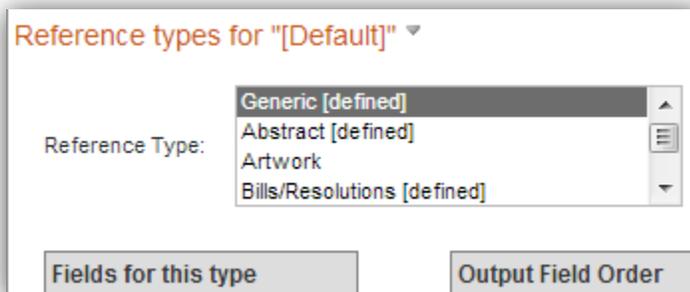


The screenshot shows the 'Citation Settings' panel. At the top are three tabs: 'Bibliography', 'In-Text Citation', and 'Notes'. The 'In-Text Citation' tab is selected. Below the tabs is the heading 'Citation Settings' with a dropdown arrow. A help icon and the text 'Use \n for carriage return or \t for tab' are visible. There are two text input fields for 'Precede with { ' and 'Follow with }'. Below these is a dropdown menu for 'Special Citation Handling' set to 'use APA citation format'. At the bottom is a text input field for 'Citation Separator ;'.

Note: *In-text citations that are author-date are defined similarly to **Formats** (below). You will select fields and apply punctuation and spacing. Numeric in-text citations do not require any fields to appear in the **Output Field Order** column.*

- Next check the **Formats** of your reference types. Formats are created for each reference type based upon examples provided in the *Instructions to Authors*. The format is the definition for all aspects of the each reference type's presentation and it can be different from reference type to reference type.

At a minimum, you **MUST** create a definition for the *Generic* reference type's format. To see which formats have been defined already, scroll through the reference types list (located just above the **Output Field Order** box). Wherever you see **[defined]** next to a reference type, this is a reference type the output style will using.



The screenshot shows the 'Reference types for "[Default]"' panel. It features a list of reference types: 'Generic [defined]', 'Abstract [defined]', 'Artwork', and 'Bills/Resolutions [defined]'. The 'Generic [defined]' type is highlighted. Below the list are two buttons: 'Fields for this type' and 'Output Field Order'.

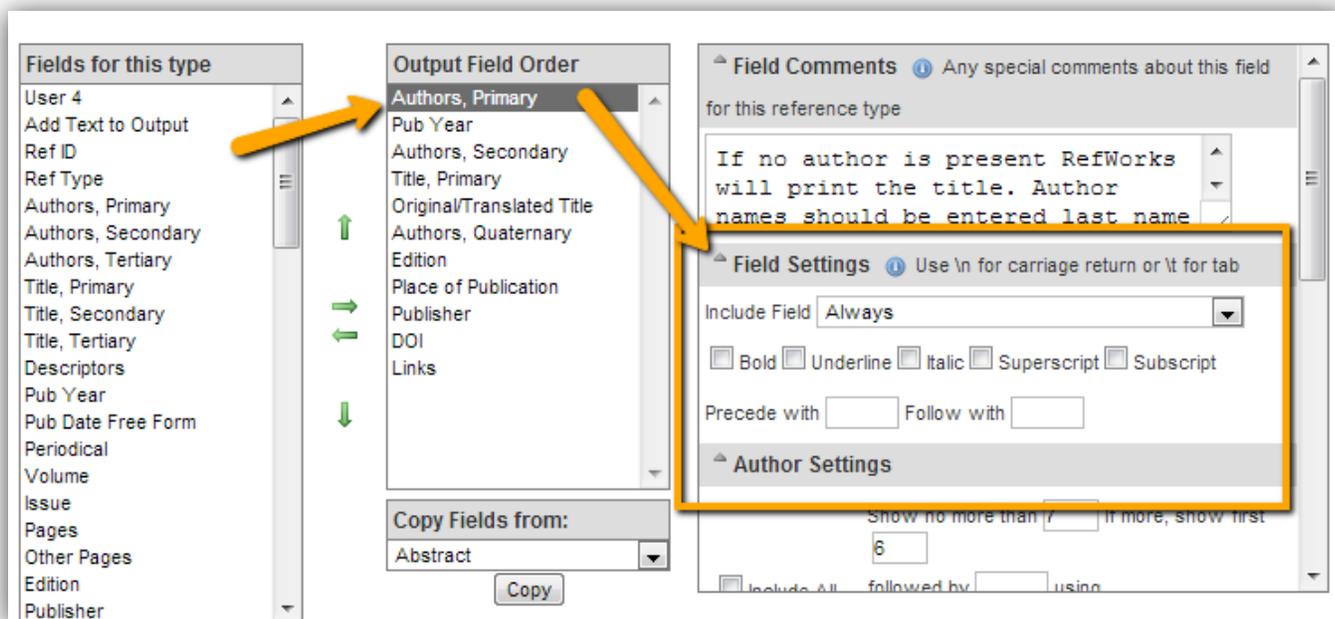
- At the bottom of the output style editor, you will see a preview pane. Changing the reference type from the **Reference Type list** located above the **Fields for this Type** and **Output Fields Order** boxes will change the contents of the preview pane.

Reference types that do not say **[defined]** next to them use the **Generic** reference type's format by default.

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: To make sure the final result of your modifying the reference type format matches the examples in the *Instructions to Authors*, look for the proper order of the elements (output fields), as well as any punctuation, spacing and text attributes (bolding, italicizing and underlining) where appropriate.

Click on any of the individual fields in the **Output Field 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 or the right and left arrow buttons to change the order of the fields, or, to add or remove a field completely. For details about the individual **Field Settings**, see the online help.



Once you have checked and modified your formatting, make sure to save your changes!

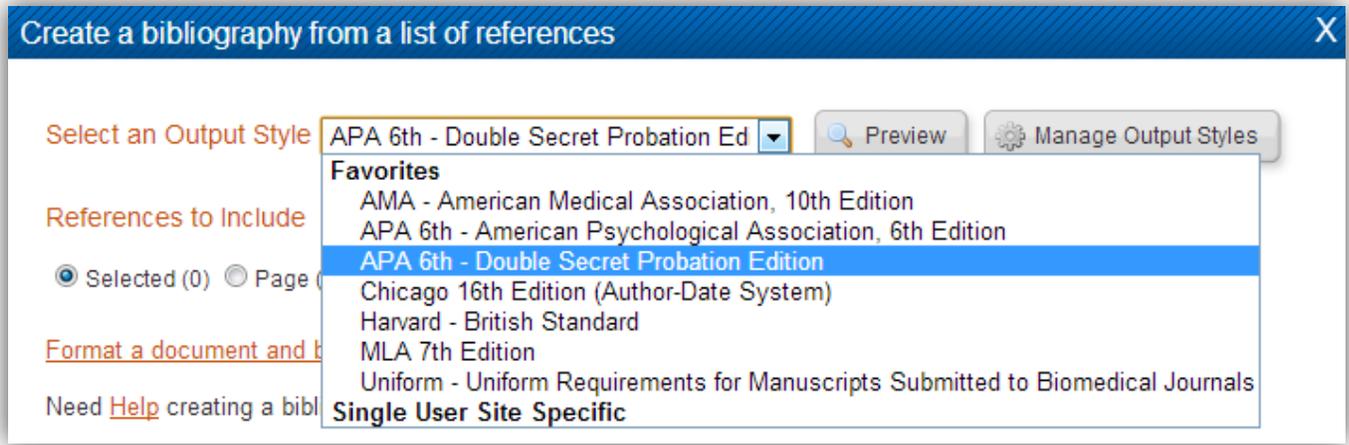
Modified output styles are automatically added to the **Output Style Manager** (Bibliography > Output Style Manager) on the list of **Favorites** in your account. The new style may be displayed in red type depending on your internet browser.

The screenshot shows the 'Output Style Manager' window. At the top, there are navigation links: 'List of Output Styles', 'Request New Output Style', and 'Edit Output Style', along with a 'Help' link. Below these is a search bar and a 'Show All' dropdown menu. The main area is divided into two columns: 'List of Output Styles' and 'Favorites'. The 'List of Output Styles' column contains a scrollable list of styles including '3 Biotech', 'AAAR - Arctic, Antarctic, and Alpine Research', 'AACC - American Association of Cereal Chemists', 'AAPG - American Association of Petroleum Geologists', and 'AAPS - American Association of Pharmaceutical Scientists'. The 'Favorites' column contains a scrollable list of styles including 'AMA - American Medical Association, 10th Ed', 'APA 6th - American Psychological Association', 'APA 6th - Double Secret Probation Edition' (highlighted in red), 'Chicago 16th Edition (Author-Date System)', and 'Harvard - British Standard'. A text box on the right states: 'Your favorite output styles are what you can easily access when working in RefWorks and Write-N-Cite.'

The new style will also appear in the list of styles from which you may format your document's in-text citations and references.

The screenshot shows the 'Format a document and bibliography' window. At the top, there is a 'Select an Output Style' dropdown menu currently set to 'APA 6th - Double Secret Probation Ed'. To the right of the dropdown are 'Preview' and 'Manage Output Styles' buttons. Below the dropdown is a list of styles under the heading 'Favorites': 'AMA - American Medical Association, 10th Edition', 'APA 6th - American Psychological Association, 6th Edition', 'APA 6th - Double Secret Probation Edition' (highlighted in blue), 'Chicago 16th Edition (Author-Date System)', 'Harvard - British Standard', 'MLA 7th Edition', and 'Uniform - Uniform Requirements for Manuscripts Submitted to Biomedical Journals'. Below this list is the heading 'Single User Site Specific'. At the bottom, there is a link: 'Create a bibliography from a list of references instead of formatting a document.' and a text box: 'Need Help creating a bibliography?'.

And you will also find your new style listed with other styles from which you may create a stand-alone bibliography.



We suggest you generate a trial bibliography using your new style from the **Create a Bibliography from a List of References** or view your style in using the **Output Style Preview** both accessed via the **Bibliography** menu.

Make sure you have references in your RefWorks database that will produce good results, i.e., complete and accurate records in a variety of reference types!

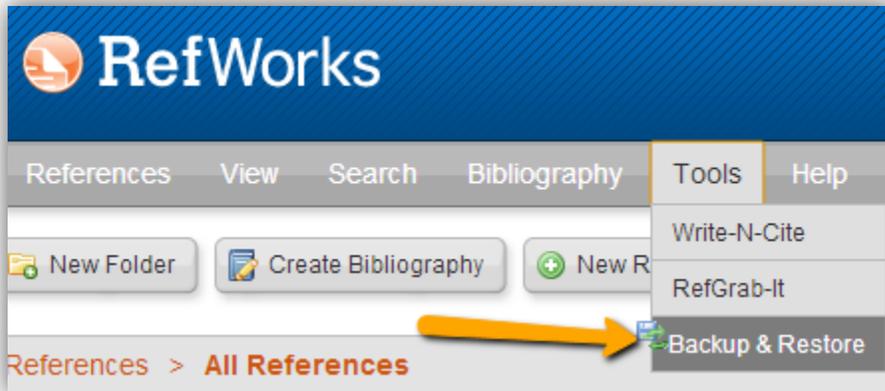
Check the formatted citations and references. To make any further changes, locate your output style using the **Output Style Editor** and select the **Edit** button again.

Don't forget to save as you work and when you are finished to ensure your work is not lost.

Sharing Modified Output Styles

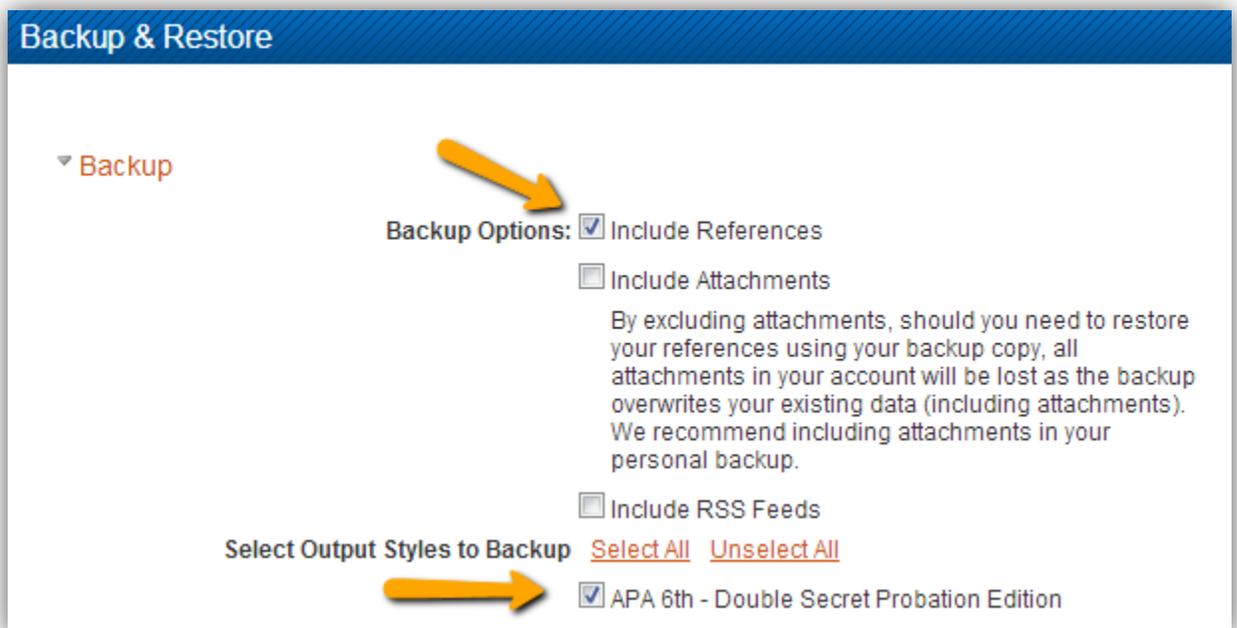
Backing Up a RefWorks Database

1. From the **Tools** menu select **Backup & Restore**

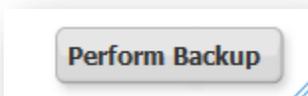


2. Click on the **Backup** heading, and then select only **Include References** and the modified styles you intend to share.

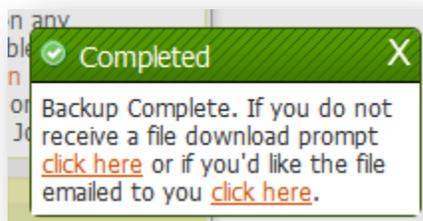
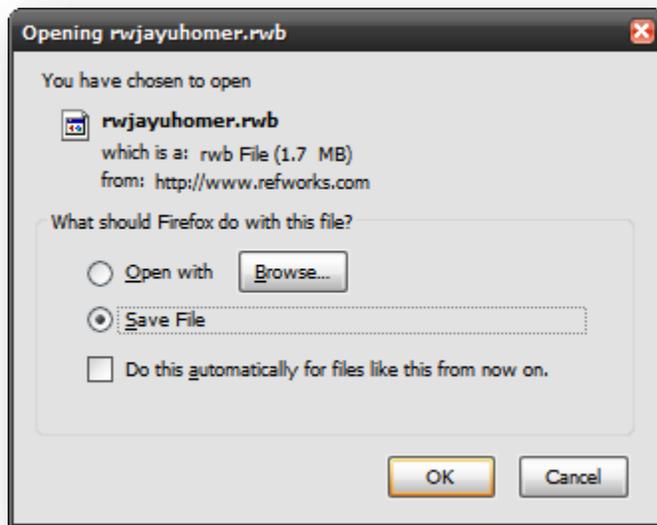
By default, all modified styles in your account are selected for backup. You may deselect any you do not wish to share.



3. Click on **Perform Backup**



4. Save the file when prompted. If you are not prompted to save the file, click the link that says **Click here to save your backup file** to download the backup to your computer.



The backup file will be saved as a ZIP or RWB file that can be attached to an email or shared using another method.

Please do not change the extension of the file as it is necessary to the restore process used to import the style.

Please do not attempt to open the file. It is password protected to prevent corruption of the contents.

Importing a Custom Output Style

1. Save the RWB/ZIP file provided to you by your colleague on your computer in a location that is easy to find like the desktop.

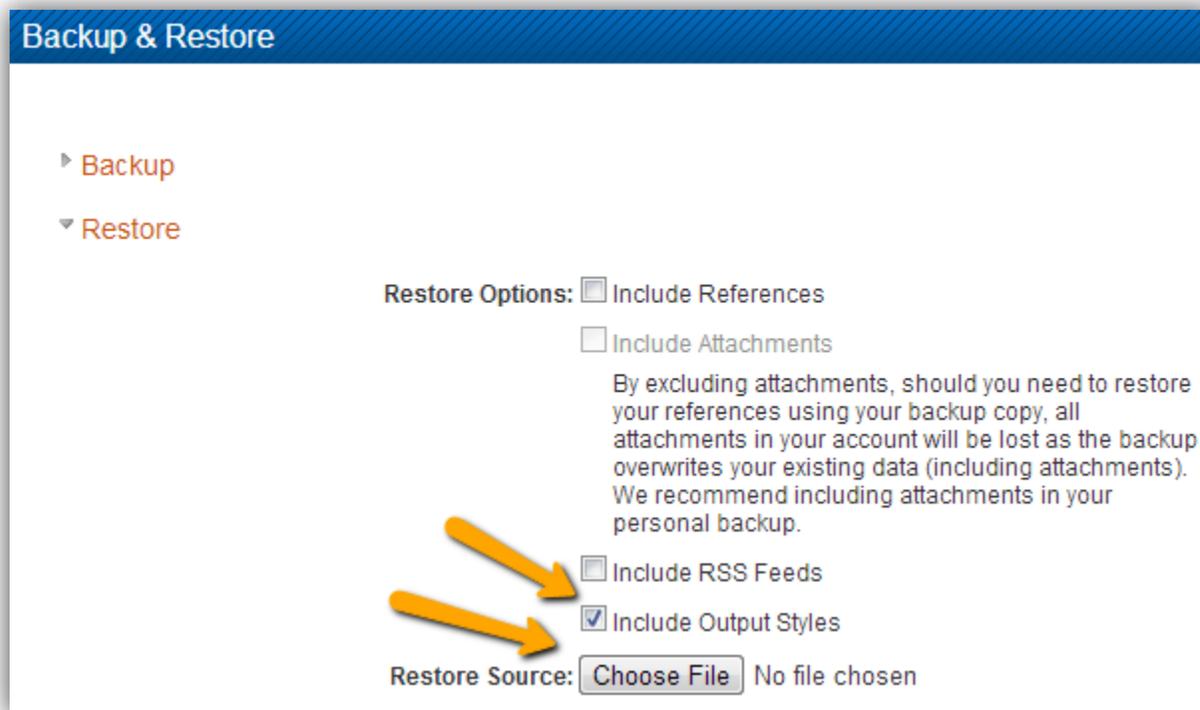
Please do not change the extension of the file as it is necessary to the restore process used to import the style.

Please do not attempt to open the file. It is password protected to prevent corruption of the contents.

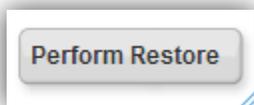
2. From the **Tools** menu select **Backup & Restore**



3. Select the **Restore** heading, mark the **Include Output Styles** option then select the **Choose File** or **Browse** button and select the file sent to you by your colleague that should be saved on your computer



4. Select the **Perform Restore** button to import the backup file that contains the custom output style



The result will be a new entry in your output style list that may appear in red. It can be used in same manner as any other output style on that list.

Note: *You will have to add the new output style to your list of available styles using the **Output Style Manager**. Enter and search for the name of the new output style and add it as a **Favorite**.*