

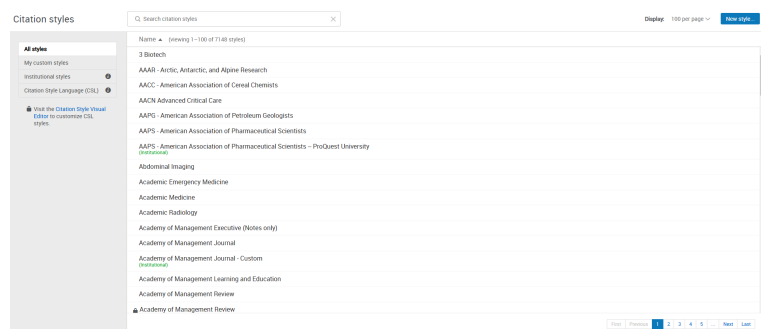
## Managing Citation Styles

Citation styles define how references appear in a document. RefWorks comes with thousands of out-of-the-box citation styles, including styles from the open source [Citation Style Language \(CSL\) project](#). You can edit all out-of-the-box styles and create your own custom styles.

A style can contain multiple formats:

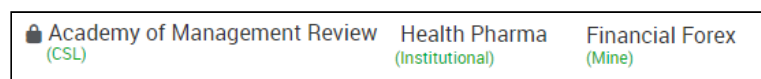
- Bibliography Format – How the reference appears in a bibliography.
- Citation Format – How the reference appears in an inline citation.
- Footnote Format – How the reference appears in a footnote citation.

You manage citation styles in the Citation styles page ([Create Bibliography > Citation Style Editor](#)).



### Citation Styles

The styles on this page include out-of-the-box styles created by RefWorks, out-of-the-box CSL styles, personal custom styles that you have created and and institutional styles shared by your RefWorks administrators.



### Styles

To view or edit a style, search for and select the style.

### Note

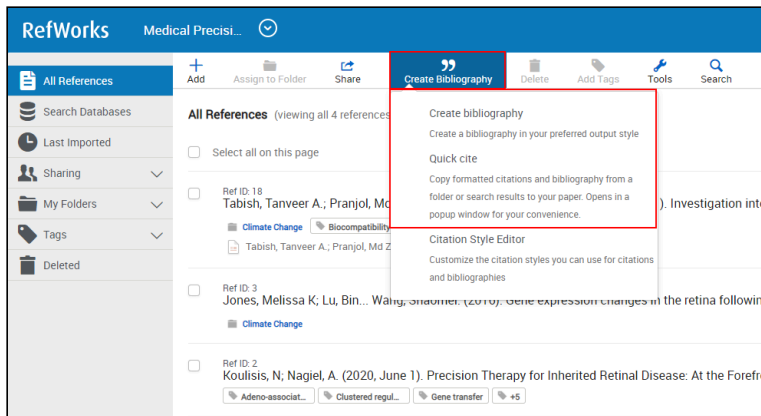
If you are an administrator, you can define default styles for your users and you can share your personal citation styles as institutional styles.

See [Managing Citation Styles for Admins](#).

## Selecting Citation Styles

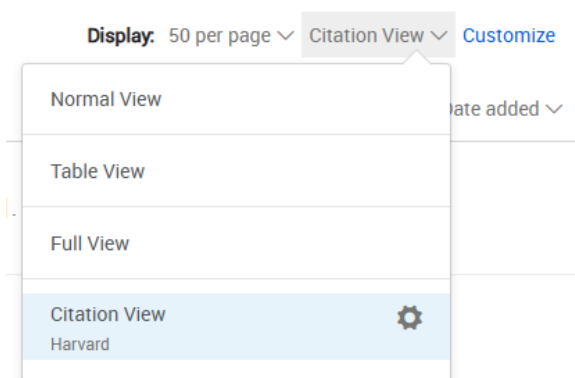
You select a citation style in one of the following ways:

- In RefWorks, under [Create Bibliography > Create Bibliography](#) or [Quick Cite](#).



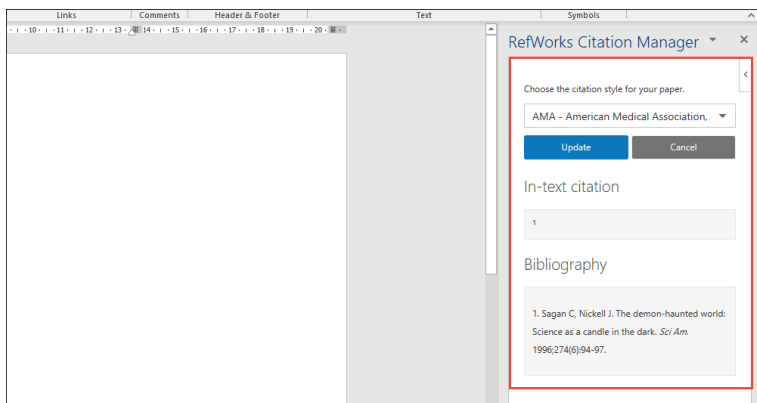
### Selecting a Citation Style from Create Bibliography

- In RefWorks, in **Citation View**.



### Selecting a Citation Style from Citation View

- Using the RefWorks writing tool add-ons, such as the RefWorks Citation Manager Word add-on.



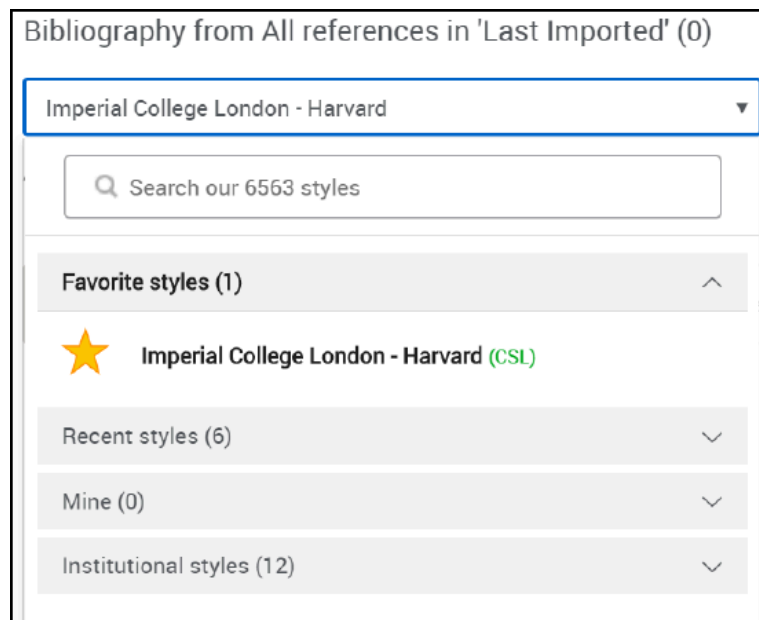
### Selecting a Citation Style from the RefWorks Citation Manager

There are four lists that help you find styles:

- Favorite styles
- Recent styles
- Mine - (a list of custom, personal styles)

- Institutional styles (set by an Admin).

You can mark a style as a favorite by selecting the star icon next to the style in a list. The style then appears in the Favorite styles drop-down list, which appears if there is at least one style marked as a favorite. To remove a favorite from the list, clear the star icon. The style is removed from the Favorites list when RefWorks is refreshed. If the required style is not in one of these lists you can search all styles by starting to type the style name in the search box.



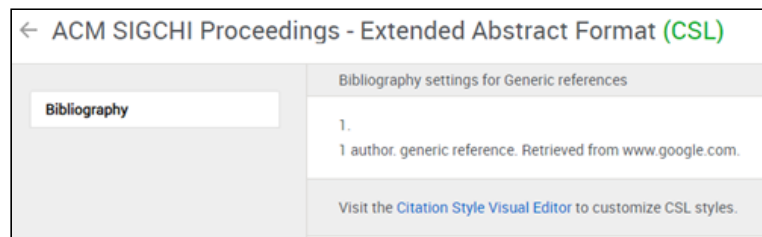
### Favorite Styles

When selecting styles in RefWorks, they display as recent in the writing tool add-ons.

## Editing CSL Citation Styles

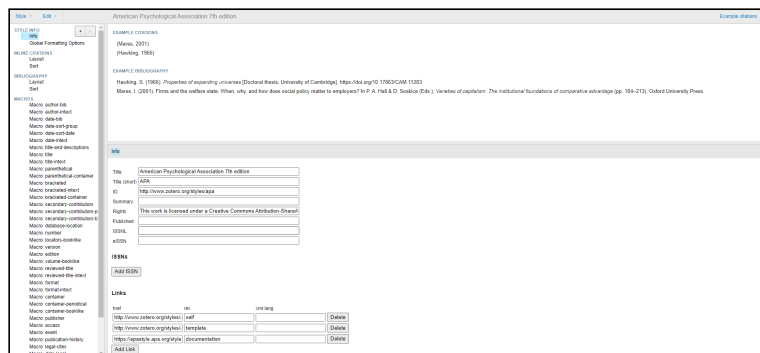
### To edit a CSL citation style:

1. On the Citation styles page (**Create Bibliography > Citation Style Editor**), search for and select the style. A simple style details page appears.



### Citation Style CSL, Details

2. Select **Citation Style Visual Editor**. You are directed to the CSL website where you can edit the style using their interactive visual editing tool. For more information about this tool, follow their on-screen instructions.



### Citation Style CSL, Details

3. CSL styles are updated daily in RefWorks; there is no need to manually add the edited style to RefWorks.

## Creating Custom Citation Styles

You can create personal, custom citation styles. If you just need to make a few changes, the easiest way is to edit an existing style. If you need to create a style is not similar to an existing one, the easiest way is to start from scratch.

### Note

When editing an out-of-the-box style, save a copy of the style before making changes.

## Starting with Existing Styles

To create a custom style by editing an existing style:

1. Copy an existing style in one of the following ways:
  - A. On the Citations style page ([Create Bibliography > Citation Style Editor](#)) search for and select the style. Select **Options > Duplicate**. Enter the new style name and select **Create duplicate**.
  - B. On the Citations style page ([Create Bibliography > Citation Style Editor](#)) search for and select the style. Select **Save a copy**. Refworks duplicates the style with a default name, which you can edit.
  - C. On the Citations style page ([Create Bibliography > Citation Style Editor](#)), select **New Style**. Make sure the checkbox **Copy settings from existing style** is checked and search for and select the style. Enter the new style name and select **Create**.
2. Continue with editing the style as described below in [Editing Custom and Out of the Box Styles](#).

## Starting from Scratch

To create a custom style from scratch:

1. On the Citation styles page ([Create Bibliography > Citation Style Editor](#)), select **New style ...**. The **Create citation style** pane appears.

### Create citation style

2. Clear the checkbox **Copy settings from existing style**.
3. Enter a name for the new style.
4. Select **Create**. Continue with editing the style as described below in [Editing Custom and Out of the Box Styles](#).

## Editing Custom and Out of the Box Styles

### Note

When editing a personal citation style that was a duplicate of another style, you can revert to the original style: select **Options > Revert to original** and select **Yes**.

### To edit a custom or out-of-the-box citation style:

1. Search for and select the style. A page with style details appears.

### Citation Styles, Details

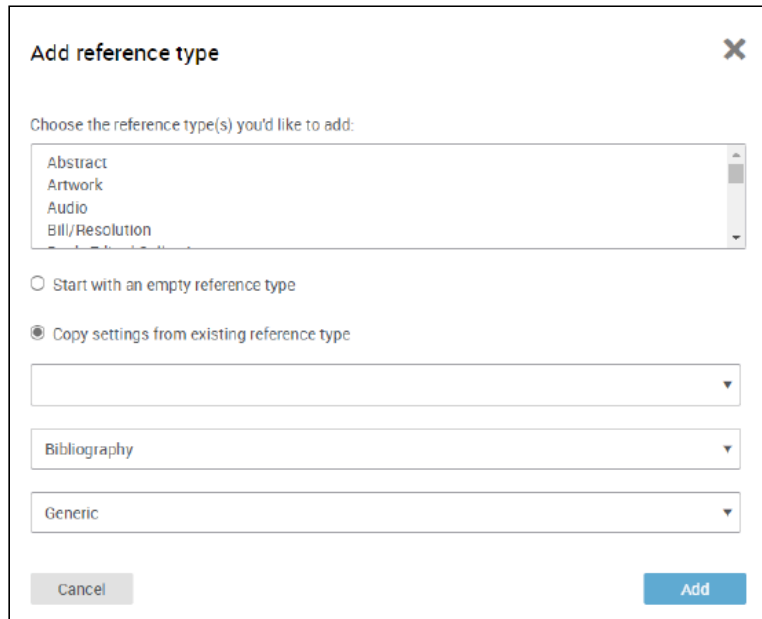
This page has six main areas:

- 1 – Style format: **Bibliography**, **Citations**, or **Footnotes**
- 2 – Reference type: **Generic**, **Journal Article**, and so forth
- 3 – Language option
- 4 – A sample reference using the current format, reference type, and language

5 – The fields included using the current format, reference type, and language

6 – Field formatting pane

2. To rename the style: click on the style name and type in the name, or select **Options > Rename**.
3. **Add Reference Types:** Add reference types by selecting **+** in the relevant area. You can select multiple types using Ctrl.



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### Note

When starting from a blank style (see [Starting from Scratch](#)) you need to add at least one reference type.

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To design a reference type from scratch, select **Start with an empty reference type**.

To copy the design of an existing reference type, select **Copy settings from existing reference type** and select the type from the drop down list. The formatting of this reference type will apply to all selected types. For example if the **Author** field is set to Bold, the corresponding fields in these types will be Bold as well. You can then edit specific types if adjustments are needed.

4. **Edit Reference Types:** Select the format, reference type, and language you want to edit.
  - A. In the fields bar, drag and drop the fields to change their order. Select **+** to add a new field or to add plain text. Select a field or text box and then select **X** to remove the field or text. When you select a field or text box, the element's configuration expands in the formatting pane below the fields bar (6 in the style details page).
  - B. In the formatting pane, edit the citation in the selected format (Bibliography, Citations, Footnotes). The formatting pane changes depending on the selected format, e.g., if Bibliography is selected then the Bibliography Settings window displays.
  - C. Select the **+** icon to expand the **Settings** window.

Bibliography Settings

Bibliography title

Use numbered list

Add to reference  [reference]

After bibliography

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Sort

Indent

Line spacing

---

Include empty fields in reference output

Apply APA rules for Electronic Source field inclusion

Works by the same author(s)

### Bibliography Settings

Citations Settings

Citation Format

Sort

---

Use only reference numbers in citations

Use number ranges. Separated ranges using

---

Use APA citation format

### Citations Settings

Footnotes Settings

Note separator

Line spacing

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Include references in bibliography

Repeated references

Consecutive references

Consecutive sources

### Footnotes Settings

- D. Select a field or text title to edit it as required. For information about the various options, see [Field Parameters](#).
- E. To add a language, enter the language you want to add. Select whether to start with a blank configuration or copy another language (recommended). When you are done select **Add**. The type of language is added to the relevant pane.

### Alternative language group

To delete a language, select the settings icon next to it and select **Delete**.

A citation style must have a definition for at least one format in the **Generic** reference type and the default language.

5. **Delete Reference Types:** To remove a reference type, select the trash can next to it.
6. If you are editing an out-of-the-box style, select **Save a Copy** to save your changes as a new custom (personal) style. If you are editing a custom style, select **Save** to save your changes.

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## Deleting Custom Citation Styles

You cannot delete out-of-the-box styles.

### To delete a custom citation style:

On the Citation styles page (Create **Bibliography > Citation Style Editor**), search for and select the style. Select **Options > Delete** and select **Yes** in the confirmation dialog box.

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## Field Parameters

For the full list of fields refer to [RefWorks Reference Fields and Types](#). The following table presents non-obvious field parameters. Hover over a field in the UI to see a tooltip with additional information.

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### Note

For any text parameter, use \t to indicate a tab and \n to indicate a new line. To add line break (carriage return) refer to [this article](#).

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Citation Style Field Parameters

Field	Parameters	Notes
Bibliography Settings	<ul style="list-style-type: none"> <li>• Bibliography title – Title that displays before the bibliography</li> <li>• Use numbered list – Number each bibliography entry; numbering starts at 1. When selected, you can also define text that displays before and/or after each number.</li> <li>• Add to reference – Text that displays before and/or after each reference.</li> <li>• After bibliography – Text that displays after the bibliography.</li> <li>• Include empty fields in reference output – Include an empty string (and any configured text elements) for any missing reference field.</li> <li>• Apply APA rules for Electronic Source field inclusion – See tooltip.</li> </ul>	
Citations Settings	<ul style="list-style-type: none"> <li>• Citation Format – Text that displays before and/or after the reference.</li> <li>• Sort – The order in which multiple references are listed in the citation.</li> <li>• Use only reference numbers in citations – Include only the bibliography number, not the entire formatted reference. To handle number ranges, configure <b>Use number ranges</b> as well.</li> <li>• Use APA citation format – See tooltip.</li> </ul>	
Footnote Settings	<ul style="list-style-type: none"> <li>• Note separator – How to separate notes cited together. For example, to cite 12 use ; as a separator.</li> <li>• Include references in bibliography – Automatically include footnote citations in the bibliography. If not selected, only inline citation entries are manually added to the bibliography are included.</li> </ul>	
All fields	<ul style="list-style-type: none"> <li>• Include field – Always include this field, or include only for physical or electronic citations.</li> <li>• Add text – Before and/or after the field text.</li> <li>• Comment – Internal note about this field (does not appear in the reference).</li> </ul>	
Numeric fields, including Publication (Year), Volume, Edition, etc.	<ul style="list-style-type: none"> <li>• Add suffix – Use ordinal number form.</li> </ul>	
Text fields, including Title	<ul style="list-style-type: none"> <li>• None – No formatting is applied.</li> <li>• UPPERCASE – All text is capitalized.</li> <li>• lowercase – No text is capitalized.</li> <li>• Title Case – Capitalize the first letter of each word.</li> <li>• Sentence – Capitalize the first word only and proper nouns.</li> </ul>	
Name fields, including Authors, Translators, Editors, etc.	<ul style="list-style-type: none"> <li>• For each author – Before and/or after the text.</li> <li>• Separators – Between authors.</li> <li>• First Author – Unique formatting for first author only.</li> </ul>	
Text elements	Edit the text element as required.	Common text elements include parentheses and hyphens.