



HARVARD GRADUATE SCHOOL OF EDUCATION

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Using RefWorks to Create Annotated Bibliographies in APA 5th Style

To modify the APA 5th Style to include a field where you have recorded annotations—such as User 1 (or however you've renamed your User 1 field):

1. In RefWorks, click on "Bibliography."
2. Select the APA – American Psychological Association, 5th Edition output style.
3. Click on "Edit" to open the Output Style Editor.
4. **Rename your output style.** Important! Go to the "Name" field and rename the style (for example "APA 5th annotated with User 1." This will prevent you from making changes to the original style. Click on "Save As."

You are now ready to edit your style.

5. Note the "Reference Type" drop box. When you begin altering your style, you will need to edit the style for all of the reference types which may be included in your reference list. So, if your RefWorks folders contain records for journals articles, magazine articles, books, sections of books, and so forth, you will need to change the style for each of these kinds of resources.

Name: Created: Friday, June 15, 2001 6:56:06 PM Modified: Tuesday, October 02, 2007 10:48:20 AM

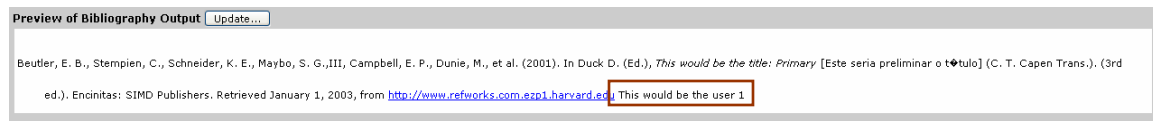
Comments: Link:

Reference Type: Undefined types will use Generic format

6. To edit a reference type, you will select the field(s) from "Fields for this type" to add to your reference. For example, for an annotated bibliography with User 1, select "User 1" from "Fields for this type" and click on > to add that field to your reference. The box on the right, labeled "Output Field Order", shows the fields which *actually* display in the style and the order in which they appear.

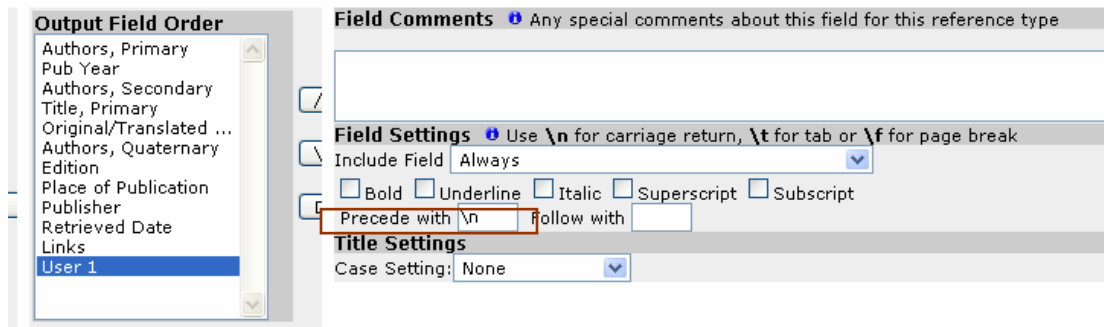
The screenshot shows the RefWorks Output Style Editor interface. On the left, the "Fields for this type" panel lists various fields: Language, Classification, SubFile, Original/Translated ..., Links, DOI, Call Number, Database, Data Source, Identifying Phrase, Retrieved Date, Shortened Title, User 1 (highlighted), User 2, User 3, User 4, User 5, URL, and Sponsoring Library. A right-pointing arrow (>) is positioned between the two panels. On the right, the "Output Field Order" panel lists the fields currently included in the style: Authors, Primary; Pub Year; Authors, Secondary; Title, Primary; Original/Translated ...; Authors, Quaternary; Edition; Place of Publication; Publisher; Retrieved Date; Links; and User 1 (highlighted). Below the "Output Field Order" panel, there is a "Copy Fields from:" section with a dropdown menu set to "Abstract" and a "Copy" button.

7. You may find that after adding additional fields to your citation, that the format is not exactly as you would like. If you look at the Preview window shown below (where we have added our "User 1" field), you will note that the spacing is not correct.



In this case, you will need to go to the "Field Settings" window for our "User 1" field and add the necessary spacing.

8. Click on "User 1" in the "Output Field Order" box. The field settings will appear to the right. To precede the User 1 field with a space, add \n to the "precede with" box.



9. The "User 1" annotation now appears below the citation:



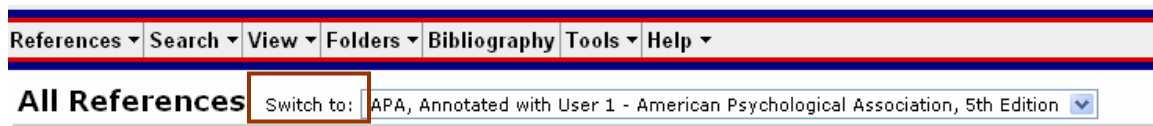
Important Things to Note About Editing Styles

Remember, you will have to make changes for all of the field types contained in your bibliography. "Generic" will not change the styles for all of the fields, just records which are labeled "Generic" in your RefWorks folders.

Once you have made your changes, click "Save" to keep them in your new style. Your new style will appear in red in your output style list when you are ready to create bibliographies.

If You Want to See Your Annotations in Your Reference List...

1. Tools > Customize > Add your custom style to the dropdown, "Output Styles Choices for Reference View." Save.
2. After your save is successful, view a folder or all your references.
3. Choose your custom style from the "switch to" dropdown box.



4. Annotations from User 1 appear in your list of references.

after school programs Folder Switch to:

Use: Selected Page All in List Sort by: Authors, Primary

Ref ID: 968 Book, Whole Reference 1 of 8 after school programs; test [View](#) [Edit](#) [FIND IT @ HARVARD](#)

Bodilly, S. J., Beckett, M., & Rand Corporation. (2005). *Making out of school time matter : Evidence for an action agenda*. Santa Monica, CA: Rand Corp.

Ref ID: 965 Book, Whole Reference 2 of 8 after school programs; test [View](#) [Edit](#) [FIND IT @ HARVARD](#)

Fashola, O. S. (2001). *Building effective after-school programs*. Thousand Oaks, Calif.: Corwin Press, Inc.

Based on "Editing Output Styles" (University of Chicago Libraries)
<http://www.lib.uchicago.edu/e/using/bibtools/refworks/editingoutput.html>

Retrieved May 21, 2007