



**RefWorks 2.0  
Advanced  
Workbook**

(revised Aug. 2011)

## RefWorks 2.0 Advanced User Workbook

### Introduction

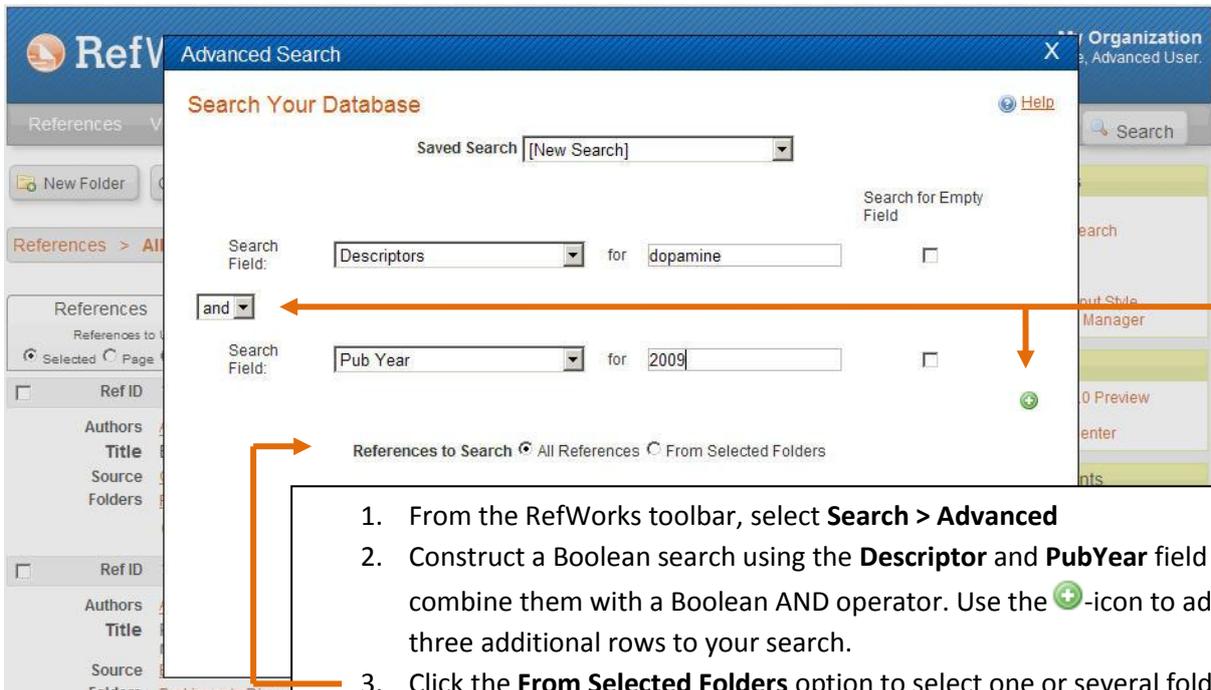
The workbook is designed to guide users through some of the advanced features of using RefWorks. The Workbook follows the same topics of the Advanced Features Tutorial and Advanced Features training sessions offered by RefWorks.

Knowledge of RefWorks' basic features is a pre-requisite to using this workbook. You will need at a minimum, a RefWorks account with some references and folders set up.

We suggest using this workbook as a post-training handout and/or as a companion piece to the RefWorks tutorials for self-directed study.

- Task 1:** Advanced Searching
- Task 2:** Using Lookups
- Task 3:** Save a Search & View Saved Search Results
- Task 4:** Edit a Saved Search
- Task 5:** Creating a Custom View
- Task 6:** Sorting and Printing References
- Task 7:** Editing Multiple References
- Task 8:** My List
- Task 9:** Capturing Data from Web Pages with RefGrab-It
- Task 10:** Importing from an RSS Feed
- Task 11:** Checking for Duplicates
- Task 12:** Using the Output Style Preview Utility
- Task 13:** Backing Up and Restoring Your Account
- Task 14:** Working Offline with Write-N-Cite III for Windows

**Task 1:** Advanced Searching



1. From the RefWorks toolbar, select **Search > Advanced**
  2. Construct a Boolean search using the **Descriptor** and **PubYear** field and combine them with a Boolean AND operator. Use the -icon to add up to three additional rows to your search.
  3. Click the **From Selected Folders** option to select one or several folders to be included in your search
  4. Click **Search**
- Note:* The descriptor field searches for exact matches to the term entered. All other fields provide embedded results, like art, part, smart, etc.
- You can save your searches and access them easily from the **View > Saved Search Results** menu. See Task 3 & 4 on the next page for details.

**Task 2:** Using Lookups



1. From the RefWorks toolbar, select **Search > By Descriptor**
  2. Locate any descriptor that has more than one record
  3. Click on the descriptor to display all the records with that term in the descriptor field.
- Notes:*  
You can edit  or delete  a specific lookup term (author, descriptor or periodical) from the icons next to a descriptor. These options only edit or delete the specific value, not the entire reference.

## RefWorks 2.0 Advanced User Workbook

### Task 3: Save a Search & View Saved Search Results

**Advanced Search**

Search Your Database

[New Search]

Search Field: Descriptors for Parkinson's Disease

Search for Empty Field

for brain stimulation

From Selected Folders

Search Save Reset

**Save**

Please enter a name for your search strategy and click the Save Search button.

Search Name: Brain Stimulation

Cancel Save

1. Construct your search **Advanced Search** and click on **Save**

2. Provide a name for the search and click on **Save**

3. To access your search results, select **View > Saved Search Results > your search**

Helpful Hint:  
Your search might not show in the Saved Search Results menu until the application has re-freshed completely. Use F5 (Windows) / CMD+R (Mac) to refresh the application

RefWorks

References View Search Bibliography Tools Help

View Folder

Saved Search Results Brain Stimulation

### Task 4: Edit a Saved Search

**Advanced Search**

Search Your Database

[New Search]

[New Search]

Brain Stimulation

Search for Empty Field

From Selected Folders

Search Save New Delete Reset

1. Select **Search > Advanced**

2. From the drop-down list select the search you wish to edit

3. The search screen will be populated with the search variables, enabling you to make any changes you wish

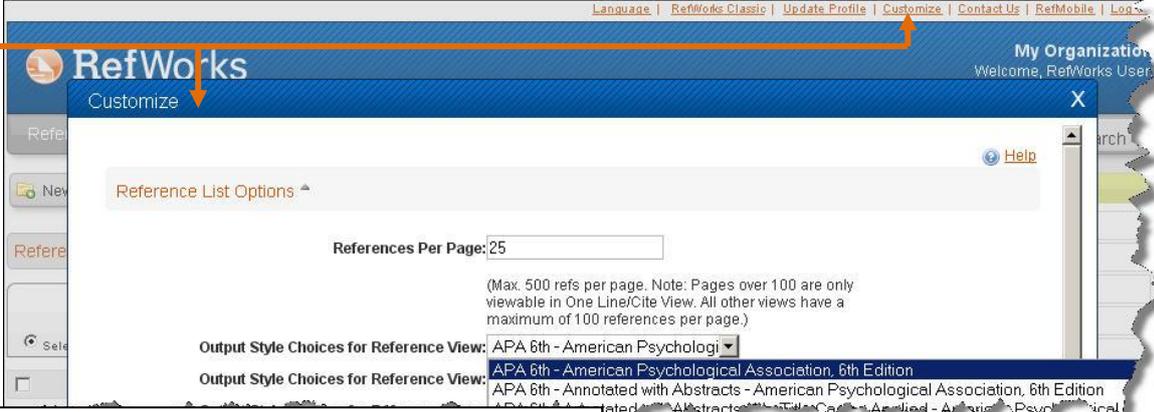
4. Save the search, once you are done

Helpful Hint:  
You can delete a search from here as well

Page 4

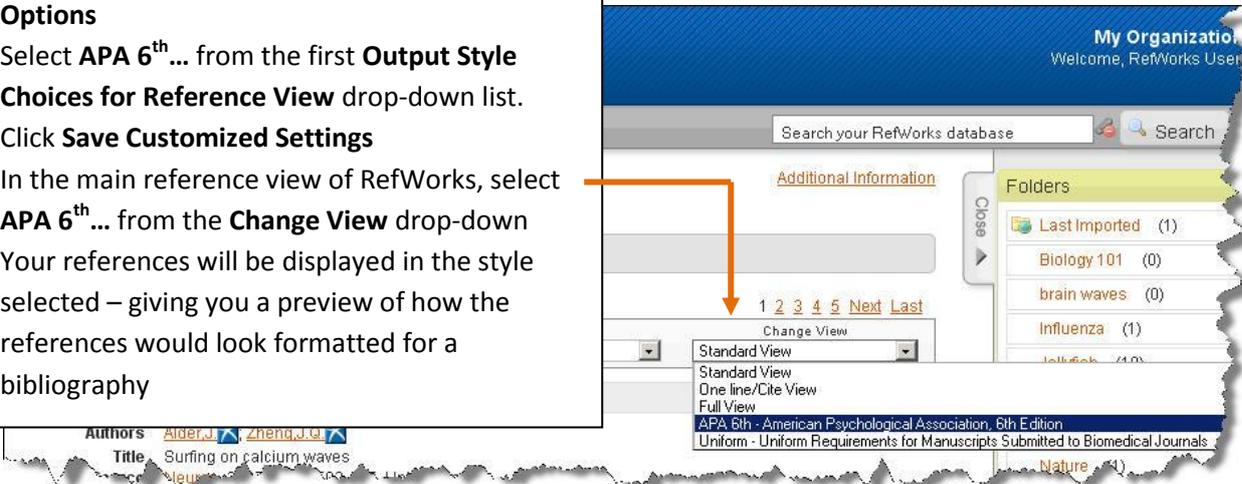
## RefWorks 2.0 Advanced User Workbook

### Task 5: Creating a Custom View



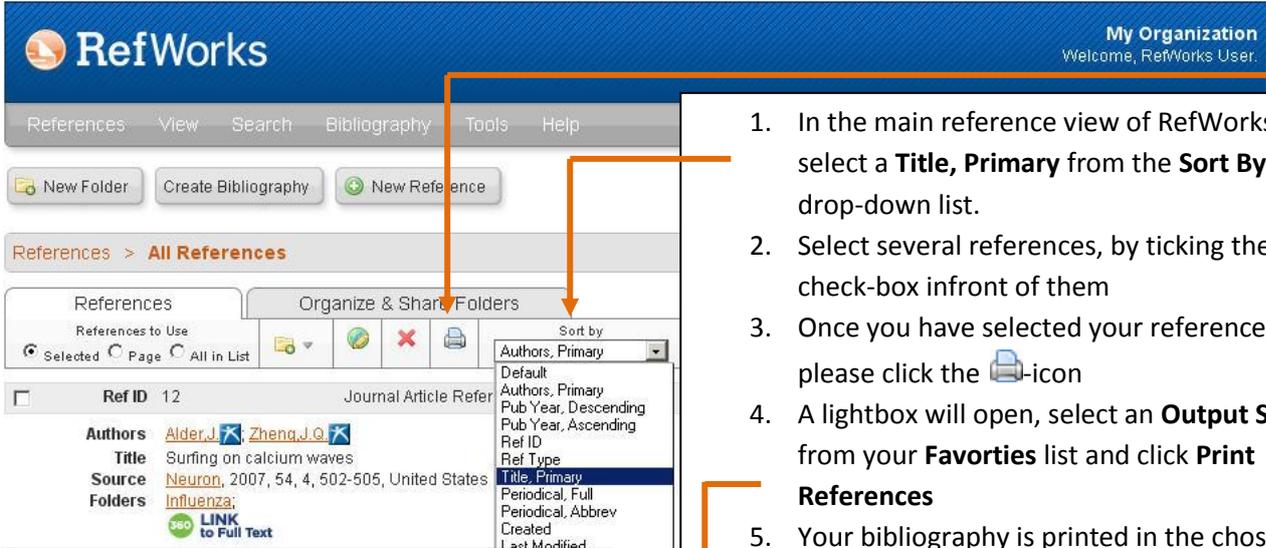
The screenshot shows the 'Customize' window in RefWorks. The 'Reference List Options' section is visible, with 'References Per Page' set to 25. Below this, there are two 'Output Style Choices for Reference View' drop-down menus. The first menu is open, showing 'APA 6th - American Psychological Association, 6th Edition' selected. The second menu is also open, showing the same style selected. A text box on the left provides instructions for customizing the view.

1. Select **Customize** and then **Reference List Options**
2. Select **APA 6<sup>th</sup>...** from the first **Output Style Choices for Reference View** drop-down list.
3. Click **Save Customized Settings**
4. In the main reference view of RefWorks, select **APA 6<sup>th</sup>...** from the **Change View** drop-down
5. Your references will be displayed in the style selected – giving you a preview of how the references would look formatted for a bibliography



The screenshot shows the main reference view of RefWorks. A search bar is at the top. Below it, there are 'Additional Information' and 'Folders' sections. A 'Change View' drop-down menu is open, showing 'Standard View' selected. Below the menu, a list of references is displayed, including 'Surfing on calcium waves' and 'Influenza'. A text box on the right provides instructions for sorting and printing references.

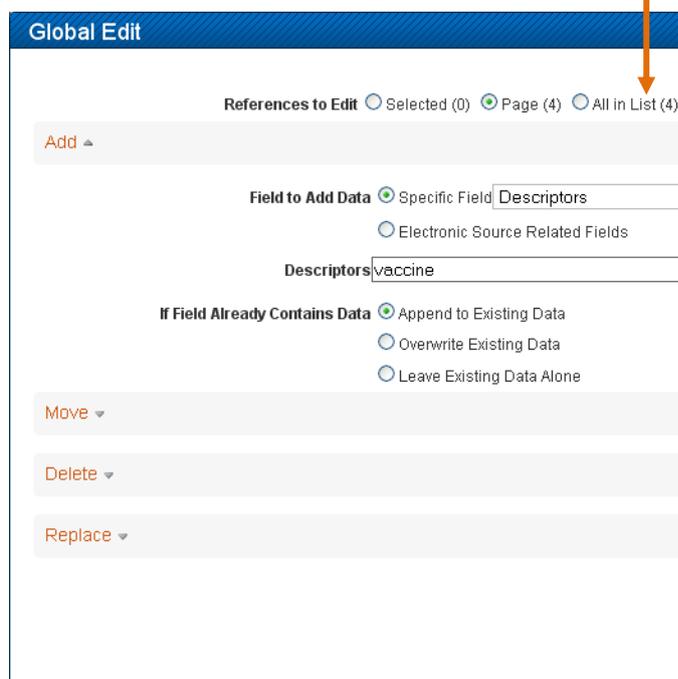
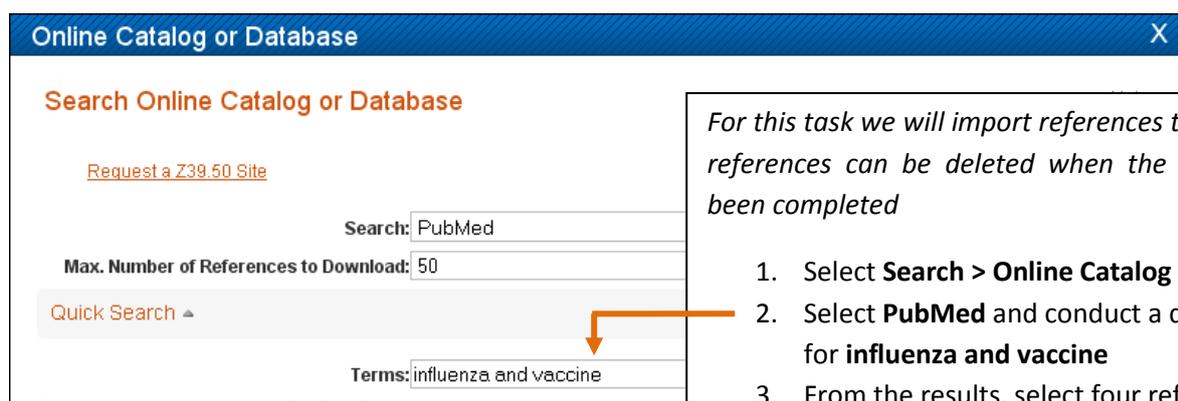
### Task 6: Sorting and Printing References



The screenshot shows the main reference view of RefWorks. A search bar is at the top. Below it, there are 'References' and 'Organize & Share' sections. A 'Sort by' drop-down menu is open, showing 'Title, Primary' selected. Below the menu, a list of references is displayed, including 'Surfing on calcium waves' and 'Influenza'. A 'Print' lightbox is open, showing 'Selected (3)' references and 'APA 5th - American Psychological Association, 5th Edition' selected. A text box on the right provides instructions for sorting and printing references.

1. In the main reference view of RefWorks select a **Title, Primary** from the **Sort By** drop-down list.
2. Select several references, by ticking the  check-box in front of them
3. Once you have selected your reference, please click the  icon
4. A lightbox will open, select an **Output Style** from your **Favorites** list and click **Print References**
5. Your bibliography is printed in the chosen output style, sorted by Title, Primary (overriding the output style's own sorting requirement)
6. You can **print** and/or **save** this list from the **File** menu in your browser.

**Task 7:** Editing Multiple References



*For this task we will import references to edit. These references can be deleted when the exercise has been completed*

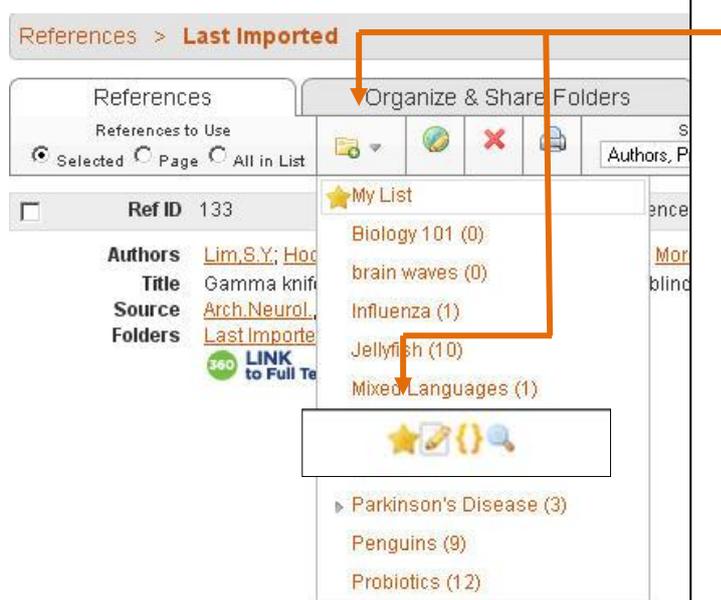
1. Select **Search > Online Catalog or Database**
2. Select **PubMed** and conduct a quick search for **influenza and vaccine**
3. From the results, select four references and click the **Import** button
4. View the **Last Imported** folder, select all references and click the global edit icon .
5. In the **Add** area, select **Descriptors** from the **Specific Field** drop-down list
6. The form will expand to reveal all relevant options. Please enter **vaccine** in the **Descriptors** text box
7. In the **Field Already Contains Data** section, select **Append to Existing Data**
8. Click the **Add Data** button
9. To verify that your action was successful, click on **Search > By Descriptor** and browse to **V** for vaccine. You will see an entry for vaccine containing your edited references.

*Notes:*

**Overwrite Existing Data** will remove any existing information in your record and replace it with what you are adding

**Leave Existing Data Alone** will only add your change to records that do not have any information in the particular field

**Task 8: My List**



1. From any folder, select the first two references
2. Click the add to folder icon  and select **My List**. Alternatively click the My List icon  next to each references you would like to add to My List.
3. Conduct a **Quick Search** for any term and add two more references to **My List**.
4. Click on **View > My List** to see your references. You will also find a link to **My List** in the **Quick Access Toolbar**

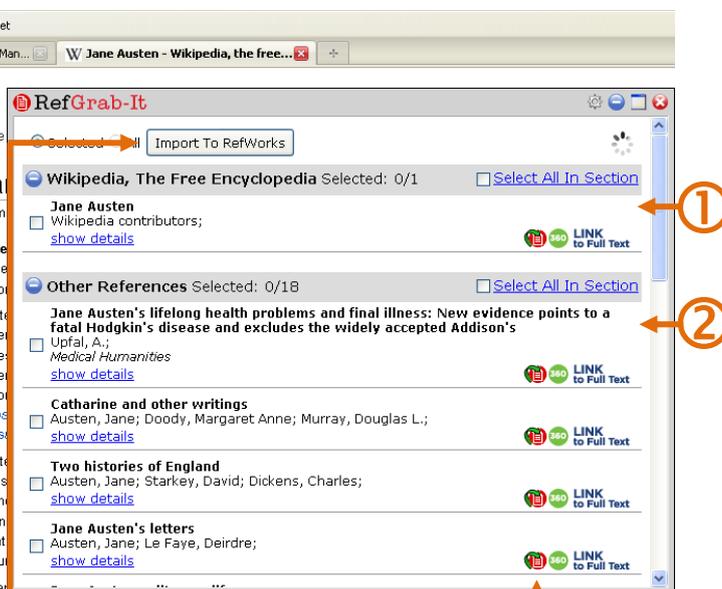
*Notes:*

**My List** is available in many functions within RefWorks, such as Export, Global Edit, Create Bibliography, etc.

My List is a temporary folder – when you log out of RefWorks, this temporary folder will be cleared.

**Task 9: Capturing Data from Web Pages with RefGrab-It**

1. Add the **RefGrab-It** bookmarklet to your favorites / bookmarks toolbar, by going to **Tools > RefGrab-It** and following the on-screen instructions
2. Navigate to [http://en.wikipedia.org/wiki/Jane\\_Austen](http://en.wikipedia.org/wiki/Jane_Austen) and click the **RefGrab-It** bookmarklet
3. RefGrab-It displays the results in a lightbox. **The first reference shown will be for the webpage.** ①
4. If you click on **Other References** ② you will find those items, we were able to resolve based on the DOI, ISBN, PMID or COinS, etc. for items on the page
5. Select the first two items in the **Other References** section and click the **Import To RefWorks** button  
Alternatively click the Import to RefWorks icon  to import individual references

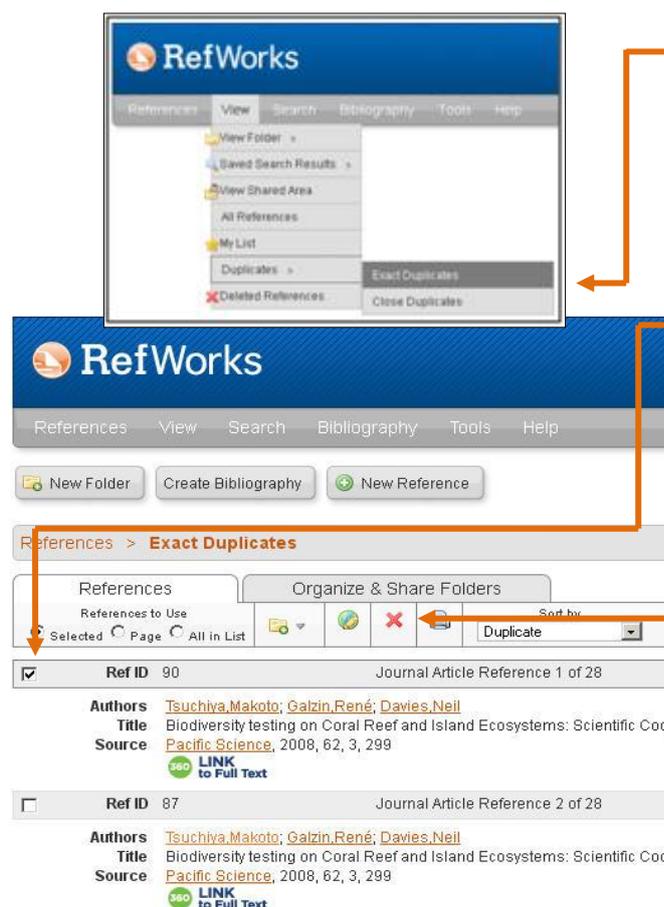


## Task 10: Importing from an RSS Feed



1. Go to Nature Magazine's RSS feed page at <http://www.nature.com/nature/newsfeeds.html>
2. Right-Click on the Nature's current issue table of contents link and select Copy Link Location (🌐) or Copy Shortcut (🌐)
3. In RefWorks click on **Search > RSS Feeds**
4. Paste the URL into the **RSS Feed URL** text box and click **Add RSS Feed**
5. You will be asked, whether you wish to retrieve the RSS Feed right away, click **OK**
6. RefWorks will now retrieve all information from the RSS Feed and present it in a result overview. Select the items you would like to import and click the **Import** button

## Task 11: Checking for Duplicates



1. In RefWorks select **View > Duplicates > Exact Duplicates**
2. RefWorks will compare the **Author, Title** and **Publication Year** fields for all records in your database and present exact matches to you
3. By default RefWorks will mark the most recently added references in a set of duplicates for deletion  
*Make sure to look through the entire page before proceeding!*
4. Click the delete icon **X** to remove the selected records from your account

**Notes:**  
If there are more than two duplicates, RefWorks will mark only one reference for deletion. You will need to select others yourself.

RefWorks will keep all deleted items for 30 days in the Deleted References folder **View > Deleted References**, from where you can restore them.

**Helpful Hint:** You can also check for duplicates in a specific folder. Click on the **Organize & Share Folders** tab and then click the **Folder** icon 📁 and select **Duplicates** and either **Exact Duplicates** or **Close Duplicates**.

**Task 12:** Using the Preview Output Style Utility

Select a style and type of citation to preview.

Output Style: **MLA 7th Edition**  Use references in my database

**Book, Section**

**Bibliography**  
Schneider, S. A., and C. Klein. "PINK1 Type of Young-Onset Parkinson Disease." *Genetics*. Washington, Seattle, 1993. Print.

**In-Text Citation** (Schneider and Klein)

**Footnote**  
S. A. Schneider and C. Klein. "PINK1 Type of Young-Onset Parkinson Disease." *Genetics*. Washington, Seattle, 1993. Print.

**Book, Whole**

**Bibliography**  
Boch, J., and R. Supperer. *Veerinärmedizinische Parasitologie*. 3. Aufl. ed. Berlin: P...

**In-Text Citation** (Boch and Supperer 97-123)

**Footnote**  
J. Boch and R. Supperer. *Veerinärmedizinische Parasitologie*. 3. Aufl. ed. Berlin: Pa...

**Conference Proceedings**

**Bibliography**  
Behrens, H. "Zur Brucella-Ovis-Infektion Der Grauen Ziegen" *Tierärztliche Wochenschrift*. Gießen, 1888. 67-70. Print

1. In RefWorks select **Bibliography > Preview Output Style**
2. Select **MLA 7th Edition** from the Output Style drop-down list
3. By default the **Use references in my database** option is selected. For a more complete display of reference type formatting, **deselect** this option.
4. Return to the Output Style drop-down list to select another output style, to see how this selection will change the preview

**Task 13:** Backing Up and Restoring Your Account

**Backup & Restore**

Backup ▾

Backup Options:  Include References  
 Include RSS Feeds  
 Include Attachments

Select Output Styles to Backup [Select All](#) [Unselect All](#)  
 Training University (Harvard)  
 Osnabrück (nach DUDEN) (1)

**Backup**

1. Select **Tools > Backup & Restore**
2. By default all backup options are selected. Click the **Perform Backup** button
3. You will be prompted to save a .rwb or .zip file to your computer, store it in an easy to access location

**Restore**

1. Select **Tools > Backup & Restore**
2. Click the **Restore** link and click on browse to select the .rwb or .zip file to be restored
3. Select the options, you wish to restore and click **Perform Restore**

**Notes:**  
**Restoring a database overwrites everything in your account.** If you restore a file from another user, for example to import an output style, please only check the **Include Output Styles** option.

**Backup & Restore**

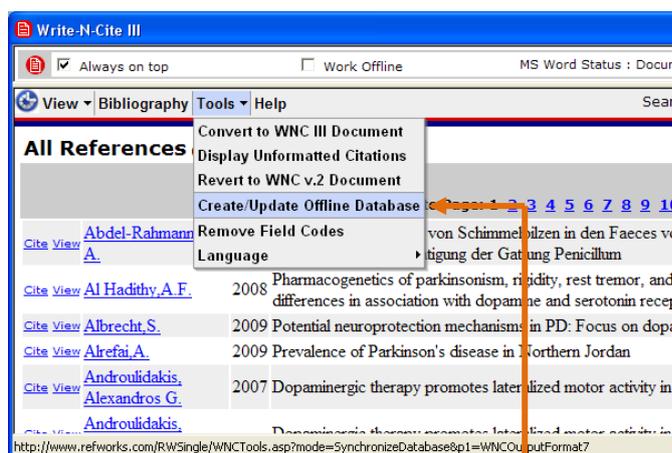
Backup ▾

Restore ▸

Restore Options:  Include References  
 Include RSS Feeds  
 Include Attachments  
 Include Output Styles

Restore Source: C:\Documents and Settings\...

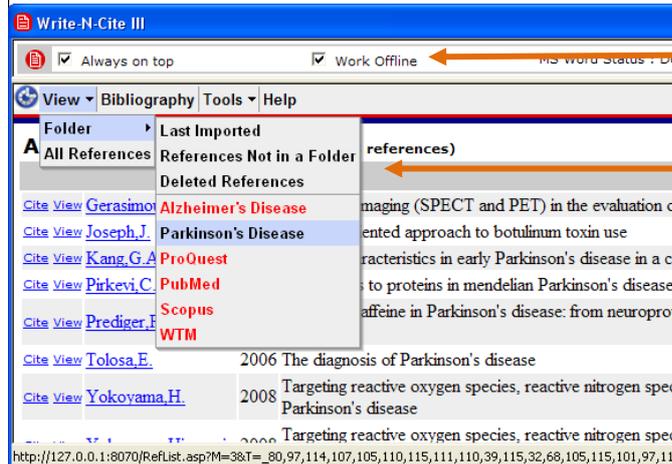
**Task 14:** Working Offline with Write-N-Cite III for Windows



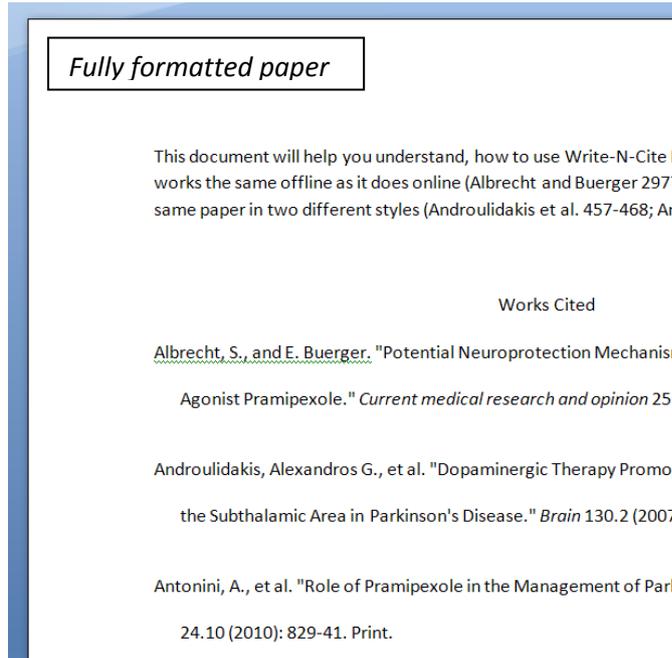
This exercise requires you to have downloaded and installed Write-N-Cite III for Windows. During the installation of Write-N-Cite III make sure to select the option, which will allow you to work offline.

1. Open **Microsoft Word** and launch **Write-N-Cite III** from the ribbon, the toolbar or the desktop icon
2. Login to your RefWorks database
3. Select **Always on top** to keep Write-N-Cite visible
4. Download your RefWorks database by selecting **Tools > Create/Update Offline Database** and then click the **Create** button
5. Once the download is complete, click the **Work Offline** check box
6. In your document, type some text, then select a folder of references from the **View > Folders** menu
7. In your word document, place your cursor, where you wish to insert the citation
8. Back in Write-N-Cite III, click the **Cite** link next to the record that you wish to cite.
9. Save the document on your computer
10. In Write-N-Cite III click on **Bibliography**, then select an **Output Style** for your paper and click on **Create Bibliography**
11. Your document will now be fully formatted.
12. You can continue to add references, make changes and reformat your paper as often as you need.

This document will help you understand, how to use Write-N-Cite works the same offline as it does online {{46 Albrecht, S. 2009}} two different styles {{298 Androulidakis, Alexandros G. 2007; 62



*Fully formatted paper*



**Notes:**  
 You can also work offline without Write-N-Cite III or Microsoft Word. In this case you will need to manually type the citation placeholders, e.g. {{46 Albrecht, S. 2009;}} or simply {{46;}} into your word processing document and then use the **Create Bibliography** option within RefWorks to format your paper, once you are online again.