RefWorks 2.0 Advanced Workbook

(revised Aug. 2011)

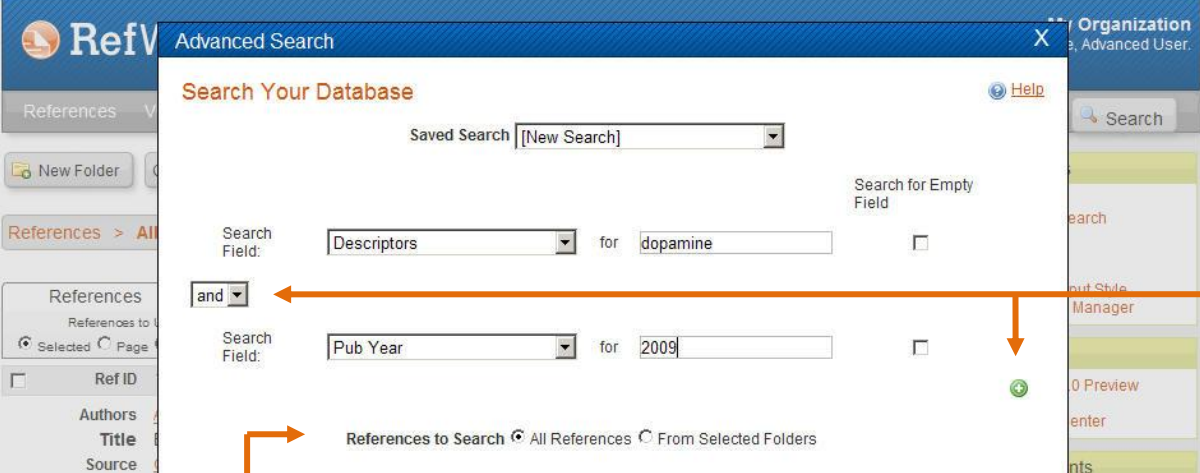## RefWorks 2.0 Advanced User Workbook

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

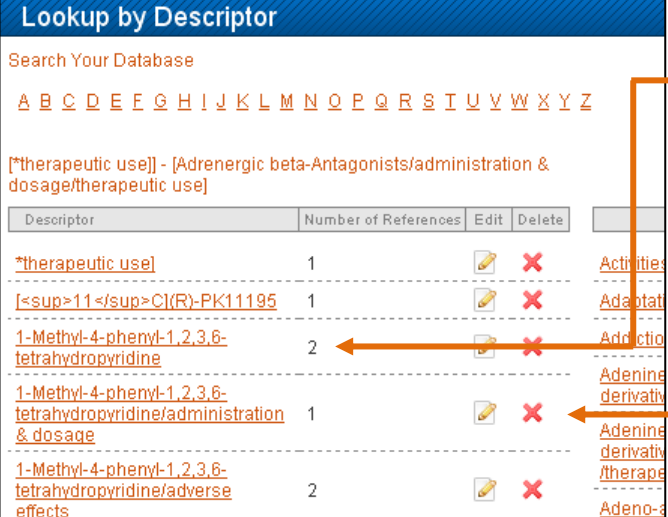*Task 14:*   Working Offline with Write-N-Cite III for Windows

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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 embeeded 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.
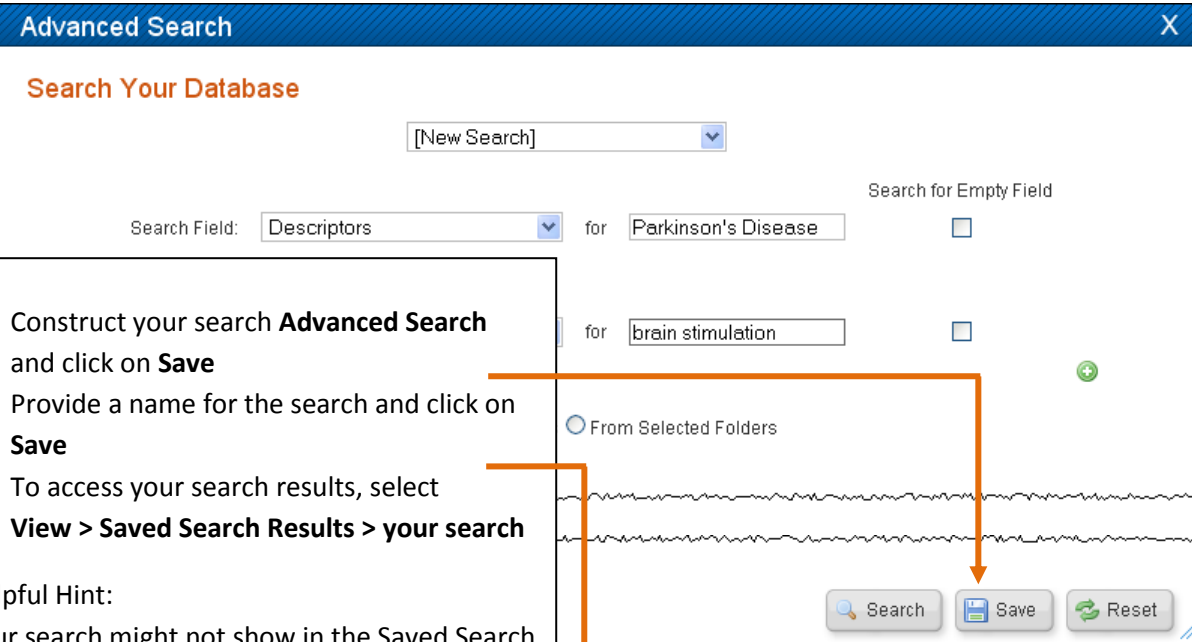
Task 2:   Using Lookups

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.

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Task 3:   Save a Search & View Saved Search Results

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 refreshed completely. Use F5 (⊞) / CMD+R (⌘) to refresh the application
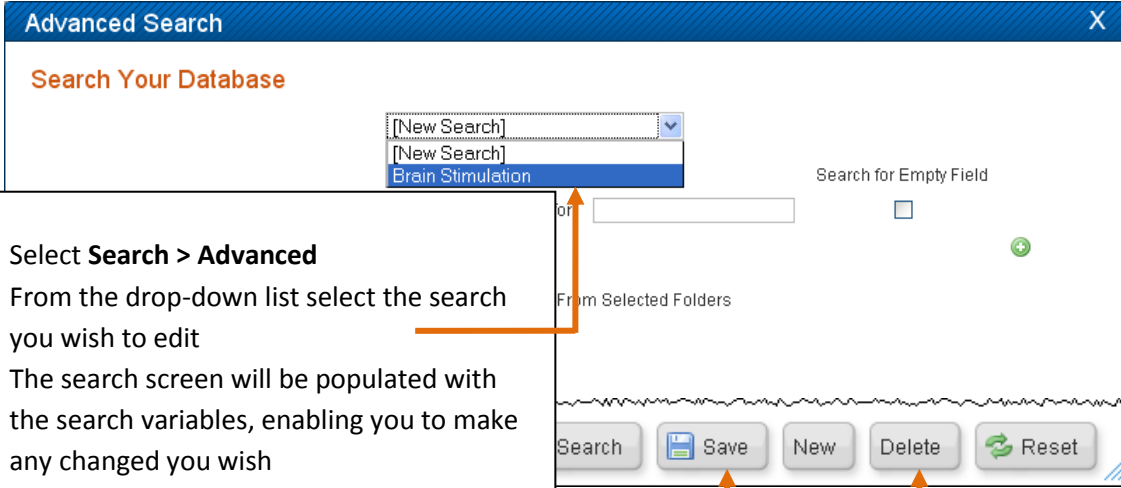
Task 4:   Edit a Saved Search

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 changed you wish
4. Save the search, once you are done

Helpful Hint:

You can delete a search from here as well

Task 5: Creating a Custom View

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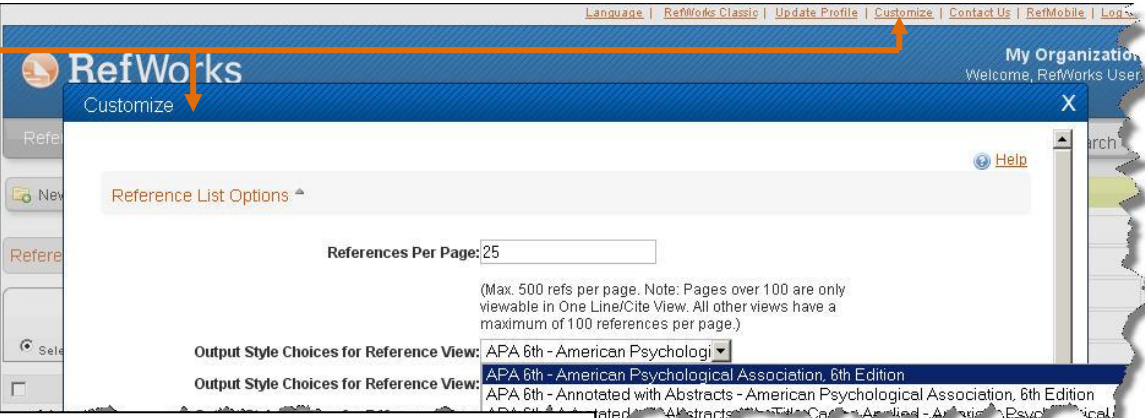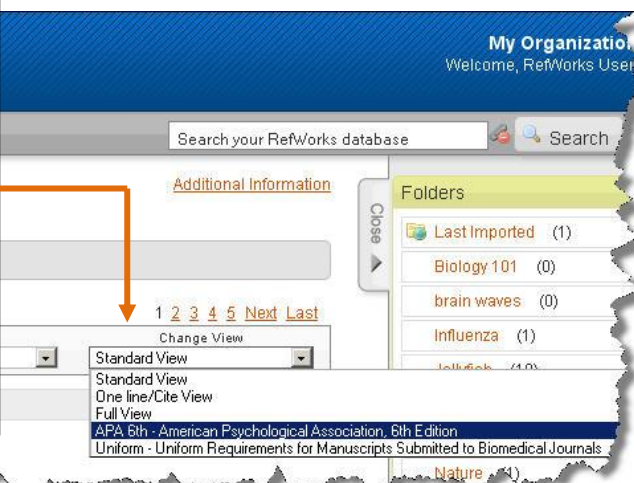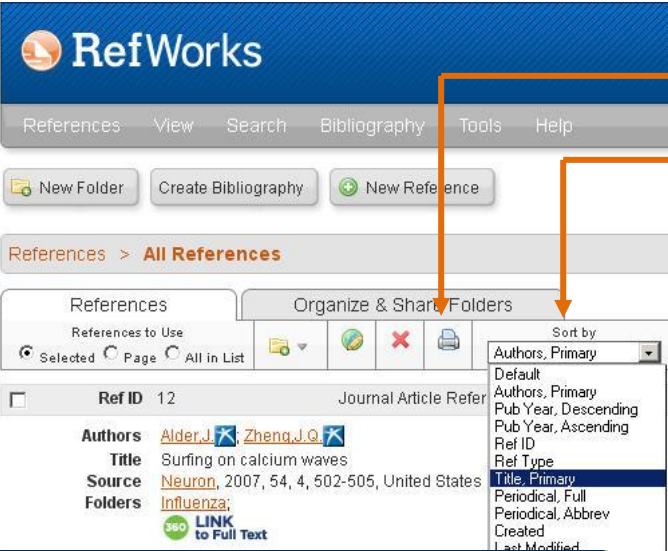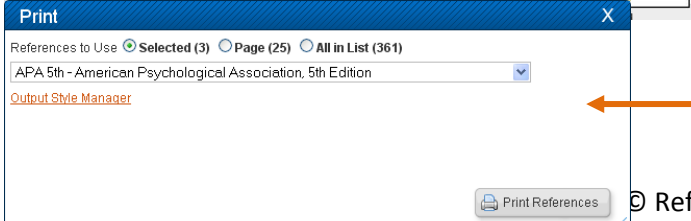2. Select **APA 6th…** from the first **Output Style Choices for Reference View** drop-down list.
3. Click **Save Customized Settings**
4. In the main reference view of RefWorks, select **APA 6th…** from the **Change View** drop-down
5. Your references will be displayed in the style selected – giving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

Task 6: 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 infront of them
3. Once you have selected your reference, please click the 🖨-icon
4. A lightbox will open, select an **Output Style** from your **Favorties** 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.

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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 Exiting 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
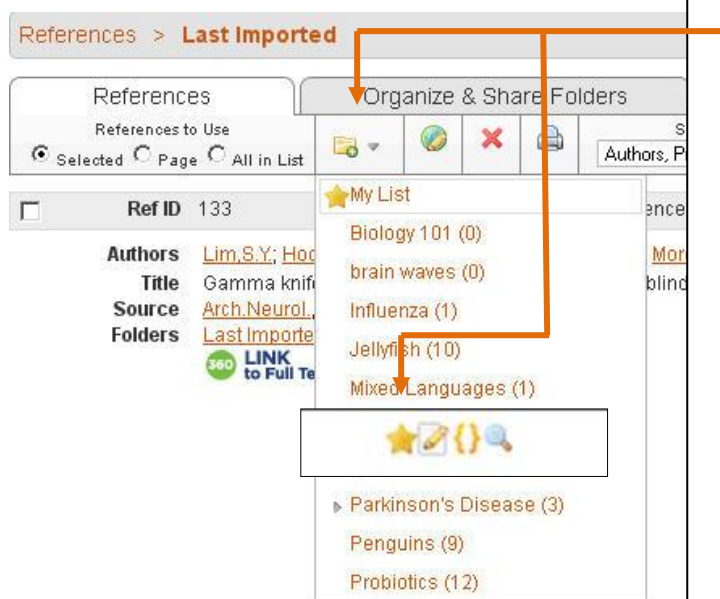
1. From any folder, select the first two references
2. Click the add to folder icon and select **My List**. Alternatively click the My List icon next to each references you would like to add to My List.
3. Conduc t a **Quick Search** for any term and add two more references to **My List**.
4. Click on **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** boomarklet 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 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
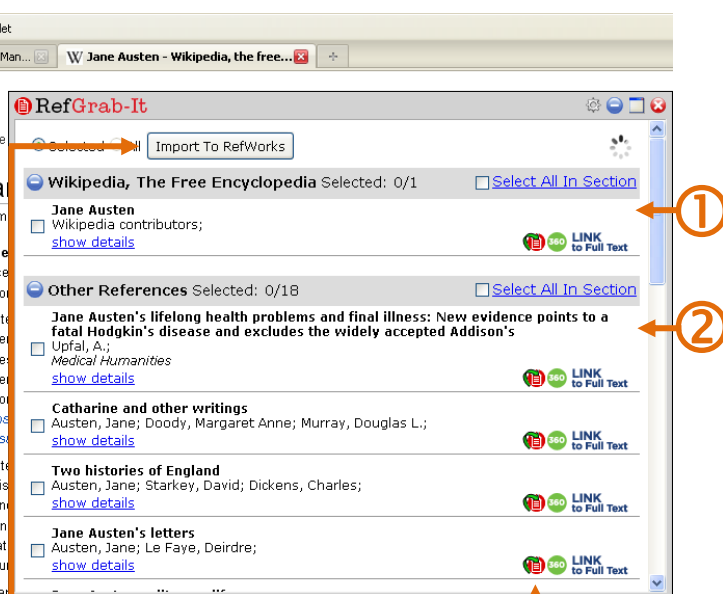
Task 10:   Importing from an RSS Feed

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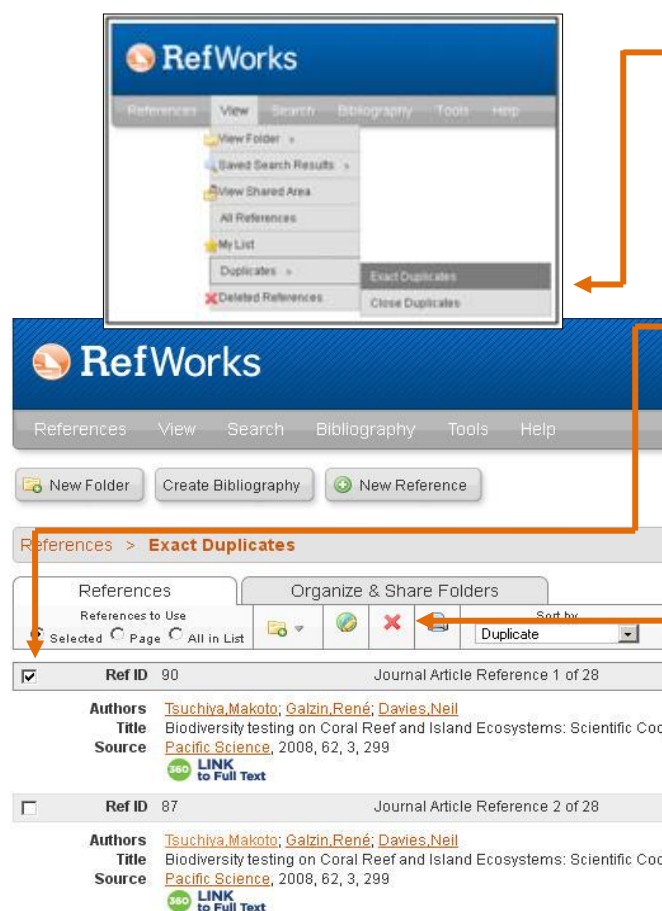
1. In RefWorks select **View > Duplicates > Exact Duplicates**
2. RefWorks will compare the **Author**, **Title** and **Publication Year** fields for all records in your database and present exact matches to you
3. By default RefWorks will mark the most recently added references in a set of duplicates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

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 outut style, to see how this selection will change the preview

Task 13: Backing Up and Restoring Your Account


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.
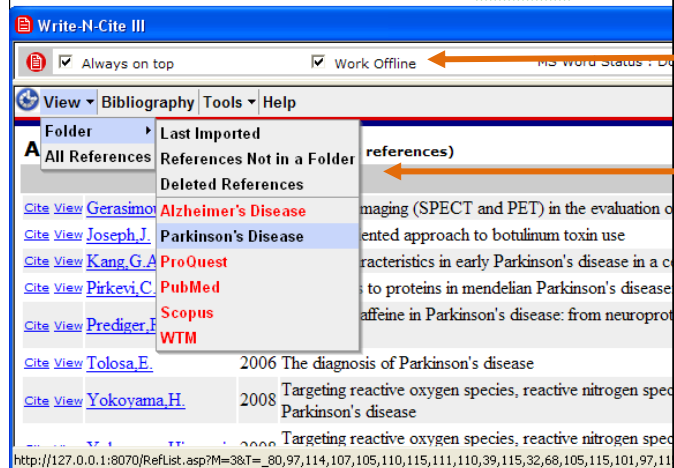
Task 14: Working Offline with Write-N-Cite III for Windows
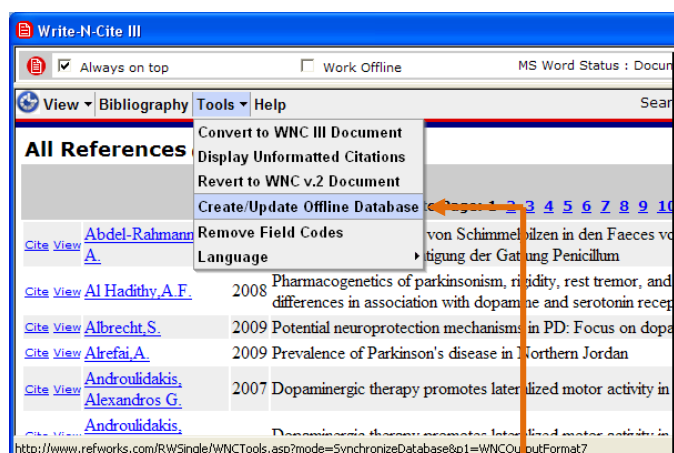
This exercise requires you to have downloaded and installed Write-N-Cite III for Windows. During the installation of Write-N-Cite III make sure to select the option, which will allow you to work offline.

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.

Notes:
You can also work offline without Write-N-Cite III or Micorosft 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.