

# **RefWorks Advanced Features 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.

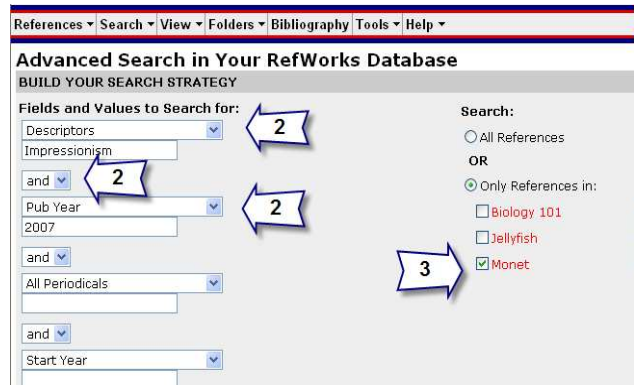
Knowledge of RefWorks' basic features is a pre-requisite to using this workbook. You will need at a minimum, a RefWorks account with some references and folders set up.

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

## RefWorks Advanced Features Workbook

### Task 1 Advanced Searching

1. From the RefWorks toolbar, select **Search, Advanced**
2. Construct a Boolean search using **Descriptor** field **AND** **Pub Year** field. *Remember:* the Descriptor field searches for exact matches to the term entered. All other fields provide embedded results (like art, part, smart, etc.)
3. Select a specific folder to search.
4. Click **Search**.
5. Your results will be displayed for you.

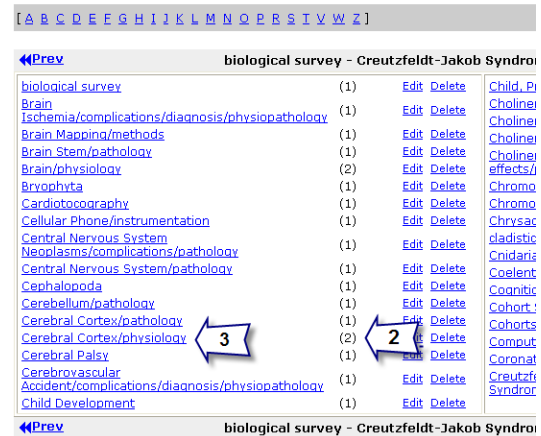


### Task 2 Using Lookups

1. Select **Search, Lookup 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.

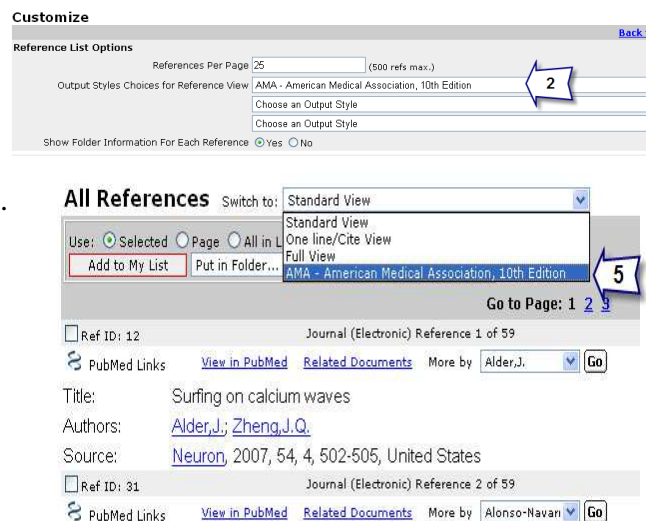
*NOTE: You can edit or delete a specific lookup term (author, descriptor or periodical) from the links in the lookups. These options only edit or delete the specific value, not the entire reference.*

#### Lookup by Descriptor in Your RefWorks Database



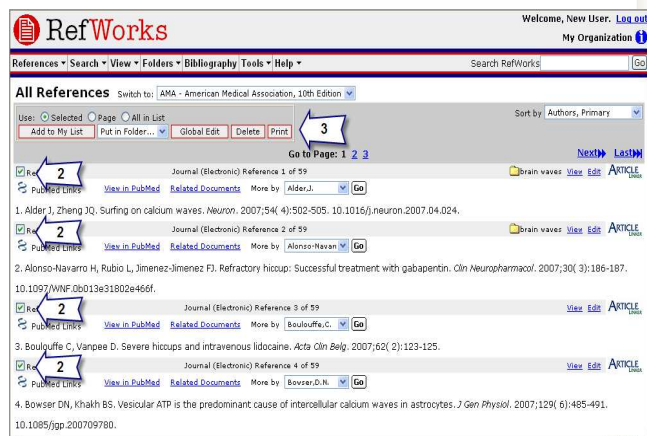
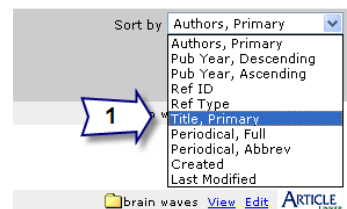
### Task 3 Creating a Custom View

1. Select, **Tools, Customize** from the toolbar.
2. Select **AMA – American Medical Association 10<sup>th</sup> Edition** in the first **Output Style Choices for Reference View** drop-down.
3. Click **Save** at the bottom of the page.
4. Select **View, All References** from the toolbar.
5. Select the **AMA** style in the **Switch to** drop-down.
6. Your references will be displayed in the style selected – giving you a preview of how the reference would look formatted for a bibliography.



### Task 4 Sorting and Printing References

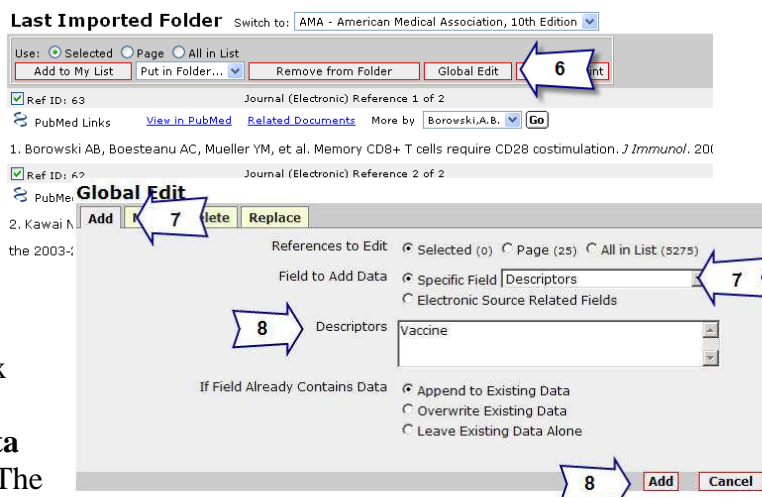
1. With your references still displayed in the AMA 10<sup>th</sup> view, click on the **Sort By** drop-down and select **Title, Primary**.
2. From your newly displayed list, select the first four records by clicking in the checkbox to the left of the appropriate citations.
3. Click the **Print** button.
4. In the new window, select an **Output Style** from your **Favorites** list and click **Print**.
5. Your bibliography is printed in the output style you chose, sorted by Primary Title (overriding the sort of the output style).
6. Click **Print** again to print the file or save the file to your computer using **File, Save As** and naming the file.



### Task 5 Editing Multiple References

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

1. Conduct a search from within RefWorks by selecting **Search, Online Catalog or Database**.
2. Select **PubMed** as the online database to search.
3. In the **Quick Search** box, enter **Influenza** and click the **Search** button.
4. From the results window, select the first four records to import and click the **Import** button.
5. From the import results screen, click on the **View Last Imported Folder** button.
6. Select the four references again and click on the **Global Edit** button.
7. In the **Add** area, select **Descriptors** in the **Specific Field** drop-down.
8. Enter **Vaccine** in the **Descriptors** text box and click the **OK** button.
9. Leave the **If Field Already Contains Data** option set to **Append to Existing Data**. The descriptor Vaccine will be added to all records and any existing descriptors will still remain.

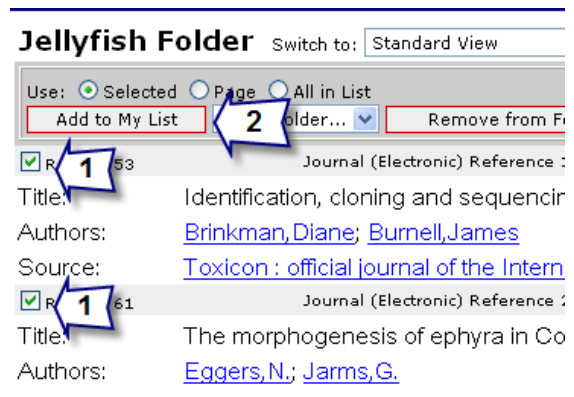


*Note:* The **Overwrite Existing Data** option will remove any existing existing information in your record (in this example – the descriptor field) and replace it with what you are adding. The **Leave Existing Data Alone** option will only add your change to records that do not have any information in the particular field (i.e., that field is empty). It skips over records that already have information in the field.

10. View your results from the descriptor lookup (**Search, Lookup By Descriptor**). Click on **V** in the alphabetic listing at the top of the descriptor lookup page).

### Task 6 My List

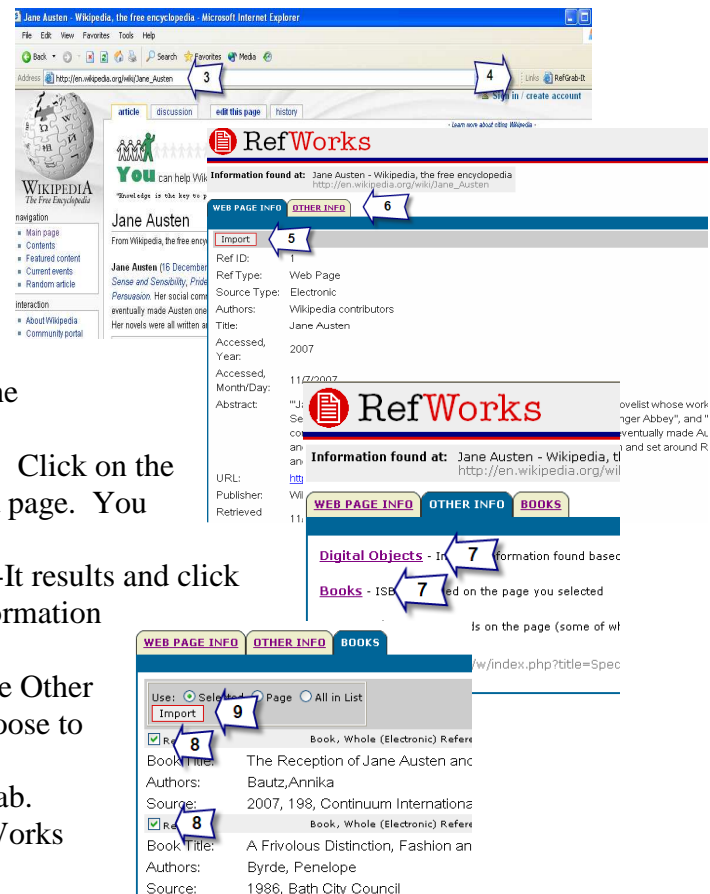
1. From any folder, select the first two references.
2. Click on **Add to My List**.
3. Then, conduct a **Quick Search** on any term in your RefWorks database and from the search results and select two more records and add them to **My List**.
4. Access the records in My List by selecting **View, My List**.



**Remember:** My List is a temporary folder – when you log out of your RefWorks account, any references in My List go back to their original location in your account.

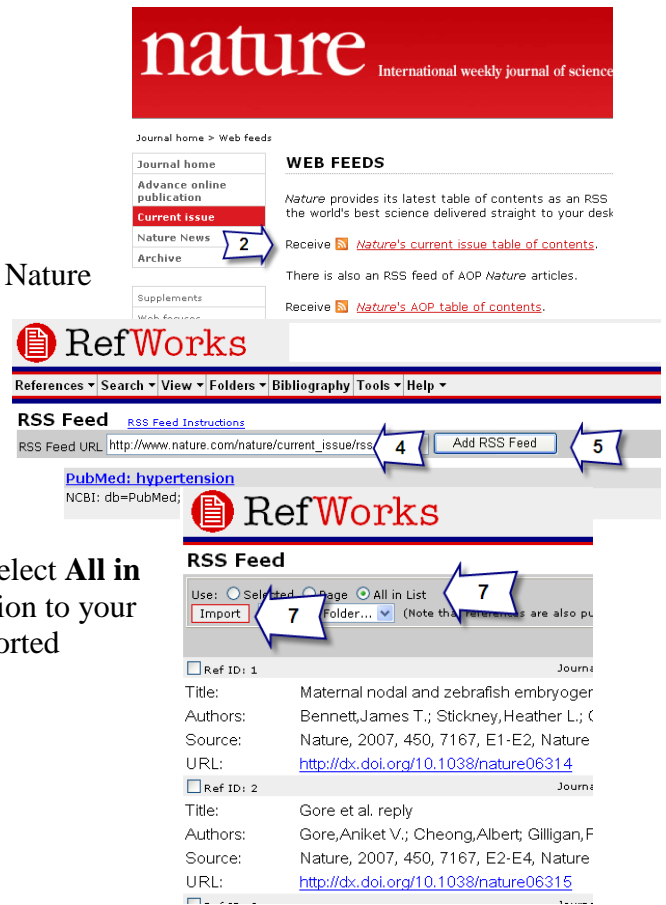
### Task 7 Capturing Web Page with RefGrab-It

1. Navigate to **Tools, RefGrab-It** to install the RefGrab-It plug-in in your browser's bookmarks or favorites area. If you already have RefGrab-It installed in your browser you can skip to #3.
2. **Install** RefGrab-It according to the instructions on the page.
3. Open another instance of your browser and go to: [http://en.wikipedia.org/wiki/Jane\\_Austen](http://en.wikipedia.org/wiki/Jane_Austen)
4. Click on **the RefGrab-It** link either from the **Links** area of your browser, or by selecting it from the **Bookmarks** or **Favorites** list.
5. RefGrab-It displays the results in another window. Click on the **Import** button to import the data from the Wikipedia page. You will be brought into RefWorks.
6. Go back to the browser window with the RefGrab-It results and click on the **Other Info** tab to locate the supplemental information RefWorks has found.
7. Click on the **DOI** and **Books** links displayed on the Other Info page to see the additional references you can choose to import.
8. **Select** the first two books listed under the **Books** tab.
9. Click the **Import** button to add them to your RefWorks account.



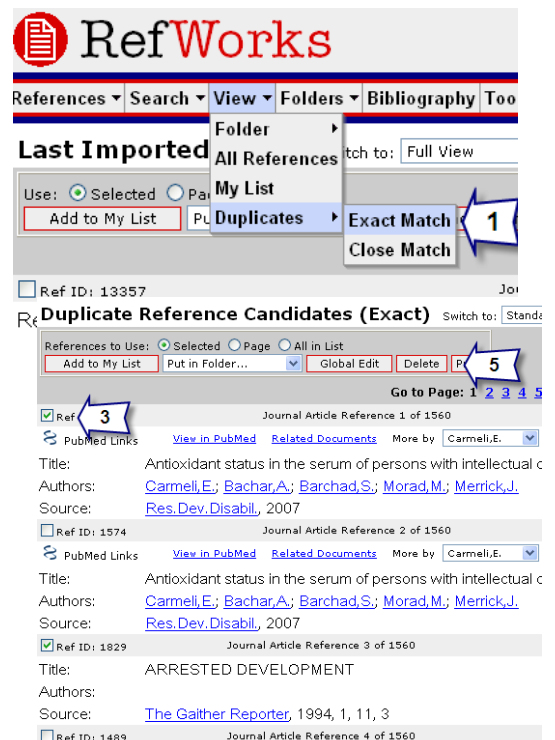
### Task 8 Importing from an RSS Feed

1. Go to the Nature magazine rss feed page at: <http://www.nature.com/nature/newsfeeds.html>
2. Right mouse click on the **orange RSS icon** for the Nature Table of Contents. Select **Copy Shortcut**.
3. In RefWorks, select **Search, RSS Feed**.
4. Right mouse click and paste the shortcut you copied into the **RSS Feed URL** box.
5. Click **Add RSS Feed**.
6. You will be asked if you wish to retrieve the RSS feed. Click **OK**.
7. A new window will open with your feed results. Select **All in List** and click the **Import** button to add this information to your account. Your reference will appear in the Last Imported Folder.



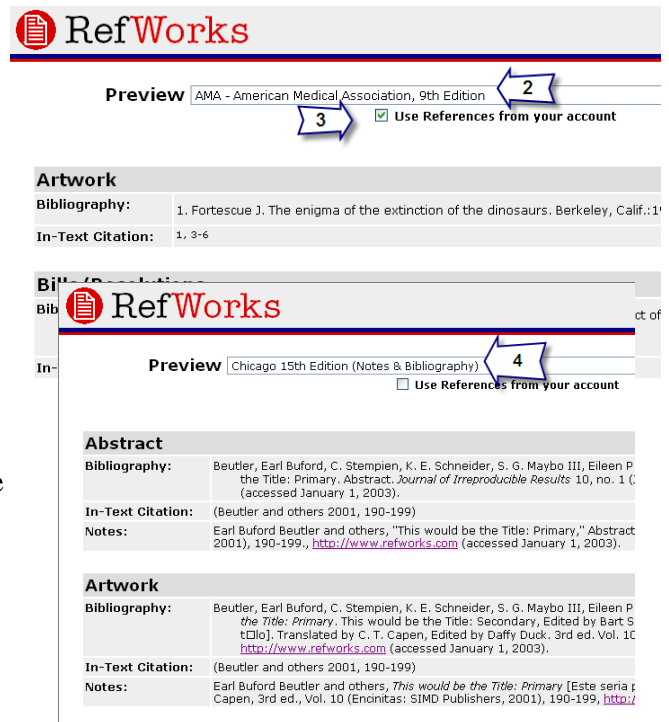
### Task 9 Checking for Duplicates

1. In RefWorks, select **View, Duplicates, Exact Match**.
2. RefWorks will compare the Author, Title and Publication Year fields for all records in your database present them to you.
3. RefWorks will mark the most recently added "duplicate" for deletion. *Note:* If you have three or more of the same record, only one record per duplicate match will be marked for deletion. You will need to manually mark any others for deletion.
4. **Mark** any additional records you wish to delete.
5. Click the **Delete** button to remove the record from your account.



**Task 10** Using the Output Style Preview Utility

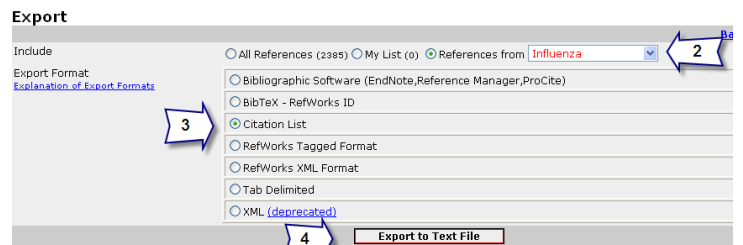
1. Select **Tools, Preview Output Style** from the toolbar.
2. Select **AMA – American Medical Association 9<sup>th</sup> Edition** from the **Preview** drop-down.
3. By default the **Use References from your account** option is selected. For a more complete display of reference type formatting for the output style, **deselect** this option by clicking on the checkmark.
4. Return to the **Preview drop-down** and select **Chicago 15<sup>th</sup> Edition (Notes & Bibliography)** to see how this style will format the bibliography, in-text citation and footnotes for the various reference types.



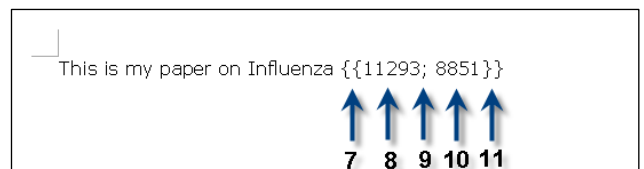
**Task 11** Working Offline (Traditional Method)

**Note:** Items 1-5 require you to be online and logged into your RefWorks account.

1. Select **References, Export** from the toolbar.
2. Select a folder of references from the drop-down.
3. Select **Citation List** as your **Export Format**.
4. Click **Export to Text File**.
5. A new window will open with a file to save to your computer. (For this exercise you do not need to save the file, just keep the window open).
6. Launch your word processing software and type **“This is my paper on Influenza “**
7. Insert a temporary citation placeholder by typing the opening curly brackets **“{“** (do not add the quote marks).
8. Go back to your displayed citation list and copy a **Ref ID** from your list and **insert or paste** that number **AFTER** the opening curly brackets.
9. After you enter the number, **add a semi-colon**.
10. Go back to the citation last and **copy another RefID** and paste it in your document, just after the semi-colon.
11. Close the temporary citation placeholder with left facing curly brackets **“}”** (do not add the quote marks)
12. **Save** your document.



11293. Anonymous Atrial Fibrillation: State of the  
 11295. Galambos, B. M., Stephens, R. C., Feave  
 8852. Hofmann, T. Clinical application of enoxapar  
 8850. Hossain, K. C., DiNardo, J. A., Tsai-Goodmar  
 8851. Iwamoto, K., Richlin, D. Bradycardia induce  
 11294. Wintner, S., Hafner, E., Stonek, F., Stuenkel



## RefWorks Advanced Features User Workbook

13. In RefWorks, select **Bibliography** from the toolbar.

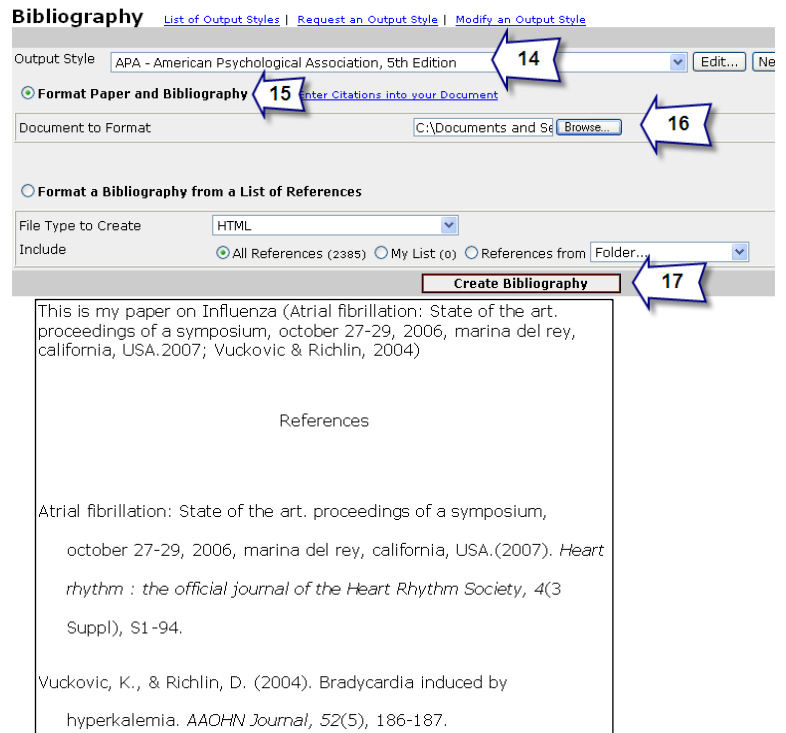
14. Select any output style from the drop-down.

15. Select **Format Paper and Bibliography**.

16. Browse to locate your file as the **Document to Format**.

17. Click **Create Bibliography**.

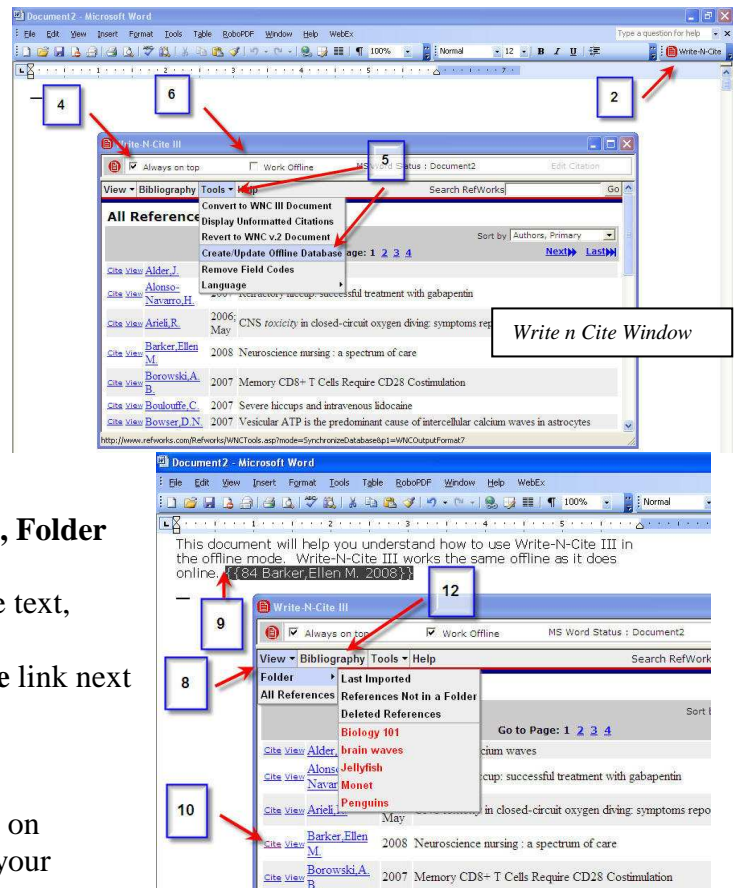
18. A second document, with proper citations and formatted bibliography, will be displayed. You can save this document to your computer.



### Task 12 Working Offline with Write-N-Cite III for Windows (optional)

**Note:** This exercise requires you to have downloaded and installed Write-N-Cite III for Windows.

1. Log out of RefWorks.
2. Open **Microsoft Word** and launch **Write-N-Cite III** from the Word toolbar or from the desktop icon.
3. Login to your RefWorks database.
4. Select **Always on top** to keep Write-N-Cite visible.
5. Download your RefWorks database by selecting **Tools, Create/Update Offline** database and the **Create** button.
6. When the download is complete, click the **Work Offline** option.
7. In your document, type the following text:
8. Select a folder of references from the **View, Folder** menu options.
9. In Word document, place your cursor in the text, **where you want to insert the citation**.
10. Back in Write-N-Cite III, click on the **Cite** link next to the record that you want to cite.
11. Save your document to your computer as **WNCOffline** (File, Save As).
12. Back in the **Write-N-Cite Window**, click on **Bibliography** and choose an output style for your paper. Click the **Create Bibliography** button.

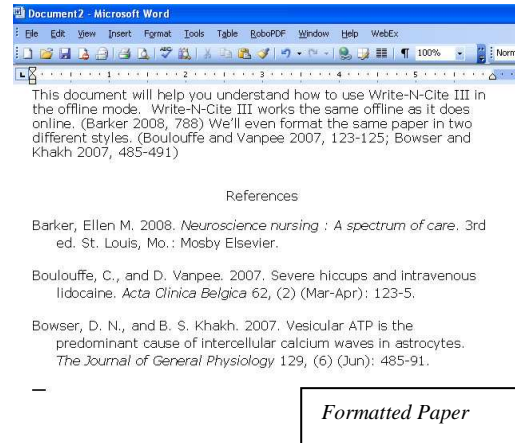


## RefWorks Advanced Features User Workbook

13. Your document will be formatted. Save it (**File, Save**).

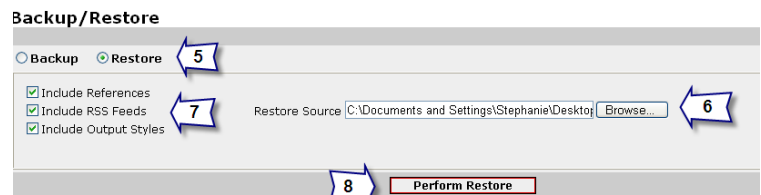
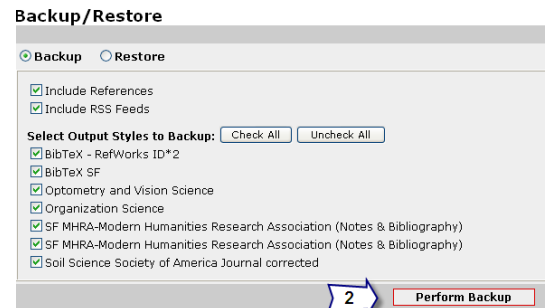
14. Return to your formatted document and continue typing text and add a few more citations. You can include more than once citation placeholder in the same grouping (known as citing multiple sources)

15. Repeat the bibliography creation selecting a different output style from the Bibliography area in Write-N-Cite III. Your document will be re-formatted in the new style. Save it (File, Save).



### Task 13 Backing Up and Restoring Your Account

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 file or .zip file to your computer. **Save this file** to your desktop for easy retrieval.
4. To restore, select **Tools, Backup/Restore**.
5. Click the **Restore** button.
6. **Browse** to find the .rwb or .zip file.
7. Check **Include References, Include RSS Feeds** and **Include Output Styles** (if applicable).
8. Click on **Perform Restore**.
9. Your account is restored – all references, Ref IDs, folders containing references and customization options are restored.



**NOTE:** Restoring a database overwrites everything in your account. If you restore a file from another user (for output style sharing purposes) we strongly recommend that you do not check **Include References** and **Include RSS Feeds**. Doing so will cause permanent loss of your data.