

RefWorks Fundamentals Workbook

Introduction

The workbook, first created by CSA Training Specialist Michele Walker, is designed to guide users through some of the basic features of using RefWorks.

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

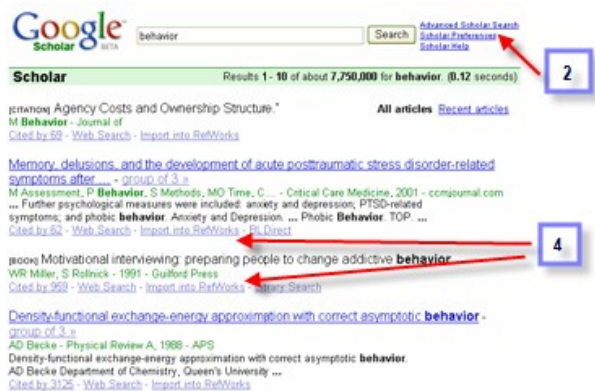
RefWorks Fundamentals Workbook

Task 1 Set-up an account.

1. Point your browser to www.refworks.com/refworks (or click through from your institution's web page link).
2. Click on **Sign up for an Individual Account**.
3. Fill in the form.
4. Click **Register**.
5. Congratulations you now have a RefWorks account! Close your browser.
6. Open your browser and return to www.refworks.com/refworks and login to your new account.

Task 2 Direct Import from Google Scholar (<http://scholar.google.com>)

1. Make sure cookies are enabled to allow setting of preferences in Google Scholar
2. From the Google Scholar search screen click on **Scholar Preferences**.
3. At the bottom of the screen, in **Show links to import citations into**, select **RefWorks**. Save your preference.
4. Search results will now display an **Export to RefWorks** link, so conduct a search on **Behavior** and export the first record.



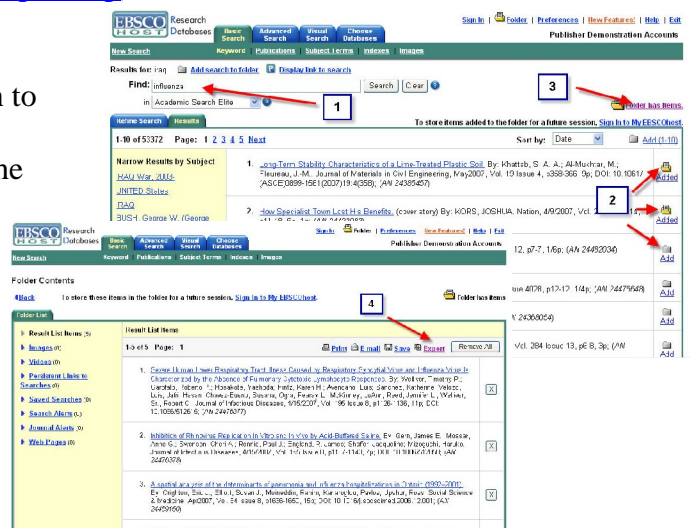
NOTE: Records are imported one at a time from Google Scholar and once imported into RefWorks, automatically open in the 'edit' mode.

NOTE: Consistent data such as title, author, year, etc may not exist in your results; the only thing they may display is the URL. If the metadata exists, it will import into RefWorks.

Task 3 Direct Import from EBSCOHost

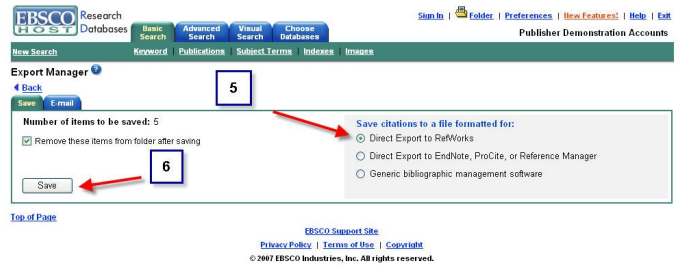
Note: You can substitute a different vendor for this exercise. The complete list of Direct Export partners is available from: http://www.refworks.com/content/products/direct_export.asp). Check the RefWorks online help for detailed instructions for a specific vendor.

1. After selecting the EBSCO database(s) you wish to search, conduct a search on **Influenza**.
2. Select several records to import by clicking on the **Add** link to the right of the records you wish to add.
3. Click on the **Folder has Items** link.
4. Click on **Export**.



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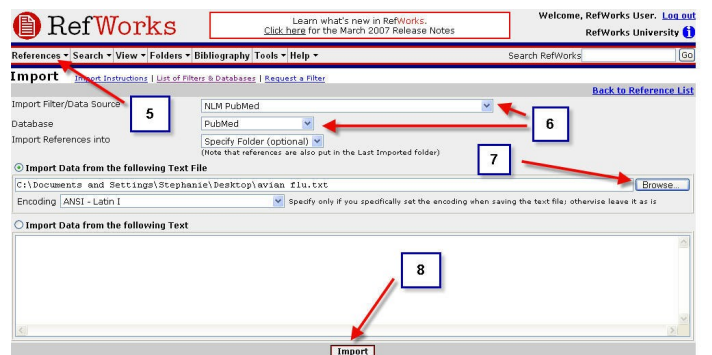
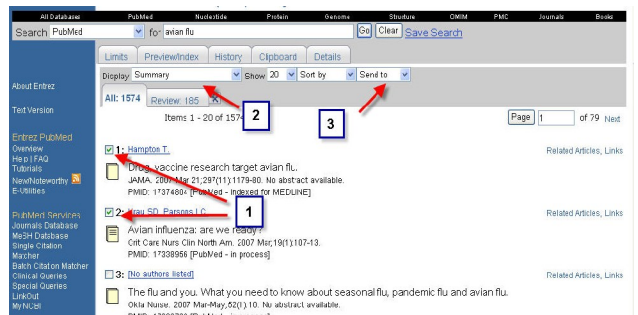
5. Select **Direct Export to RefWorks**.
6. Click the **Save** button.
7. Your records should be imported into your **Last Imported Folder** in RefWorks.



Task 4 Import data from a Saved Text File

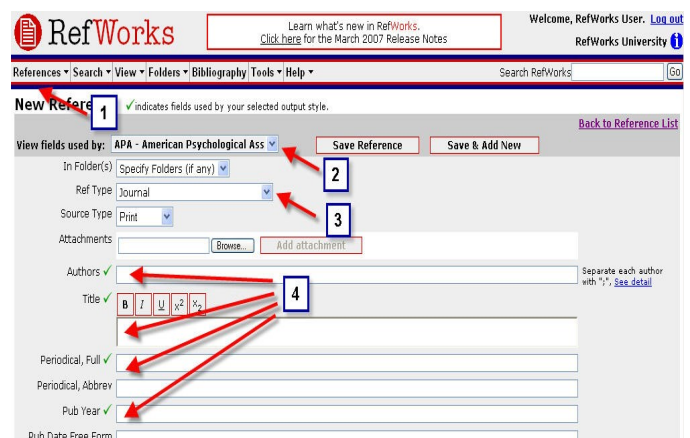
In this example, we are using PubMed as our data vendor (<http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?db=PubMed>)

1. In a separate browser window open PubMed and carry out a simple search on **Influenza**.
2. From your search results, select items to save by clicking in the checkbox to the left of the appropriate citations.
3. In the **Display** summary, select **Medline** to view your records.
4. In the **Send to** drop-down, select **Text**. A new window will open with your references. Use your **Browser's Save As** function to save the file to your computer. Make sure to save the file as a .txt file in the **Save as file type** drop-down.
5. In **RefWorks**, select **References/Import** from the toolbar.
6. Select **NLM PubMed** as the data source and **PubMed** as the database.
7. **Browse** to find the text file you saved to your computer and click on **Open**.
8. Click **Import**. Your records should appear in the **Last Imported Folder**.



Task 5 Add new reference manually

1. Click **References, Add New Reference**.
2. Select **APA** in **AccuCite** (View Fields used by box).
3. Select **Journal** as reference type.
4. Enter details in all fields marked with ✓ (ie fields required for correct citation in this output style).
5. Use the term assistant drop-down box in **Author**, **Periodical Title** and **Descriptor** field to select entries already found in your reference collection.
6. **Save reference**, or **Save & Add New** to continue adding more references.



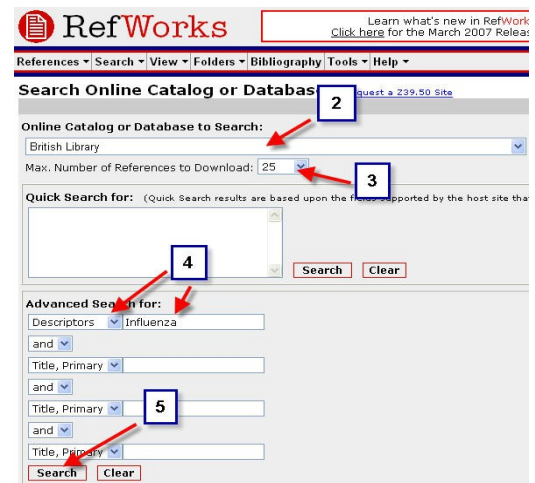
Task 6 Search z39.50 Database (PubMed)

1. Click on **Search, Online Catalog or Database**
2. Select **Pubmed** from the drop-down
3. Search for 'avian flu' in the quick search area
4. Import all on 'Page'
5. Close the search results page and return to RefWorks.



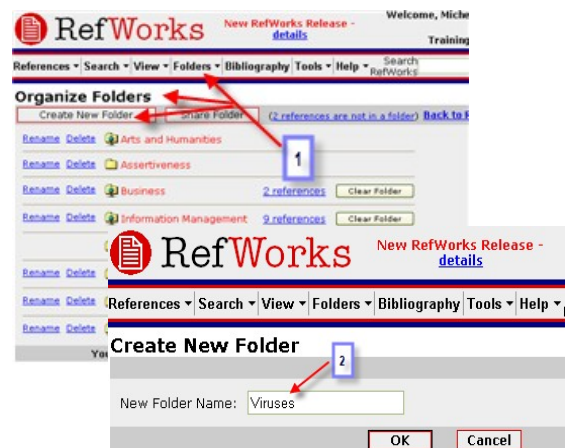
Task 7 Search a Library Catalog.

1. Click on **Search, Online Catalog or Database**.
2. Choose a library catalog from the alphabetical drop-down list.
3. Set the **Max. Number of References to 25**.
4. Do an **Advanced Search** for the **Descriptor: Influenza**.
5. Import **All in the list**.
6. Close the search results and return to RefWorks.



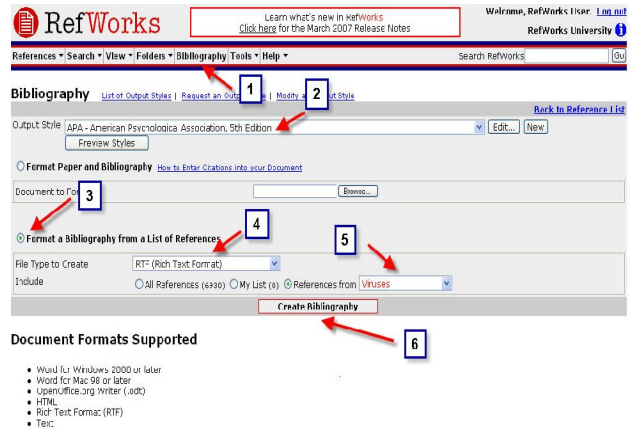
Task 8 Creating folders and moving information

1. Click on **Folders, Organize Folder** then click on the **Create New Folder** button.
2. Name it **Viruses** and click on **OK**.
3. Create another folder called **Behaviors**.
4. In RefWorks **Quick Search**, search for **flu**.
5. Select **All in list**.
6. Add to the folder **Viruses**.
7. In RefWorks **Quick Search**, search for **behavior**.
8. Select **All in list** and the **Behaviors** folder. Click **Import**.



Task 9 Create a list of references in preferred Output Style

1. In RefWorks, click **Bibliography**.
2. Select **APA – American Psychological Association, 5th Edition** as the output style.
3. Select the **Format a Bibliography from a List of References** radio button.
4. Select **RTF (Rich Text Format)** as **File Type to Create**.
5. Select **Viruses** in the **References from Folder** drop-down.
6. Click on **Create Bibliography**.



A list of properly formatted references will be created as an RTF file for you to save, print, or email as required.

Task 10 Create a Bibliography with Write n Cite v.2 (optional)

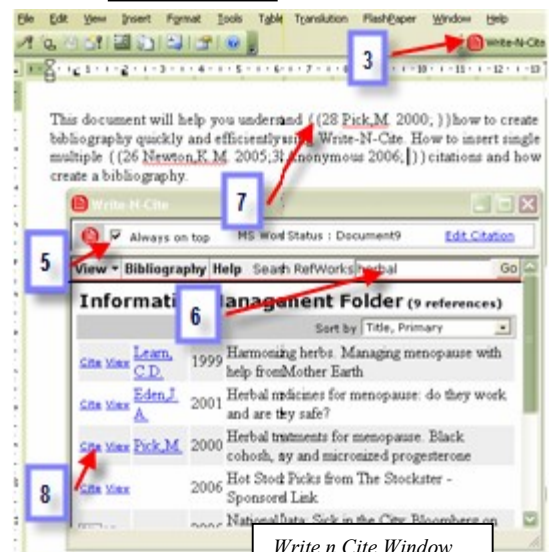
Note: If you are using Write-N-Cite III for Windows skip to the next task.

1. Log out of RefWorks.
2. Open **Microsoft Word** and type the following text:

This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite III. How to insert single and multiple citations and how to create a bibliography.

3. Launch the **Write-N-Cite** plug in on the Word toolbar or from the Word menu option **Tools, Write-N-Cite**.
4. Login to your RefWorks database.
5. Select **Always on top** to keep Write-N-Cite visible.
6. Do a **quick search** for **flu**.
7. In Word document, place your cursor in the text, **where you want to insert the citation**.

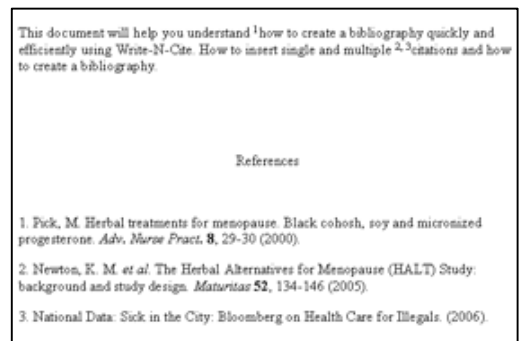
Word window



Write n Cite Window

8. Back in Write-N-Cite, click on the **Cite** link next to the record that you want to cite.
9. Return to your 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)
10. Save your document to your computer as **Rwcite** (File, Save As).

11. Back in the Write-N-Cite Window, click on **Bibliography** and choose **Nature** as the output style
12. This will create a second document called **Final-RWcite**. Save as **RWCiteNature** and close the formatted paper.
13. Repeat the bibliography creation selecting a different output style. Another **FinalRWcite** document will be created with the new style. Save as **RWCite<StyleNameHere>**.



Sample 'final document – with properly formatted citations and bibliography

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NOTE: remember to *always work and edit in the original word document* (though you can save as many final documents, at various stages and in as many styles as you wish)

Task 11 Create a Bibliography With Write-N-Cite III for Windows (optional)

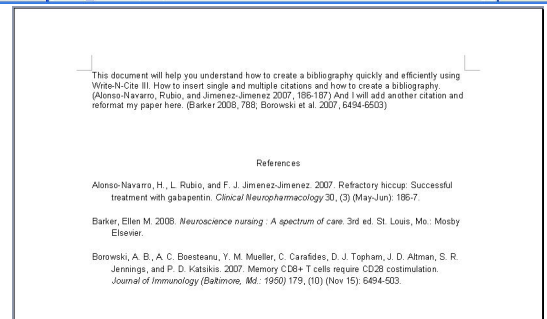
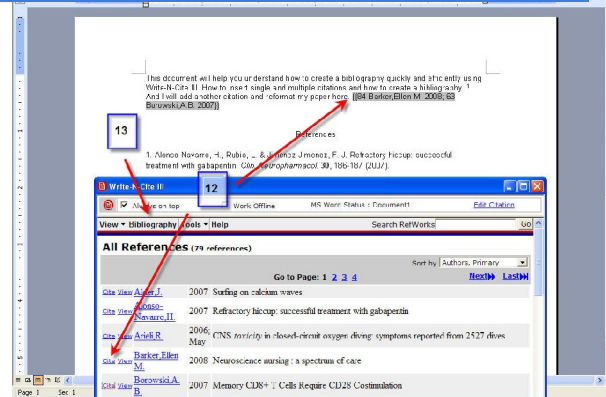
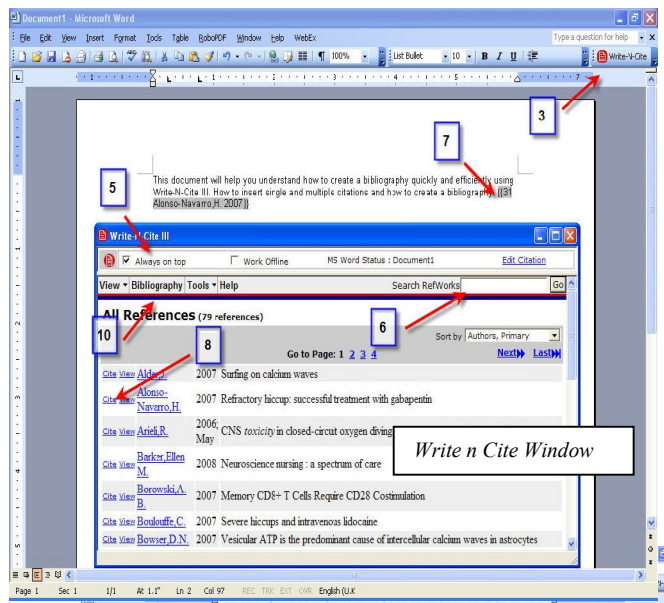
1. Log out of RefWorks.
2. Open **Microsoft Word** and type the following text:

This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite. How to insert single and multiple citations and how to create a bibliography.

3. Launch the **Write-N-Cite III** plug in on the Word toolbar or from the desktop icon.
4. Login to your RefWorks database.
5. Select **Always on top** to keep Write-N-Cite visible.
6. Do a **quick search** for **flu**.
7. In Word document, place your cursor in the text, **where you want to insert the citation.**
8. Back in Write-N-Cite, click on the **Cite** link next to the record that you want to cite.
9. Save your document to your computer as **Rwcite** (File, Save As).
10. Back in the Write-N-Cite Window, click on **Bibliography** and choose **Nature** as the output style.

11. Your document will be formatted. Save it (File, Save).
12. 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)

13. 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).



Sample 'final document – with properly formatted citations and bibliography

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Task 12 Create a Bibliography *without* Write-N-Cite (using One Line/Cite View)

1. Open your word processor and type the following text:

This document will help you understand how to create a bibliography quickly and efficiently when Write-N-Cite plug-in is not available. (This can happen when working from machines other than your own or off-campus).

2. Login to RefWorks.

3. Do a quick search for **avian flu**.

4. Choose the **One line/Cite view** in the **Switch to:** drop-down.

5. Choose a reference and click on its **Cite** link.

6. A box will open with the RefWorks temporary citation placeholder.

7. Click on the **Select Citation** button.

8. In your document, place your cursor where you want the citation to appear and use the word processor's **paste** function to insert the citation placeholder into your document.

9. Repeat the previous steps with another citation, or multiple citations, placing them elsewhere in the text (make sure to **Clear** the **Citation Viewer** first!).

10. Close and save your document as **Avian flu** (file type must be either .doc, .odt or .rtf)

11. In RefWorks click on **Bibliography**

12. Choose **JAMA** as the output style.

13. Select **Format Paper and Bibliography**.

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

15. Click on **Create Bibliography**.

16. You now have a second document, with proper citations and formatted bibliography. Save as **Final Avian Flu**.

