

## SKILLS FOR LEARNING

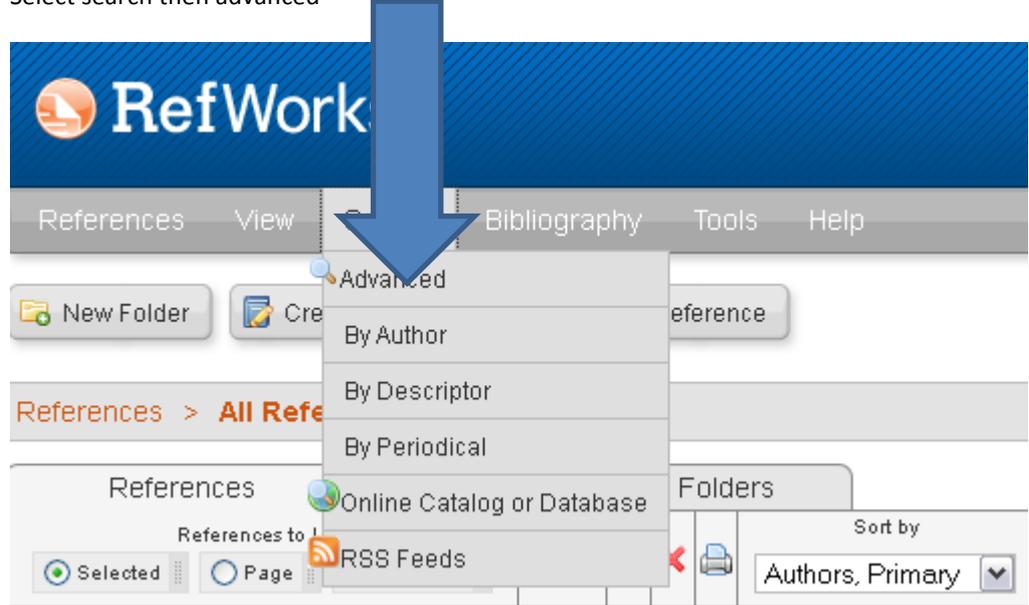
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# ADVANCED GUIDE TO REFWORKS

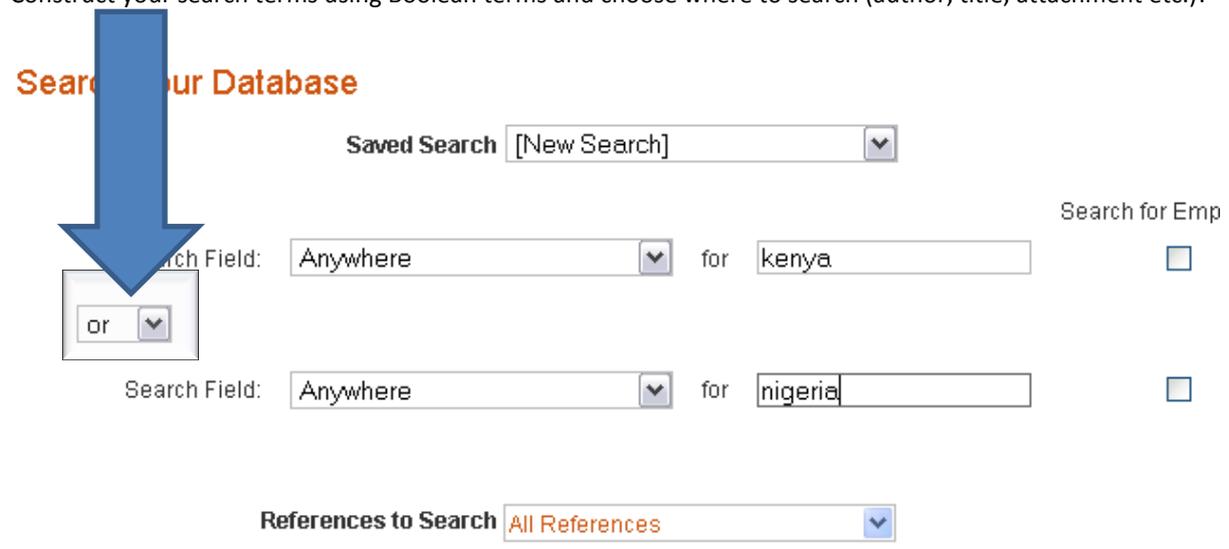
1. Advanced searching
2. My List
3. Adding attachments
4. Importing from RSS feeds
5. Deleting duplicate references
6. Sharing references
7. Editing the output style
8. Working offline
9. One line/cite option
10. Export your references to a different reference management programme
11. Backing up and restoring your account
12. RefMobile

# 1. Advanced searching

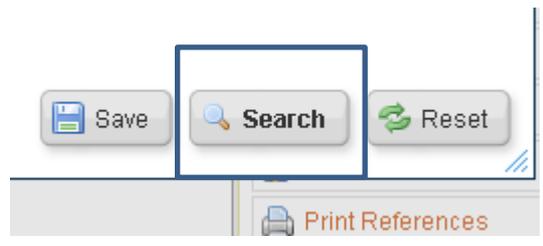
Select search then advanced



Construct your search terms using Boolean terms and choose where to search (author, title, attachment etc.):



You can save your search for easy reference to next time or just hit search



Search using lookups

**Task 2: Using Lookups**

**Lookup by Descriptor**

Search Your Database

A B C D E E G H I J K L M N O P Q R S T U V W X Y Z

[\*therapeutic use] - [Adrenergic beta-Antagonists/administration & dosage/therapeutic use]

Descriptor	Number of References	Edit	Delete	
[*therapeutic use]	1			Activities
[<sup>11</sup>C](R)-PK11195	1			Adaptat
1-Methyl-4-phenyl-1,2,3,6-tetrahydropyridine	2			Addictio
1-Methyl-4-phenyl-1,2,3,6-tetrahydropyridine/administration & dosage	1			Adenine derivati
1-Methyl-4-phenyl-1,2,3,6-tetrahydropyridine/adverse effects	2			Adenine derivativ /therape

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.

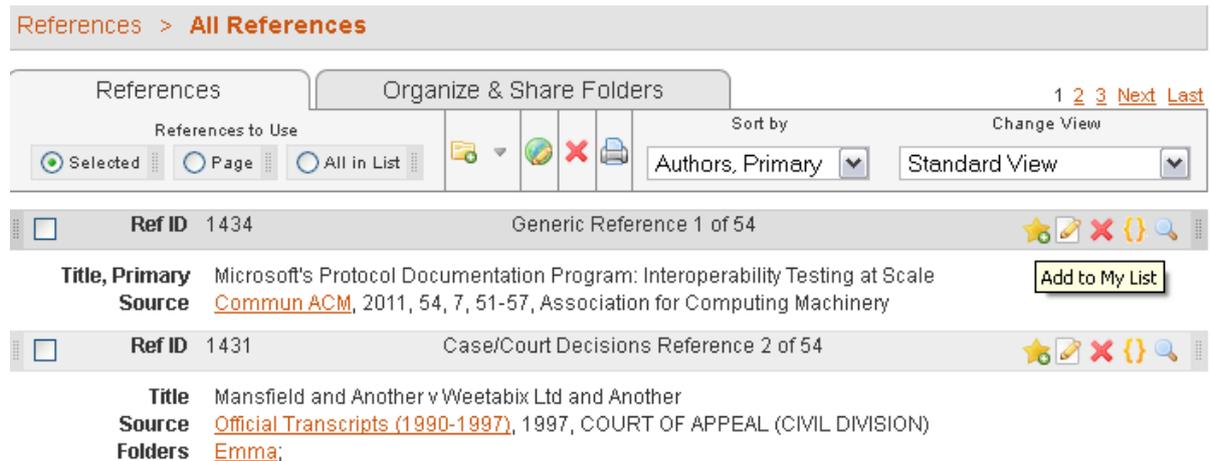
*Notes:*

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.

## 2. Using my list

My List is a temporary folder when you log out of RefWorks, this temporary folder will be cleared. It can be useful for staff to use during workshops as my list is deleted after the workshop so your RefWorks account will be the same.

To add references to my list simply click the star icon  next to any references you want to add, you can add as many as you need



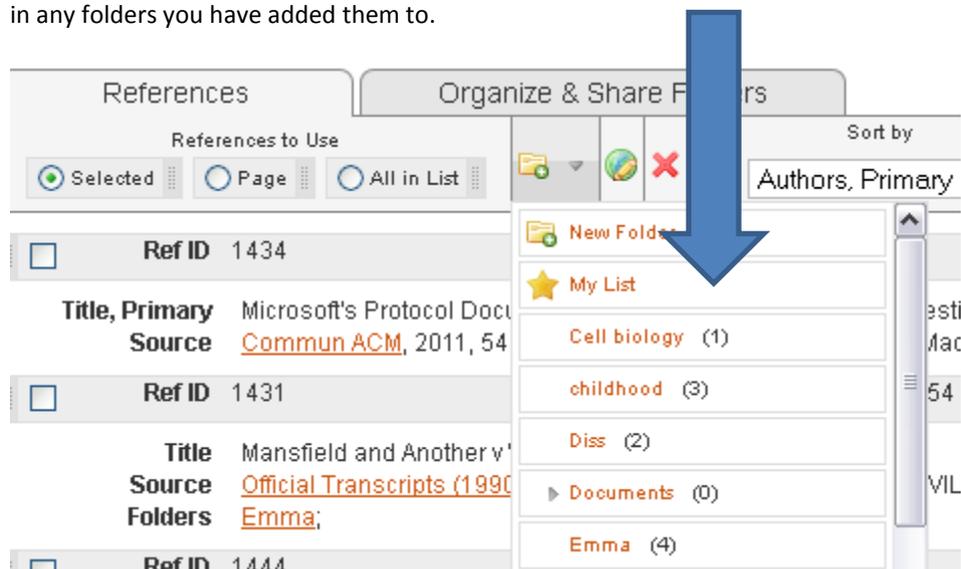
References > All References

References Organize & Share Folders 1 2 3 Next Last

References to Use Selected Page All in List Sort by Authors, Primary Change View Standard View

<input type="checkbox"/>	Ref ID 1434	Generic Reference 1 of 54						<a href="#">Add to My List</a>
	<b>Title, Primary Source</b>	Microsoft's Protocol Documentation Program: Interoperability Testing at Scale <a href="#">Commun ACM</a> , 2011, 54, 7, 51-57, Association for Computing Machinery						
<input type="checkbox"/>	Ref ID 1431	Case/Court Decisions Reference 2 of 54						
	<b>Title</b>	Mansfield and Another v Weetabix Ltd and Another						
	<b>Source</b>	<a href="#">Official Transcripts (1990-1997)</a> , 1997, COURT OF APPEAL (CIVIL DIVISION)						
	<b>Folders</b>	<a href="#">Emma</a> ;						

Then from the folder list just choose my list to work with the references you selected earlier. Remember My List is deleted every time you log out of RefWorks but the references will still be store under all references and in any folders you have added them to.



References Organize & Share Folders Sort by Authors, Primary

References to Use Selected Page All in List

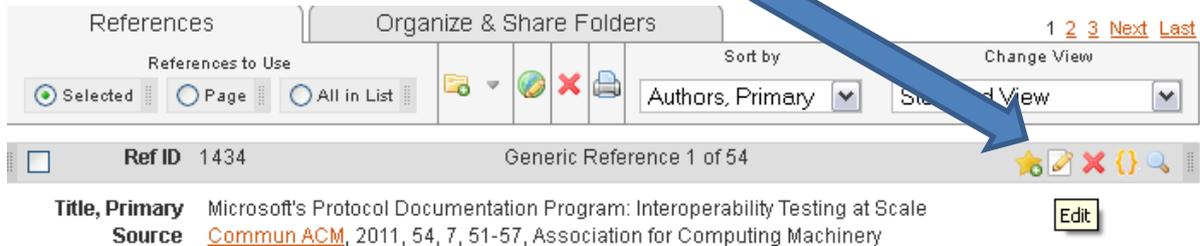
<input type="checkbox"/>	Ref ID 1434	<b>Title, Primary Source</b> Microsoft's Protocol Doc <a href="#">Commun ACM</a> , 2011, 54							
			New Folder	My List	Cell biology (1)	childhood (3)	Diss (2)	Documents (0)	Emma (4)
<input type="checkbox"/>	Ref ID 1431	<b>Title</b> Mansfield and Another v <b>Source</b> <a href="#">Official Transcripts (1990</a> <b>Folders</b> <a href="#">Emma</a> ;							
<input type="checkbox"/>	Ref ID 1444								

### 3. Adding attachments

To attach a file to you RefWorks record:

Save the file that you want to attach.

Locate the appropriate RefWorks record and go into the edit page



Scroll to the attachment option and browse to the file on your computer you wish to save

Add to folder

Select a folder...

Attachments

Browse... No file selected.

Additional Fields

Once the file has been added, click save



Additional Fields



Any reference with an attachment has a paper clip icon



You can also search any pdf attachments you have added using the advanced search technique (See 1. advanced searching)

## 4. Importing references using RSS feeds

Go to Nature magazine's RSS feed page at <http://www.nature.com/nature/newsfeeds.html> or choose your own RSS feed

Right-click on the Nature's current issue table of contents link and select copy link location

### WEB FEEDS

**Nature provides its latest table of contents as an RSS web feed, so you can get science delivered straight to your desktop.**

Receive [Nature's current issue table of contents](#).

Receive [Nature's Latest Research](#).

Receive [Nature's Biological Sciences Research](#).

Receive [Nature's Chemical Sciences Research](#).

Receive [Nature's Earth and Environmental Sciences Research](#).

Receive [Nature's Physical Sciences Research](#).

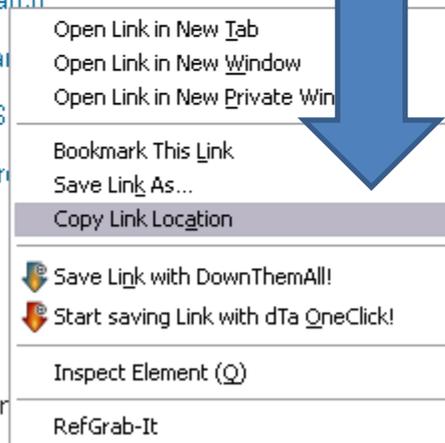
Receive [Nature's News & Comment](#).

Receive [Nature's Comment articles](#).

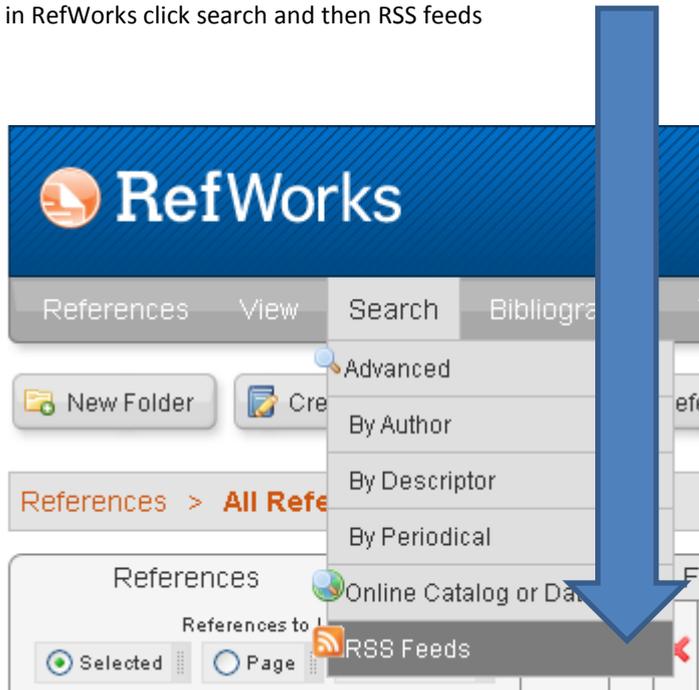
Receive [Nature's Latest Free Content](#).

There is also an RSS feed of AOP *Nature* articles.

Receive [Nature's AOP table of contents](#).



Back in RefWorks click search and then RSS feeds



Simply paste the URL into the feed box and click add RSS feed

### RSS Feeds in your account

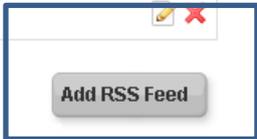
[Help](#)

<http://web.ebscohost.com/ehost/results?sid=4910b522-721d-4d7a-8c53-0ae6368ea547%40sessionmgr4003&vid:bdata=JmRiPXNpaCZkyj1hOWgmnZGI9YW1lZCZkyj1hY2kmZGI9YWlyJmRiPWFzdSZkyj1idGgmZGI9cnp0JmRiPWNwaC%3d%3d#>

[BBC Sport - Olympics](#)

[BBC Sport - Sport Editors'blog](#)  
This blog is where our editors write about our coverage and issues. Here are our tips and house rules. If you have a general question check our FAQs or our broadcast schedule. If you can't find an answer, e-mail us.

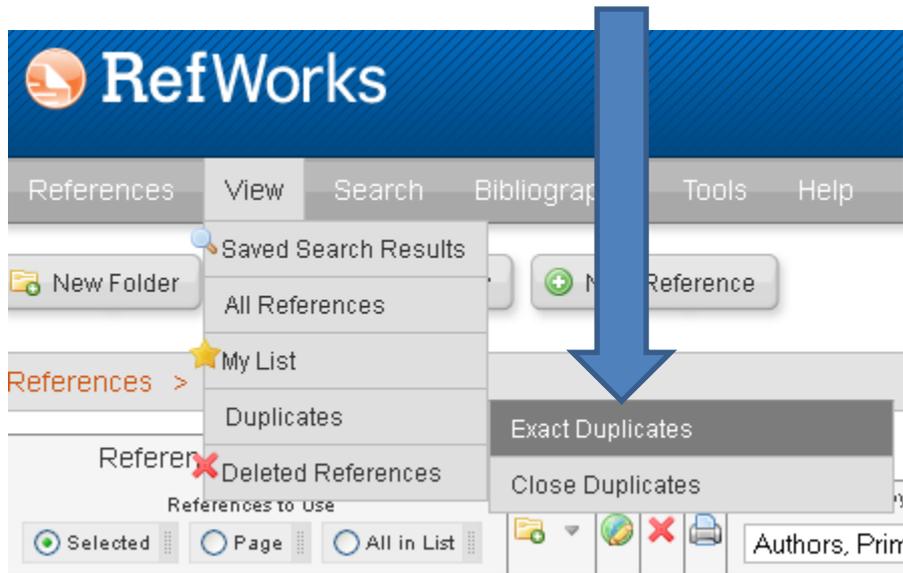
[BBC Sport - Tim Vickery blog](#)  
I cover South American football from Brazil. There's a wealth of talent and a rich culture - a fascinating continent to follow football. Here are some tips on taking part and our house rules.





## 5. Deleting duplicates

In RefWorks select View > Duplicates > Exact Duplicates

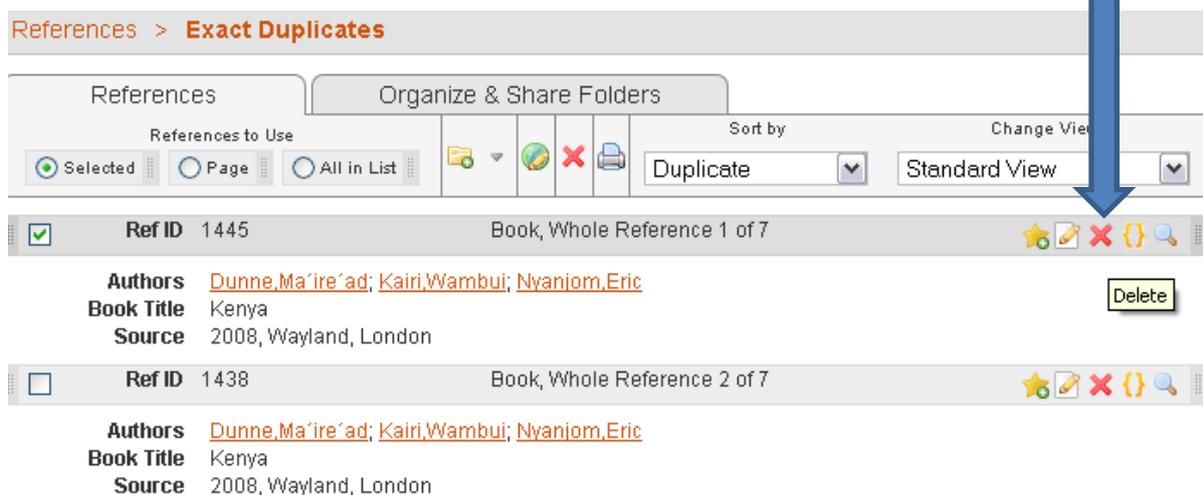


RefWorks will compare the Author, Title and Publication Year fields for all records in your database and present exact matches to you

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!

Click the delete icon to remove the selected records from your account



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

## 6. Sharing references

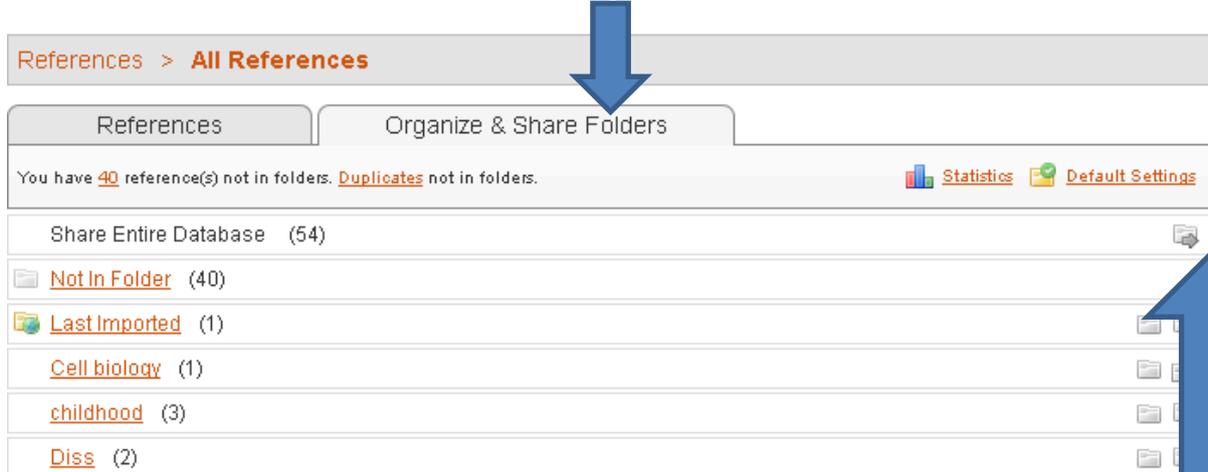
There are various ways of sharing references using RefWorks:

### Creating a shared account.

If you are working in a research group or university team where you all wish to contribute to a shared database of references you can create a new RefWorks account using your university team email (e.g. skills@wlv.ac.uk) or create a personal account and share the username/password among yourselves.

### Personal accounts

If you want to share all your references: Click on the Organize & Share Folders tab:



You will see a list of your folders and an option to Share Entire Database.

To share your all your references - Click on the folder with the green arrow icon opposite the Share Entire Database option.

Click save, after adding or amending any options.

Shared Folder [Entire Database] 

 [Help](#)

The data you are about to share may be copyright protected or subject to data provider restrictions. Users should check with the appropriate database provider(s) to ensure compliance with any restrictions such provider(s) may impose upon downloading or sharing of the information.

▼ Share Information

URL



Title

Title as it will appear in RefShare

Information

- ▶ Share Options
- ▶ Limitations
- ▶ Output Style Options
- ▶ Fields to share

RefWorks will generate the URL, so just click the folder and choose email this share:



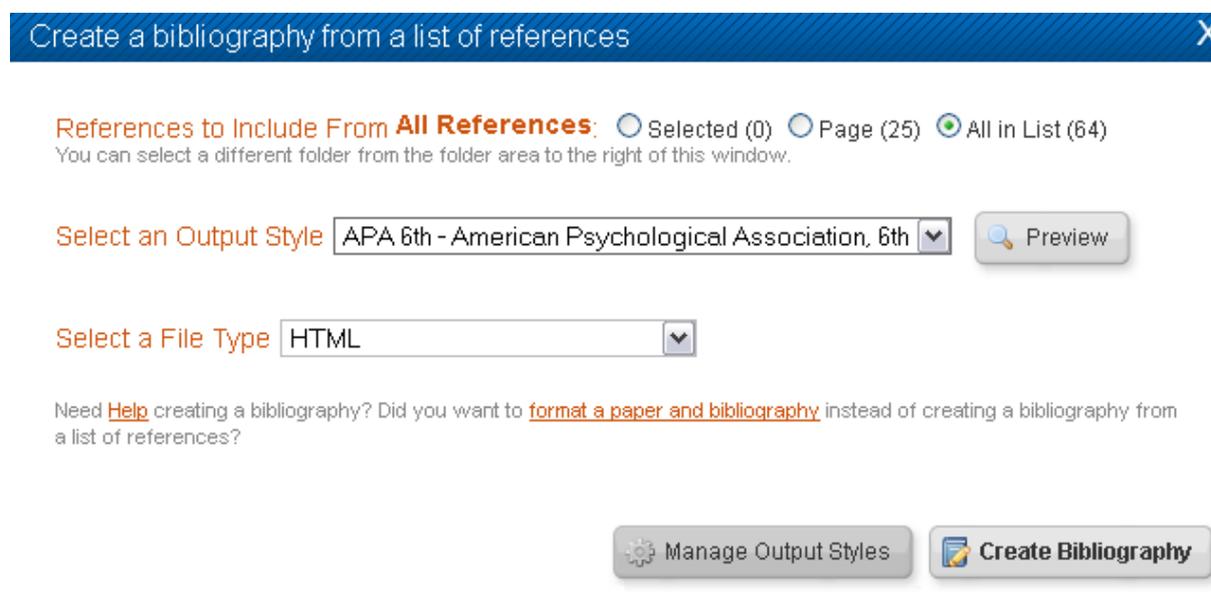
### Share A Folder

Follow the steps above but rather than choosing entire database only select a folder.

## 7. Editing the output style

The majority of users will never need to edit a style provided in RefWorks. RefWorks supports the main University referencing styles and also includes styles for thousands of publishers of books and journals.

From the create a bibliography choose manage output styles and search for the style you require.



The screenshot shows a window titled "Create a bibliography from a list of references" with a close button (X) in the top right corner. Below the title bar, there are three radio button options for "References to Include From": "All References" (selected), "Selected (0)", and "Page (25)". A note below these options states: "You can select a different folder from the folder area to the right of this window." Below this, there is a "Select an Output Style" dropdown menu currently set to "APA 6th - American Psychological Association, 6th" and a "Preview" button. Underneath is a "Select a File Type" dropdown menu set to "HTML". At the bottom of the window, there is a help message: "Need [Help](#) creating a bibliography? Did you want to [format a paper and bibliography](#) instead of creating a bibliography from a list of references?" and two buttons: "Manage Output Styles" (with a gear icon) and "Create Bibliography" (with a document icon).

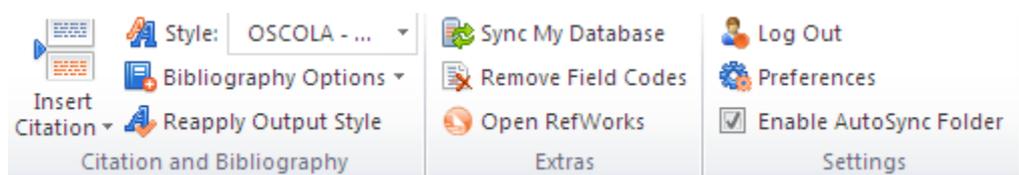
If you feel you need to edit a style please contact the liaison team at [LISLiaison@wlv.ac.uk](mailto:LISLiaison@wlv.ac.uk).

If you feel you are an advanced RefWorks user and wish to attempt to edit a style, RefWorks have guidance available here: <http://www.refworks.com/refworks2/help/RefWorks2.htm>.

If using the editing feature the main point to bear in mind is that it is generally much easier to edit an existing style than to create a new one from scratch, however remember to edit the name when saving so the original style is intact.

## 8. Working offline

### Using Write-N-Cite 4 Offline:



Write-N-Cite 4 works the same whether you are online or offline. There is no difference in functionality except you will lack the ability to sync Write-N-Cite or open RefWorks with your RefWorks account when you are offline.

### Using Write-N-Cite 3 offline:

As all University computers should always be connected to the internet this shouldn't be an issue as if a member of staff or a student are using RefWorks offline on a personal computer they will have the latest version (see above).

The following steps need to be followed to use written-cite 3 offline:

### Using Write-N-Cite III for Windows Offline:

Write-N-Cite III has a feature that allows you to download your references to a computer and access those references to use while writing your paper. In addition to being able to view the references and insert temporary citation placeholders, Write-N-Cite III allows you to format a bibliography in the style of your choice while being offline.

Write-N-Cite III offline functions the same as if you were online. Regardless of whether you are online or not, you cannot add, edit or delete references in your account. You need to log in to your RefWorks database to perform those functions.

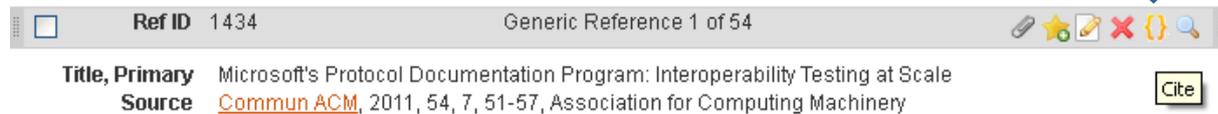
### Downloading Your RefWorks Account To Work Offline:

1. Launch Write-N-Cite III and log in. You must be online in order to download your RefWorks database. Once the data is downloaded you can then use Write-N-Cite III offline.
  2. From the Write-N-Cite III Tools menu, select Create/Update Offline Database.
  3. Click the Create button.
  4. Your data is downloaded.
- Note: Each time you update your RefWorks account and you want to work offline, you will need to repeat steps 1 through 4 above to update the references stored on your local computer.
5. Click the Work Offline checkbox to work offline.

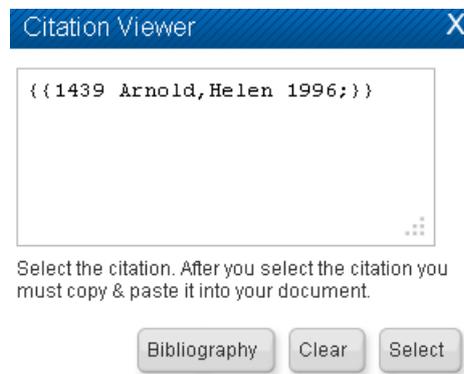
## 9. One line/cite view

Use this feature when Write & Cite is incompatible with your word processing software (e.g. Pages or Google Docs). Note - you should also save your finished document as an RTF (Rich Text Format) file in order for RefWorks to format the bibliography.

Open your document and log into your online RefWorks account (not your Write-N-Cite account). On the main page, locate the reference you wish to cite and click cite:



A Citation Viewer window will appear containing the citation:



Copy and paste or drag and drop the citation into the right place in your document.

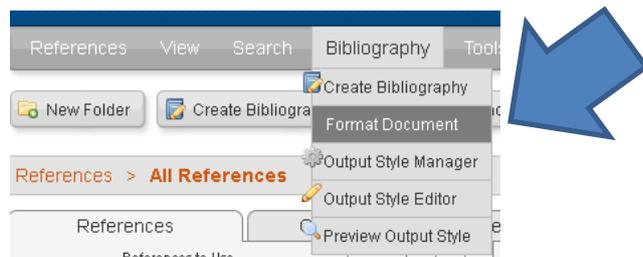
Remember to clear the Citation Viewer window before creating your next citation.

In your document paste the temporary citation into the place you want it:

This is my assignment `{{1439 Arnold,Helen 1996;}}`

After adding all your citations remember to save and close your document.

In RefWorks select bibliography and format document



Select an output style and upload your document and click open:

Select an Output Style

Drop a document to format here or [select a file](#) from your computer.

RefWorks will then format your document:

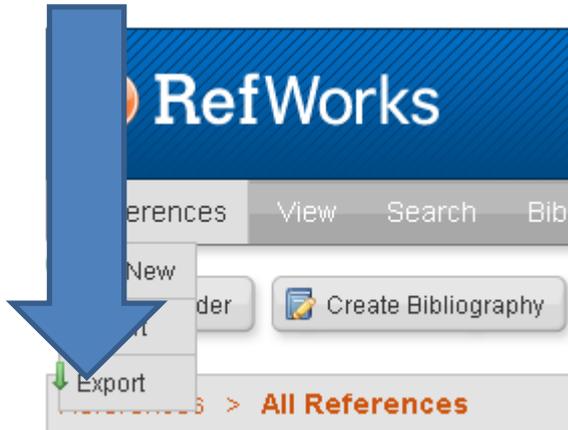
This is my assignment (Arnold, 1996)

### References

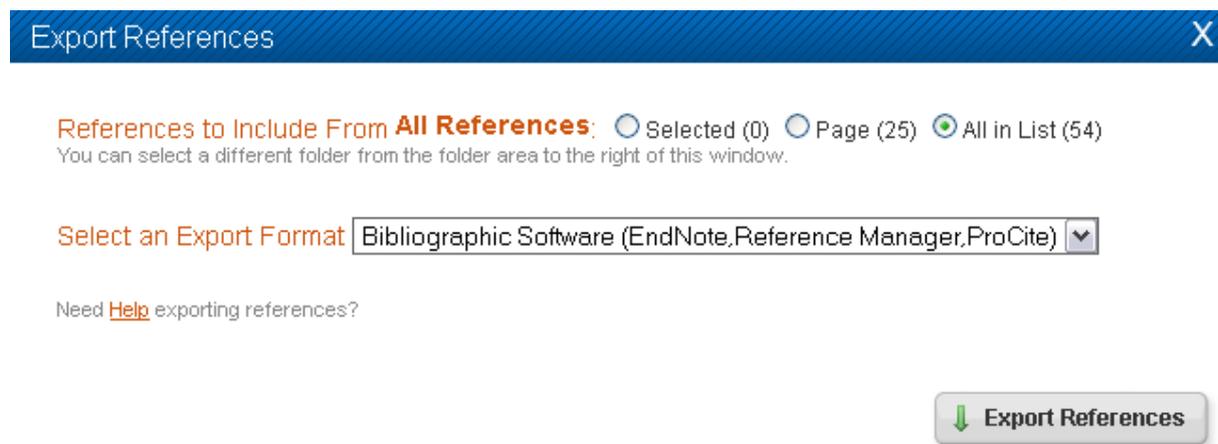
Arnold, H. (1996). *Postcards from Kenya*. London: Penguin.

## 10. Export your references to a different reference management programme

Choose references and then export



In the export references box choose which folder (or all references) you wish to export, choose the name of the reference management programme you wish to export to and click export references.



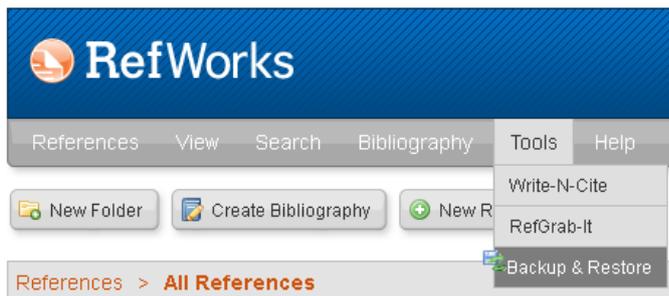
Save the file then upload it to your chosen reference management system following their instructions.

## 11. Backing Up and Restoring Your Account

RefWorks makes sure your data is safe and secure on their servers, but there may be a time when you wish to have your own personal copy of your database or you want to move an account to another organisational subscription. The Backup & Restore feature allows you to create a file that is a copy of your account that can only be restored in RefWorks.

### Backup

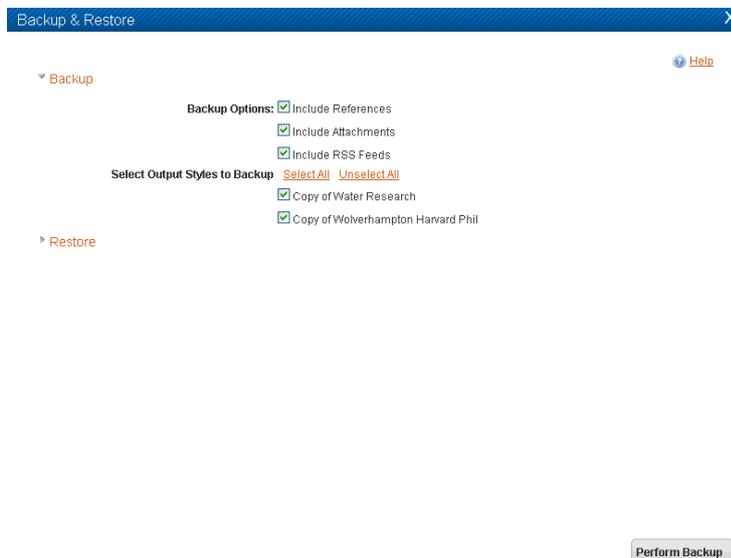
Select Tools > Backup & Restore



By default all backup options are selected.

Click the Perform Backup button

You will be prompted to save a .rwb or .zip file to your computer, store it in an easy to access location (my documents for example).



## Restore

Select Tools > Backup & Restore

Click the Restore link and click on browse to select the .rwb or .zip file to be restored

Select the options, you wish to restore and click Perform Restore

Backup & Restore X

[Help](#)

▸ Backup

▾ Restore

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

**Restore Source:**  No file selected.

### 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

## 12. RefMobile

You can also use RefWorks to add references or manage your folders on the go. Simply log-in to your RefWorks account on your smart device (IPad, smart phone etc.) and RefWorks Mobile will launch. You can search your database, manage folders or add references using author, title or isbn/issn number:



### Search

Search your entire RefWorks database for whatever you need



### View & manage folders

Reorganize your database on the fly



### Exclusive! Smart Add

Quickly search the Web for a reference using key information—such as author name and year published, or identification numbers—and add it to your database with a click



### View all records

Review them, add them to folders



### Add a Note

To any record

Any changes you make will then automatically sync with your account next time you log-in on a pc.



### Cite this work:

Skills for Learning (2014) *Advanced guide to RefWorks* [online] Wolverhampton: University of Wolverhampton [Accessed 19 September 2013] Available from <<http://www.wlv.ac.uk/skills>>

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