

## **SKILLS FOR LEARNING**

## **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			
RefWor	°k		
References View	Bibliography	Tools	Help
	Advanced		0
Cre	By Author	eterence	
References > All Refe	By Descriptor		
	By Periodical		
References	Online Catalog or Database	Folder	s
References to	Dee Foode		Sort by
Selected ○ Page			Authors, Primary 💌

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

Sear		ur Data	ibase					
			Saved Search	[New Search]		[	<b>~</b>	
								Search for Emp
	or 💌	ich Field:	Anywhere	~	for	kenya		
	Sea	rch Field:	Anywhere	~	for	nigeria		
		R	eferences to Search	All References			~	

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

E Save	Search	🕏 Reset
	🔒 Print I	/// References

Search using lookups

## Task 2: Using Lookups

Lookup by Descriptor								
Search Your Database								
ABCDEEGHIJKLMNOPORSIUYWXYZ								
["therapeutic use]] - [Adrenergic beta-Antagonists/administration & dosage/therapeutic use]								
o escriptor	Humber of Neterences	E.G.I	U EI EVE					
*therapeutic use]	_1	ø	_×	Acti	itie:			
[ <sup>11</sup> C](R)-PK11195	1	P	×	Ada	utati			
1-Methyl-4-phenyl-1,2,3,6-	2		*	Add	ctio			
tetranydropyridine				Ade	nine			
1-Methyl-4-phenyl-1,2,3,6- tetrahydronyridine/administration	1	1	×	deri	vativ			
& dosage				Ade	nine			
1-Methyl-4-phenyl-1.2.3.6-				den:	<u>vativ</u> rane			
tetrahydropyridine/adverse	2	Ì	×	Aller				

- From the Ref Works 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 is 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							
Refe	rences to Use		Sort by	Change View			
<ul><li>Selected ∅</li></ul>	Page All in List		🗎 Authors, Primary 💌	Standard View 💌			
Ref ID	1434	Generic R	eference 1 of 54	🁈 🖉 🗙 {}  🕴			
Title, Primary Source	Microsoft's Protocol Do Commun ACM, 2011, 5	cumentation Progra 4, 7, 51-57, Associa	am: Interoperability Testing a ation for Computing Machine	t Scale <mark>Add to My List</mark> ry			
Ref ID	1431	Case/Court Decis	ions Reference 2 of 54	📩 🏹 🗙 {} 🔍 📗			
Title Source Folders	Mansfield and Another <u>Official Transcripts (199</u> Emma;	v Weetabix Ltd and <u>90-1997)</u> , 1997, CC	Another URT OF APPEAL (CIVIL DIVI	SION)			

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 Or	ganize & Share F rs	
References to Use	Sort	t by
⊙ Selected O Page O All in List	🛛 🍯 🎽 🖉 👗 🛛 Authors, Pi	rimary
<b>Ref ID</b> 1434	New Folder	
Title Deimone Minnesoffe Destand D	📩 🌟 My List 🔍	
Source Commun ACM, 2011,	54 Cell biology (1)	esti Aac
Ref ID 1431	childhood (3)	≡ 54
Title Mansfield and Anothe	erv' Diss (2)	
Source Official Transcripts (1	99( Documents (0)	VIL
roiders <u>Emma</u> ,	Emma (4)	
Ref ID 1444		

## 3. Adding attachments

To attach a file to you RefWorks record:

Save the file that you want to attach.

Locate the appro	iate RefWorks record and go into the edit page	
Reference	Organize & Share Folders 1 2 3 Next Las	<u>st</u>
Refer	bes to Use Sort by Change View	
⊙ Selected ▮ C	age 📗 🔿 All in List 📗 🔤 🝸 🥙 🎽 Authors, Primary 💌 🛛 Sta. 🔍 View 💌	
Ref ID	434 Generic Reference 1 of 54	
Title, Primary Source	dicrosoft's Protocol Documentation Program: Interoperability Testing at Scale Edit Commun ACM, 2011, 54, 7, 51-57, Association for Computing Machinery	
Scroll to the attac	ment 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 F	lds	
Once the file has	een added, click save	
Attachments	Browse No file selected.	
	Delete	
* Additional Fields	(314-K)	
· Next	Duplicate Save Reference	
Any reference wi	an attachment has a paper clip icon	
Ref ID	413 Journal Article Reference 5 of 54 🥒 🚖 🏹 🔍	***
Authors Title	Akbarian,Is'haaq The relationship between vocabulary size and depth for ESP/EAP learners	

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

## 4. Importing references using <sup>SRSS</sup> feeds

Go to Nature magazine's RSS feed page at <u>http://www.nature.com/nature/newsfeeds.html</u> 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 an ge 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. Open Link in New <u>T</u>ab Receive Nature's Chemical Sciences Resear Open Link in New <u>W</u>indow Open Link in New Private Win Receive Nature's Earth and Environmental S Bookmark This Link Receive Nature's Physical Sciences Resear Save Link As... Copy Link Location Receive Nature's News & Comment. Save Link with DownThemAll! Receive Nature's Comment articles. Start saving Link with dTa OneClick! Receive Nature's Latest Free Content. Inspect Element (Q) There is also an RSS feed of AOP Nature ar RefGrab-It Receive Nature's AOP table of contents.

Back in RefWorks click search and then RSS feeds

🕓 RefWor	rks		
References View	Search	Bibliogra	
	Advanced		
New Folder	By Author		efe
References > All Refe	By Descri	otor	
	By Periodi	cal	
References	Online Cat	talog or Da	F
References to Selected Page	RSS Feed	S	<

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

### RSS Feeds in your account

http://web.ebscohost.com/ehost/results?sid=4910b522-721d-4d7a-8c53-0ae6368ea547%40sessionmg bdata=JmRiPXNpaCZkYj1hOWgmZGI9YW1IZCZkYj1hY2kmZGI9YWlyJmRiPWFzdSZkYj1idGgmZGI9cnpoJn %3d%3d#	1 <u>r4003&amp;vid=</u> 1RiPWNwa(
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 genera question check our FAQs or our broadcast schedule. If you can't find an answer, e-mail us.	al 📝 🗙
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 foo Here are some tips on taking part and our house rules.	otball.
http://feeds.nature.com/NaturePhysicalSciencesResearch	S Feed

(a) <u>Help</u>

RefWorks will now retrieve the RSS feed, however it gives the option of checking the feed before importing everything. Simply tick the boxes of any item(s) you want and click import then ok to confirm

	Ref ID	Journal Article Reference 1 of 8										
	Title Source	ange in the chemical composition of infalling gas forming a disk around a protostar ture Physical Sciences Research, <prism:rightsagent xmlns:prism="http://prismstandard.org&lt;br&gt;mespaces/basic/2.0/">permissions@nature.com</prism:rightsagent> <items> <rdf.seq> <rdf.li :resource="http://dx.doi.org/10.1038/nature13000" /&gt; <rdf.li 2="" are="" import="" rdf.resource="http://dx.doi.org/(TRUNCATED)&lt;/th&gt;&lt;/tr&gt;&lt;tr&gt;&lt;th&gt;&lt;/th&gt;&lt;th&gt;Ref ID&lt;/th&gt;&lt;th&gt;Journal Article Reference 2 of 8&lt;/th&gt;&lt;th&gt;٩,&lt;/th&gt;&lt;/tr&gt;&lt;tr&gt;&lt;th&gt;&lt;/th&gt;&lt;th&gt;Title&lt;br&gt;Source&lt;/th&gt;&lt;th&gt;Fuel gain exce&lt;br&gt;Nature Physica&lt;br&gt;&lt;u&gt;namespaces&lt;/u&gt;&lt;br&gt;df:resource=" references?<="" selected="" sure="" th="" the="" to="" want="" you=""><th>ard.org Beq&gt; <rdf.li rq/(TRUNCATED)</rdf.li </th></rdf.li></rdf.li </rdf.seq></items>										ard.org Beq> <rdf.li rq/(TRUNCATED)</rdf.li 
	Ref ID		٩									
	Title Source	Plasma physic Nature Physic: hamespaces/ rdf.resource="	<u>ard.org</u> Seq> <rdf.li rq/(TRUNCATED)</rdf.li 									
	Ref ID		, <b>Q</b>									
	Title Source	Condensed-matter physics: History matters for a stirred superfluid Nature Physical Sciences Research, <prism:rightsagent xmlns:prism="&lt;u&gt;http://prismstan&lt;/u&gt;&lt;br&gt;&lt;u&gt;namespaces/basic/2.0/&lt;/u&gt;">permissions@nature.com</prism:rightsagent> <items> <rdf 'df.resource="<u>http://dx.doi.org/10.1038/nature13000"</u> /&gt; &lt;rdf.li rdf.resource="&lt;u&gt;http://dx.doi.</rdf </items>	<u>dard.org</u> :Seq> <rdf:li orq/(TRUNCATED)</rdf:li 									
_	5 ( 5		Back to feeds									

## 5. Deleting duplicates

In RefWorks select View > Duplicates > Exact Duplicates

🕓 Ref	Wo	rks				
References	View	Search	Bibliograp	T	ools	Help
🗟 New Folder	Saved S All Refe	Gearch Results erences		Refer	rence	
References >	My List					
Defense	Duplica	ates	Exact D	uplicates		
Referen	CDeleted	l References	Close D	)uplicates		3
⊙ Selected (	⊖ Page	O All in List		Ø × 4	Au	thors, Prim

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

Refer	ences > I	Exact Du	iplicates									
	References Organize & Share Folders											
	Refer	ences to Us	e						Sort by		Change Vie	
💿 s	elected 📗 🤇	Page	🔿 All in List 📗	6	~		×		Duplicate	~	Standard View	
	Ref ID	1445			Во	iok, '	Who	le R	eference 1 of 7		👈 🖉 🗙	{} 🔍 🛙
	Authors Book Title Source	<mark>Dunne,N</mark> Kenya 2008, W	<u>Ma'ire'ad; Kairi,V</u> 'ayland, London	<u>Vami</u>	bui;	<u>Nya</u>	injon	<u>n,Eri</u>	i <u>c</u>			Delete
	Ref ID	1438			Во	ok, '	Who	le R	eference 2 of 7		📩 🖉 💥	: {} 🔍 🛛
	Authors Book Title Source	<mark>Dunne,N</mark> Kenya 2008, W	<u>Ma'ire'ad; Kairi,V</u> 'ayland, London	Vaml	bui;	<u>Nya</u>	injon	n,Eri	i <u>c</u>			

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:

References > All References	
References Organize & Share Folders	
You have <u>40</u> reference(s) not in folders. <u>Duplicates</u> not in folders.	📊 Statistics 📑 Default Settings
Share Entire Database (54)	
Not In Folder (40)	
Last Imported (1)	
Cell biology (1)	
childhood (3)	E .
Diss (2)	E 1

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.

					) <u>Help</u>
Shared Folder	[Entire Database]	•	•		-
The data you are about to share r database provider(s) to ensure c	nay be copyright protected or subject to data provider re ompliance with any restrictions such provider(s) may im	strictions. Users pose upon dowr	should check nloading or sha	with the appropriate rring of the informat	on.
Share Information					
URL	http://www.refworks.com/refshare2?site=06618129	4635600000/79	1501		
Title	Title as it will appear in RefShare				
Information					
Share Options					
Limitations					
Output Style Options					
Fields to share					
		E Save	🕏 Reset	Copy to default	Cancel

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

References Organize & Share Folders   You have 40 reference(s) not in folders. Duplicates not in folders.	Webinars	
Share Entire Database (54)	f 🗹 🕂 🚔	
🖻 Not In Folder (40)	http://www.refworks.co	ire2
Last Imported (1)	📄 📄 Remove Share	
Cell biology (1)	Shared Folder Option	
- E 11 dE d - (9)		]
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.

Create a bibliography from a list of references X
References to Include From All References; O Selected (0) O Page (25) O All in List (64) You can select a different folder from the folder area to the right of this window.
Select an Output Style APA 6th - American Psychological Association, 6th 💌 🔍 Preview
Select a File Type HTML
Need <u>Help</u> creating a bibliography? Did you want to <u>format a paper and bibliography</u> instead of creating a bibliography from a list of references?
ان کې Manage Output Styles 🛛 🕞 Create Bibliography

If you feel you need to edit a style please contact the liaison team at 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: <u>http://www.refworks.com/refworks2/help/RefWorks2.htm</u>.

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 stepos need to be followed to uise 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 user 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:

					$\mathbf{v}$	
	Ref ID	1434	Generic Reference 1 of 54	I 🚖 🖉 🗙	{} 🔍	
Title,	, Primary	Microsoft's Protocol Do	cumentation Program: Interoperability Testing at Scale		Cite	
	Source	Commun ACM, 2011, 5	4, 7, 51-57, Association for Computing Machinery			Ε.

#### A Citation Viewer window will appear containing the citation:

Citation \	/iewer		X
{{1439	Arnold,Helen	1996;}}	
			.::
Select the ci must copy &	tation. After you se paste it into your	elect the cit document.	ation you

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

	11111111111111111111111111111111111111			111111111	
References			Bibliography	Tool	$\wedge$
			Create Bibliogra	aphy	
New Folder	Cre	ate Bibliogra	Format Docume	ent -	
References > .	All Refe	rences	Output Style Mar	nager	
		6	Output Style Edi	tor	
Referenc	es		Preview Output :	Style e	
Refe	rences to U	lse			

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



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

	RefWorks	
	erences View Search B	ibl
4	New der 🔂 Create Bibliography	
Į.	xport > All References	

In the export references box chose 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.

Export References	//////////////////////////////////////
References to Include From All References; O Select You can select a different folder from the folder area to the right of this	ted (0) OPage (25) OAll in List (54) window.
Select an Export Format Bibliographic Software (EndNo	ote,Reference Manager,ProCite) 💌
Need Help exporting references?	
	Lange 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).

Perform Backup

ackup & Restore		
Backup		🚱 <u>Help</u>
	Backup Options: 🗹 Include References	
	🗹 Include Attachments	
	Include RSS Feeds	
Select Output	Styles to Backup Select All Unselect All	
	Copy of Water Research	
	Copy of Wolverhampton Harvard Phil	
Destore		

#### 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	//////////////////////////////////////
	🕢 Help
Backup	
Restore	
Restore Options: 🗖 Include References	
Include Attachments	
Include RSS Feeds	
Include Output Styles	
Restore Source: Browse No file selected.	

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

## 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



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 & manage folders Reorganize your database on the fly



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 <a href="http://www.wlv.ac.uk/skills>">http://www.wlv.ac.uk/skills></a>

To request this document in an alternative format please contact <a href="mailto:skills@wlv.ac.uk">skills@wlv.ac.uk</a>