RefWorks Advanced Feature Training  
Training Outline

The following is a sample outline of a RefWorks Advanced Feature training session. This session would run approximately 1.5 hours if given demonstration style...longer if hands-on. Session attendees should have a knowledge of RefWorks basic features.

Module 1: Advanced Searching and Lookups  
- Using the Advanced Search  
  o Creating a Search String  
  o Folder-specific searching  
- Using the Lookup feature  
  o Viewing records from a Lookup  
  o Editing and deleting terms from the Lookups

Module 2: Viewing, Sorting and Printing References  
- Using the Switch to: option  
  o Standard View  
  o One Line/Cite View  
  o Full View  
- Customizing the Switch to: option  
  o Adding Output Styles  
  o Changing the number of records displayed on a page  
- Sorting references  
  o Using the Sort by drop-down  
  o Establishing a default sort  
- Using the Print feature  
  o How the Print feature differs from a Reference List created in the Bibliography area

Module 3: Editing Multiple References  
- Using Global Edit  
  o Editing a single field vs. Electronic Source Related Information fields  
  o Changing default import options to allow for global edit of Electronic Source Related information

Module 4: My List  
- Functions of My List  
- Creating a reference list from My List  
- Exporting My List

Module 5: Additional Methods for Importing References  
- Capturing data from a web page with RefGrab-It  
- Using RefWorks RSS feed reader to view and import

Module 6: Checking for Duplicates
- Two options: Exact and Close Match
- How exact match and close match differ

**Module 7: Using the Output Style Preview Utility**
- How the utility works and
- How it can help you locate a type of output style

**Module 8: Working Offline**
- What you need to work offline
- Creating a paper offline
- Formatting a paper created offline

**Module 9: Backing Up Your Account**
- Using the Backup feature
- Backup vs. Export
- Restoring a backup file