

## **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