

**RefWorks 2.0
Fundamentals
Workbook**

(updated Aug. 2011)

RefWorks 2.0

Fundamentals Workbook

Introduction

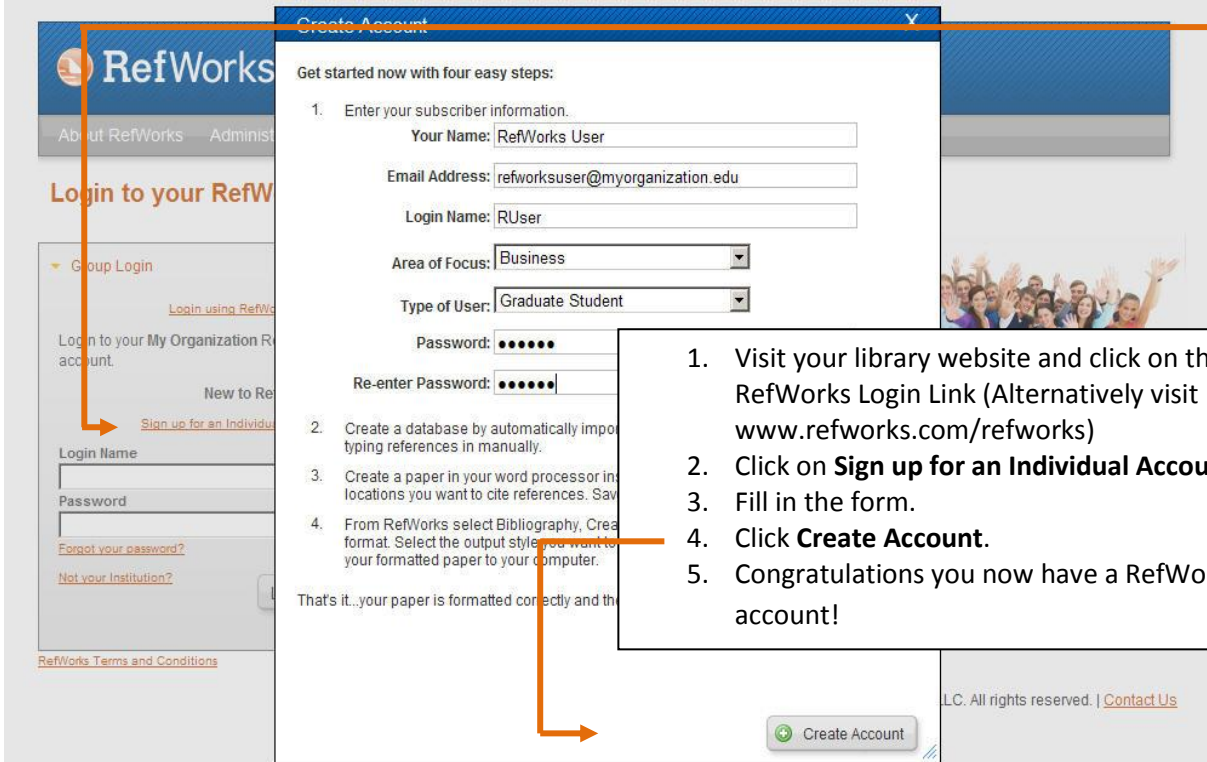
The workbook is designed to guide users through some of the basic features of using RefWorks.

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

- Task 1:** Set-up an account
- Task 2:** Direct Import from Google Scholar
- Task 3:** Direct Import from ProQuest
- Task 4:** Import Data from a Saved Text File
- Task 5:** Add New Reference Manually
- Task 6:** Search Online Database
- Task 7:** Search Library Catalog
- Task 8:** Creating Folders and Moving Information
- Task 9:** Create a List of References in Preferred Output Style
- Task 10:** Create a Bibliography with Write-N-Cite III for Windows
- Task 11:** Create a Bibliography without Write-N-Cite

RefWorks User Workbook

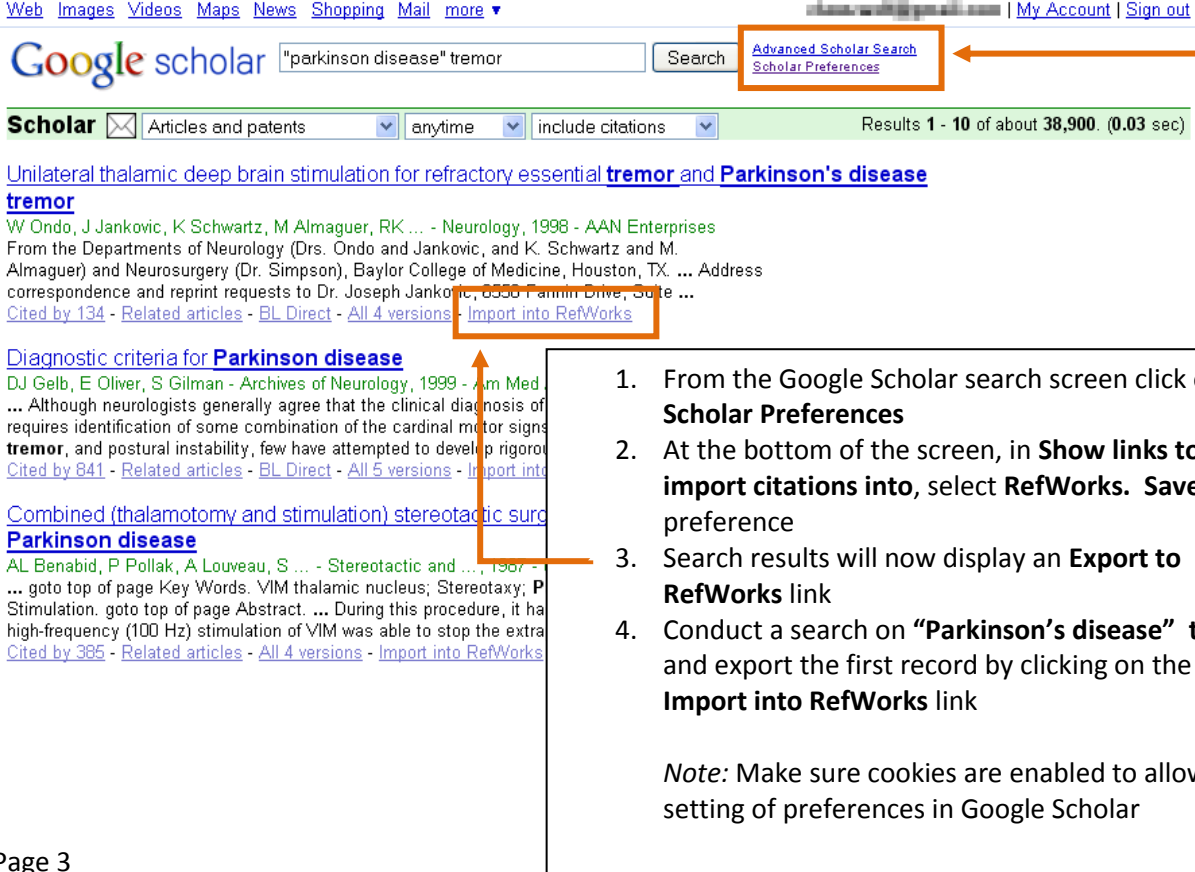
Task 1: Set-up an account



The screenshot shows the RefWorks 'Create Account' page. The form includes fields for 'Your Name', 'Email Address', 'Login Name', 'Area of Focus', 'Type of User', 'Password', and 'Re-enter Password'. A 'Create Account' button is at the bottom right. A list of five steps is overlaid on the right side of the form, with orange arrows pointing to the 'Sign up for an Individual Account' link on the left and the 'Create Account' button.

1. Visit your library website and click on the RefWorks Login Link (Alternatively visit www.refworks.com/refworks)
2. Click on **Sign up for an Individual Account**.
3. Fill in the form.
4. Click **Create Account**.
5. Congratulations you now have a RefWorks account!

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



The screenshot shows a Google Scholar search for "parkinson disease" tremor. The search results are displayed, and an orange box highlights the 'Advanced Scholar Search' and 'Scholar Preferences' links. A list of four steps is overlaid on the right side of the page, with orange arrows pointing to the 'Advanced Scholar Search' link, the 'Import into RefWorks' link, and the 'Import into RefWorks' link in the search results.

1. From the Google Scholar search screen click on **Scholar Preferences**
2. At the bottom of the screen, in **Show links to import citations into**, select **RefWorks**. **Save** your preference
3. Search results will now display an **Export to RefWorks** link
4. Conduct a search on **"Parkinson's disease" tremor** and export the first record by clicking on the **Import into RefWorks** link

Note: Make sure cookies are enabled to allow setting of preferences in Google Scholar

Task 3: Direct Import from ProQuest

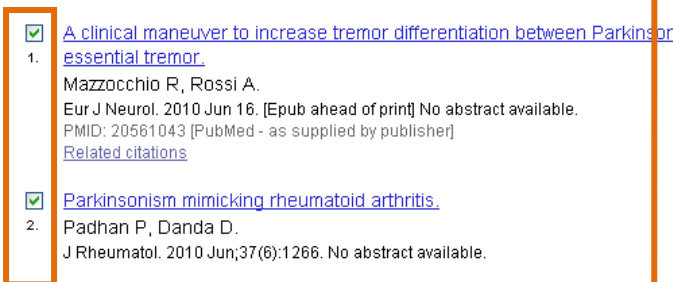
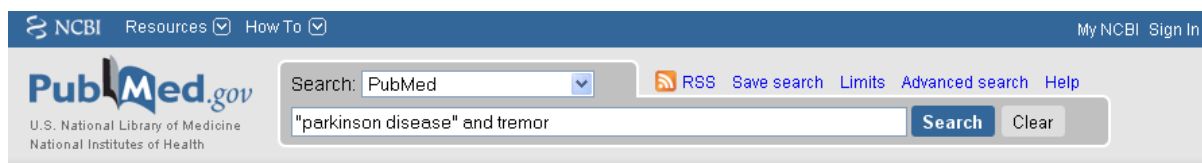
Note: You can substitute a different vendor for this exercise. The complete list of Direct Export partners is available from: <http://www.refworks-cos.com/refworks/DEPartners/>. Check the RefWorks online help for detailed instructions for a specific vendor.

The screenshot shows the ProQuest search results page for 'Parkinson's Disease and tremor'. The search results are filtered to 'Scholarly journals' and show 9641 results. A list of results is displayed, with the first result selected. An 'Export' dialog box is open, showing 'Items selected: 20' and 'Export to: RefWorks'. The dialog box also includes a 'Continue' button and a 'Cancel' button. A text box with a list of instructions is overlaid on the right side of the screenshot, with arrows pointing to the corresponding elements in the ProQuest interface.

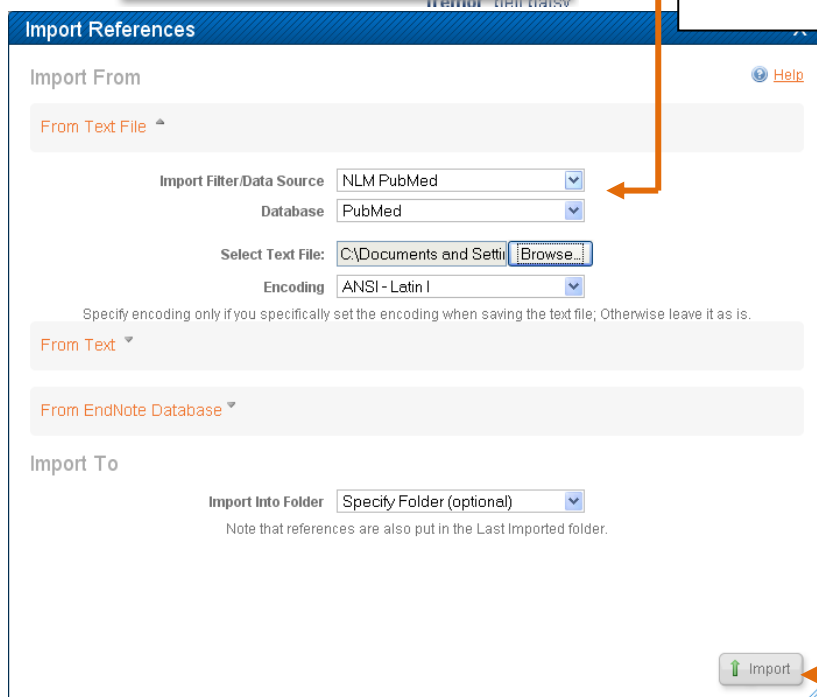
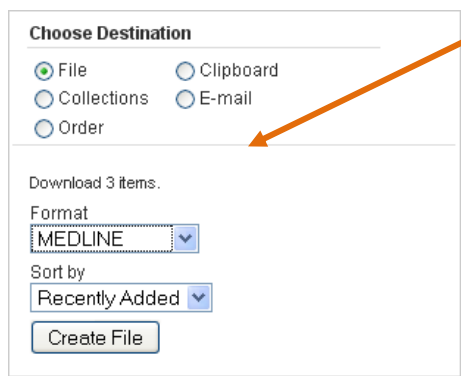
1. Conduct a search for **Parkinson Disease and tremor**
2. For each record you want to export, click on the check box to the left of it
3. Click on Export
4. Select Export to RefWorks from the drop down box and then click on Continue
5. Your records will be imported into your **Last Imported** folder in RefWorks

Task 4: Import Data from a Saved Text File

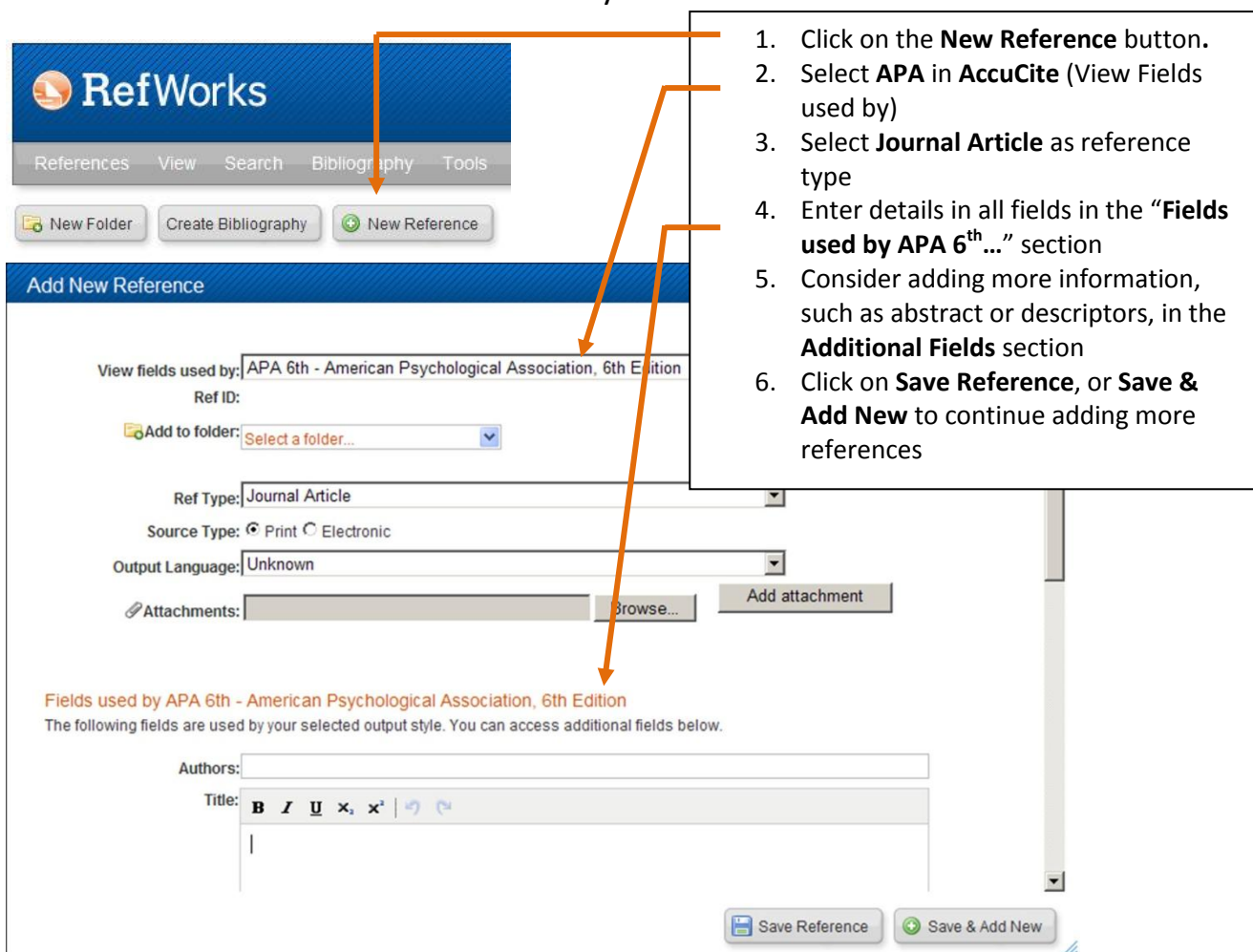
Note: You can substitute PubMed for one of the many hundred other databases supported by RefWorks. A full list is available at <http://www.refworks-cos.com/refworks/ImportFilters/>



1. In a separate browser window open PubMed and carry out a simple search on **“Parkinson’s disease” and tremor**
2. From your search results, select items to save by clicking the **checkbox** to the left of the appropriate citations
3. In the **“Send to”** menu select **File**, Format **Medline** and click on **Create File**
4. In RefWorks, select **References > Import** from the toolbar
5. Select **NLM PubMed** as the data source and **PubMed** as the database
6. Browse to find the text file you saved to your computer and click **Open**
7. Click **Import**. Your records should appear in the *Last Imported Folder*



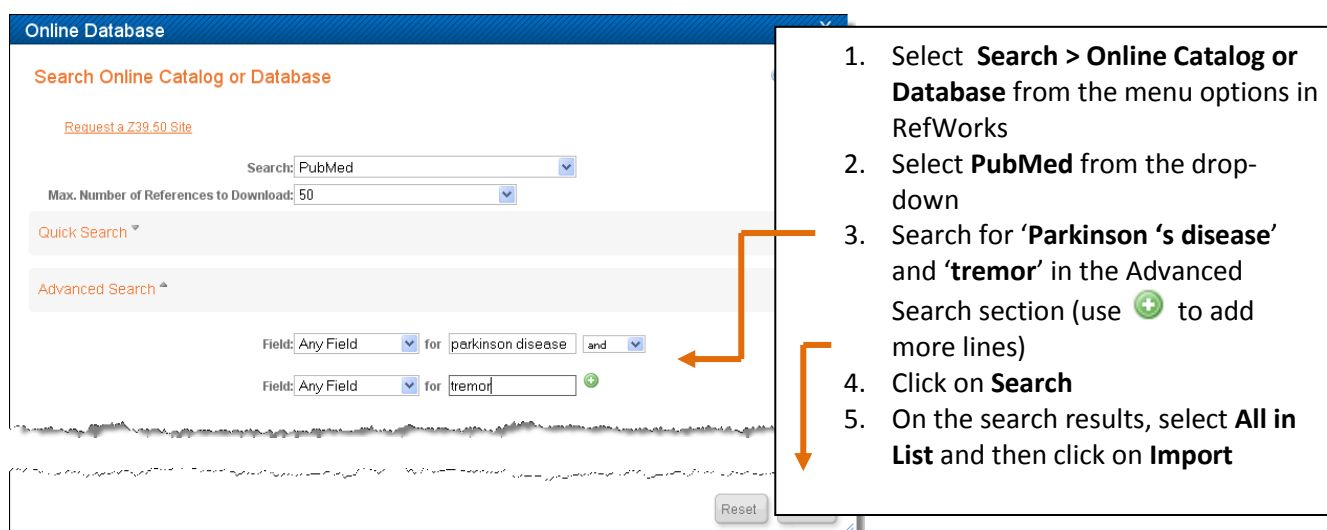
Task 5: Add New Reference Manually



The screenshot shows the 'Add New Reference' form in RefWorks. The form includes fields for 'View fields used by', 'Ref ID', 'Add to folder', 'Ref Type', 'Source Type', 'Output Language', and 'Attachments'. Below these fields is a section titled 'Fields used by APA 6th - American Psychological Association, 6th Edition' with a list of fields and a 'Title' field with a rich text editor. At the bottom are 'Save Reference' and 'Save & Add New' buttons. A list of six numbered instructions is on the right, with orange arrows pointing to the 'New Reference' button, the 'View fields used by' dropdown, the 'Ref Type' dropdown, the 'Fields used by' section, the 'Additional Fields' section, and the 'Save Reference' button.

1. Click on the **New Reference** button.
2. Select **APA** in **AccuCite** (View Fields used by)
3. Select **Journal Article** as reference type
4. Enter details in all fields in the “**Fields used by APA 6th...**” section
5. Consider adding more information, such as abstract or descriptors, in the **Additional Fields** section
6. Click on **Save Reference**, or **Save & Add New** to continue adding more references

Task 6: Search Online Database

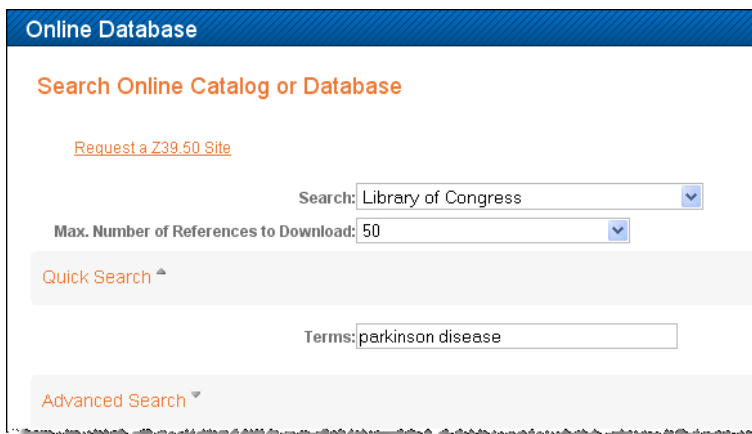


The screenshot shows the 'Online Database' search interface. It includes a search bar with 'PubMed' entered, a dropdown for 'Max. Number of References to Download' set to 50, and a 'Quick Search' section. Below that is an 'Advanced Search' section with two search criteria: 'Field: Any Field for parkinson disease and' and 'Field: Any Field for tremor'. A 'Reset' button is at the bottom right. A list of five numbered instructions is on the right, with orange arrows pointing to the 'Search' dropdown, the 'PubMed' dropdown, the search criteria fields, the 'Search' button, and the 'All in List' option.

1. Select **Search > Online Catalog or Database** from the menu options in RefWorks
2. Select **PubMed** from the drop-down
3. Search for **'Parkinson 's disease'** and **'tremor'** in the Advanced Search section (use **+** to add more lines)
4. Click on **Search**
5. On the search results, select **All in List** and then click on **Import**

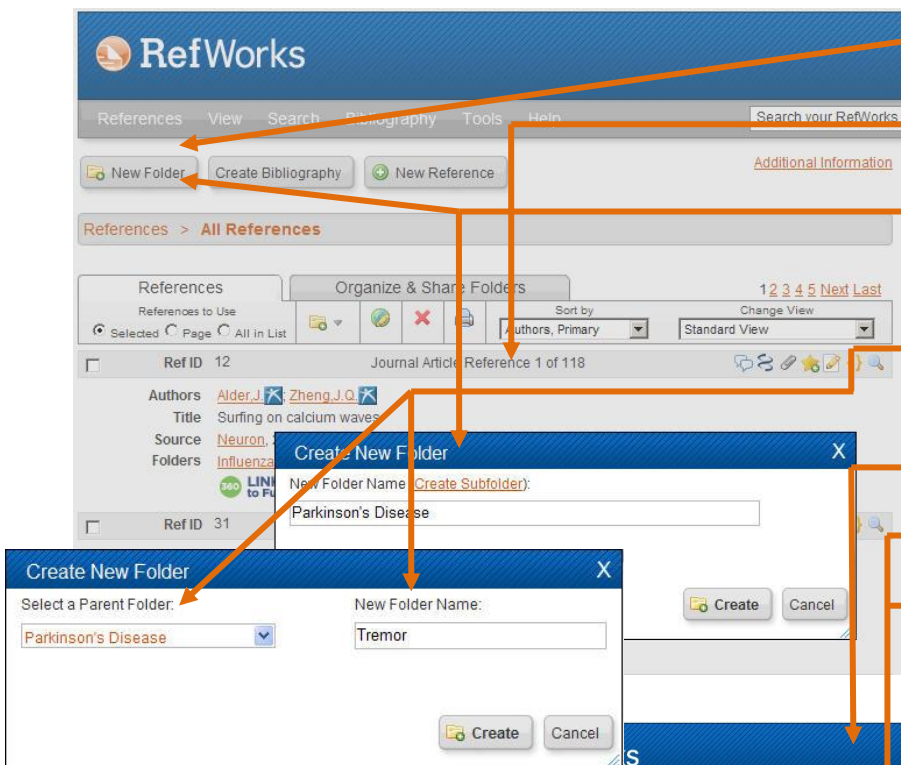
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Task 7: Search Library Catalog

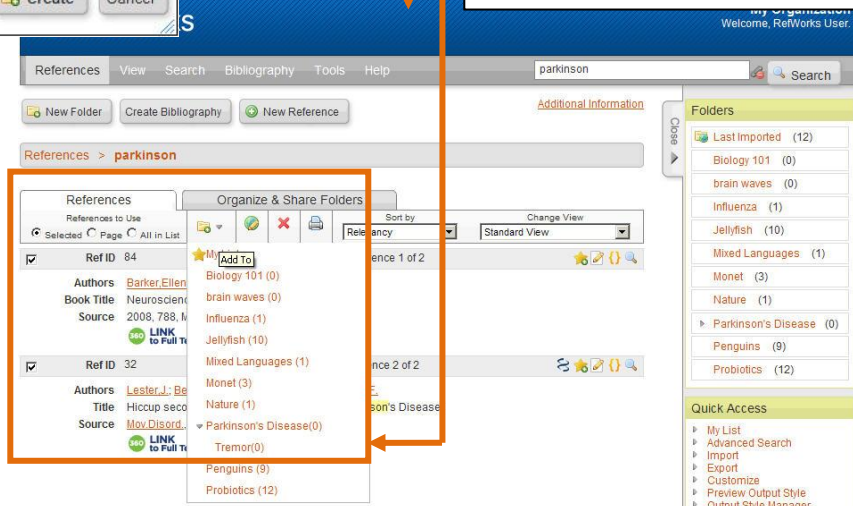


1. Click on **Search > Online Catalog or Database**
2. Select **Library of Congress** from the drop-down
3. Search for **'Parkinson disease'** in the Quick Search box
4. Click on **Search**
5. On the search results, select several references and then click on **Import**

Task 8: Creating Folders and Moving Information



1. Click the **New Folder** button
2. Name it **Parkinson's Disease** and click **Create**
3. Create a sub-folder called **Tremor** (click **New Folder** then **Create Subfolder** link).
4. Select **Parkinson's Disease** as the parent folder and enter **Tremor** in the **New Folder** box. Click **Create**.
5. In RefWorks **Quick Search**, search for **Parkinson**.
6. Select **All** under "References to Use".
7. Add to the folder **Parkinson's Disease**.
8. In RefWorks **Quick Search**, search for **tremor** and move them into the subfolder labeled tremor



Task 9: Create a List of References in Preferred Output Style

Create Bibliography

[List of Output Styles](#) [Request New Output Style](#)

Output Style: APA 5th - American Psychologic

[Output Style Manager](#) [Preview Output Style](#) [Edit](#)

Format Paper and Bibliography

Format a Bibliography from a List of References

File Type: Word for Windows (2000 or later)

Document Formats Supported: Word, Open Office, RTF, Text, and HTML

References to Include: All References My List Parkinson Disease

Create Bibliography

1. In RefWorks, click **Bibliography**.
2. Select **APA 5th – American Psychological Association** as the output style.
3. Select the **Format a Bibliography from a List of References**
 - a. Select **Word for Windows** as **File Type**.
 - b. Select **Parkinson’s Disease** in the **References to Include** Folder drop-down box.
 - c. Click on **Create Bibliography**.

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

Helpful Hint: Output Style Manager

Output Style Manager

Nature Search

Show Search Results

Your favorite output styles are your primary means of output style in RefWorks.

List of Output Styles

Nature
Nature Biotechnology
Nature Genetics
Nature Immunology
Nature Neuroscience
Nature Reviews Cancer
Nature Reviews Drug Discovery
Nature Reviews Genetics
Nature Reviews Immunology
Nature Reviews Microbiology

Preview Output Style

Favorites

APA 5th - American Psychological Association,
APA 6th - American Psychological Association,
Chicago 15th Edition (Author-Date System)
Council of Science Editors - CSE 7th, Citation-Se
Council of Science Editors - CSE 7th, Name-Yea
Harvard
Harvard - British Standard
MLA 7th Edition
Uniform - Uniform Requirement for Manuscripts
Vancouver

Remove All

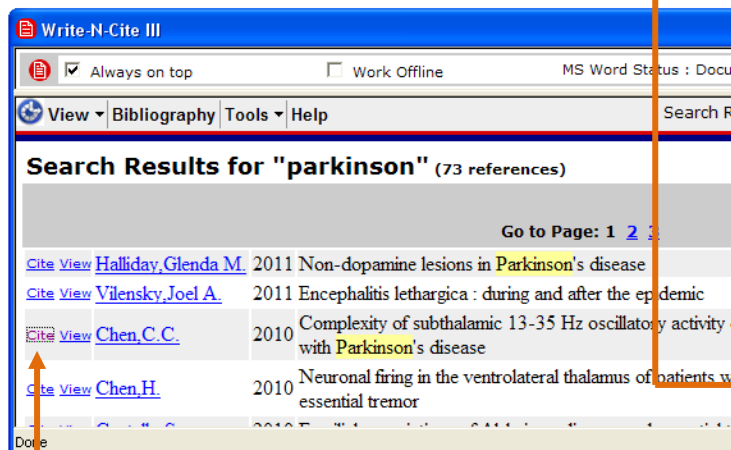
By default RefWorks only shows a small number of Output Styles as your “Favorites”. Select **Bibliography > Output Style Manager** to adjust your favorites list.

1. Either browse or search for the styles you would like to add to your list of Favorites.
2. Select the particular style in the “List of Output Styles” box.
3. Click the right arrow to make it a ‘favorite’.

Task 10: Create a Bibliography with Write-N-Cite III for Windows

OurDissertation

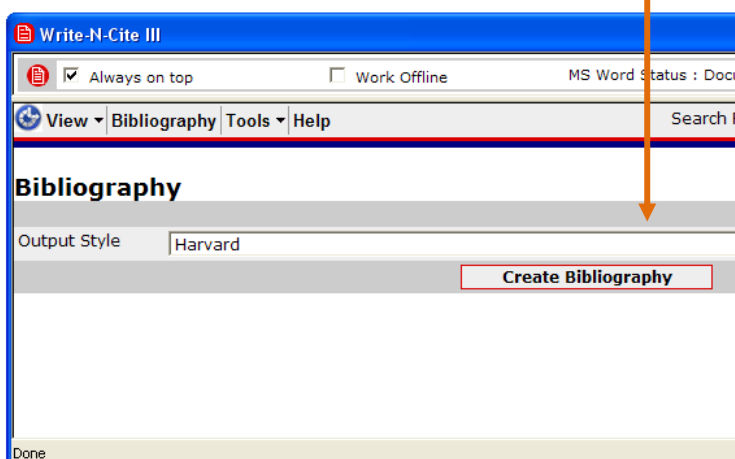
This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite. **{18 Chen,C.C. 2010}** How to insert single and multiple citations and how to create a bibliography.



OurDissertation

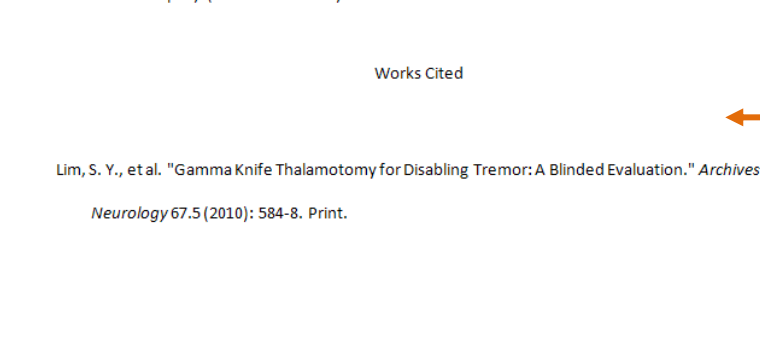
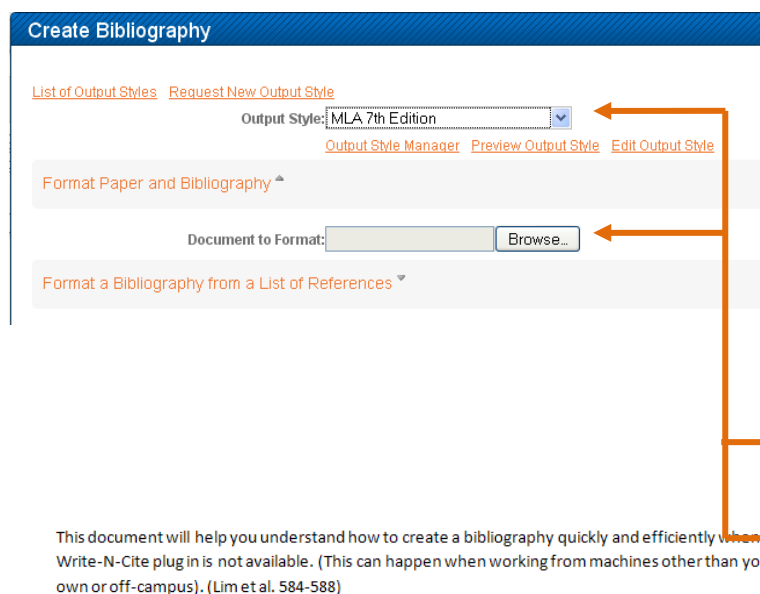
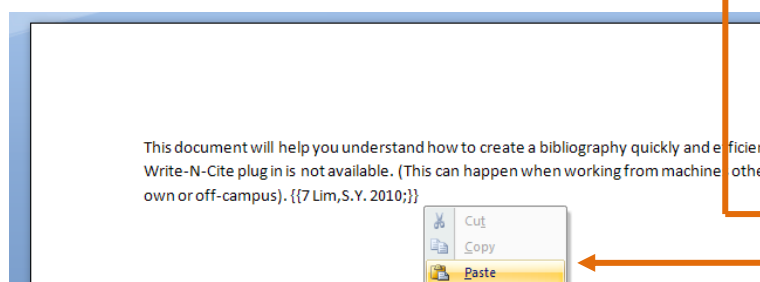
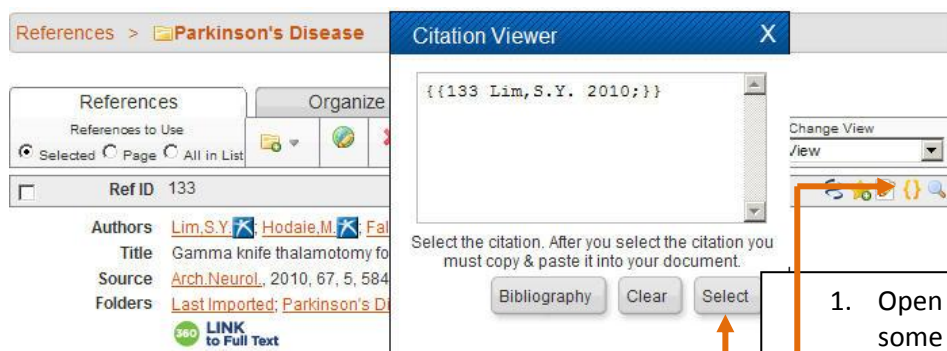
This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite. **{Chen et al. 2010}** How to insert single and multiple citations and how to create a bibliography.


Chen, C.C., Hsu, Y.T., Chan, H.L., Chiou, S.M., Tu, P.H., Lee, S.T., Tsai, C.H., Lu, C.S. & Brody, D.R. (2010) "Complexity of subthalamic 13-35 Hz oscillatory activity directly correlates with clinical impairment in patients with Parkinson's disease", *Experimental neurology*, vol. 224, pp. 234-240.



1. Open **Microsoft Word** and type some text
2. Launch the **Write-N-Cite III** plug in on the Word toolbar or from the desktop icon
3. Login to your RefWorks database
4. Select **Always on top** to keep Write-N-Cite visible
5. Do a **quick search** for **Parkinson**
6. In Word document, place your cursor in the text, **where you want to insert the citation**
7. Back in Write-N-Cite, click on the **Cite** link next to the record that you want to cite
8. Save your document to your computer as **rwcite** (File > Save As)
9. Back in the Write-N-Cite Window, click on **Bibliography** and choose **Harvard** as the output style, then click on **Create Bibliography**
10. Your document will be formatted. Save it (File > Save)
11. Return to your formatted document and continue typing text and add a few more citations. You can include more than one citation placeholder in the same grouping (known as citing multiple sources)
12. 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)

Task 11: Create a Bibliography without Write-N-Cite



1. Open your word processor and type some text
2. In RefWorks do a quick search for **Parkinson**
3. Choose a reference and click on its Cite  icon
4. A box will open with the RefWorks temporary citation placeholder
5. Click on the **Select** button and copy the placeholder (e.g. CTRL+C)
6. In your document, place your cursor where you want the citation to appear and use the word processor's **paste** function (e.g. CTRL+V) to insert the citation placeholder into your document
7. Repeat the previous steps with another citation, or multiple citations, placing them elsewhere in the text (make sure to **Clear the Citation Viewer** first!)
8. Close and save your document as **Parkinson** (file type must be either .doc, .odt or .rtf)
9. In RefWorks click on **Create Bibliography**
10. Choose **MLA 7th Edition** as the output style
11. Select the **Format Paper and Bibliography** section
12. Browse to locate your file as the **Document to Format**
13. Click on **Create Bibliography**
14. You now have a second document, with formatted citations and a bibliography. Save the document as **Final - Parkinson**