



Workbook

September 27, 2016

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NEW RefWorks — 42

What is NEW RefWorks

Reasons for converting to NEW RefWorks

Methods of migrating your data

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[RefWorks UC Libraries Web Pages](#)

Getting started with RefWorks

The University of Cincinnati Libraries maintains an institutional subscription to RefWorks, an Internet based reference management service. All University of Cincinnati students, faculty and staff are eligible to establish one or more RefWorks accounts under this institutional subscription. Because RefWorks is Internet based, you will have access to your account at any time and from any location where you have access to the Internet. Visit [UC RefWorks](#) to discover many of the features of this excellent service.

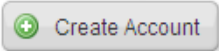
Connecting to RefWorks

You can connect to RefWorks through any of the following three methods¹: 1) using any on-campus PC, 2) connecting through the [UC Libraries proxy server](#) or by 3) using the University of Cincinnati's [SSL VPN](#)² (Secure Sockets Layer Virtual Private Network). Either of the latter two methods is necessary for off-campus access to the UC Libraries organizational subscription.

TIP: For ALL students, faculty or staff, your RefWorks account(s) will remain viable even after you leave the University of Cincinnati. As long as UC Libraries maintains its RefWorks institutional account you will continue to have access to your RefWorks account(s).

RefWorks Tutorial

Creating a RefWorks Account

When you connect to RefWorks to set up your account, do so from on campus or be certain to connect using either the [UC Libraries' proxy server](#) or through a [VPN account](#). Fill in all boxes in the "Create Account" form: including your name, your email address (All RefWorks announcements and password information will come to this address.) and a login name and password (both must have at least 4 contiguous characters). When you have completed the "Create Account" form, press the  button to confirm the creation of your new RefWorks account.

EXERCISE



1. Open your browser and, depending on your circumstances, click on either of the following links:

On-campus Access <https://www.refworks.com/Refworks> (Use this URL if logged in using VPN)
Off-campus Access (<http://proxy.libraries.uc.edu/login?url=http://www.refworks.com/refworks>)
(This off-campus link inserts the UC Libraries proxy address into the RefWorks login URL.)
2. Click on *Sign up for a New Account*.
3. Complete all the boxes in the "Create Account" form.
4. Click the [**Create Account**] button.
5. Congratulations, you now have a RefWorks account! Log out and close your browser.
6. Open your browser, connect to RefWorks and login to your new account.

¹ You may see a reference in the RefWorks help information that refers to a "Group Code" for off-campus access to RefWorks. The UC Libraries does not use the Group Code as a connection method for off-campus access.

² See the [SSL VPN FAQ](#) site for more information about setting up VPN for off-campus access to restricted services.

The RefWorks interface

The RefWorks interface incorporates intuitive Web 2.0 conventions, including lightboxes to enhance navigation and collapsible quick access menus to place a plethora of unobtrusive options right at the your fingertips.

Navigating RefWorks

Take a moment to peruse the RefWorks screen below and notice the wide range of command options -- including links, a main menu bar, buttons, active tabs, active icons and even a collapsible "Quick Access" bar. Running your cursor over (mouse over) any of the icons will display the icon's function.

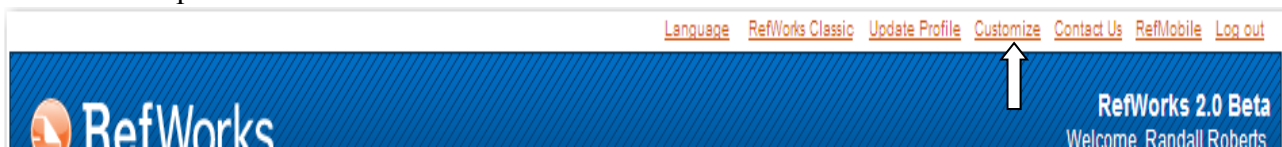
The screenshot shows the RefWorks interface with a top navigation bar, a search bar, and a main content area displaying a reference. A sidebar on the right contains a 'Quick Access Bar' with various options like 'Advanced Search', 'Import', 'Export', 'Create Bibliography', 'Delete References', and 'Print References'. A legend table is overlaid on the bottom left, explaining the icons used in the interface.

	Enables the addition of references to a folder.
	Enables the Global edit screen for adding, moving, deleting or replacing data for multiple references.
	Used to delete single or multiple references.
	Used to print single or multiple references.
	Indicates attachments linked to references.
	Adds a single reference to MyList folder.
	Opens a reference into edit mode.
	Creates an unformatted cite to paste into document.
	Opens a full reference.

Quick Access Bar

Customizing your RefWorks database

RefWorks provides a variety of ways to customize the look and the functionality of your RefWorks account. It is possible to personalize your display of references and enable optional features that facilitate the management of your RefWorks references. The customization option can be found as a link at the top of the RefWorks screen.



The following exercises and recommendations will provide you with guidelines for customizing your account. For a more complete explanation of the Customize feature and an explanation of all the Customize options, open your RefWorks account, select **Help** from the main menu bar, then select “Launch Help file” and take the following path: *Getting Started >> Customizing your Account.*

EXERCISE

1. Invoke the **Customize** option. (above graphic)

“Reference List Options” (See the screen graphic displayed below.)

2. Set **References per page** to “50.”
3. Select three **Output Styles**: “APA 6th,” “MLA 7th” and a third output style of your choice. [These selections control only the display of references in RefWorks. The Output Style Manager (available from the menu bar under “Bibliography”) controls the output style for bibliographies.]
4. Ensure the **Show Folder Information for Each Reference** is set to “Yes.” [This setting will display the folder icon(s) for each reference. This icon is an active link that not only indicates the folder into which a reference resides, but it also will, when clicked, display the folder’s contents.]

Customize

Reference List Options ▲

References Per Page: 25

Output Style Choices for Reference View: APA 6th - American Psychological
MLA 7th Edition
Select an Output Style

Show Folder Information For Each Reference: Yes No

Author Resolver Links: Default Setting (Show 2 Bars)

Automatically Mark Duplicates: Yes No

Startup Options ▼

Import Options ▲

Default Source Type for Imported References: Print

Show Option for Global Edit of Electronic Source Related Fields After Import: Yes No

RefWorks Links ▲

Show PubMed: Yes No
Show Scopus: Yes No

Reference Edit Options ▼

Cancel Save Customized Settings

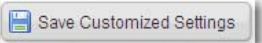
“Import Options”

(See the screen graphic on the previous page.)

5. Set **Show Option for Global Edit of Electronic Source...** to “Yes.”
[This setting will enable you to easily add important meta data, e.g. data source, as a global edit to all electronically imported references.]

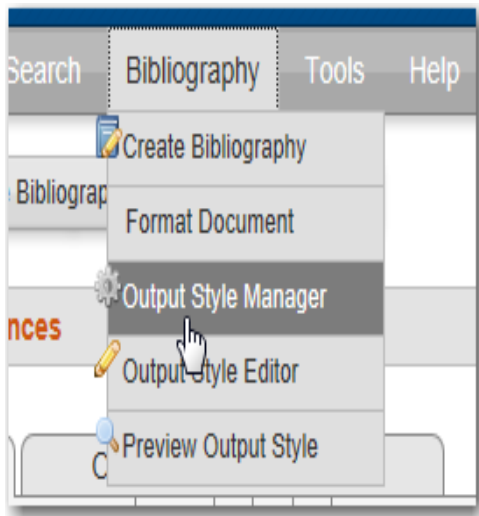
“RefWorks Links”

(See the screen graphic on the previous page.)

6. Set both **Show Pubmed** and **Show Scopus** to “Yes.”
[This setting enables a dynamic link between your RefWorks references and these databases.]
7. Click on the  button to save your new settings.

The Output Style Manager

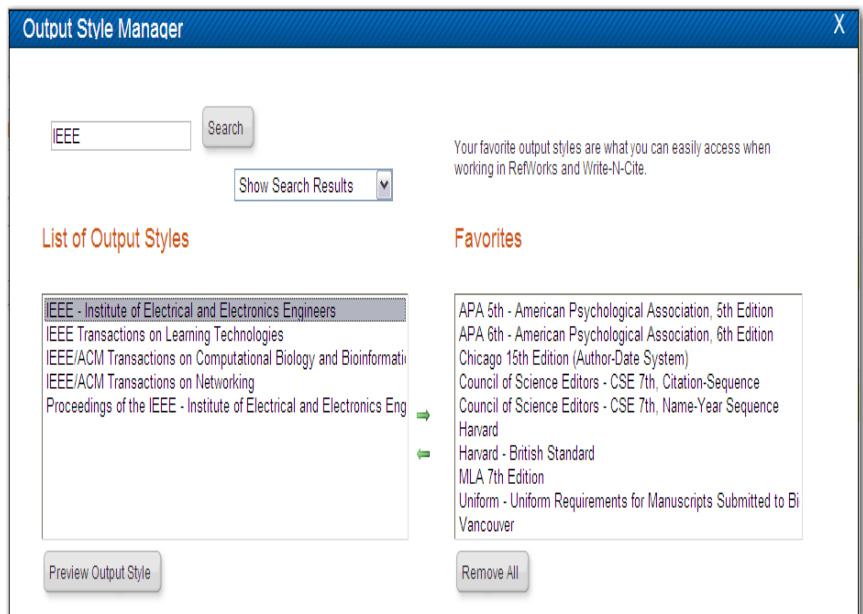
The Output Style Manager, though not an option under the Customization feature of RefWorks, enables further personalization of your RefWorks account. Unlike the **Output styles option** available via the Customization feature that was used to control the display of references within your RefWorks



database, the **Output Style Manager** controls the display of references for a variety of different functions. The settings selected in the Output Style Manager control the display of in-text citations, footnotes and bibliographies created with Write-N-Cite; the independent bibliography function and the reference editing function. There are default output styles in your Output Style Manager Favorites box. You can remove any items in the Favorites box and add as many as you wish from the List of Output Styles box. **Complete the exercise below to learn how to add an output style to your Output Style Manager favorites list.**

EXERCISE

1. From the *RefWorks menu bar* (see above) click on **Output Style Manager**.
2. In the *Output Style Manager* box (right) enter "IEEE" and then press the **[Search]** button.
3. Select/Highlight "IEEE – Institute of Electrical and Electronics Engineers" and then click on the green arrow that points in the direction of the "Favorites" box to add the IEEE output style as a favorite.



Organizing your RefWorks database

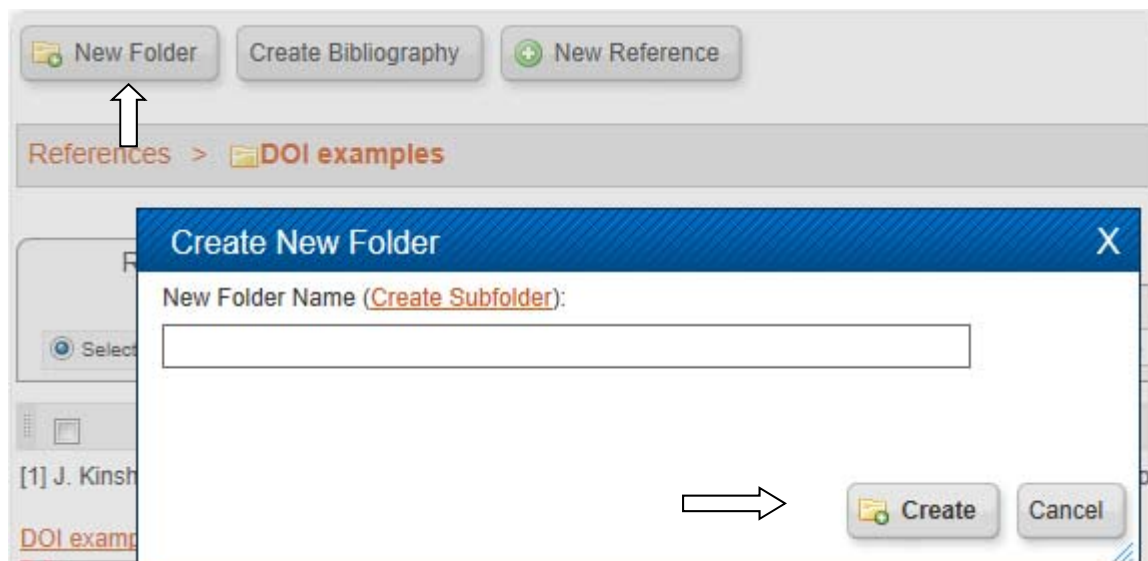
RefWorks Tutorial

RefWorks folders serve multiple purposes. Folders are one of many organization or discovery tools available to facilitate the “finding” process in your personal database. Folders can help you organize your references into meaningful categories, enabling you to easily “find” single references or groups of similar references. Additionally, RefWorks folders may be used as storage locations to help process your references.

There are two types of folders: customized folders and RefWorks system folders. Customized folders (the folders you create) can be used to organize and find your references. There is no limit to the number of customized folders you create. RefWorks system folders (created by RefWorks) include the “Last Imported” folder and the “MyList” folder. The “Last Imported” folder is a temporary holding area for all new references imported or exported into your database. References in this folder always are moved out when newly imported or exported references are added. The “MyList” folder also is a temporary holding location that can be used to place references for some impending action, e.g. printing, exporting, deleting, global editing, etc. This folder is emptied at the end of every RefWorks session.

Creating a RefWorks Folder

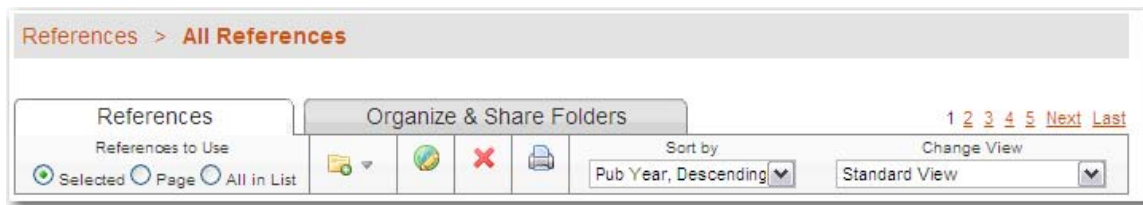
To create a new customized folder, simply click on the **[New Folder]** button; place your cursor in the “Create New Folder” box; enter the name of your new folder and then press **[Create]**.



EXERCISE

1. Create two folders: a “MyFirst” folder and a “Sample Database” folder.
2. Click on the **[New Folder]** button.
3. Click in the “Create a New Folder” box; enter the name of your first folder and press **[Create]**.
4. Repeat the process to create your second folder.
5. Click on the **Organize & Share Folders tab** (graphic on next page) to view your new folders.

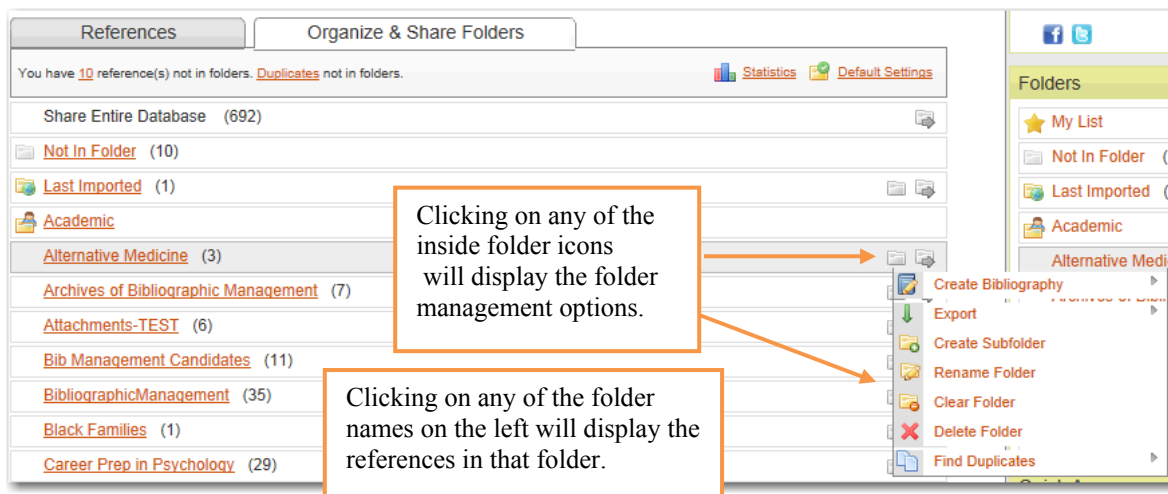
Click on the “**Organize & Share Folders**” tab to view all of your RefWorks folders.



Managing RefWorks Folders

The Organize & Share Folders window displays your folders alphabetically, and shows the number of references held in each folder. Clicking on a folder name will open a folder, displaying the references in that folder. Clicking on the inside folder icon will display the folder management options (see below) with which you can manage both folders and folder content. A short description of each option follows:

1. Create Subfolder -- enable creation of one or more subfolders
2. Rename -- enables editing of the folder name
3. Clear -- enables emptying of the folders contents, but references remain in the database
4. Delete -- enables removal of the folder from the database, but references remain in the database
5. Duplicates -- enables searching for duplicate references



TIP: References may be stored in multiple folders or subfolders. Editing a reference in one folder will alter that reference in all folders. The number of references not placed in a folder is revealed immediately below the References tab (10 references share this status in the above graphic) and in the “Not in Folder” folder. To display all references that are not in a folder, click on the hyperlinked number or on the “Not in Folder” link. The “Not in Folder” option also is available from the Quick Access bar.

Building your RefWorks database

There are five major functions for inputting references into your RefWorks database: exporting, importing, the online catalog tool, RefGrab-It and manual record entry. Usually the most efficient method for entering new references, particularly for multiple records, is exporting records directly from a database, followed by importing and then by the online catalog tool (Z39.50). Circumstances may often dictate the method available to you.

Exporting References into RefWorks

[RefWorks Tutorial](#)

The export option is available from most major bibliographic databases. The export process for most databases involves four generic steps. Though the “look” and terminology may vary depending on the database interface, most databases utilize these same four steps:

1. Open a database, conduct a search and retrieve records.
2. Select, store or mark the records you want to export.
3. Go to the place where the selected, stored or marked records are located.
4. Look for the word “export,” and then select “RefWorks” as the export format or source.

Some bibliographic databases do not offer the export option, or the export feature may be available but not for RefWorks. To electronically transfer records from these databases you will have to “import” the records into RefWorks. An explanation of the import process and corresponding exercises can be found in the next section on [Importing](#).

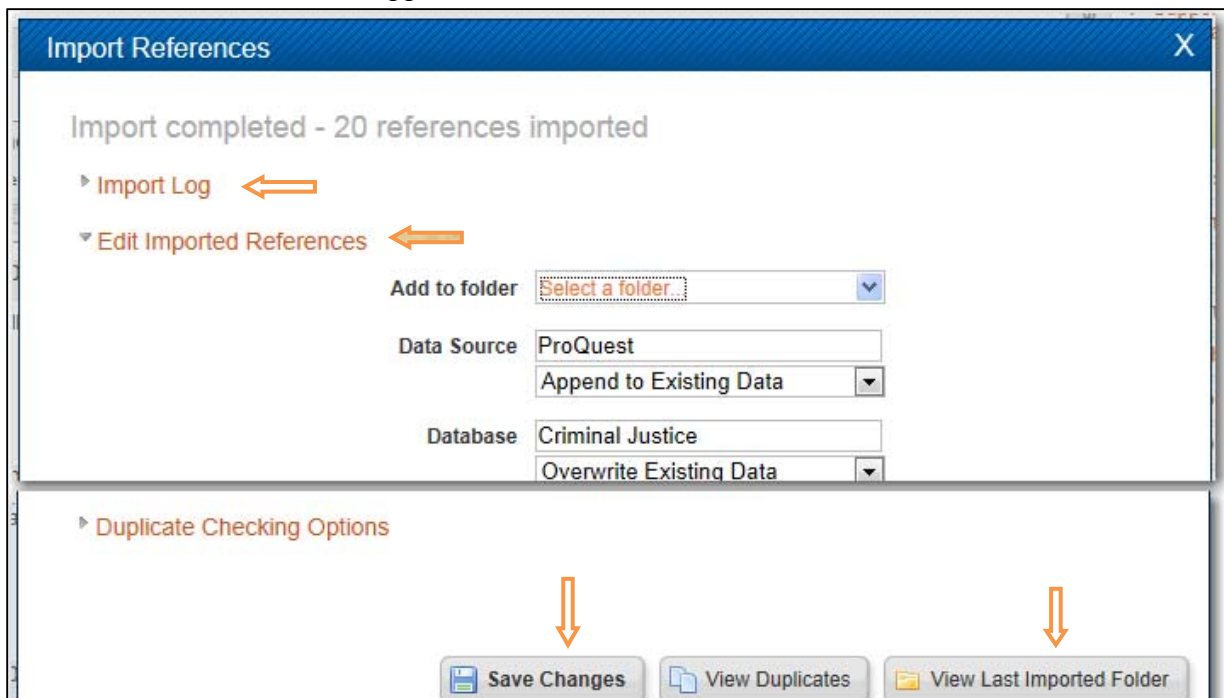
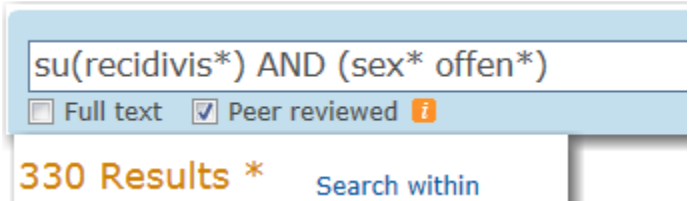
The export exercises on the following pages demonstrate how to enter a search, retrieve and select records and export records to RefWorks. These exercises are conducted in five different databases. Many of these databases share an interface with dozens of other databases. That is, dozens of databases may have totally different content, but they share the same interface or “look,” and all databases that share a common interface “export” records identically. Therefore, by practicing and learning how to export records from one of the databases in the following exercises you will acquire the skill set to export records from dozens of other databases that use the same interface, and any one of these “related” databases may be essential to your discipline.

RefWorks direct export database exercises in this workbook

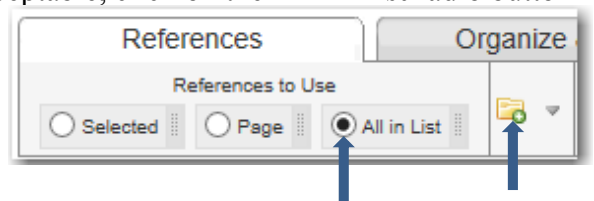
Database Name	Brief Description	Interface name & number of databases sharing the interface
Criminal Justice Periodicals	Specialized database for the criminal justice journal and trade literature	ProQuest (55)
Google Scholar	Large multidisciplinary Internet search engine that indexes academic scholarship from a wide range publishers, societies and universities.	Google (1)
Scopus	Large database of the science, social science and (to a limited extent) humanities journal literature	Elsevier (1)
PsycINFO	Specialized database of the psychology literature	EbscoHost (105)
Summon	Index to article databases and books, films and other materials in the UC Libraries catalog	N/A

EXERCISE [ProQuest Criminal Justice](#) — **Vendor: ProQuest** (This database vendor hosts a wide variety of databases in the areas of business, technology, science and the social sciences as well as the newspaper and dissertation literature.)

1. Open the Criminal Justice Periodicals database and click on the “Advanced” search tab.
2. Conduct the following search: enter the term *recidivis**, limiting to the **Subject heading (all)** field, then drop down to the next line of boxes and enter the expression *sex* offen** -- limiting to the **Document title** field.
3. Limit to “Peer reviewed.”
4. Click on [Search].
5. Put a check in the “Select 1-20” box, then mouse over “Export/Save” and select **RefWorks**.
6. From the **Export/Save** window click on the [Continue] button to export records to RefWorks. [You may have to disable the popup blocker].
7. If RefWorks is already open, you should see the “Import References” window (see graphic below) indicating the number of references imported and providing options for opening the “Import Log” or the “Edited Imported References” windows. If RefWorks is not open, the above action (step #6) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.



8. In the **Import References** window (above), use “**Import Log**” to identify and correct any import errors.
9. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on [Save Changes] to confirm the changes.
10. Click on the “**View Last Imported Folder**” button to display your new references.
11. Randomly review these references. If they are acceptable, click on the **All in List** radio button (right), select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon (right) to move your references to the MyFirst folder.



EXERCISE [Google Scholar](http://scholar.google.com) — <http://scholar.google.com>

To export records from Google Scholar into RefWorks you must first configure Google Scholar to recognize RefWorks as your preferred Bibliographic Manager. Complete the first Google Scholar exercise below to enable this process.

Google Scholar cannot export multiple references in a single export operation. References exported with the Google Scholar Bibliography Manager feature must be exported one at a time. Occasionally Google Scholar records will omit bibliographic information. Check your records carefully.

EXERCISE (Enabling the Bibliography Manager in Google Scholar)

1. Make sure cookies are enabled in your browser to allow setting of preferences in Google Scholar.
2. Go to the Google Scholar search screen (<http://scholar.google.com>) and click on “More” and then on “Settings.”
3. At the bottom of the screen under “Bibliography Manager” click on the radio button for “**Show links to import citations into,**” and then select **RefWorks**.
4. Click on [**Save**], return to the Google Scholar search screen and enter your search.
5. Search results in the results list will now display an “Import into RefWorks” link.




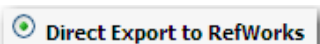
EXERCISE (Searching and exporting from Google Scholar)

1. Connect to Google Scholar (<http://scholar.google.com>).
2. Enter the following search: “*cognitive style*” *personality*.
3. After you identify a relevant click on the “More” option below that reference, and then click on **Import into RefWorks**.

TIP: The “Import into RefWorks” option will display “only” if you enabled the “Bibliography Manager” (See above exercise) in Google Scholar. There are other options for exporting Google Scholar records into RefWorks. Clicking on the title link in the Google Scholar results list may invoke different publisher or vendor web sites (e.g., Science Direct or APA PsycNet) that often include their own bibliography management tools.

4. If RefWorks is already open, you should see the “Import References” window (see graphic below) indicating the number of references imported and providing options for opening the “Import Log” or the “Edited Imported References” windows. If RefWorks is not open, the above action (step #6) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.
5. In the **Import References** window (above), use “**Import Log**” to identify and correct any import errors.
6. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported reference. Click on [**Save Changes**] to confirm the changes.
7. Click on the “**View Last Imported Folder**” button to display your new reference.
8. Review this reference for accuracy. If it is acceptable, click on the check box next to the Ref ID number and then click on the “**Selected**” radio button.
9. Select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon to move your references to the MyFirst folder.

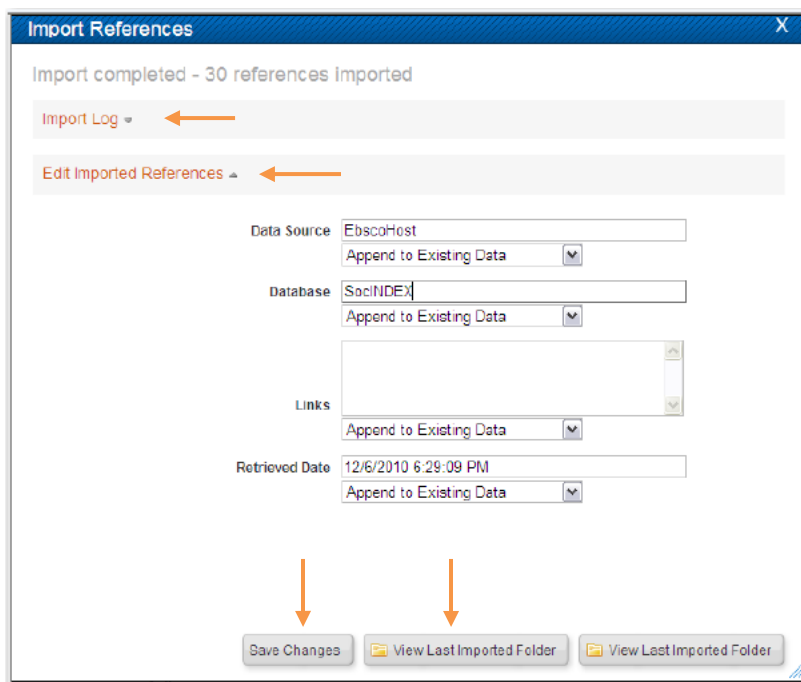
EXERCISE [PsycINFO](#) — Vendor: EBSCOHost

1. Open the PsycINFO database.
2. In the first search box enter the expression *learning N4 outcome** (limiting to the **TI Title** field) and then drop down to the next search box and enter the expression *evaluat* OR assess** (limiting to the **TI Title** field).
3. Confirm that the **AND** operator is the selected Boolean operator between the two search boxes, and limit your search from 2008 to 2013. Then click on the **[Search]** button.
4. Select **Share** and then click on “  **Results (1 – 30)** ” to add the first 30 records of your result set to your EbscoHost folder.
5. Click on the  icon that is located on the Ebsco main menu bar.
6. Check the “**Select/deselect all**” box to select all the records, and then click on .
7. Select  and then click on the **[SAVE]** button.
8. If RefWorks is already open, you should see the “Import References” window (see graphic below) indicating the number of references imported and providing options for opening the “Import Log” or the “Edit Imported References” windows. If RefWorks is not open, the above action (step #7) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.

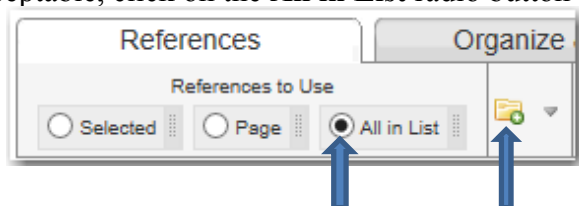
The RefWorks **Import References** window on the right provides the following editing/checking options:

1. An import log to identify RefWorks’ detected export errors*
2. An edit option to make a easy global edit on all the newly imported references
3. A duplicate checking option to display the newly imported references

* Import Log error messages and solutions are provided on page 43.

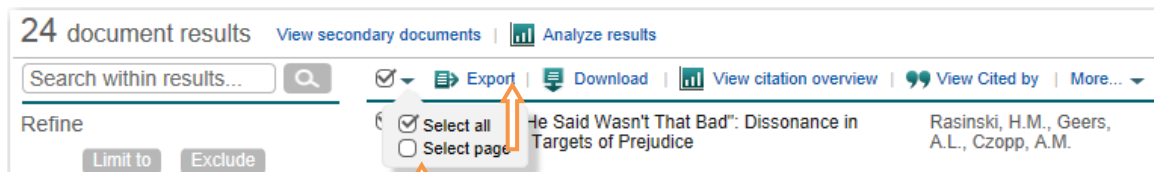


9. In the **Import References** window (above), use the “**Import Log**” option to identify and correct any import errors.
10. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on **[Save Changes]** to confirm the changes.
11. Click on the “**View Last Imported Folder**” button to display your new references.
12. Randomly review these references. If they are acceptable, click on the **All in List** radio button (right), select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon (right) to move your references to the MyFirst folder.

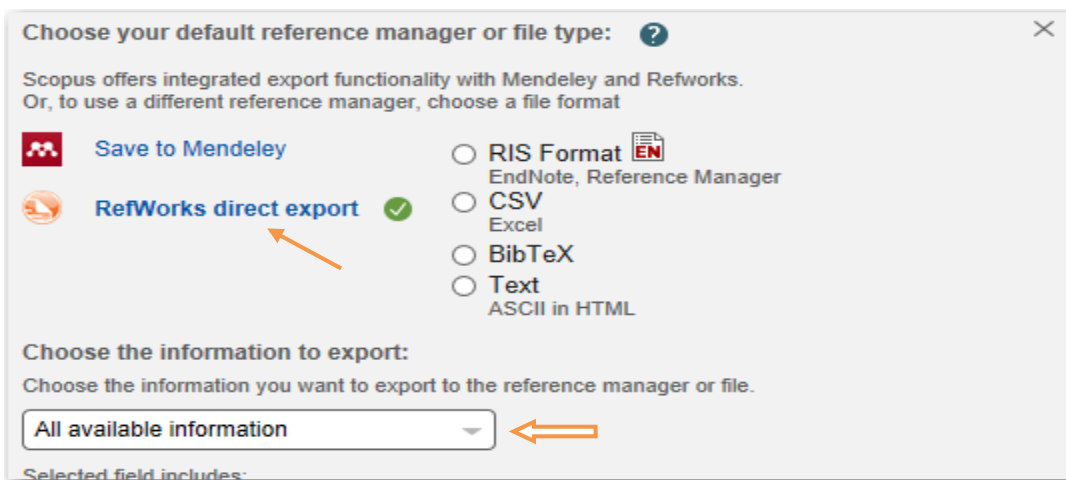


EXERCISE [SCOPUS](#) — **Vendor: Elsevier** (this is not a suite of databases but a single comprehensive database that offers significant coverage for the social, life, health and physical sciences.)

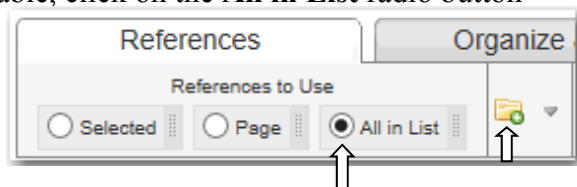
1. Open the SCOPUS database.
2. In the “Search for” box, enter the following expression: “**cognitive dissonance**” AND **personalit*** AND **female***.
3. Limit your search to items published from 2000 to the present, and press [**search icon**].
4. In the **Refine results box** limit this result further to the **Subject Area** of *Psychology* and press the [**Limit to**] button.
5. In the **Documents results box**, check “**All**” to select all of these references; then select [**Export**].



6. In the box shown below select “**RefWorks direct export**” and select “All available information” then press the [**Export**] button.



7. If RefWorks is already open, you should see the “Import References” window (See the “**Import References**” box graphic on the previous page) indicating the number of references imported and providing options for opening the “Import Log” or the “Edited Imported References” windows. If RefWorks is not open, the above action (step #6) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.
8. In the **Import Window**, use the “**Import Log**” option to identify and correct any import errors.
9. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on [**Save Changes**] to confirm the changes.
10. Click on the “**View Last Imported Folder**” button to display your new references.
11. Randomly review these references. If they are acceptable, click on the **All in List** radio button (right), select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon (right) to move your references to the MyFirst folder.



EXERCISE [Summon](#) — This search tool provides a master index to many of the research literature databases, including the UC Libraries’ library catalog.

1. Open the Summon database.
2. Select the **[Advanced Search]** option to invoke the window displayed below.
3. In the **title search** box, enter the following expression: **child* obesity longitudinal** and press the **[Search]** button.

With these **terms**: Basic Search

Written/created by:
e.g. Fitzgerald

With these words in the **title**:
e.g. The Great Gatsby

ISBN:

From this **publication**:
e.g. Journal Of Endocrinology

Volume: and **Issue**

Dates published from: to

Show with this **format**:

Show Only: Items with full text online
 Scholarly materials, including peer-reviewed
 Items in the library catalog (mostly print and physical material)

Exclude from results: Newspaper articles
 Book reviews
 Dissertations

Expand your results: Include results from outside your library's collection


[Reset Form](#) [Clear Form](#) [Cancel](#)

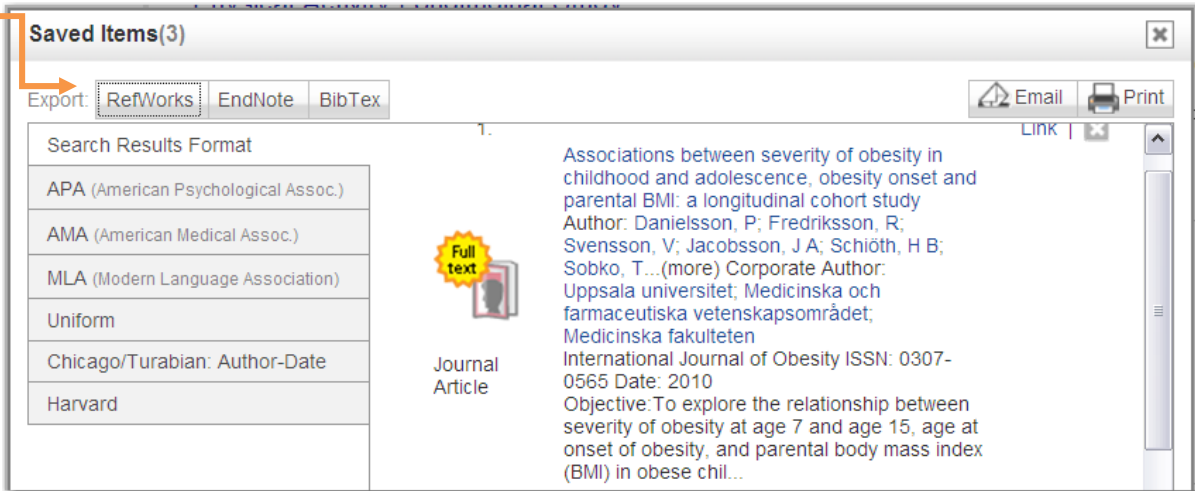
4. Save the first three references by clicking on the “**save this item**” icon associated with each reference. **Note: You will need to “mouse over” each reference to activate this icon.**

Analysis of Drop-Outs in a **Longitudinal Study**: The Spanish Sample of the
EU Childhood Obesity Programme: Early Programming by Infant Nutrition
(QLK1-2001-00389) (EPOC)

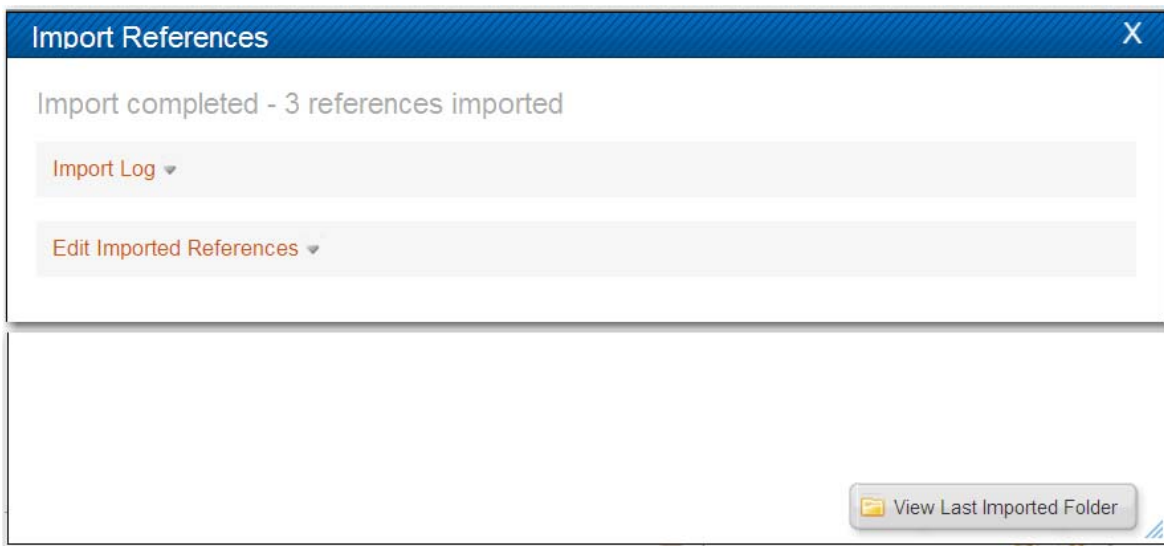
Author: Méndez, G; Escribano, J; Closa, R; Capdevila, F; Luque, V; Mariné, J
Early Nutrition and its Later Consequences: New Opportunities Vol: 569 ISBN: 1402035349 ISSN: 0065-2598 Date: 2005 Start Page: 217
Subjects: Medicine & Public Health, Developmental Biology, Pediatrics, Medicine/Public Health, general

Availability: Full Text Online

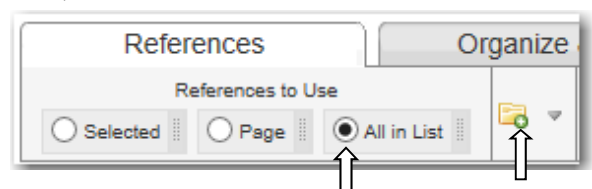
5. Click on the  **Saved Items (3)** option located on the bottom of the Summon result list page.
6. In the **Saved Items** dialog box click on the **[RefWorks]** tab to begin the export process.



7. If RefWorks is already open, you should see the “Import References” window (see below) indicating the number of references imported and providing options for opening the “Import Log” or the “Edited Imported References” windows. If RefWorks is not open, the above action (step #6) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.



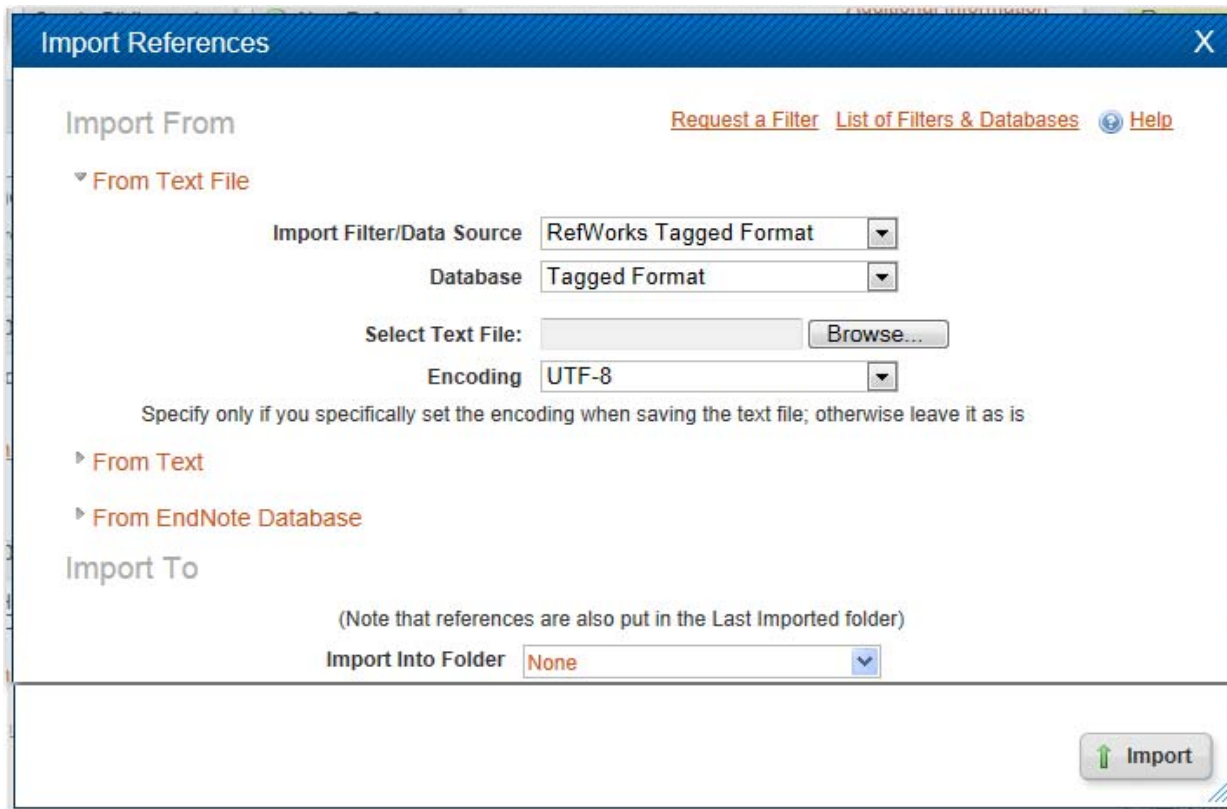
8. In the **Import Window**, use the “**Import Log**” option to identify and correct any import errors
9. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on **[Save Changes]** to confirm the changes
10. Click on the “**View Last Imported Folder**” button to display your new references.
11. Randomly review these references. If they are acceptable, click on the **All in List** radio button (right), select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon (right) to move your references to the MyFirst folder.



Importing records into RefWorks

There are occasions where your only electronic option is to import references. This is true when a bibliographic database does not, for example, offer an export option or if the database offers an export option but it fails to work.

Importing references from a bibliographic database requires that you “save” the references in a text (.txt) file and in a tagged format. The latter requirement simply means that you must save the records in a “RefWorks,” tagged or similarly named format. Once you have saved the data as a “.txt” file, open RefWorks and click on **[References]** from the RefWorks menu bar and then select “**Import.**” This will invoke the RefWorks “Import References” window (below). Work through the import exercises on the next few pages to learn the process for importing references.



RefWorks import exercises in this workbook

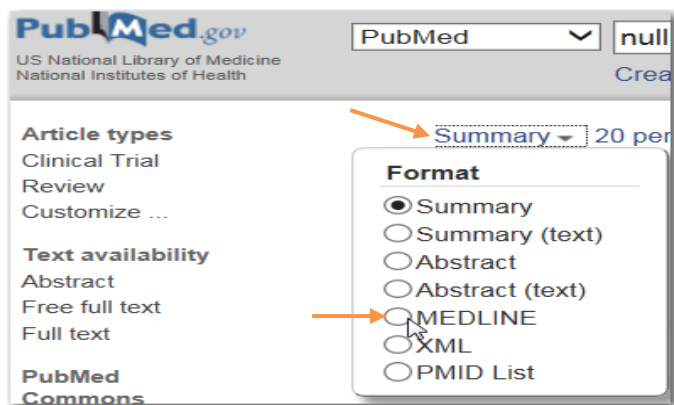
Database Name	Brief Description	Notes
PubMed ³	National Library of Medicine database of the biomedical literature	No export option -- references must be imported into RefWorks
RefWorks	You may share records with other RefWords users by importing their records into your personal database	RefWorks references are exported in a format called “RefWorks Tagged Format”

³ An alternative process for importing references from PubMed is the RefGrab-It function. See the tutorial on [RefGrab-It](#) for additional information on this function.

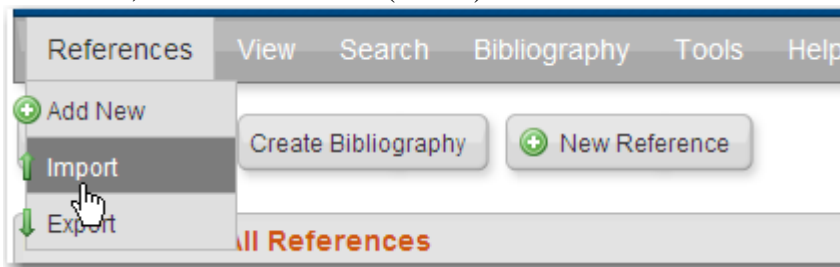
EXERCISE PubMed — Vendor: NLM (This is not a suite of databases but a single comprehensive database that offers significant coverage for the research literature of the life and health sciences.)

This example includes an exercise in opening the PubMed database and saving references as a text file. URL for PubMed (<http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?db=PubMed>)

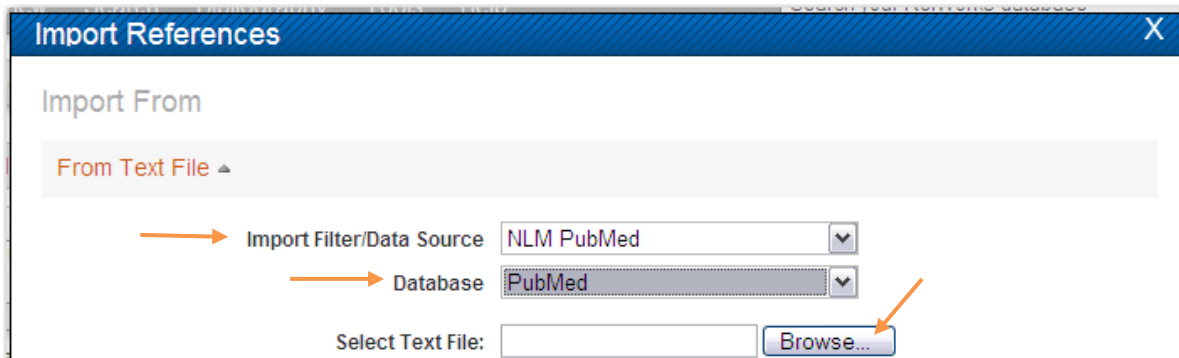
1. In a separate browser window or session open PubMed and enter the following search: **influenza and pandemic and japan**
2. From your search results, select the first 5 records by clicking in the checkbox to the left of the citations.
3. Select “**Summary,**” and then select **Medline** (see below).



4. A new window will open with your references in a RefWorks compatible format. Use your **Browser’s Save As** function to save the file to your computer. Make sure to save the file as a “Text” file from the “**Save as type**” drop-down menu.
5. **Return to RefWorks**; on the main menu (below) mouse over **References** and select **Import**.



6. Select **NLM PubMed** as the “Data Source” and **PubMed** as the “Database.”



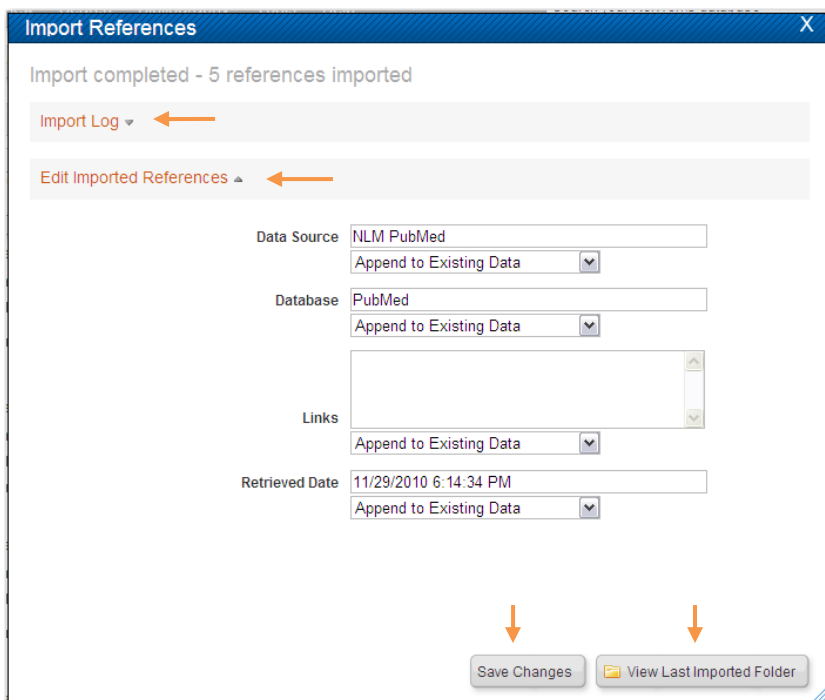
7. **Browse** to find and select the PubMed text file you just saved, and click on the [**Import**] button.

- If RefWorks is already open, you should see the “Import References” window (see graphic below) indicating the number of references imported and providing options for opening the “Import Log” or the “Edited Imported References” windows. If RefWorks is not open, the above action (step #7) should invoke the RefWorks Login screen. After you log in, the “Import References” window should appear.

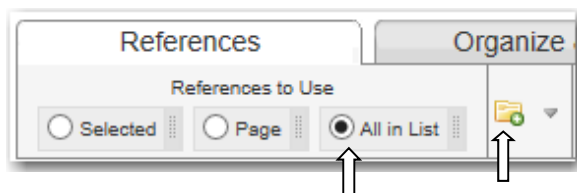
The RefWorks **Import References** window on the right provides the following editing/checking options:

- An import log to identify RefWorks’ detected export errors*
- An edit option to make a easy global edit on all the newly imported references
- A duplicate checking option to display the newly imported references


* Import Log error messages and solutions are provided on page 43.



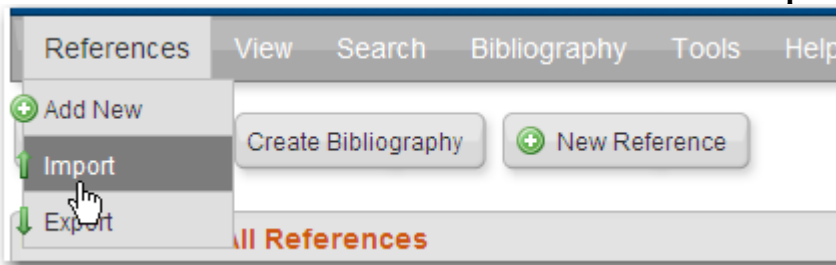
- In the **Import References** window (above), use the “**Import Log**” option to identify and correct any import errors.
- Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on [**Save Changes**] to confirm the changes.
- Click on the “**View Last Imported Folder**” button to display your new references.
- Randomly review these references. If they are acceptable, click on the **All in List** radio button (right), select the “MyFirst” folder by moving your cursor over the **Add to Folder** icon (right) to move your references to the MyFirst folder.



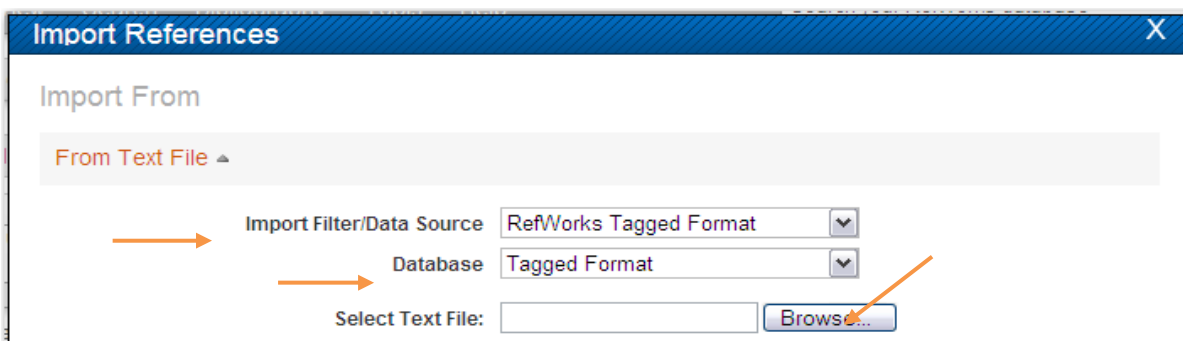
TIP: RefWorks provides another, more sophisticated, way to import PubMed records into RefWorks. Click on the following online tutorial on the RefWorks’ [RefGrab It](#) tool.


EXERCISE RefWorks file — Vendor: None (These references were exported (in RefWorks Tagged Format) from another RefWorks database.) 

1. Select **References** from the RefWorks main menu bar and then select **Import**.



2. Select **RefWorks Tagged Format** as the “Data Source” and **Tagged** as the “Database.”

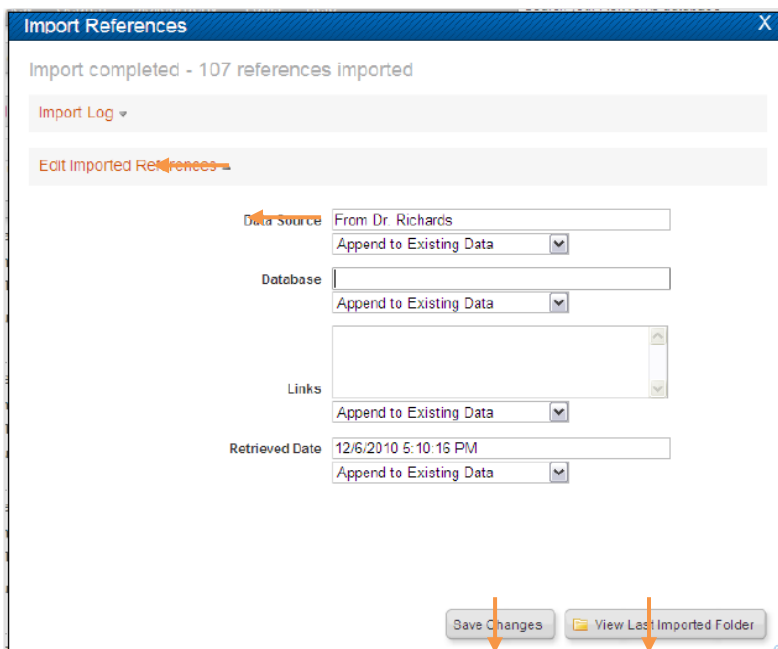


3. **Browse** to find and select the SampleDatabase.txt file (See file attachment on top of page) and click on the **[Import]** button. 
4. In the **Import References** window (below), use the “**Import Log**” option to identify and correct any import errors.
5. Use the “**Edit Imported References**” option to add data source and database information to all of your newly imported references. Click on **[Save Changes]** to confirm the changes.
6. Click on the “**View Last Imported Folder**” button to display your new references.

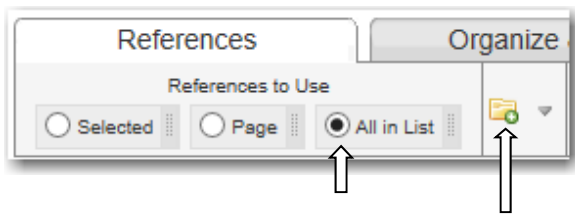
The RefWorks **Import References** window on the right provides the following editing/checking options:

1. An import log to identify RefWorks’ detected export errors*
2. An edit option to make a easy global edit on all the newly imported references
3. A duplicate checking option to display the newly imported references

* Import Log error messages and solutions are provided on page 43.



7. Randomly review these references. If they are acceptable, click on the **All in List** radio button (arrow). Then move your cursor over the **Add to Folder** icon (a list of your folders will appear) and slide your cursor over the SampleDatabase folder. Click on the SampleDatabase folder.



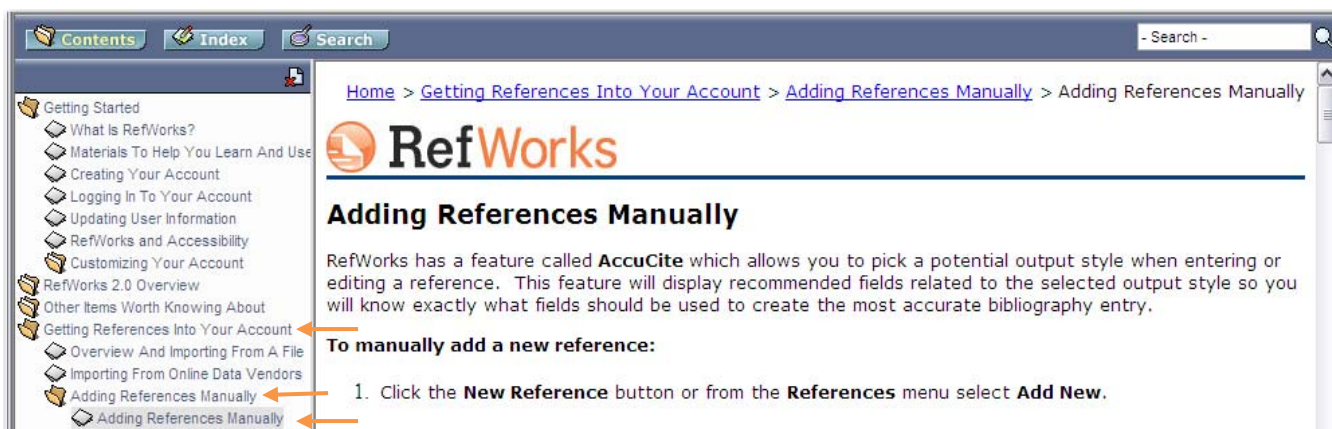
Entering references manually into RefWorks

Occasionally manual entry of references is necessary or even preferable to the electronic methods of adding references to your database. For example, a reference may not be available electronically, or you may find that it is faster to enter one or two references manually than to find and then export the references electronically into your database.

To find detailed instructions for manual entry of data, select **Help** from the RefWorks menu bar (right) and then select “**Launch Help File.**”



This will open the RefWorks Help window. From the Help window (below), take the following path: *Getting References into Your Account >> Adding References Manually >> Adding References Manually.*



Additional information about entering data into specific fields, e.g. author, title, publisher, etc. is available by scrolling through this help section to the area entitled “Reference Field Descriptions.”

EXERCISE

1. Select **References** from the RefWorks menu bar and then select **Add New**. This will invoke the “Add New Reference” window (below).
2. Select “**APA 6th ...**” for your output style in the “**Fields used by:**” field.
(NOTE: the output style you select will determine the fields to be displayed for editing.)
3. In the “Add to folder” field, select “MyFirst.”
4. Select “Journal Article” as the “Ref Type.”

5. Begin entering data for the first “Burle” reference. (NOTE: The “Term Assistant” will help you automatically fill in data for selected fields.)

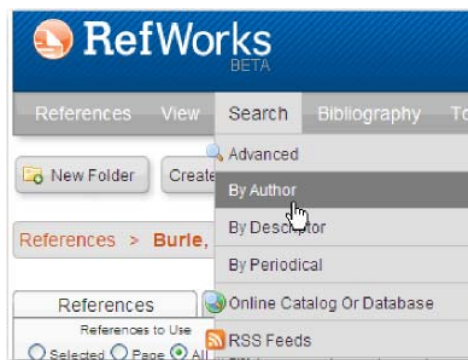
Sample references for manual entry

Burle, Bret (2000). High-speed memory scanning. *Cognitive Brain Research*, 9(3), 327-337.
 Burle, Bret (2000). Response selection in a four choice task. *Cognitive Brain Research*, 9(4), 125-134.

6. Save the reference by pressing the **[Save Reference]** button.
7. RefWorks will confirm with the message, “This reference has been saved,” and you will remain in the edit mode
8. Close the “Add New Reference” window.

EXERCISE

1. Click on the **[New Reference]** button.
2. Enter the data for the 2nd reference (see above) in the exercise.
3. Remember to specify the folder location as “MyFirst” before saving the reference.
4. Save the reference by pressing the **[Save Reference]** button.
5. RefWorks will again confirm with the message, “This reference has been saved.”
6. Close the “Add New Reference” window.
7. Click on **Search** (graphic on right) from the RefWorks menu bar, and select “By Author” to browse your database by author names.
8. Confirm your two “Burle” references are in your “MyFirst” folder.

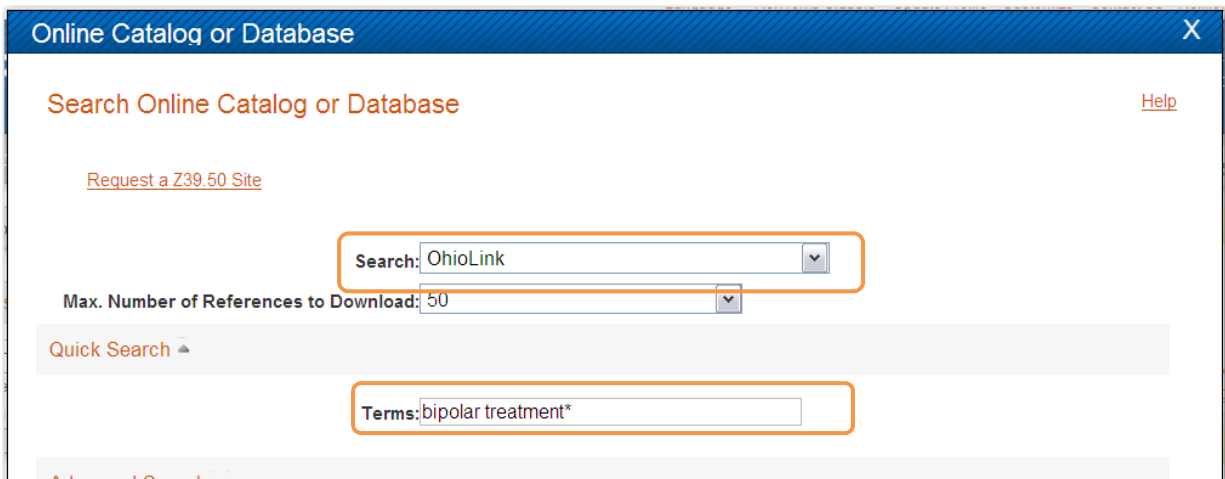
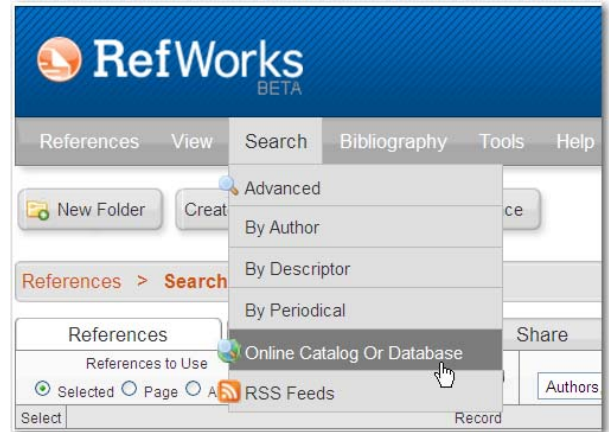


Using the Online Catalog or Database tool to import references

The **Online Catalog or Database** search tool provides a convenient mechanism for finding and importing books and other library materials from hundreds of library catalogs (including the UC Libraries, OhioLINK and NLM catalogs) into your RefWorks database. Though either [Summon](#) or [WorldCat](#) provide more robust search tools for finding and exporting books into RefWorks, the **Online Catalog or Database** search tool is initiated from within RefWorks, and does not require you to open another browser session to access a database.

EXERCISE

1. Select **Search** from the RefWorks menu bar, and then select “**Online Catalog or Database**” option to display the **Online Catalog or Database** window.
2. In the **Search** box (see graphic below) select **OhioLINK**.
3. In the **Terms** box enter the following query: *bipolar treatment*. **Note: RefWorks inserts the Boolean term AND between the search terms, thus retrieving only those references including both terms.**
4. Click on the **[Search]** button to invoke the search and retrieve your results.
5. Select 3 references, click on **[Import]**.
6. Click on **[OK]** to confirm your import.
7. Click on “**View Last Imported Folder.**”



7. Randomly review these references. If they are acceptable, click on the **All in List** radio button and then select the “**MyFirst**” folder from the Folder icon options.

Using RefGrab-It to enter References into RefWorks

RefGrab-It is a utility that works with your browser to import information on single references into your RefWorks database. For a tutorial about RefGrab-it, see the following link: [RefWorks RefGrab-It Tutorial](#) and then select the link to “**Capturing Data From A Web Page.**”

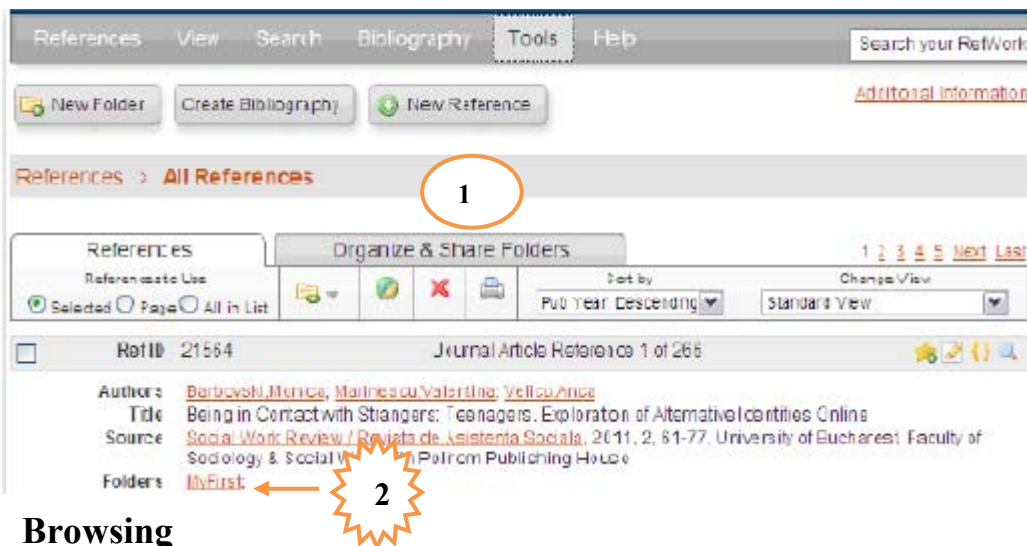
Finding references

Personal information management systems are of little value if you cannot easily and quickly find and manipulate the references collected and stored there. RefWorks provides a variety of easy-to-use finding tools, including folders, browsing indexes and two levels of searching.

Folders

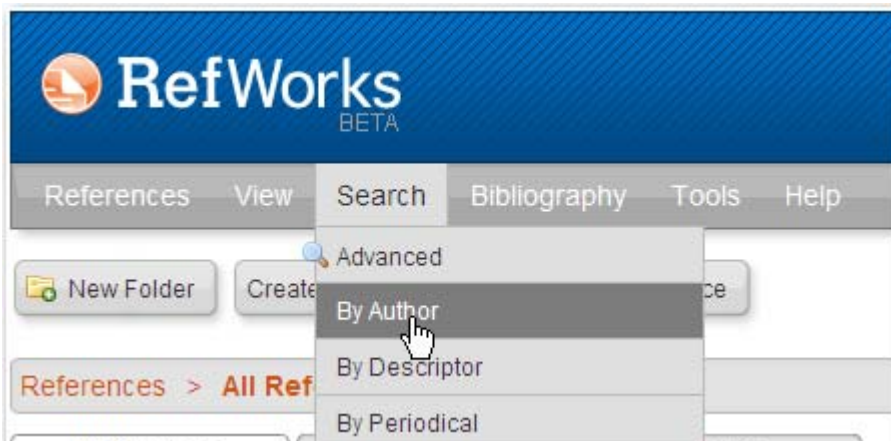
Earlier in this workbook you discovered how to create folders. Folders can facilitate your organization and consequentially your discovery of references in your personal database. There is no limit on the number of folders or subfolders you can create to organize your references. Therefore, you have the capability to create a comprehensive hierarchical organization of your references, further enhancing your ability to quickly find smaller “groups” of similar references.

You can access the references in your folders by **1)** selecting the **Organize and Share Folders** tab and then selecting your desired folder, **2)** selecting the specific folder icon located below a reference to display all references in that folder or by **3)** selecting your folder directly from the Quick Access bar.



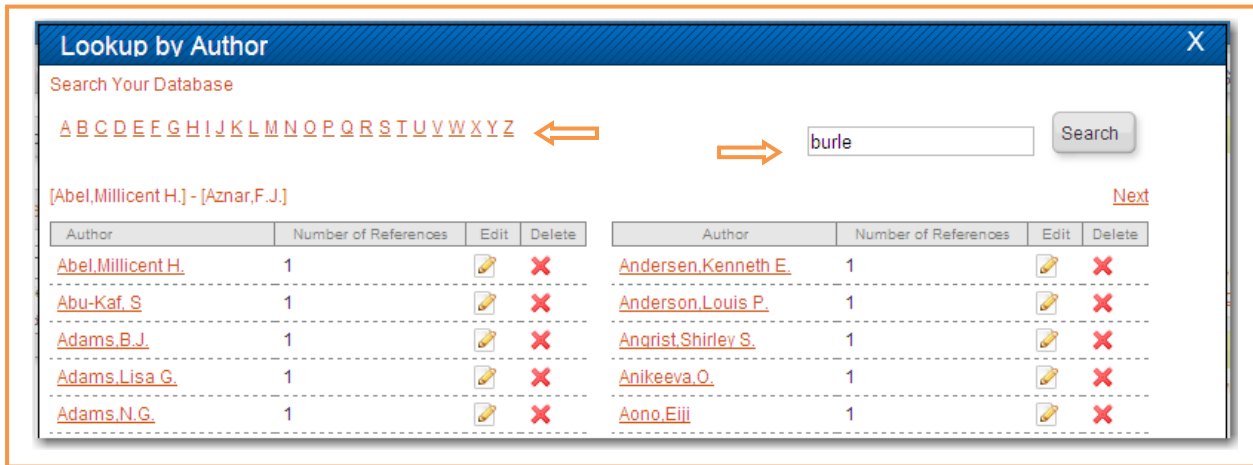
Browsing

RefWorks provides 3 different indexes for browsing: author, periodical title and descriptors/subject headings. To access any of the browsing indexes select **Search** from the RefWorks main menu, and



then select the index you desire to browse. This will invoke a new window (see the “Look up by author” graphic on next page). The browse window enables browsing by successive pages or advancing through the list by selecting a letter in the alphabet. **Note that the browse window also provides a search**

option (graphic on next page) to accelerate and pinpoint your search through the index.




EXERCISE — Browsing


1. Select **Search** from the RefWorks main menu.
2. Select “By Author” to open the “Lookup by Author” window.
3. Search for a reference by Burle, a reference you created manually from an exercise earlier in the workbook.

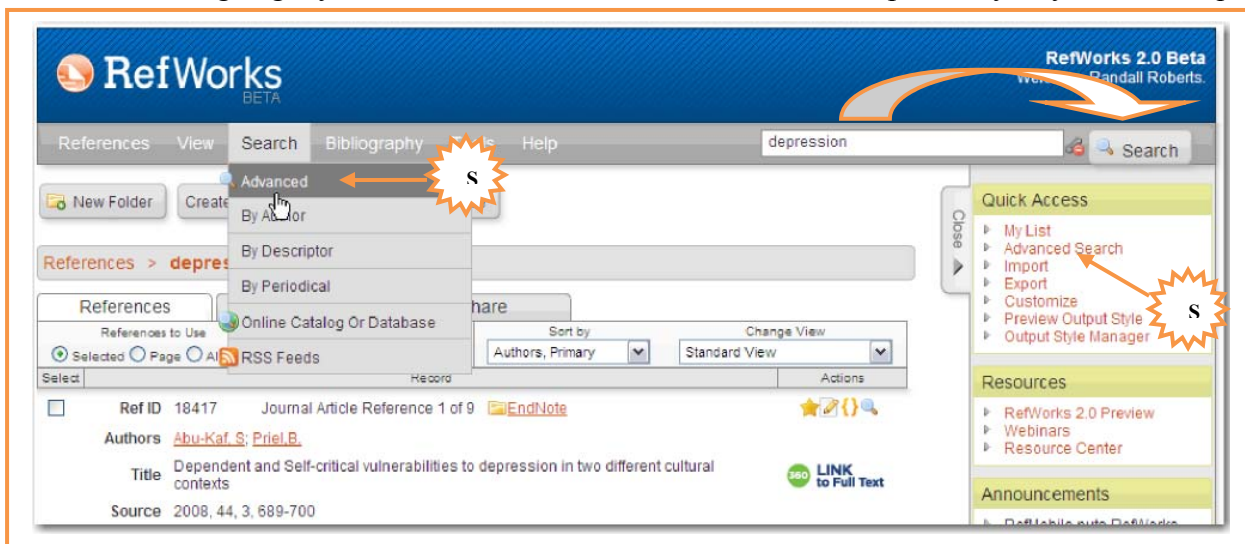
Searching

[RefWorks Tutorial](#)


Folders and browsing are very useful but general discovery tools. RefWorks also provides two searching tools for more precise and comprehensive retrieval of information from your personal RefWorks database.

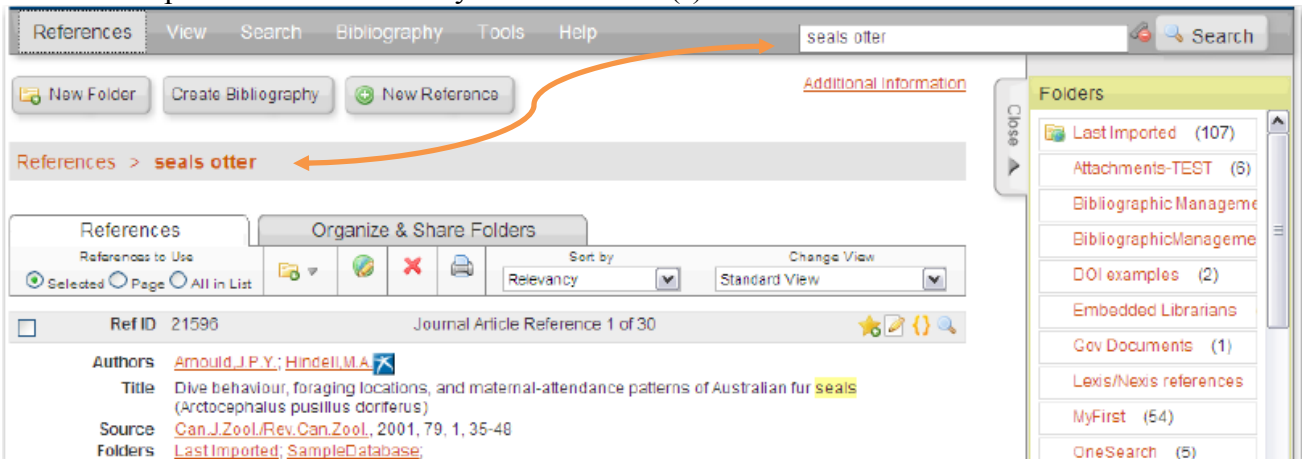
The **Quick Search** tool  facilitates searching for single terms or synonymous or related terms, e.g. adolescents or teenagers or teens, from all the references in your database. Quick Search also includes the option to search all text readable attachments for all the references in your database.

The **Advanced Search** tool  is accessible from the RefWorks main menu and from the Quick Access bar. This tool enables searching of your whole database or by individual folders. Further, the Advanced Search tool includes the use of Boolean operators and field level searching, e.g. by title, author, abstract, etc., to enhance the specificity of your search query.




EXERCISE — Quick Search

1. Enter the expression “seals otter” into the Quick Search box and then press [Search].
2. Note that RefWorks displays the search expression from the Quick Search box after “References > {search expression}” as the title of the displayed references (see below).
3. Randomly review the results display and look for any of the terms from your search expression.
4. For many of the references you will likely have to click on the view icon  to open the complete reference to find your search term(s).

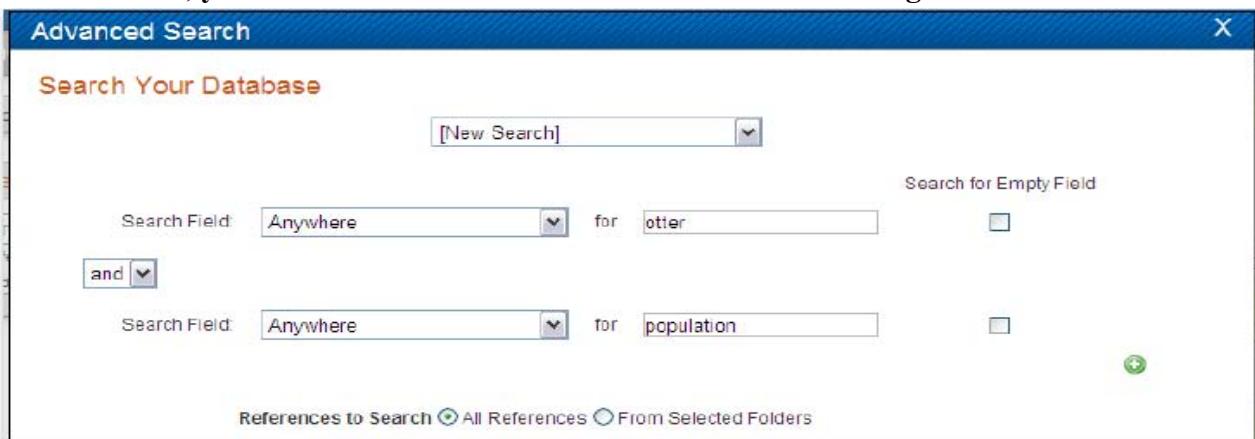


TIP: In the above exercise, the expression “seals otter” is searched by RefWorks as if the Boolean OR operator were inserted between the two terms. Consequently, the search will yield a result that includes any reference in your RefWorks database that includes at least one occurrence of either of the two terms. Because of the implicit OR operator between terms in the Quick Search box, adding more terms **increases** the size of your result set.

EXERCISE — Advanced Searching

1. Select the Advanced Search option from the Quick Access bar and click on the  icon to add an additional search box.
2. Enter “otter” into the first search text box and “population” into the second search text box.
3. Your results will appear under “**References > Advanced Search.**”
4. Review your results; each reference should include at least one occurrence of both search terms.

NOTE: You can use multiple Boolean ANDs or ORs to combine search concepts. However, you cannot mix ANDs or ORs in the same search argument.







TIP: Searches may be saved. If you anticipate using the same or a similar search frequently, click the [Save] button when prompted by RefWorks after you invoke your search. The next time you conduct an Advanced Search you will have the option to select a previously saved search.

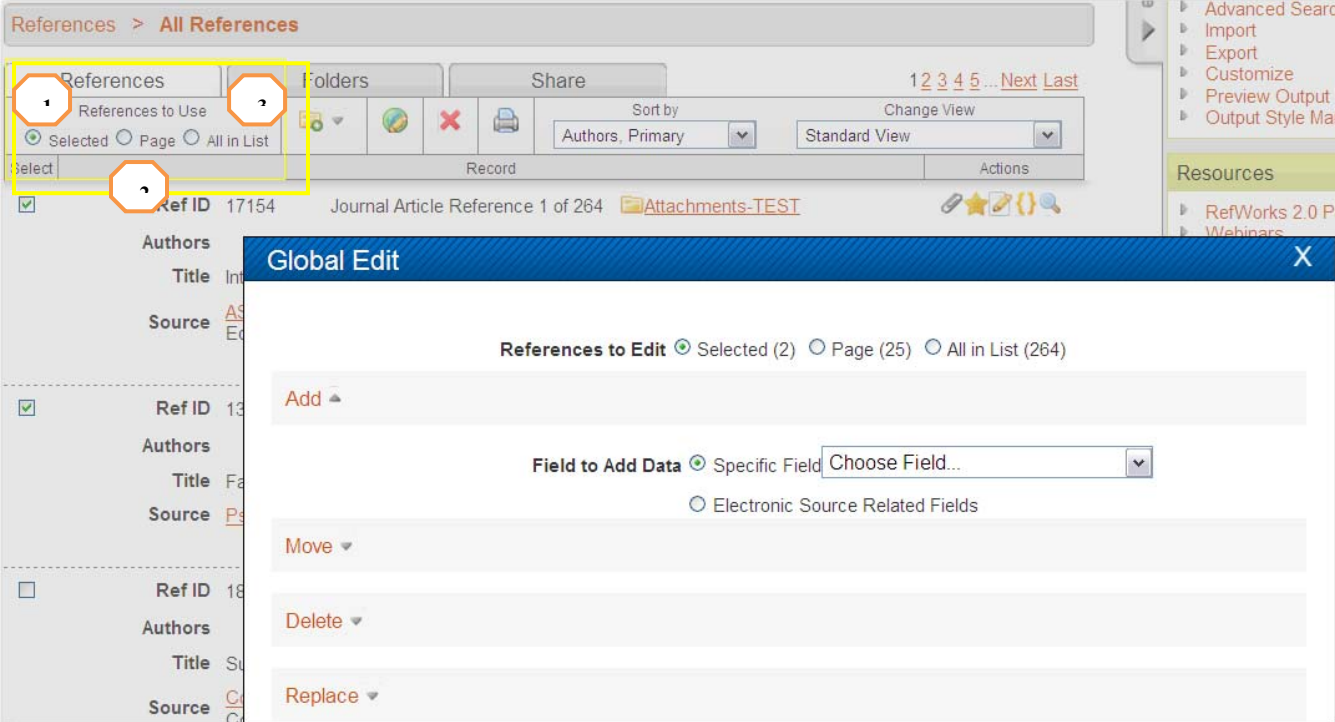
Management of references

RefWorks provides a host of tools to move, manipulate, delete, print and enhance the references in your RefWorks database, including a robust global editing capability, a full-text finding tool and an attachment tool that enables the attachment of full text articles (in PDF or other formats) to the corresponding references in your RefWorks database.

Global Editing

Central to many of the references management functions and particularly to the global editing function is the **“References to Use”** area (yellow rectangle) of the RefWorks window. From here you can choose 1) **Selected** (checked) references, 2) a **Page** of references or 3) **“All in List”** for subsequent global editing. Depending on your selection from the “References to Use” area, you can perform the following functions:




- **Move references to folders using the Folder icon** 
- **Delete references using the Delete icon** 
- **Print references using the Print icon** 
- **Perform any of four global edit functions with the Global Edit icon** 
 - e.g., add, move, delete or replace data

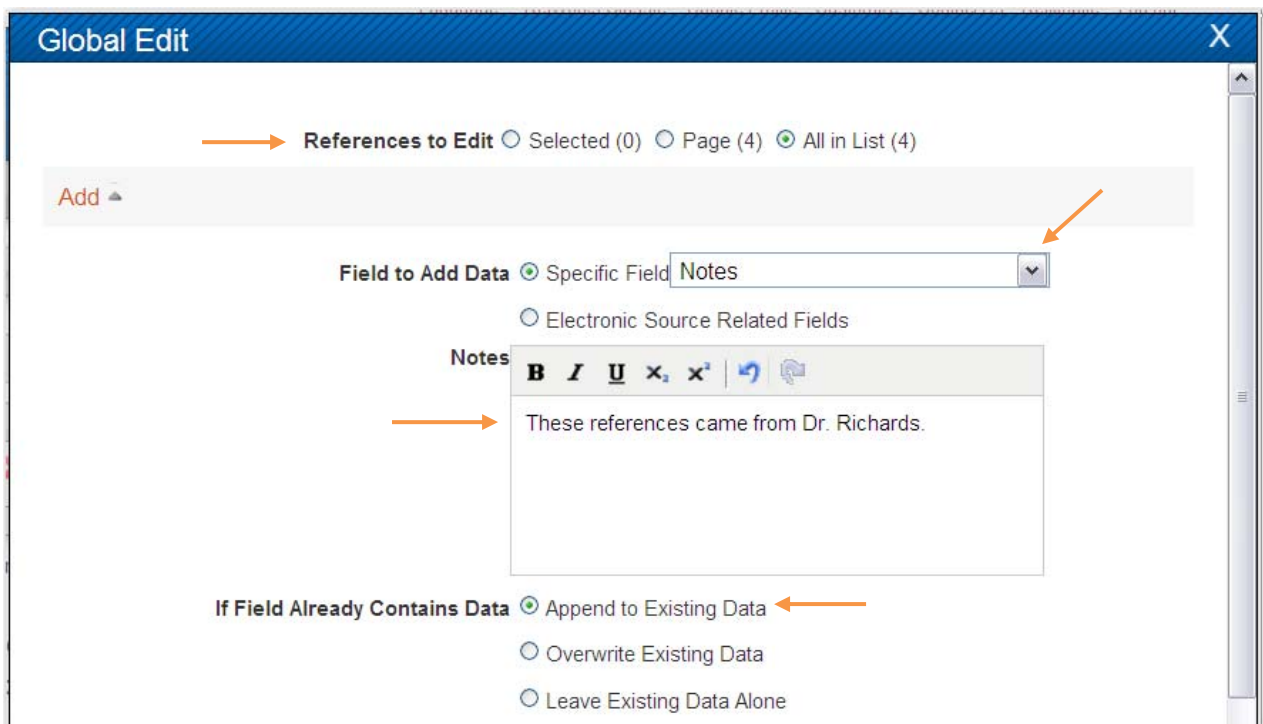


The screenshot displays the RefWorks interface. A yellow rectangle highlights the 'References to Use' area, which includes radio buttons for 'Selected', 'Page', and 'All in List'. The 'Selected' option is currently chosen. Below this area, a list of references is visible, with the first one selected. A 'Global Edit' dialog box is open in the foreground, showing options for 'References to Edit' (Selected (2), Page (25), All in List (264)). The dialog box has four main sections: 'Add', 'Move', 'Delete', and 'Replace'. The 'Add' section is active, showing a 'Field to Add Data' dropdown menu set to 'Specific Field' and a 'Choose Field...' dropdown menu. The 'Move', 'Delete', and 'Replace' sections are currently inactive.


EXERCISE — Using the “My List” folder and Global editing to add data to multiple references

TIP: The **MyList** folder is not like a regular folder. References added to **MyList** are only available during the current RefWorks session. Therefore, the **My List** folder is an excellent temporary storage or “staging” area to collect references for global editing, printing, exporting or any number of tasks that require a temporary separation of references. At the end of a session references are deleted from **MyList**, but they remain in your database.

1. Display the records in your My First folder, and select/mark any 4 references.
2. Move your cursor over the **Folder** icon  and select **My List** to move these references into the **MyList** folder. (Note: the MyList folder always appears on top of the folder list.)
3. Click on **MyList** from the **Quick Access Bar** to display the four references you just moved.
4. Click on the **Global Edit**  icon to open the Global Edit window.
5. Next to “References to Edit,” select the “All in List” radio button. (See graphic below)
6. Next to the “Field to Add Data” label, select the “Notes” field, and then add the following text: *These references came from Dr. Richards.*
7. Click on the “Append to Existing Data” radio button.
8. Click on the **[Add Data]** button to begin the global edit, and then click on **[OK]** to confirm your edit. Then to be “really sure” you want to globally edit these references (one of many RefWorks safe guards against inadvertent global edits or deletions) enter the expression “edit all” and then click on the **[Edit References]** button.
9. With a temporary pop up window, RefWorks will confirm your successful edit.
10. Close the Global Edit window to return to your **My List** folder
11. Click on the **View** icon  next to any reference to confirm your new message appears in the Notes field.



Full text finding tool

The RefWorks **full text finding tool** for the University of Cincinnati institutional account of RefWorks is “Article Linker.” Article Linker is the UC Libraries’ openURL resolver or server. Clicking on the Article Linker icon  next to any RefWorks’ article reference will invoke a search for that reference in UC Libraries’ vast collection of electronic journals.

NOTE: The full text finding tool and RefWorks’ attachment tool are complimentary reference management tools. Used together, these two tools will significantly expand and augment your simple references database into a database including searchable and manageable full text records.

EXERCISE ——— Using Article Linker to find a full text article

(This exercise works specifically with data collected in the [RefWorks file import exercise](#).)

1. Select the “Sample Database” from the “Folders” area of the Quick Access bar.
2. Find and select the [**Article Linker**] button for the “Ahnert” reference. This will open the UC Libraries’ **UC Article Linker window**, generated by the openURL resolver or server.
3. Select “**Article**” across from “OhioLINK Electronic Journal Center (EJC).”
4. Click on the article title link, e.g. The East German Child....”
5. Click on the PDF Full text link.
6. Save this article (PDF file) to your desktop or other location of your choosing. (**Note: the following attachment tool exercise will require you to access this file.**)


TIP: The UC Article Linker window provides access to a wide and disparate range of full text article providers. Finding a full text article may differ greatly among providers. Most of the time the path is intuitive. However, if you encounter any difficulties, you may contact the Langsam Library’s Info Commons help line (513-556-1867) or the [UC Libraries Help page](#).

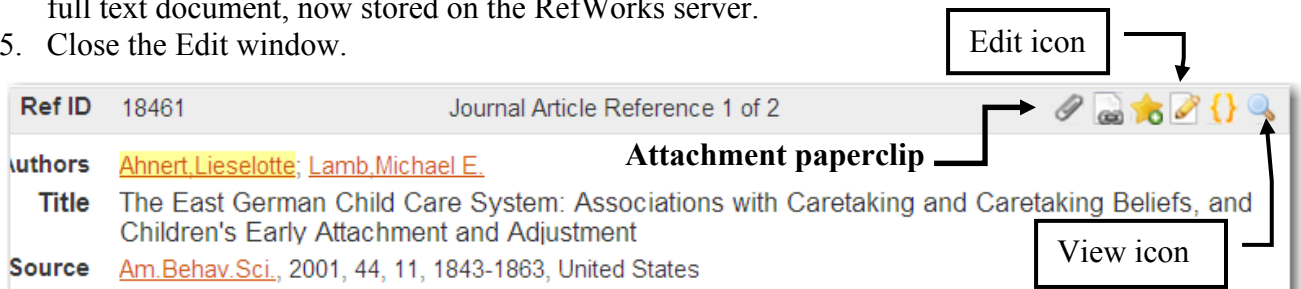
RefWorks attachment tool



The **RefWorks attachment tool** enables UC RefWorks account holders to attach files to their RefWorks database references. This feature is particularly useful for managing full text articles. There is a 20MB limit per file (full text record) attachment and a 1GB storage limit per user. More information about adding attachments is available from the [“Finding Full Text and Saving File Attachments in RefWorks video tutorial.”](#)

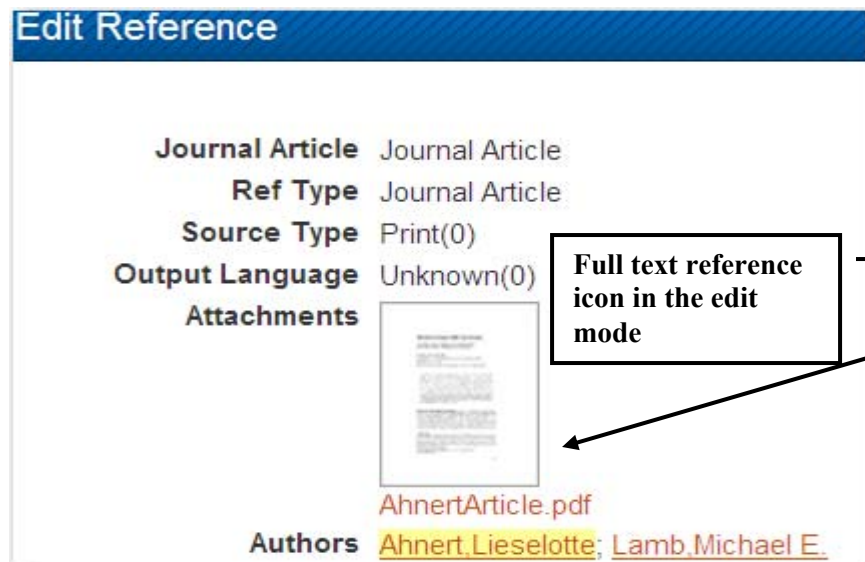
EXERCISE — Using the Attachment tool

(This exercise works specifically with the full text article retrieved in the [previous exercise](#).)

1. Use the Search “By Author” technique (see [browsing exercise](#)) to find the “Ahnert” reference from the previous exercise. Click on the **[Edit]** icon  to open the reference in a new Edit window.
2. In the “**Attachments**” field, click on the **[Browse]** button to locate and select the “AhnertArticle.pdf” file via the following path on the classroom PCs: Desktop >> “Roberts” folder >> “RefWorks” folder. (**Note: Outside of the classroom, you should have downloaded and saved this file on your PC from the previous exercise.**)
3. Simply “selecting” the AhnertArticle.pdf will secure the file (attachment) to your reference.
4. Once “attached” you will see an icon below the Attachments field representing the link to your full text document, now stored on the RefWorks server.
5. Close the Edit window.



6. There is now a paperclip (above graphic) next to the Ahnert reference. You can access this full text attachment by simply clicking on the file name that appears when you point your mouse at the paperclip. The attachment also is accessible via the Edit  mode or via the View  mode. See the example of the attachment icon in the edit record below.



Bibliography creation

With RefWorks there are predominately two methods by which you can create bibliographies. The **Write-N-Cite method** involves the creation of a manuscript, paper, report, etc. into which you create in-text citations or footnotes and create a bibliography composed of references corresponding to the in-text citations or footnotes in compliance to a selected output style, e.g., APA or MLA. The **Reference List method** involves the identification of selected references from your RefWorks database (or even your complete database) and the subsequent creation of a bibliography from your selected references, again in compliance with a selected output style.

Write-N-Cite method

[RefWorks Tutorial Ver. 3](#)

[RefWorks Tutorial Ver. 4](#)

Write-N-Cite (WnC) is a utility that runs inside your word processor and runs an abbreviated version of RefWorks that enables you to search for references, add in-text citations or footnotes to your manuscript and to create a corresponding bibliography. There are 3 versions of Write-N-Cite:

- Version 4.0 for MS Word 2007, 2010 & 2013 (32 or 64 bit) on Windows XP/Vista/Windows 7 and Microsoft Word 2007 or above.
- Version 4.0 for MS Word(Mac)
- Version 3 for earlier versions of Windows through Windows 7 and Word 2003, 2007 & 2010
- Version 2.5 for Mac.

*** **WnC must be installed. Instructions for installing and using all three versions of Write-N-Cite are available through the UC Libraries' [RefWorks website](#).** ***

NOTE: WnC 4.0 should also work on MS Office 365, provided the full desktop version of Word is installed. For all other word processors — including Open Office, Pages, Google Docs and a virtual version of MS Office 365 — you will want to use RefWorks One Line/Cite View. Instructions for using the One Line/Cite View are available as an [online tutorial](#) and through the [RefWorks support documentation](#).

EXERCISE Write-N-Cite (Version 3)

(This exercise works specifically with data collected in the RefWorks workshop and the attached practice manuscript page.)

1. Open the file “RefWorksCWYW.doc” in the “RefWorks” classroom folder, and click on the “**Add-Ins**” tab.
2. Find and click on the “Write-N-Cite icon on the Microsoft Word toolbar. This will open the Write-N-Cite “Login” window. (The “Login” window is invoked even if you have RefWorks already open.)
3. Login to RefWorks
4. Make sure there is a check in the box next to “Always on Top” to keep the “Write-N-Cite” window on top of all other program windows.
5. Return to your Word document; place your cursor between the author’s name “**Lamb**” and the word “**characterizes**” in the 1st line of the 1st paragraph, leaving a space between “Lamb” and your cursor.

- a. Use the [Search RefWorks] box in the Write-N-Cite window to find the article by “Ahnert & Lamb”⁴ about the East German child care system

TIP: In the WNC quick search box you can search for any term in a reference, e.g. keyword or author’s name. Multiple terms are combined by RefWorks with an “OR” operator, so use a single unique term to find your reference. For example, find “**Ahnert**” for the above reference.

- b. Click on the “Cite” link to insert an unformatted citation into your Word document.
6. In your Word document place your cursor immediately before the period at the end of the 2nd paragraph, again placing a space between the cursor and the word before it.
 - a. Use the [Search RefWorks] box to find an article about “**response selection**” by **Burle**⁵.
 - b. Click on the “Cite” link to insert an unformatted citation into your Word document.
7. In your Word document place your cursor immediately before the period at the end of the 3rd paragraph, again placing a space between the cursor and the word before it.
 - a. Use the [Search RefWorks] box in the Write-N-Cite window to find a second article by “**Burle,**” related to “**high-speed memory.**”
 - b. Click on the “Cite” link to insert an unformatted citation into your Word document.
8. In your Word document place your cursor immediately before the period at the end of the 4th paragraph, again placing a space between the cursor and the work before it.
 - a. Use the [Search RefWorks] box in the Write-N-Cite window to find an article by “**Shui-Kwan Leung**”⁶.
 - b. Click on the “Cite” link to insert an unformatted citation into your Word document.
 - c. Make sure the cursor remains “somewhere” inside the Saracho citation curly brackets.
 - d. Use the [Search RefWorks] box again to find an article by “**Leslie Baxter**”⁶ to cite in this same paragraph.
 - e. Click on the “Cite” link to insert an unformatted citation into your Word document
9. To format the in-text citations and generate the bibliography for your manuscript click on the [Bibliography] button to open the *Write-N-Cite* “Bibliography” window.
10. Select “**APA 6th**” as your “Output Style,” and then click on the [Create Bibliography] button.
 - a. RefWorks will convert your “unformatted” in-text citations to “formatted” in-text citations
 - b. RefWorks also will produce the corresponding bibliography/reference list.
11. Notice the in-text citation in the 1st paragraph **repeats** the author’s name in the text of the paragraph. In APA style the authors name should not be repeated in the in-text citation.
12. To correct the “repeated” author’s name, place the mouse cursor anywhere over the formatted citation and then click on “**Edit Citation**” in the Write-N-Cite box.

TIP: If an in-text citation requires editing, it should be edited using the Write-N-Cite “Edit Citation” option located on the top right corner of the WNC box. Here you can edit your in-text citation to suppress author names or years or include page numbers or additional text. **Do not make edits to in-text citations through Word; Word edits to in-text citations will not be retained.**

13. In the Citation Editor box put a check in the “Suppress Authors” box and click on the “Save to Word” button.
14. From the RefWorks Write-N-Cite window, repeat steps 9 & 10 to generate a “revised” formatted Word document.

⁴ Retrieved with the SampleDatabase RefWorks imported references

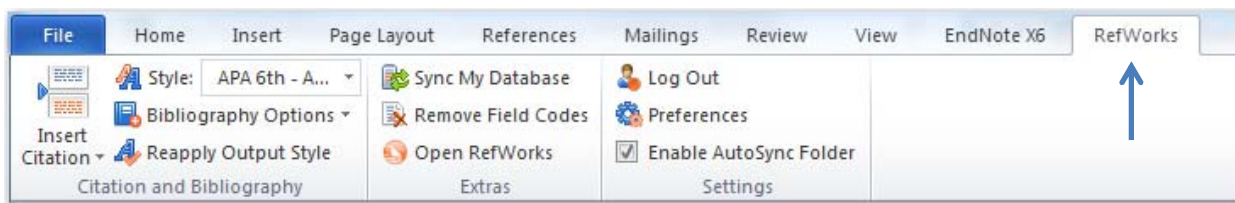
⁵ Manually added reference

⁶ Retrieved with the SampleDatabase RefWorks imported references

EXERCISE Write-n-Cite (Using version 4.0)

(This exercise works specifically with data collected in the RefWorks workshop and the attached practice manuscript page.)

WnC 4.0 has an entirely new look and is now fully integrated into MS Word, appearing in the MS Word ribbon (see below).



WnC 4.0 provides many new features. Most notable of these are the following two time saving convenience features:

1. Automatic formatting

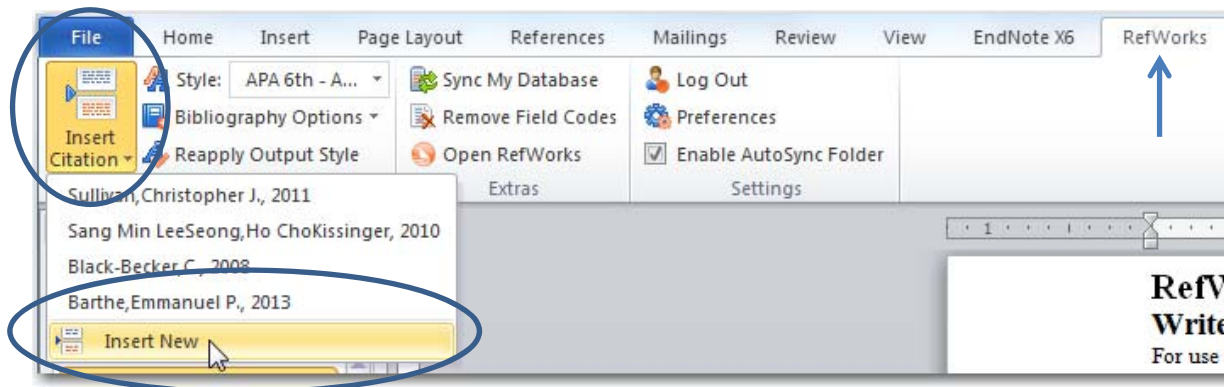
The formatted in-text cites and bibliography (for your selected output style) are created automatically.

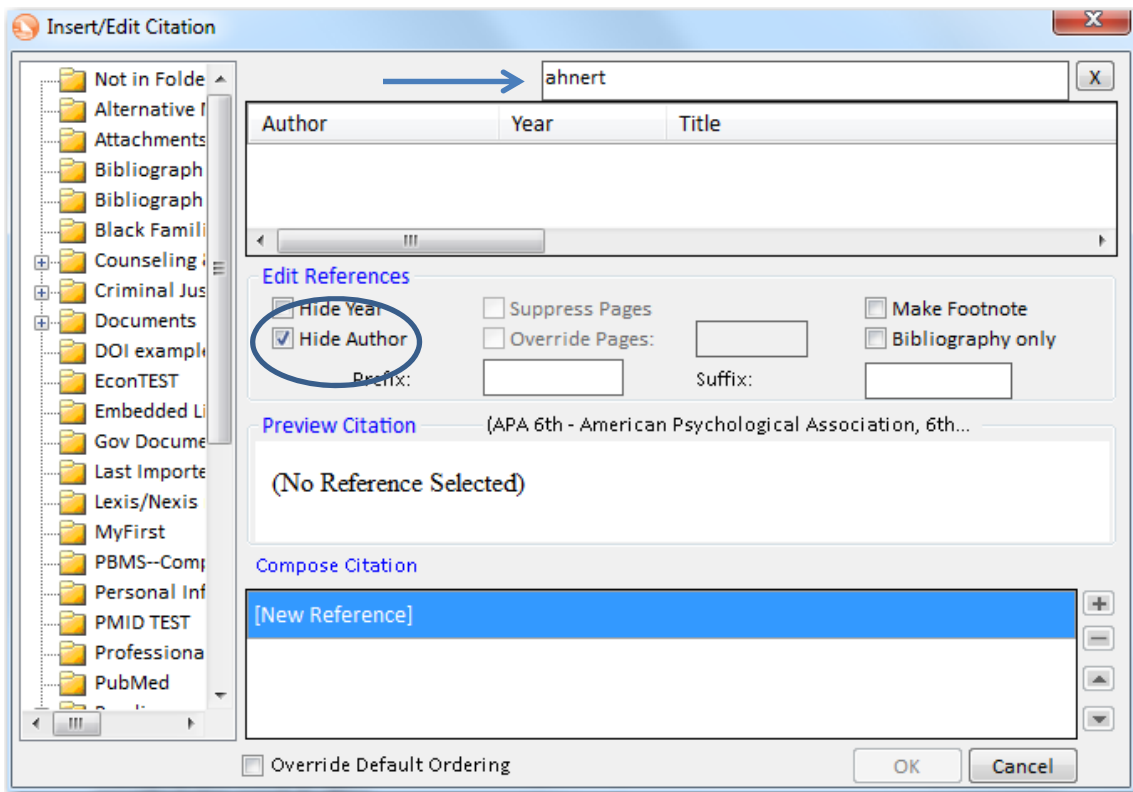
2. WnC document (manuscript) is synchronized with your RefWorks database

The first time you log into WnC your RefWorks database is synced with your WnC document. The benefit to this feature is that you need not be connected to the Internet or your RefWorks account to continue to add citations to your manuscript.

EXERCISE Write-N-Cite (Version 4.0)

1. Open the file “**RefWorks-W-N-C...**” in the “RefWorks” classroom folder, and click on the RefWorks tab (MS Word ribbon) to invoke the WnC menu palette (graphic above & below).
2. Across from **Style:** select **APA 6th** for your output style.
3. On the WnC practice document place your cursor between the author’s name “Lamb” and the word “characterizes” in the 1st line of the 1st paragraph, leaving a space between “Lamb” and your cursor.
4. Click on the “Insert Citation” icon (see graphic below) and then click on the “Insert New” option (below). This will invoke the “Insert/Edit Citation” box (next page).

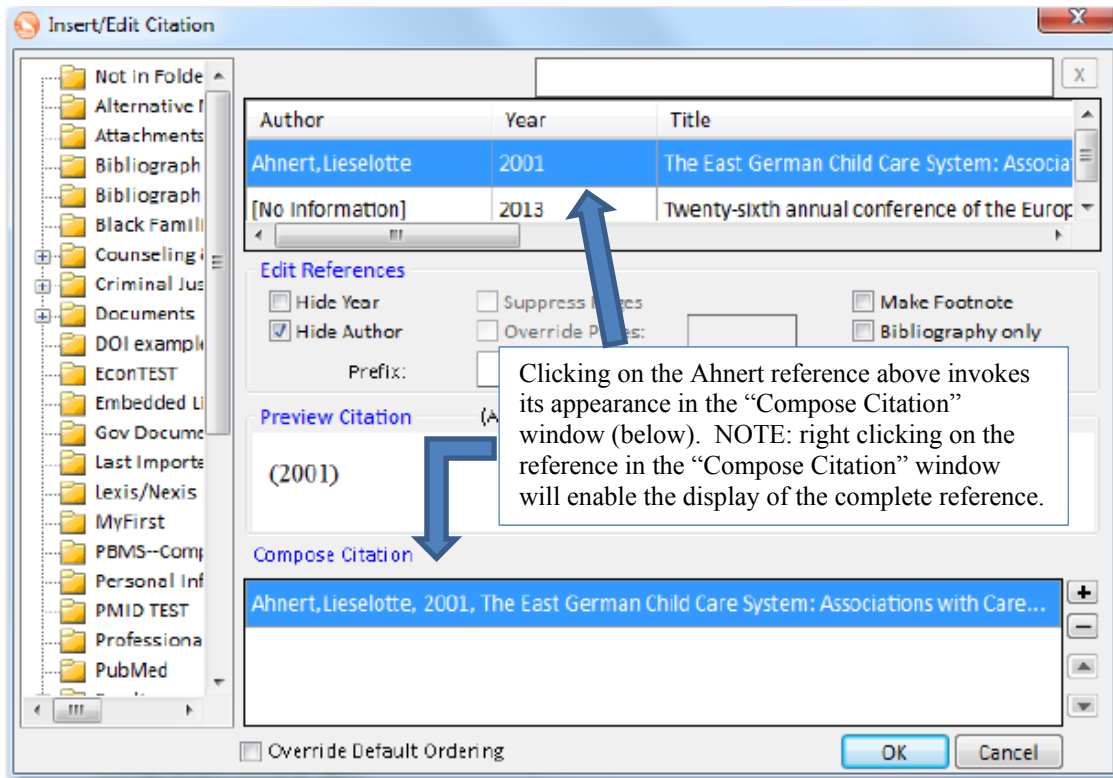




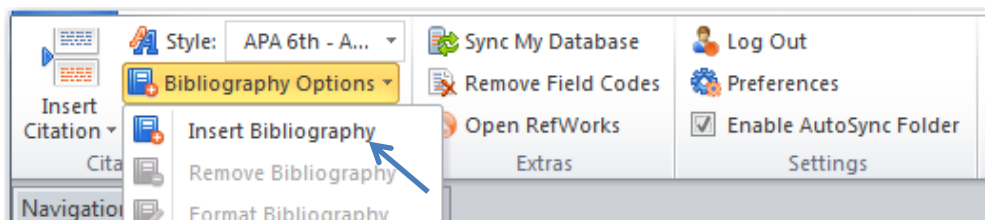
- At this point in the document we want to insert an in-text citation for an article by Ahnert & Lamb about the East German child care system. In the search box on the top of the “Insert/Edit Citation” box enter the author’s name “Ahnert.” Also, put a check in the “Hide Author” box in order to comply with the APA style guide’s rule to exclude the author’s name if it is given in the narrative.

TIP: In the WnC search box you can search for any term in a reference, e.g. keyword or author’s name. However, be aware that multiple terms in the search box are combined by RefWorks with an “OR” operator, thus giving you more (not fewer) results. Therefore, the use a single unique term will give you more precise results. For example, search for “**Ahnert**” for the above reference rather than “Lamb” or “German.”

- Click on the Ahnert reference (see graphic on next page) to display it in the “Compose Citation” window, and then click on the [OK] button to place the citation in the WnC document.



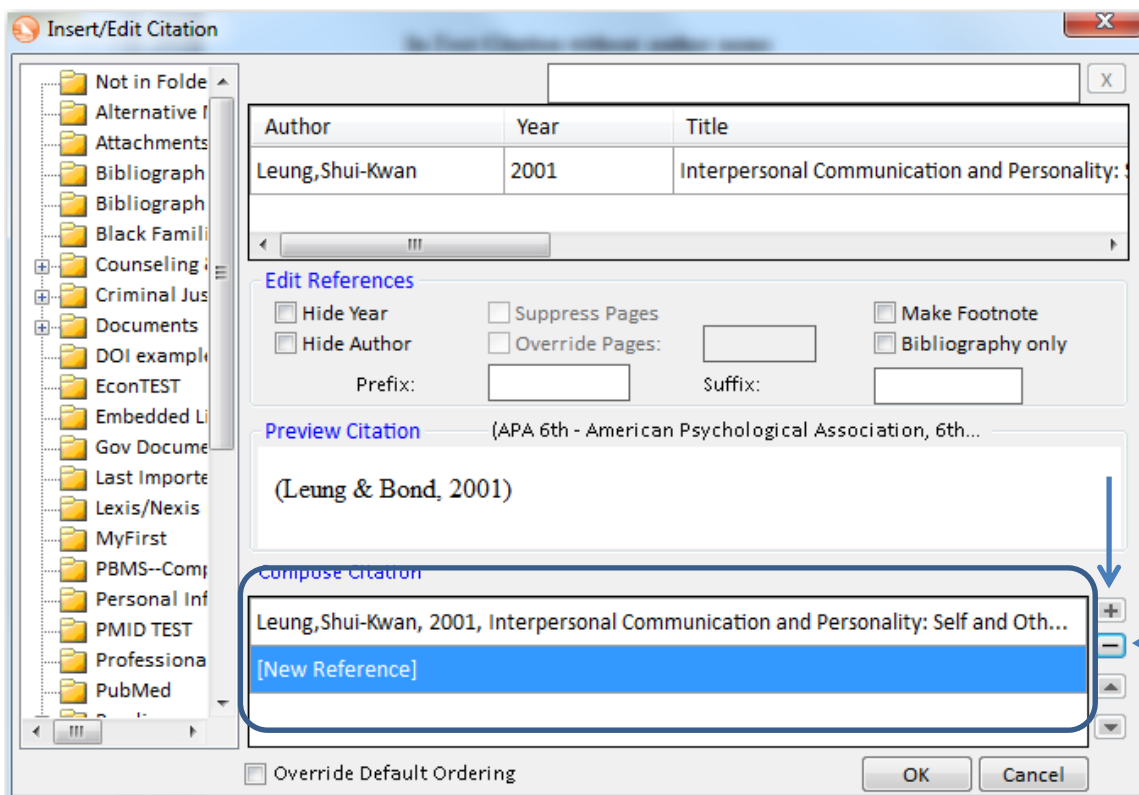
6. To turn on the automatic bibliography component of WnC place your cursor on the document where the bibliography should begin. Then click on “Insert Bibliography” (see below).



7. For your second citation place your cursor immediately before the period at the end of the 2nd paragraph, again placing a space between the cursor and the word before it.
 - a. Click on the “Insert Citation” icon and then click on the “Insert New” option to invoke the “Insert/Edit Citation” box.
 - b. Enter the author “**Burle**” into the search box, and select (highlight) the article about “**response selection,**” and then click on [OK].
8. For your third citation place your cursor immediately before the period at the end of the 3rd paragraph, again placing a space between the cursor and the word before it.
 - a. Click on the “Insert Citation” icon and then click on the “Insert New” option to invoke the “Insert/Edit Citation” box.
 - b. Enter the author “**Burle**” into the search box, and select (highlight) the article about “**high speed memory,**” and then click on [OK].

NOTE: According to APA style you can see that the Burle cites were changed to “2001a” and “2001b” in order to distinguish two different articles by the same author.

9. For your fourth and fifth citations (citing two references) place your cursor immediately before the period at the end of the 4th paragraph, again placing a space between the cursor and the word before it.
 - a. Click on the “Insert Citation” icon and then click on the “Insert New” option to invoke the “Insert/Edit Citation” box.
 - b. Enter the author “Leung” into the search box, and select (highlight) the article to add it to the “Compose Citation” window.
 - c. Click on the **+** sign (see below) to “add” another reference to this citation.
 - d. Now enter the author “Baxter” into the search box, and select (highlight) the article to add it to the “Compose Citation” window.
 - e. Click on **[OK]** to add both citations to the WnC document in the same reference and to create bibliographic references in the Reference List for both items.




TIPS: 1. You can **edit** any citation in your paper by double clicking on the in-text citation to invoke the “Insert/Edit Citation” box.

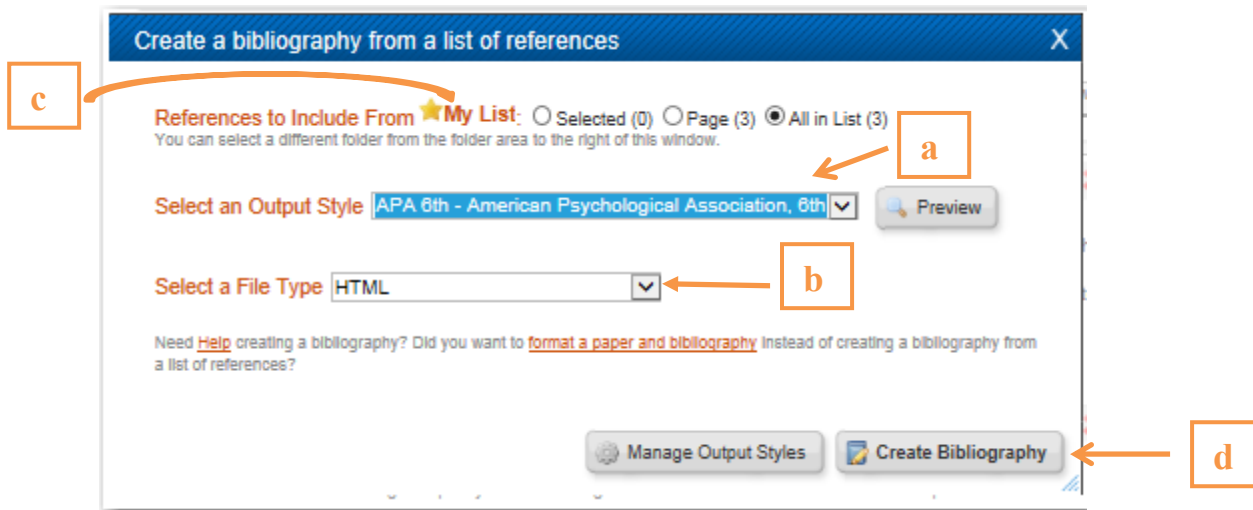
2. You can **remove** any citation in your paper using MS Word commands. However, for a compound reference such as the one produced in Step #9. Invoke the “Insert/Edit Citation” box, highlight the reference to be removed and then click on the minus button (see above).

Reference List method

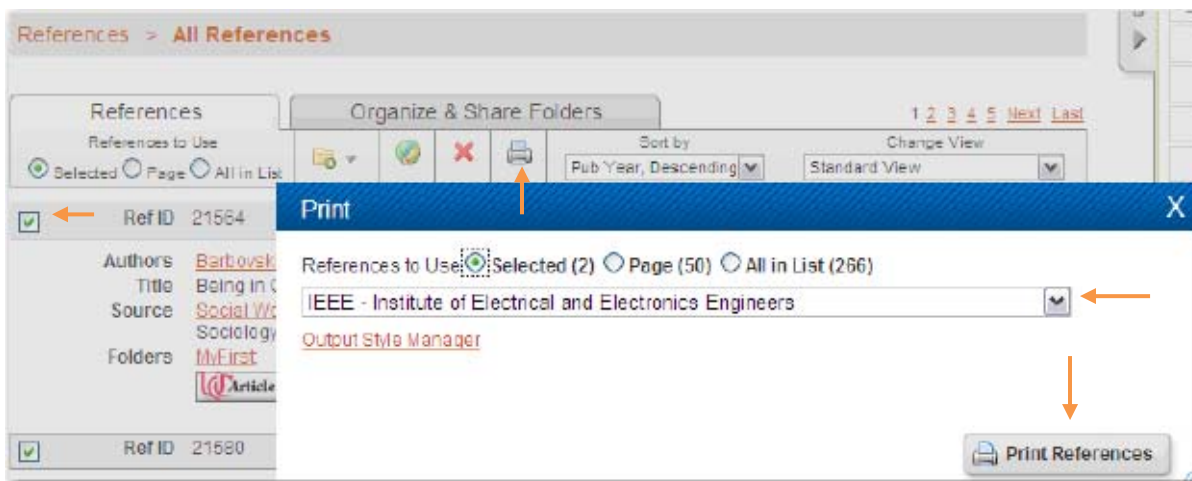
The **Reference List method** can be used to create a bibliography (list of references) from any references in your RefWorks database, without the need to create a manuscript. Your list of references can be compiled from your complete database, from one of your specific folders or from the temporary My List folder.

EXERCISE — Using the My List folder to print a simple reference list

1. Display the records in your My First folder, and select/mark any 4 records.
2. Use the **Folder** icon  to move these records into the **MyList** folder and select the MyList folder from the Quick Access bar.
3. Press the **[Create Bibliography]** button, located under the RefWorks menu bar, invoking the **Create a bibliography from a list of references** window (see below).
4. From the “Create a bibliography...” window:
 - a. Select your preferred “Output Style,”
 - b. Select “HTML” (or another file type of your choosing) as the “File Type” and
 - c. Note the default folder is MyList and the default references setting is “All in List.”
 - d. Press the **[Create Bibliography]** button to create your bibliography, and close the window.



TIP: You also can simply check references from any folder or from your entire database, click on the Print icon, select your output style and then click on the **[Print References]** button. This approach has the advantage of automatically invoking the print dialog box.



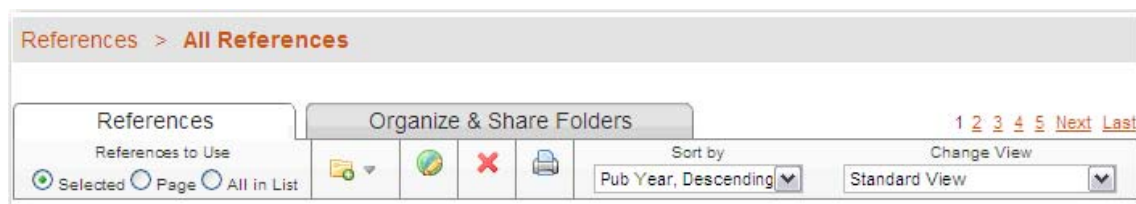
Special features

RefShare

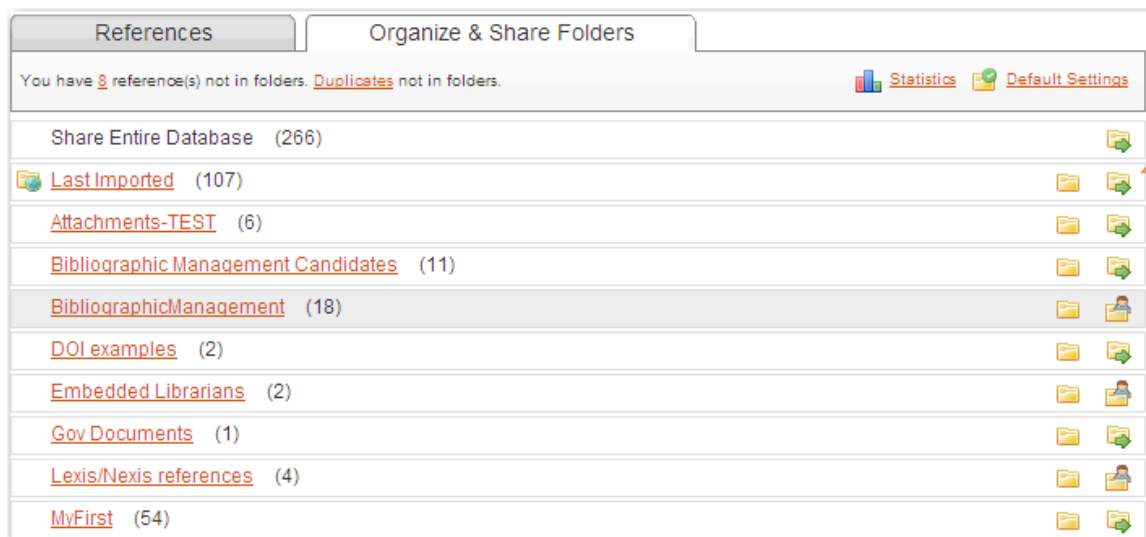
RefShare is a collaborative feature of RefWorks that enables you to share any part (folder) of your RefWorks database with anyone who has access to the Internet. You simply identify which folder or folders (even your whole database) you want to share, and RefWorks creates a RefShare link that you can share via an email message or by posting the RefShare link on a Web page. Additionally, you maintain control over the kinds of output options a viewer of your RefShare link can perform, e.g., viewing or printing (in various output styles), commenting, exporting, etc. Once you have set up a RefShare folder and shared the RefShare link, your intended audience can click on the link and view the current version of your folder or database.

EXERCISE -- Setting up your RefShare options

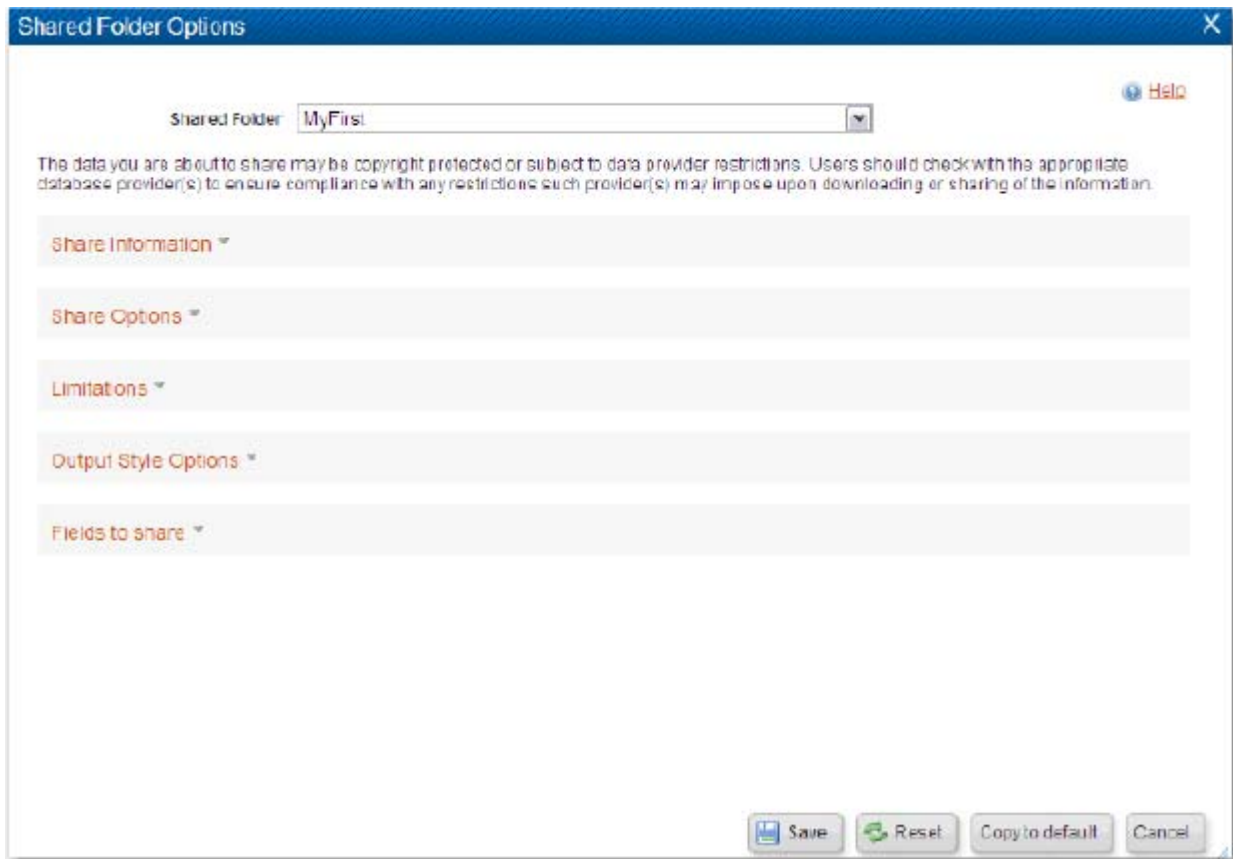
1. Log in to your RefWorks account
2. Click on the **[Organize & Share Folders]** tab (see below) to display your folders.



3. All of the folders in your personal RefWorks database will be displayed. The “outside” share folder icon (see diagonal arrow in graphic below) is the link to the various sharing options.
NOTE: Folders with a green horizontal arrow **are not** presently shared. Those folders without the green arrow **are** presently shared.
4. Click on the **share folder icon** for your MyFirst folder to create a shared folder.
5. A confirmation box will appear, click on the **[Share]** button to confirm your selection.



- In the **Shared Folder Options** window (below) complete the “Shared Folder Options” boxes and radio buttons to name/describe your shared folder and to provide options/permissions for viewers of the references in your shared folder.



- Click on the **[Save]** button to save your RefShare settings, and then close the “Shared Folder Options” window.
- Click on any shared folder icon (must **not** have the green arrow) to invoke the sharing options window (see below) and click on the “Email this share” to send the shared folder to yourself. (Note: You can copy the URL of this Shared References page and post it on a web page to expose your shared page to a wider audience.)



- To view an example of a shared folder, click on the following link: [Personal Bibliographic Management Systems](#) .

RefMobile

RefMobile is **not** an alternative access point to the “complete” RefWorks service. RefMobile is, however, an abridged extension of the anytime, anywhere RefWorks service. With RefMobile you can access your RefWorks personal database with any Web connected mobile device: mobile phone, smart phone or PDA. RefMobile provides the following functionalities:

- Search for references in your RefWorks personal database (uses the RefWorks Quick Search function)
- View and manage your folders
- View all your references
- Add a note to any displayed reference
- Access Smart Add (a unique discovery tool that searches 3 huge Internet databases (PubMed ISBNDB and CrossRef) to find references that may subsequently be saved to your RefWorks database and added to a folder.)

RefMobile is accessible at the following URL: www.refworks.com/mobile . Once logged into RefMobile on your mobile device, you will see five available options:

- Search the Quick Search tool for searching your entire RefWorks database
- Folders displays your entire list of folders from which you can select any folder
- All displays your complete list of references
- Smart Add displays the search box for searching PubMed, ISBNDB & CrossRef
- Log out Logs you off of RefMobile

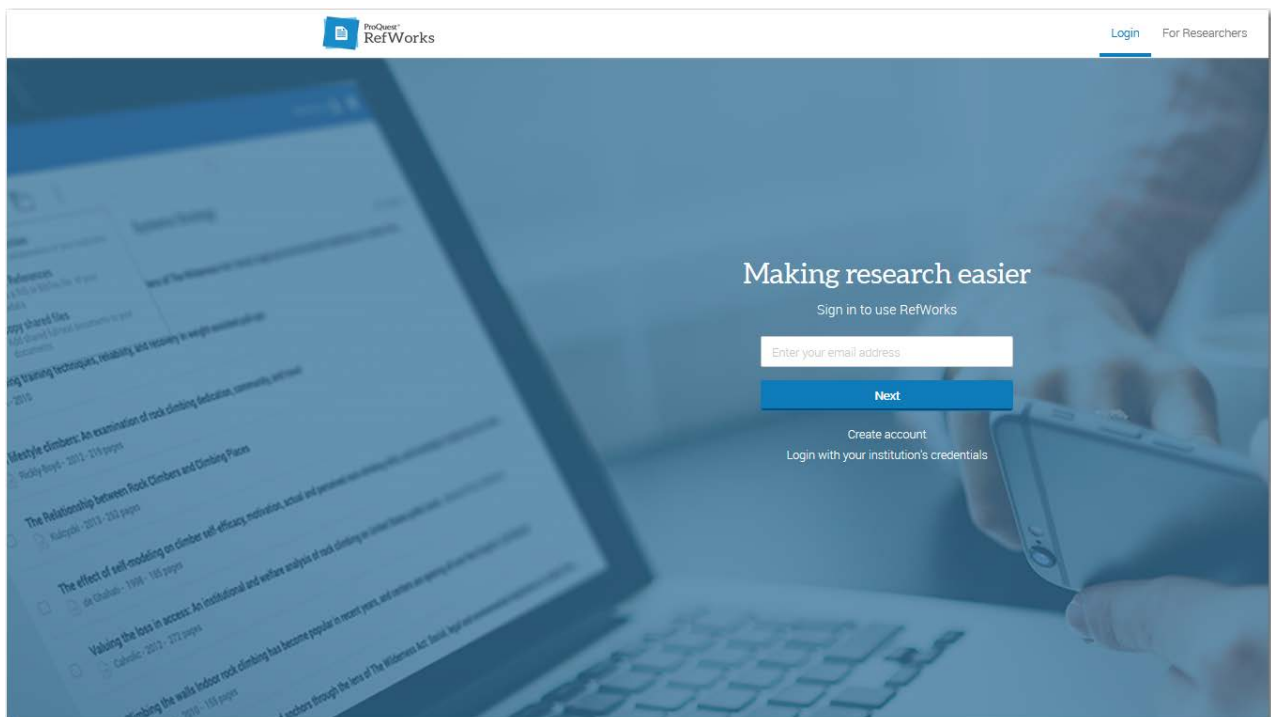
EXERCISE -- Accessing and using RefMobile

1. On your mobile device access the Internet and navigate to the following URL: www.refworks.com/mobile.
2. Enter your RefWorks Login Name and your Password.
3. Click the **[Login]** button.
4. Select the **Smart Add** option.
5. Enter the following search expression: *memory tests pcbs*, and click on the **Search** button.
6. Select the top reference.
7. Click on “**Select Folders**” to open your list of folders and press on the check box next to one of your folders to add this reference to a folder and then click on **[Save]** to save the reference to this folder.
8. Scroll to the bottom of your screen and click on the **Folders button** to display your list of folders, and click on the folder you previously selected.
9. Confirm that your newly added reference is now part of this folder.
10. Log off of RefMobile by clicking on the **[Log Out]** button.

NEW RefWorks

What is “NEW” RefWorks

There is a new sheriff in town, and his/her name is “New” RefWorks. ProQuest, the current developers of RefWorks, have developed a new platform for the RefWorks service. They have had, however, some difficulties naming it. Initially, in 2013, it was called Flow. Then, since it was an upgrade to what had been called RefWorks 2, ProQuest elected to give RefWorks a new version number, thus we had “RefWorks 3.” Finally, in 2015 ProQuest decided to name the new version simply “RefWorks.” Therefore, to distinguish “old” RefWorks from “new” RefWorks “old” RefWorks was named “Legacy RefWorks,” and “new” RefWorks was named just “RefWorks,” though it appears most folks, including the author of this workbook, have hung the moniker “New RefWorks” on this upgraded version of this very robust citation and reference management service.



Confused? Don't be. Nearly all of the University of Cincinnati's RefWorks users have what is now called Legacy RefWorks accounts. It would appear that we all will have well over a year to migrate our data, i.e., references, full text records, folders, etc., from Legacy RefWorks to “New” RefWorks. There is no rush to do this, but the migration from Legacy to “New” is inexorable, because Legacy RefWorks will eventually cease to exist. So the question becomes “when” is the best time to move from the old platform to the new one.

New RefWorks includes “most” of the excellent organization and management features of Legacy RefWorks. New RefWorks, however, has added many new and exciting features, but the most remarkable and distinguishing of these are the robust full document capturing and editing utility and the auto-completion feature for added references. Unfortunately, there are some excellent features in Legacy RefWorks that as of 9/8/16 have not been added to New RefWorks, including but not limited to the following: global editing, multiple attachments to a single record, many customization features, reference display options, RSS feed reader, browsing indexes and video tutorials.

Why Change Platforms??

There are many reasons to migrate your Legacy RefWorks data to New RefWorks, but as stated previously there is probably no urgency to do so. However, that decision rests in your hands. Here are some reasons to change and some reasons not to change, at least for now (9/8/16).

Reasons to change

- You want to use RefWorks to collect and manage your full text documents (mostly PDF articles). New RefWorks is clearly superior to Legacy RefWorks for this capability.
- You prefer or even require improved accuracy and comprehensiveness for collecting information (meta data) for your RefWorks references. New RefWorks uses a new auto-fill utility to pull from ProQuest's vast array of databases to fill in missing or inaccurate information for RefWorks references.
- As I stated previously, Legacy RefWorks has a termination date. You might as well migrate now and give yourself some time to "learn" New RefWorks before it is forced on you.
- You like new stuff, and New RefWorks is new.

Reasons NOT to change, at least for now

- The main reason NOT to change is if you are currently using Write-N-Cite from Legacy RefWorks to work on a research paper or manuscript. ProQuest currently advises that users do NOT switch from Legacy to NEW RefWorks in this situation. First, finish your document with Legacy RefWorks' Write-N-Cite. Subsequently you can migrate your data from Legacy to New RefWorks and then begin any new research papers or manuscripts with the Write-N-Cite utility for New RefWorks
- You use significant functionalities in Legacy RefWorks that are not yet available in New RefWorks.
- You hate change and you don't like new stuff. BUT — you will eventually have to change.

Test the Waters??

You can set up an account for New RefWorks to try out this new platform. You can even migrate "all" of your data to New RefWorks, AND no harm will come to your current Legacy RefWorks account. You will simply have two separate accounts.

Methods for migrating your data

In the next few weeks the UC Libraries will add a soft migration link to Legacy RefWorks. However, you can accelerate the process by simply connecting to [New RefWorks](#), setting up a new account using your UC email address and then either migrate your Legacy RefWorks data or simply add new stuff to your New RefWorks account.

More information

Visit the UC Libraries ["New" RefWorks website](#).

Take a look at the [Proquest Support Center's Evolving the Research Experience](#).

[Check out the New RefWorks Youtube videos](#) (some by ProQuest and some third party)

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Revised: 9/27/2016

>>>

RefWorks

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 9/4/2014

Workshop Objectives

- » Acquire an understanding of the purpose of RefWorks
- » Acquire a working knowledge of RefWorks' major functions
- » Learn how to customize your RefWorks service
- » Learn how to create and use folders to organize your records
- » Learn how to use the search, global edit, MyList, Article Linker and other record management tools
- » Build a RefWorks database using the following functions:
 - > Manual data entry
 - > Importing downloaded text files from a database
 - > Exporting directly from a database
- » Learn how to attach full text articles to RefWorks references
- » Produce a manuscript with in-text citations and a corresponding bibliography using the Write-n-Cite function
- » Learn how to create a shared folder

>

RefWorks Overview

- » RefWorks is provided at no cost for all UC students, faculty and staff by the University of Cincinnati Libraries
- » RefWorks is a Web based personal information management service.
- » RefWorks enables users to electronically create, import, organize, manage and share information.
- » RefWorks also facilitates the organization and management of full text documents.
- » RefWorks facilitates the creation of in-text citations, footnotes and bibliographies in almost any major style format.

>

Features

- » Easily collect references from most electronic databases.
- » Organize, maintain and search your own personal database of bibliographic and full text information.
- » Detect and control duplicate references.
- » Easily format and re-format in-text citations and bibliographies for professional papers, articles, books, etc.
- » Find full text journal articles from within RefWorks using the UC Libraries' Article Linker openURL service.
- » Attach full text articles to RefWorks references
- » Share references with anyone who has Internet access.



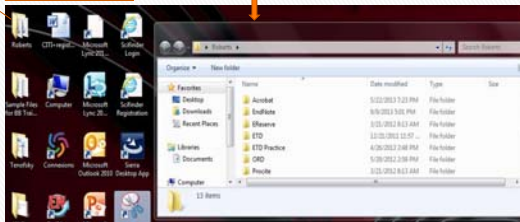
Additional Information

Please visit and bookmark the UC Libraries [RefWorks home page](#) to discover useful information about the functionalities of this product.

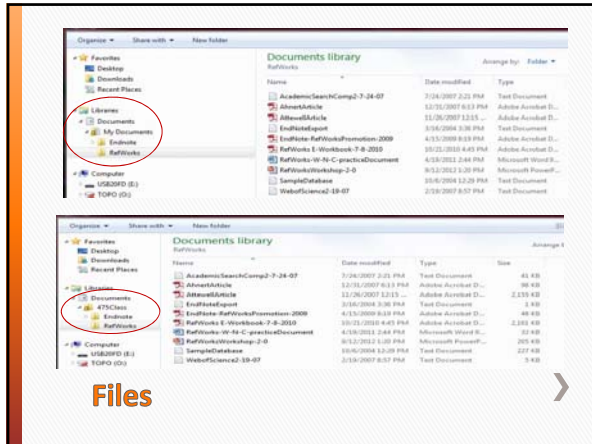


Clicking on the "Roberts" folder

Opens this screen



Path to RefWorks Workshop Files >



Import Log Error Messages

RefWorks' Import Log is an error checking tool that may be used to identify bibliographic references with bad or missing data as these references enter your RefWorks personal database. References with bad or missing data will very likely be problematic at the point of output. That is, there will be errors in your bibliographies, footnotes or in-text citations that are generated from these references. Therefore, it is imperative that you identify these references and correct them. The table below provides a short list of the most common types of error messages, including explanations of the error messages as well as possible solutions. The most opportune time to make these corrections is while these references still reside in the "Last Imported" folder. That is, the references have not yet been fully integrated into your personal RefWorks database. **Important: Print a copy of the Import Log page so you have a copy of the error information in front of you.**

Error Message	Explanation	Solution
Author pattern not found; Import as is	RefWorks requires author names to be in inverted order with a coma after the last name (e.g., McCoy, Marcia). Usually the "Author pattern not found..." error is a result of failure by the research literature database to comply with this requirement. For example, the author's name in the exported record may appear as McCoy Marcia or Marcia McCoy or just McCoy – all incorrect.	<ol style="list-style-type: none"> 1. Across from the error message you should find the author's name or part of it. 2. Find this reference in the Last Imported folder. Use the RefWorks Advanced Search function, if necessary, to look up the author's name. 3. Open this record in "Edit" mode to correct the author entry, e.g. "Jones, Tom." 4. You may have to return to the literature database or even another reference source to find the correct form of the name.
Reference type identifier not found; Use default reference type	RefWorks requires a "reference type" identifier for each reference, e.g. "journal article," "hearing" or "patent." Occasionally records will have either no reference type or one that RefWorks does not recognize. For these references RefWorks will either assign the prevailing reference type for the database from which you exported the references, e.g. journal article, OR RefWorks will assign "generic" as the reference type.	<ol style="list-style-type: none"> 1. Use the RefWorks Advanced Search function to find any "generic" reference types in your "Last Imported" folder. <ul style="list-style-type: none"> — Select "Ref Type" as your search field — Select "Generic" in the next search field — Limit your search to "Last Imported" folder. 2. Open the problem reference in "Edit" mode and change the Ref Type (beginning of record) to the appropriate type. 3. If you find no "Generic" reference types, check the references in your "Last Imported" folder for inaccurate reference types, and repeat step #2.
Source format not found; import into Notes	References imported or exported into RefWorks are broken down into fields. The "source" field often contains multiple pieces of bibliographic information, e.g. journal name, volume, pagination, etc. If this information is formatted incorrectly , all the data in this field will be placed in the "Notes" field of a reference, resulting in inaccurate reference lists or footnotes.	<ol style="list-style-type: none"> 1. Across from this error message you should find some bibliographic data that you can use to identify the problem reference, e.g. an author's name. 2. Find this reference in the Last Imported folder. Use the Advanced Search function if necessary. 3. Look at the Notes field in the problem reference. 4. Open the reference in "Edit" mode to copy and paste elements from the Notes field to the correct fields.

Error Message	Explanation	Solution
<p>Tag not defined; Not imported</p>	<p>References imported or exported into RefWorks are broken down into fields, and each field should include a tag or label, e.g. "A1" for primary author or "T1" for primary title. If this information is missing or if RefWorks does not recognize the tag, the information in this field is NOT imported.</p>	<ol style="list-style-type: none"> 1. Carefully review the Last Imported folder to identify references that may be missing important pieces of bibliographic information, e.g. author, journal name. 2. You will likely have to return to the research literature database to find the missing information. 3. Open problem references in the Edit mode to add the missing information.