



RefWorks 2.0^{BETA} Quick Start Guide

Logging In

- Access www.refworks.com/refworks and select the “RefWorks 2.0” interface option. Enter your personal Login Name and Password. (First-time users need to sign up for an individual account following the screen prompts.)
- **NOTE:** Remote users, accessing RefWorks from off-site or from a non-registered IP address, must either enter the “Group Code” prior to the personal Login Name and Password or log-in via the organization’s proxy server.

Need More Help?

Online Tutorial

A tutorial providing explanations of various RefWorks functions is available online, along with an Advanced User and RefShare Tutorials. Use the **Help** pull-down menu to access the tutorials.

Support

Online

Use the Help pull-down menu to access detailed instructions, frequently asked questions, administrator tools and much more.

E-Mail

Send questions or problems to support@refworks.com.

Webinars

RefWorks-COS now offers complimentary training webinars on RefWorks 2.0. Fundamentals and Advanced Feature sessions are also available. A complete listing of sessions can be found on the RefWorks homepage. New dates and time are added monthly.

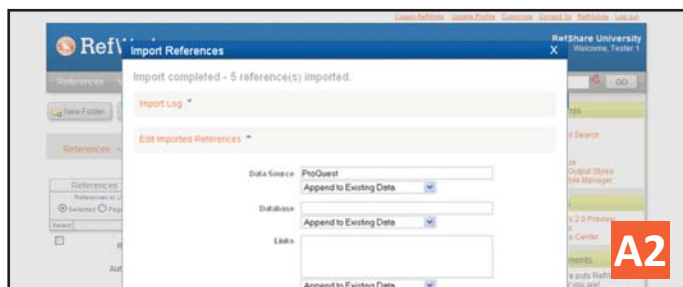
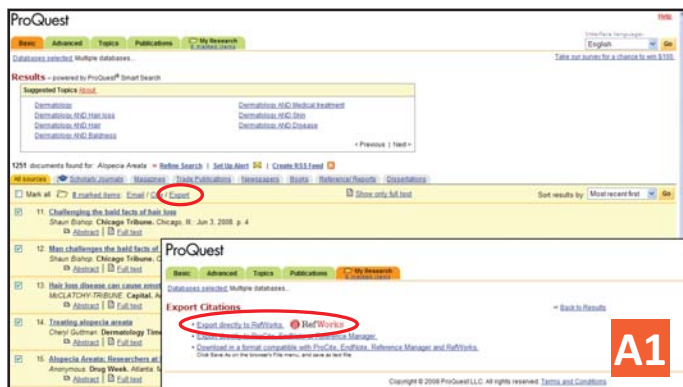
Phone

Contact RefWorks Technical Services at +1.775.327.4105.

Creating Your RefWorks Database

RefWorks provides a number of options for adding data to your database.

Importing Data Directly



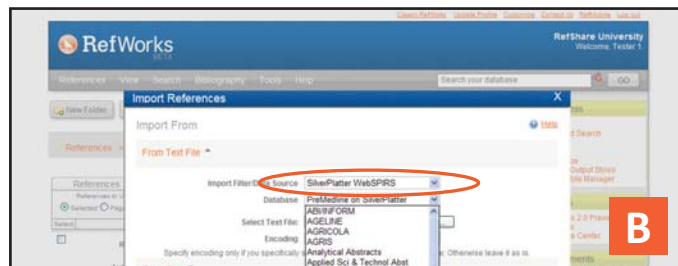
1. Under the save or export function within the online service, select or click onto the save to RefWorks option. **A1**
2. If you have your RefWorks account already open, the import will automatically begin. If not, then you will be prompted to the RefWorks login page; after you login, the import will automatically begin.
3. Select the **Folders** tab, then **Last Imported** to review the imported records.

*Helpful Hint: Every reference added to RefWorks (whether imported or entered manually) is given a print or electronic designation called Source Type. This assists in ensuring you have all the relevant data REQUIRED in your bibliography. A default Source Type may have been set by your local Administrator. Users can set their own source type in **Customize** area. **A2***

Converting References from Other Bibliographic Management Products

RefWorks is compatible with a number of other bibliographic management products. You can easily convert an existing bibliographic management database such as EndNote into RefWorks. For details related to importing data from specific individual bibliographic management products, please refer to the online **Help** section of RefWorks.

Importing Data from Saved Text Files



References can be imported into RefWorks from a text file (.txt) created by saving references from a wide variety of online services and other bibliographic management programs.

1. Retrieve the results you want to export from the online service or bibliographic manager, and save them to a text file. If the database vendor lists several different formats for saving the references, see the RefWorks Help file for further details on the appropriate selection.
2. Access your RefWorks account and click **References** from the drop-down menu; then select **Import**.
3. On the subsequent menu, access the drop-down menu next to **Import Filter/Data Source** and click the source of the data. **B**
4. Click on the **Database** drop-down menu and select the source database.
5. Click on the **Browse** button to select the text file to import.
6. Click on the **Import into Folder** drop-down menu to designate the specific folder where you want to file the imported references. If you do not choose a folder, the references will automatically go into the **Last Imported** folder.
7. Click on **Import**. When the import is complete, select the **Folders** tab and the **Last Imported** folder to review and modify the imported references.

Helpful Hint: An up-to-date listing of all online services and databases that are supported by RefWorks can be found in the Import area by clicking on the List of Filters and Databases link.

Importing from RSS Feeds

RefWorks has integrated an RSS Feed Reader so you can easily add your favorite RSS Feeds from publishers and websites, view the information and import data into your RefWorks database.

1. Locate the RSS Feed you wish to include.
2. Right mouse-click on the **RSS Feed icon or link** and select **Copy Shortcut**.
3. From within RefWorks, select **RSS Feed** from the **Search** Menu.
4. Paste the shortcut into the text bar and click the **Add RSS Feed** button.
5. Launch the RSS Feed by clicking on the name link. Your feed results will be displayed in a separate window for selection and importing.

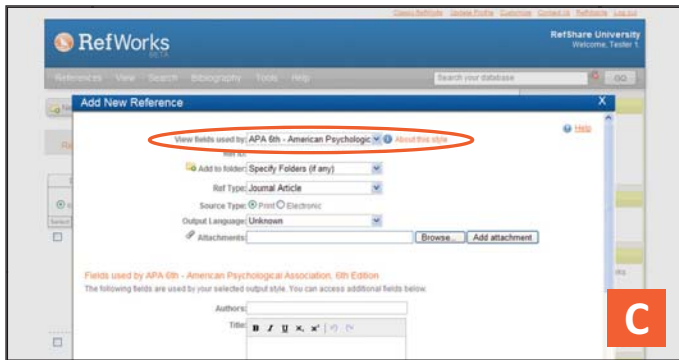
Technical Services

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Creating Your RefWorks Database (continued)

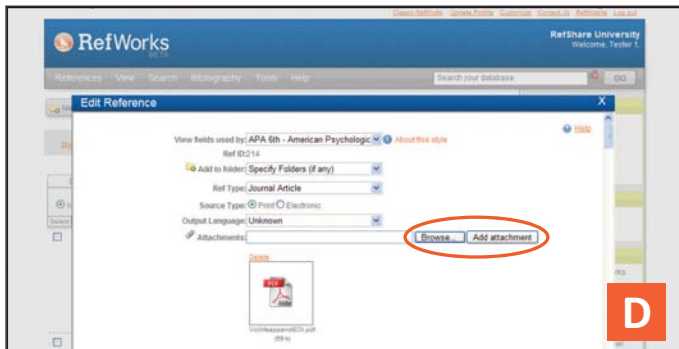
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Manually Entering References



1. Click on the **New Reference** button.
2. Select a potential bibliographic output style (e.g., APA, Chicago, MLA) under **View fields used by** to enable the AccuCite feature. **C**
3. Designate the type of reference you are entering (e.g. journal, book or dissertation) under **Ref Type**. The field names that are associated with the specific output style and reference type you chose will appear, indicating recommended information needed to produce an accurate bibliography. **These fields are not required to save the actual reference in RefWorks.** To view additional fields, click on **Additional Fields** on the bottom left of the screen.
4. Enter information in the boxes provided and click the appropriate **Save** button when finished.

Attaching Files to a Reference

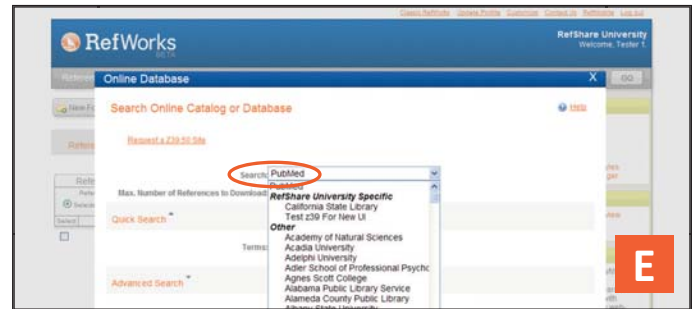


You can attach files when adding a new reference manually or editing an existing reference. Attachments can be any type of computer file (PDF, TIF, JPG, GIF etc.) that you want to associate with the bibliographic information you store in your RefWorks database. For further instructions on attaching files to your references, please refer to the **Help** file.

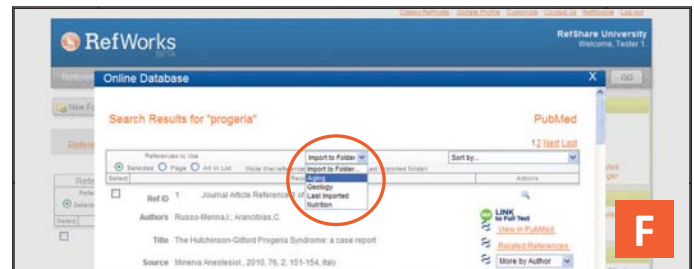
1. Select a reference in your database; click on the **Edit** button (📄).
2. Click on **Browse**. Select a file to attach. Select **Open**. **D**
3. Click on **Add attachment**.

Helpful Hint: There is no limit to the number of files you can attach to a reference. The maximum size of any individual attachment is 20 MB.

Importing from Online Catalogs or Databases



You can use RefWorks as a search interface for a number of online resources. **E** RefWorks provides access to a number of publicly available services such as NLM's PubMed as well as many universities' Online Catalogs. Additionally, institutional subscribers may also provide access to subscription-based online services (e.g., Ovid or ProQuest) through RefWorks.



1. From the **Search** pull-down menu, select **Online Catalog or Database**.
2. Select a database from the **Search** drop-down menu.
3. Select the **Max. Number of References to Download** from the drop-down menu.
4. Enter terms in either the **Quick Search for:** or run an Advanced Search by clicking on the triangle in the **Advanced Search for:** box to enter terms.
5. Click on **Search** to begin your search. A new window will open displaying your search results.
6. Select the references you wish to import into your RefWorks account and click **Import**. **F**

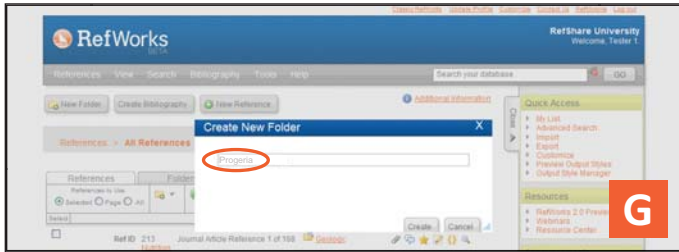
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Managing and Sharing Your References

RefWorks provides you with a number of tools to organize, edit, find, and view references in your database.

Creating Folders

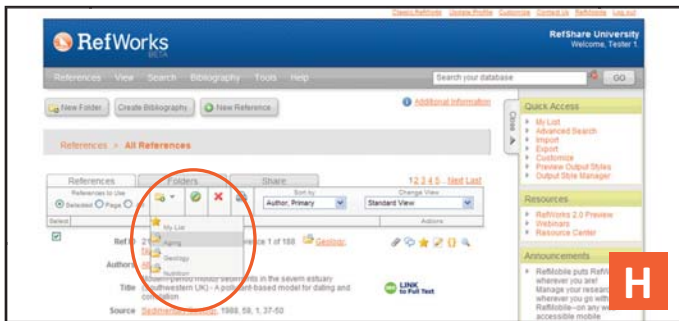


1. Click on the **New Folder** button ().
2. Enter a name in the text box; click **Create**. **G**

There is no limit on the number of folders you can create within your RefWorks account.

*Helpful Hint: The **Last Imported** folder contains only references from your most recent data import that have not been filed in other folders. References from imports prior to your last import not assigned to specific folders remain available in your primary database but unfiled.*

Putting References into Folders



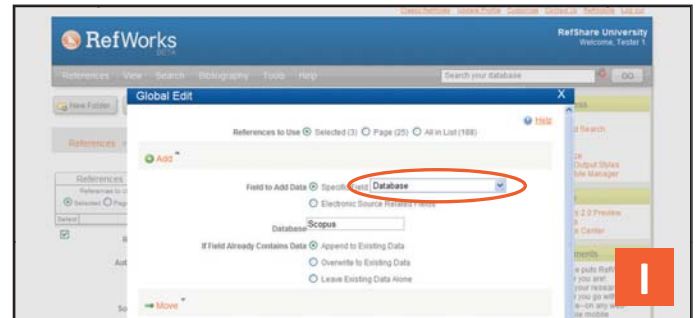
1. Mark desired references from the search results page, then click the button titled **Selected**. The selected references feature works on a page-by-page basis; this means that you must add the manually selected references to the desired folder before moving to the next page. Alternatively, you can mark **All** or all on a **Page**.
3. Select folder from the **Move To**: drop-down menu. **H**
4. References will automatically be added to the indicated folder.


Helpful Hint: References can be assigned to more than one folder.

Sorting References

1. From either the **View** pull-down menu or the **Folders** tab, select a folder or group of references.
2. Using the pull-down menu **Sort by**, located in the toolbar above the references, choose to view references by various fields within your database.

Globally Editing References



1. From the main navigation area, click on the **Global Edit** button ().
2. Select the references you wish to edit.
3. The **Add** option is displayed by default.
4. Choose the specific field to edit from the drop-down list. **I**
5. Type in the data you want to add to the field in the text field box.
6. Select the appropriate option for handling the field - **Append to Existing Data**; **Overwrite Existing Data** (what you currently have in the field will be gone); **Leave Existing Data Alone** (if the field contains data the edit feature will skip over that particular reference).
7. Click on **Add Data** .

Helpful Hint: RefWorks also offers the ability to Move, Delete, or Replace information in records. For more information on these additional Global Edit functions, please see the Help file.

Managing and Sharing Your References (continued)

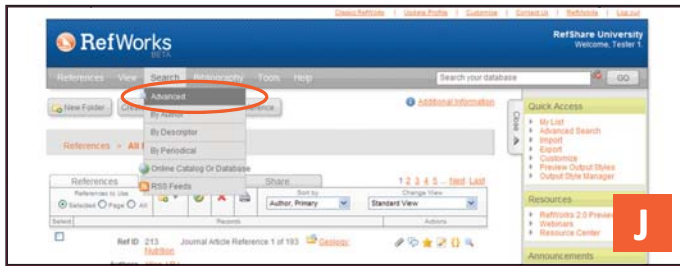
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Quick Search

Use the Quick Search feature as a search of all fields. To produce maximum results, all search terms entered are connected by the Boolean connector OR. In addition, searches retrieve embedded terms - a search for “**art**” retrieves references with “**heart**,” “**part**,” etc. The results of a Quick Search are always ranked by relevancy.

1. Enter search terms in the **Search your database** box.
2. Click on **GO**.
3. Results are displayed with the search terms highlighted.

Advanced Search

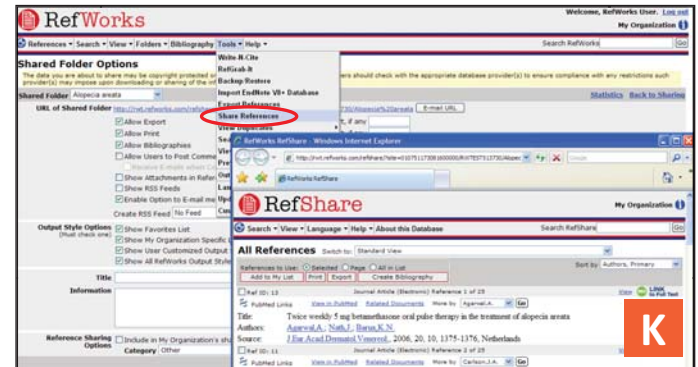


Advanced Search makes it easy to perform field-specific searches (e.g., Author, Title, Keyword), construct Boolean queries (i.e., AND, OR, NOT), and limit the search to a specific folder(s). The results of an Advanced Search are displayed alphabetically by author, with the search terms highlighted.

1. Click on the **Search** drop-down menu and select **Advanced**. **J**
2. Enter search terms and corresponding fields into the **Advanced Search** menu. Click on (+) to add more fields.
3. Connect the terms by using the Boolean operators.
4. Select **All References** or specific folders to search.
5. Click on **Search**.

Helpful Hint: You now have the option to save search strategies. Search strategies can be named and saved for easy and continual retrieval.

Sharing Your References



Note: During the RefWorks 2.0 Beta Release - RefShare will revert back to the classic interface. This feature will not reflect the RefWorks 2.0 user interface until it is officially launched.

You can share a folder of references or your entire database. RefShare is not automatically available for all RefWorks users.

1. From the **Tools** pull-down menu, select **Share References**. **K**
2. Select the folder you wish to share and click **Share Folder**. To share all of your references in your account, click **Share Entire Database**.
3. Select desired Shared Folder Options which allow you to define any use restrictions you wish to set for the RefShare Recipient(s).
4. Click on **E-mail URL**. A new window will open with a generic e-mail template and a unique URL created for your RefShare folder. Insert the e-mail address of the individual(s) you would like to share your references with. Select **Send E-mail**.

Note: As the owner of the folder or database, you determine the options your RefShare Recipient(s) will have in utilizing your shared references.

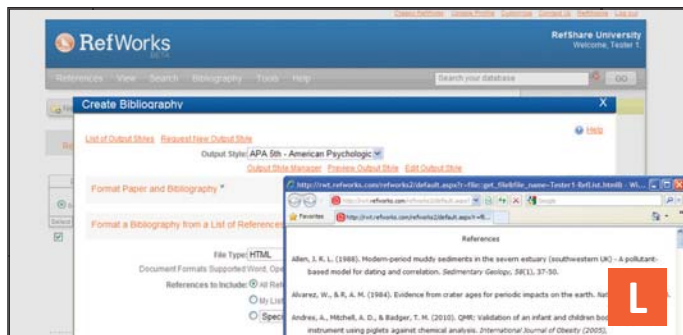
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Creating Your Paper and Bibliography

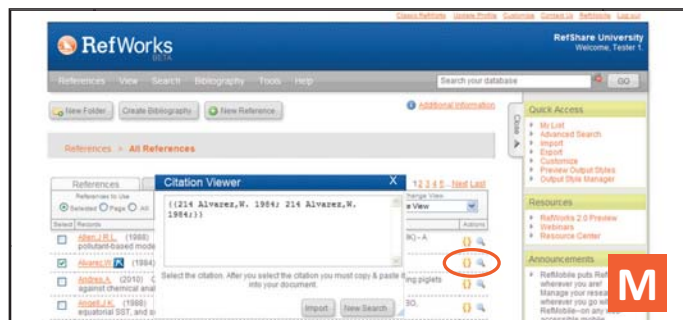
RefWorks creates bibliographies from over 1,000 output styles in seconds.

Format a Bibliography From a List of References



1. Click on the **Create Bibliography** button.
2. Select an output format (i.e., APA, MLA, Chicago, etc.).
3. Click on **Format a Bibliography from a List of References**.
4. Select what file type to create.
5. Select to format all of your references or those references from My List or from a specific folder.
6. Click on **Create Bibliography**.
7. A new window will open with your bibliography. **L**
8. Save your bibliography to your computer or disk.

One Line/Cite View Paper



1. From any reference view (all references, a folder or search results), click on the **Change View** dropdown and select **One Line/Cite View**.
2. Click on the **Cite** icon (📄) on the right side of the appropriate reference. A Citation Viewer window will appear containing the citation in an abbreviated format.
3. To cite a second reference in the same location just click on the **Cite** icon by any other reference. If you are using a Mac, you will need to click twice - the first click will activate the RefWorks program and the second will perform the Cite function. **M**
4. Once you have all of the references you need for a particular in-text citation, click on the **Select** button.
5. Perform a copy command or simply drag and drop the citation into your word processor document.
6. Go to your word processor, click on the document where you want the citation inserted and **Paste** the citation.
7. Be sure to clear the Citation Viewer window before creating your next citation.
8. Click on the **View** icon (🔍) to see the entire reference and to access the Edit command if you want to make changes.

One Line/Cite View Bibliography

1. Save the document you have just created before formatting the paper and the bibliography.
2. Click on the **Bibliography** button from within the RefWorks program.
3. Select the **Output Style** you need and use the **Format Paper and Bibliography** option to browse for the document.
4. Click on **Create Bibliography**.

Direct Exports Available From:

- 1Cate • ABC-CLIO • ACS Publications • bibliotek.dk
- BIBSYS • BioMed Central • BioOne • Blackwell Synergy
- CABI • CAIRN • Chadwyck-Healey • Compludoc • CQ Press
- CSA Illumina • CSIC • DanBib - Danish Bibliographic Centre
 - Dawson Books • DBPIA • Deep Web Technologies
- Dialnet • ebrary • EBSCOhost • Engineering Village 2
- FIS Bildung • Google Scholar • GoPubMed • HighWire
 - HubMed • IEEE • Informit
- Japana Centra Revuo Medicina (医中誌Web) • JSTOR
 - LexisNexis Academic • MetaLib
- Microsoft Live Search Academic • Newsbank • NISC
- OCLC • OCLC PICA - ZPORTAL • Ovid • Project Muse
- ProQuest • QUOSA • RISS4U • RLG's Eureka • Sabinet
- ScienceDirect • Scitopia.org • Scopus • Serials Solutions
 - SFX • SilverPlatter • Stat!Ref
 - The R2 Digital Library (Rittenhouse Book Dist.)
 - TDNet • TicToc • Thomson Gale via OpenURL Link
 - Ulrich's Resource Link • University of California Press
 - Wanfang Data Corp. • WebFeat
 - WilsonWeb via WilsonLink

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