



RefWorks Advanced Features Handbook

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Introduction

This handbook was adapted by Kay Cunningham from the **RefWorks Fundamentals Workbook** produced by CSA. It covers RefWorks' features going beyond the importing of records and generating of bibliographies. For RefWorks basics see the **RefWorks Fundamentals Workbook**.

Outline

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RefWorks Advanced Features Handbook

I: Registering with RefWorks

(Having a UofM password does not mean you have a RefWorks account automatically; you must register with RefWorks and set up whatever username and password you intend to use. Your RefWorks account is personal.)

- a. If you are on-campus, point your browser to www.refworks.com/refworks; if you are off-campus click through from the UofM's Libraries web page (<http://www.memphis.edu/libraries/>); you will have to authenticate yourself with your UUID and password to access the RefWorks sign-up page.

NOTE: trying to go to the RefWorks login page prompts security warnings from your browser. It is safe to proceed to the site, despite the browser warnings.

The screenshot shows a registration form titled "New User Information for Training University" with a note "(All fields are required)". The form contains the following fields and options:

- Your Name: Michele Walker
- Login Name: Michelew
- Password: [masked]
- Re-enter Password: [masked]
- E-Mail Address: mwalker@csa.com
- Type of User: Other (selected)
- Area of Focus: Select a Focus Area (dropdown menu)
- Select a Focus Area list:
 - CSA Staff
 - Humanities
 - Library schools
 - Nursing
 - Research Department
 - Science & Technology
 - Social Sciences
 - Other
- Register button
- Usage of [link]

- b. Click on **Sign up for an Individual Account**
- c. Fill in the form, choosing whatever you want for a username and password.
- d. Click **Register**
- e. On registration, you will receive an email confirming your registration and including your username, password, and the **UofM's Group Code** for use whenever you are off-campus.
- f. After registration, your browser will open your RefWorks account.

II. Organizing References

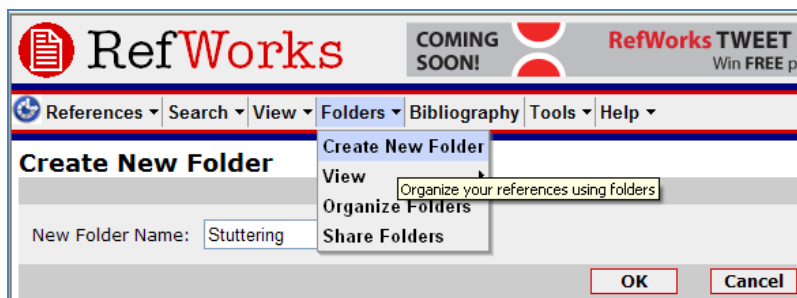
a. Folders

Assigning your references to folders is a useful means of organizing your research.

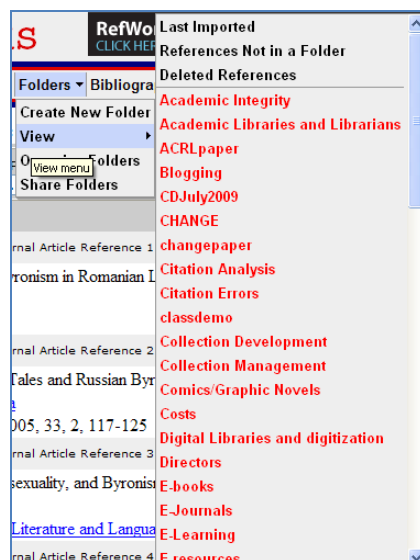
Create folders for topics you are interested in, for assignments, for classes, for papers. You can create an unlimited number of folders, and save an unlimited number of reference in them. The same reference can be assigned to multiple folders.

Folders are useful if you only want to work with a portion of your RefWorks database.

You can rename folders, empty them of references (without losing the references), and more.



Folders/Create: adds a folder on the topic you designate



Folders/View: shows list of folders



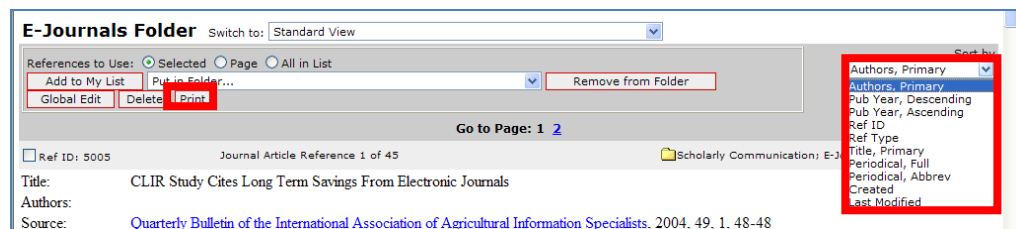
Folders/Organize: rename, delete, empty, etc.

b. Sorting

You can sort your entire RefWorks database, or you can sort individual folders by first author name, by publication year, type of reference, the name of the periodical, by the date the record was created, or by the most-recently modified records.* You can also select references to “My List” and sort those as well.

If you need a bibliography in a particular order, you would want first to apply the sort option, then print.

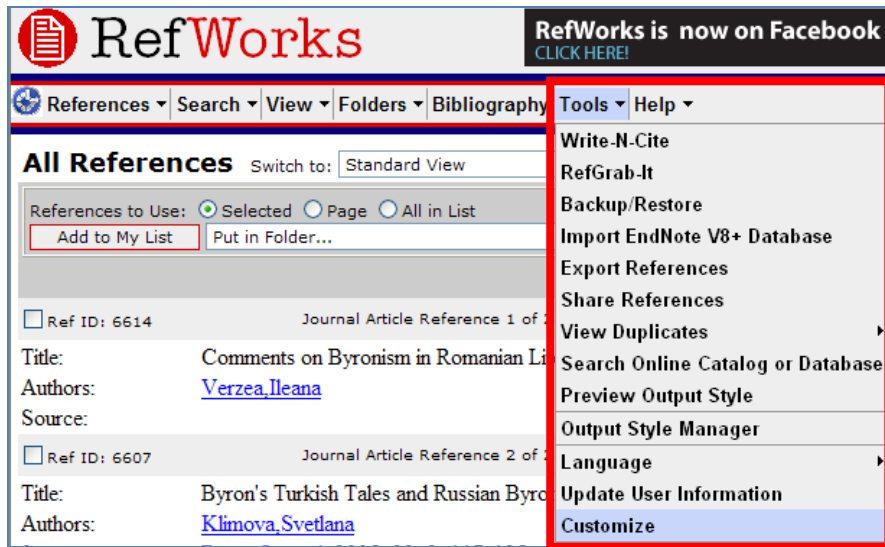
The **PRINT** option uses the “sort by” selection, overriding the bibliographic style standard. Use this method if you need a bibliography in alphabetic order, for example, instead of using the Bibliography tab.



Sort by dropdown list

*The default sort is by the most recently added reference; you can use the customization features to change the default sort. [N.B. I find the “last modified” to be particularly useful; you can edit references and they’ll move to the top of the list when you are done—K.C.]

Customizing RefWorks

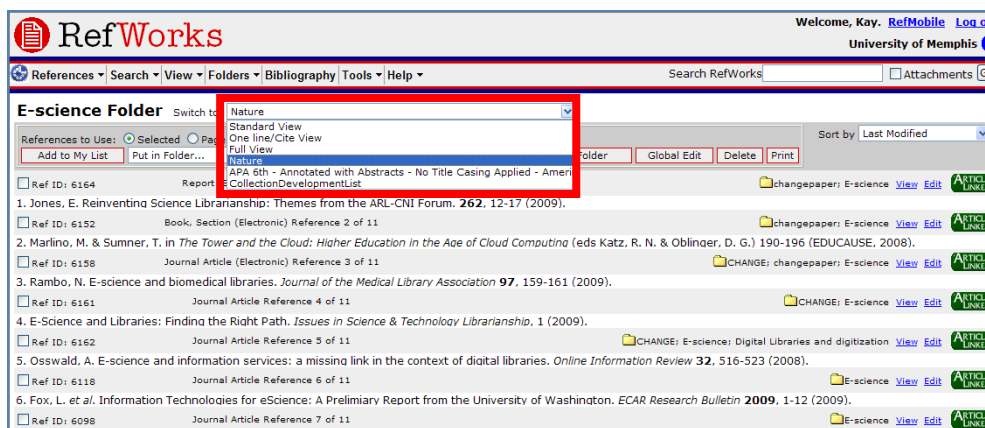


Tools/Customize: where you go to personalize RefWorks

a. Displaying Output Styles

You can select up to three output styles for automatic display within RefWorks, and you can set your default view to any one of these styles. Use this option if you want a constant preview of how RefWorks will treat your references.

This would also be a useful technique if you were using a new or unfamiliar style.



Switch to: changing the View to Nature style; other options are Standard (the default), one-line, full view (shows all details), and customized selections, APA 6th and CollectionDevelopmentList.

b. Renaming user-defined fields

On the Editing forms, you will find many fields into which you can put information, including fifteen user-defined fields. You can use these fields for whatever you wish and rename them accordingly.

See the name changes on Customize, then the changed field tags on the Edit Reference page.

Customize [Back to Reference List](#)

Reference List Options

References Per Page: 25 (500 refs max.)

Output Styles Choices for Reference View: Nature

APA 6th - Annotated with Abstracts - No Title Casing Applied - A

Collection/Development List

Show Folder Information For Each Reference: Yes No

Author Resolver Links: Default Setting (Show 2 Bars)

Automatically Mark Duplicates: Yes No

Startup Options

View Folder: Choose a Folder

Sort Ref List by: Last Modified

Language/Locale: English (United States)

Enable Screen Reader Friendly Menu: Yes No

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

Reference Edit Options

Enable Term Assistant: Yes No

Default Output Language: English

User Field Options

User 1 Field Name	Comments
User 2 Field Name	Quotes 1
User 3 Field Name	Quotes 2
User 4 Field Name	Quotes 3
User 5 Field Name	Quotes 4
User 6 Field Name	Quotes 5
User 7 Field Name	Quotes 6
User 8 Field Name	Quotes 7
User 9 Field Name	Original Annotation

Customize Page: choose output styles, choose a sort order, rename user fields

Edit Reference ✓ Indicates fields used by your selected output style.

Reference ID: 6098 ◀Prev Next▶ Duplicate View Back to Reference List

View fields used by: **MLA 6th Edition** Save Reference Save & Add New

In Folder(s) Specify Folders (if any)

Ref Type

Source Type

Output Language [What's this?](#)

Attachments

Authors Wright,Michael; Sumner,Tamara; Moore,Reagan; Koch,Traugott Separate each author with ";", See detail

Title

Periodical, Full

Pub Year

Volume

Issue

Start Page

Other Pages

Links Separate each link with ";", e.g. http://www.refworks.com; http://www.csa.com

Database

Data Source

Retrieved Date

Periodical, Abbrev

Pub Date Free Form

Descriptors DIGITAL libraries; INFORMATION resources; COMPUTERS; PREFACES; INTERNATIONAL Journal on Digital Libraries (Periodical); EVALUATION Separate each descriptor with ";", e.g. Diet; Health Behavior

Abstract

Comments

Quotes 1

Quotes 2

Quotes 3

Quotes 4

Quotes 5

Quotes 6

Quotes 7

Original Annotation

C.D. Category

User 11

User 12

User 13

Edit Reference page: showing commonly used fields and renamed user-defined fields

IV. Editing References

a. User-defined fields

User defined fields can be used for anything you like. Examples could include a field for your personal comments on the reference, direct quotes you may want to use. If you are collaborating through RefShare, you might want to assign a user-defined field to whomever you are working with for their notations.*

Any information you input into a field will display with the RefWorks Full View. If you use the user-defined fields for notes and quotations, you can open the full view of a folder and have access to (and a print out of) all of your saved commentary, making it easier—when you are writing your paper—to collect your thoughts.

Ref ID: 5262 Book, Section Reference 5 of 30 CHANGE: changepaper View Edit ARTICLE LINKED

Ref ID: 5262
 Ref Type: Book, Section
 Source Type: Print
 Output Language: English
 Authors: [Butler, Meredith A.](#); [DeLong, Stephen E.](#)
 Section Title: Planning Information Systems at the University of Albany: False Starts, Promising Collaborations, Evolving Opportunities
 Pub Year: 1997
 Start Page: 81
 Other Pages: 95
 Editors: [Schwartz, Charles A.](#)
 Book Title: Restructuring Academic Libraries: Organization Development in the Wake of Technological Change
 Publisher: Association of College and Research Libraries
 Place of Publication: Chicago
 Series Title: ACRL Publications in Librarianshi, No. 49
 Comments: early efforts at merging libraries and IT departments focused on the culture clashing. More recently the literature has focused on training issues, pay, and the service ethic (p. 84)

Quotes 1: "What is not well known, however, is how libraries and computing centers are changing their organizational structures, functions, work processes, services, and staffing as they plan for and cope with the networked distributed world in which they now operate." (p.81)
 "...are we focusing on new ways to integrate our experience and expertise on campus and within the profession at large?" (p. 83)

Quotes 2: "Recent years, however, have witnessed mounting frustrations on campus over unmet needs for more equipment, network connectivity, and user support. We have succeeded in renewing equipment and upgrading the network. But user support and training have continued to be problematic, and they can only get worse because as we upgrade our infrastructure, the number of users will jump from 2,000 to 20,000. Furthermore, although the current users tend to be 'early adopter,' and much more likely to be comfortable with technology, each of the next 18,000 will probably need substantially more training and help!" (p.90)
 "the 'help desk' (for want of a better phrase) must be fluid with layers of functions akin to a group of hyperlinked resources." (p.90)

Quotes 3: "In the past, information resources and services—print materials, telephone, television, fax, and computing--were each provided and supported separately. They were disjointed from each other, fundamentally unidirectional, and straightforward for user help." (p.90)
 "information has become bidirectional" (p.90)
 "implication of all this multifunctionality is that user support is now very complex because the services are so interrelated" (p.90)

Created: 4/26/2009 12:29:16 PM Local Timezone (GMT - 6hr)
 Last Modified: 10/22/2009 2:36:58 PM Local Timezone (GMT - 6hr)

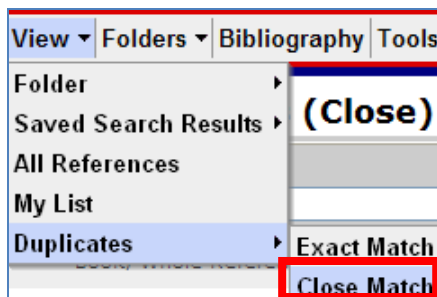
Full View showing direct quotes taken from the article

*RefShare is explained under Section VI.

b. De-duplication

If you search a variety of databases for your information, be aware that there could be overlap among your results lists. If you use folders extensively, especially for generating bibliographies, you will want to periodically check your database for duplicates: you do not want to generate a bibliography with multiple entries for the same resource.

It is probably best to choose "Close Match" as "Exact Match" means exactly that, and the slight punctuation differences between databases would prevent retrieval.



De-duping

The first two pairs of references below show close-match duplicates of the same articles. RefWorks automatically selects one for deletion. Note, however, that the last pair of references only begin with the same words; they are in fact different references, and you would not want to delete either of them. Deselect the auto-selected one before you click the delete key.



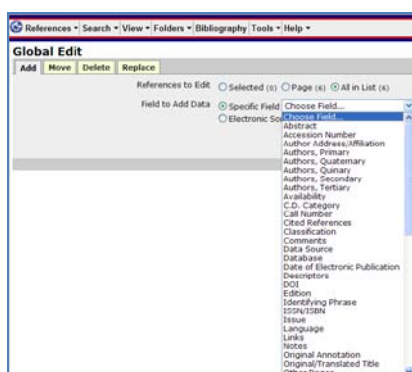
Close match duplicates

c. Global editing

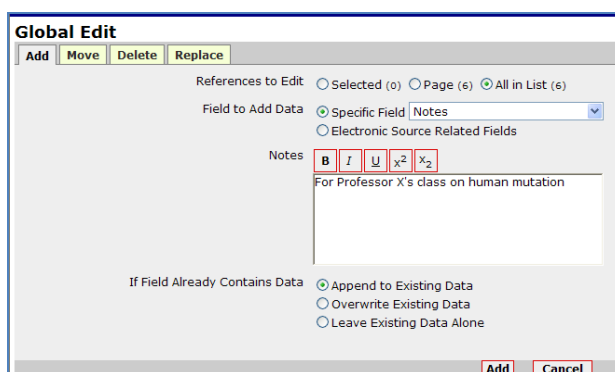
While you can edit each reference individually by using the Edit Reference page, you can edit references in batches using the Global Edit function. You might want to add the same note to all the references in a folder.

Select the references you want, then click “Global Edit.” There are several options, the simplest being to add material. Choose the field from the Data dropdown list. Key in the information.

[Note: if you are using any field other than one of your user-defined fields, it is safest to “Append to Existing Data.”



Global Edit: selecting the field



Global Edit: inputting data to append to the Notes field

Using one of the other Global Edit functions could help you construct an annotated bibliography.

The database’s own abstract is loaded into the Abstract field in RefWorks. You could use Global Edit to MOVE the existing Abstracts to some other field. [N.B. It is probably a good idea to keep them someplace; I renamed one of my user-defined fields “original abstract” for this purpose (see pages 7 & 8)—K.C.] Then you could type your own annotation into the Abstract field, since that field is the one RefWorks will read for data to create an annotation, when you use the APA with Annotations output style.

V. Output

a. Folders

Select the references you want, then click "Global Edit." There are several options, the simplest being to add material. Choose the field from the dropdown list. Key in the information.

b. My List

Select the references you want, then click "Global Edit." There are several options, the simplest being to add material. Choose the field from the dropdown list. Key in the information.

c. Other forms of output

Under the Reference dropdown, you'll find other methods of extracting data from RefWorks. If you need to send references to a collaborator who used other bibliographic software (EndNotes, or Reference Manager); if you decide to stop using RefWorks and start using one of the other products; if you want to load data into Excel, you can use the Export function.

This can be applied to all your references, a "My List" on-the-fly collection, or a folder.

The screenshot shows the RefWorks web interface. At the top, there is a navigation bar with the RefWorks logo, a search bar, and a menu with options: References, Search, View, Folders, Bibliography, Tools, and Help. Below the navigation bar, the 'Export' section is displayed. It includes a 'References to Include' section with radio buttons for 'All References (2380)', 'My List (0)', and 'References from Folder' (with a dropdown menu). The 'Export Format' section has a list of radio buttons: 'Bibliographic Software (EndNote, Reference Manager, ProCite)', 'BibTeX - RefWorks ID', 'Citation List', 'RefWorks Tagged Format', 'RefWorks XML Format', 'Tab Delimited', and 'XML (deprecated)'. A red box highlights the 'Export to Text File' button at the bottom of the form.

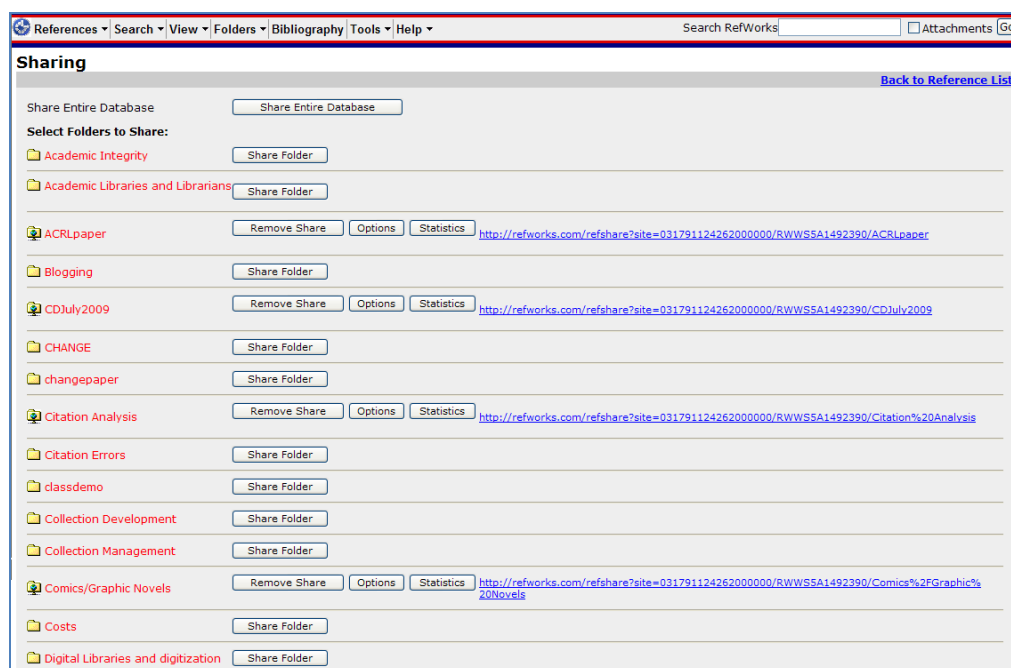
Export options (different from Bibliography)

VI. Sharing RefWorks

a. RefShare

RefShare is a way that you can give someone else access to your RefWorks account, an instructor or a collaborator, for example—even if those people do not have access to RefWorks themselves.

Go to the Folders tab, and choose “Organize Folders.” At the top of the page is a button reading “Share Folders.” Click this button to go to the Sharing page.



Sharing page: all folders are listed

Choose the folder you wish to share by clicking the “Share Folder” button.

The Shared Folder Options page opens, giving you the chance to set your external user’s rights. You can allow them (or not) to export, to print, to make bibliographies, to add comments, etc.

Once you’ve set the rights, click on the “E-Mail URL” button. This will send a RefWorks’ generated URL for your folder—with your passwords invisibly built in—to the person of your choice. (See next page for illustration.)

RefWorks COMING SOON! **RefWorks TWEET & SEEK Challenge!** Win FREE prizes! Click here for details! Welcome, Kay. [RefMobile](#) [Log out](#) University of Memphis

References Search View Folders Bibliography Tools Help Search RefWorks Attachments Go

Shared Folder Options

The data you are about to share may be copyright protected or subject to data provider restrictions. Users should check with the appropriate database provider(s) to ensure compliance with any restrictions such provider(s) may impose upon downloading or sharing of the information.

Shared Folder: Costs [Statistics](#) [Back to Sharing](#)

URL of Shared Folder <http://refworks.com/refshare?site=031791124262000000/RWWSSA1492390/Costs> E-mail URL

Allow Export Set Max. References to Export, if any

Allow Print Set Max. References to Print, if any

Allow Bibliographies Set Max. References for Bibliographies, if any

Allow Users to Post Comments on References

Receive E-mails when Comments are added

Show RSS Feeds

Enable Option to E-mail me E-mail

Create RSS Feed

OpenURL

Output Style Options (Must check one)

Show Favorites List

Show University of Memphis Specific List

Show User Customized Output Styles

Show All RefWorks Output Styles

Title Title as it will appear in RefShare

Information

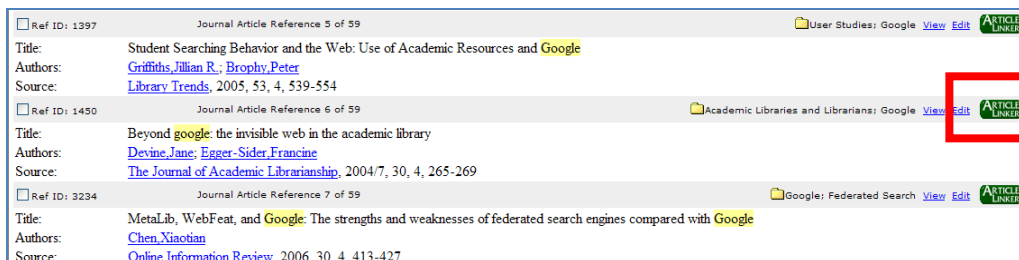
Information will be included in the organization's shared area (if applicable) and the About this Shared Folder link.

Shared Folder Options: select the rights you intend to grant, then e-mail the URL

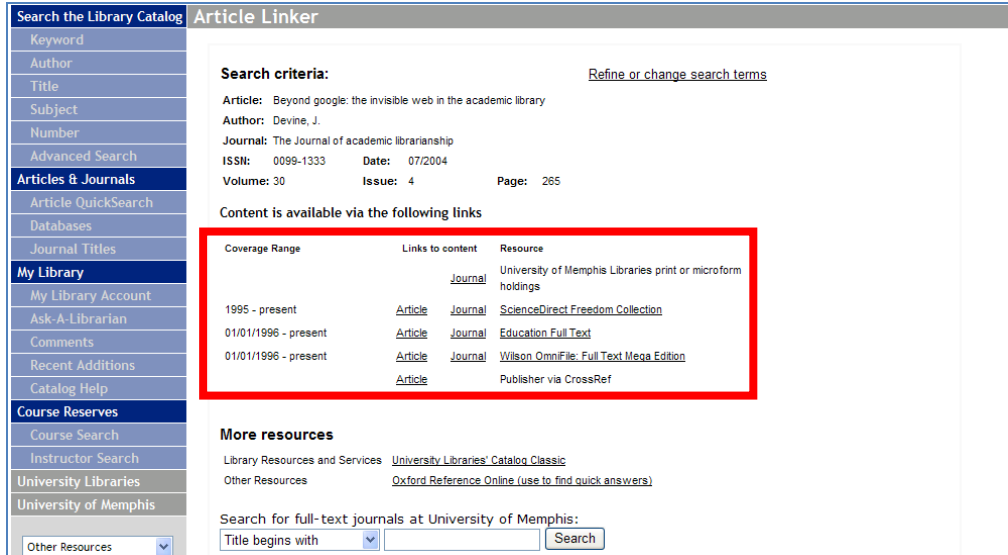
VII. Retrieving Articles

a. ArticleLinker

Notice the green ArticleLinker icons on every reference. These buttons connect you to the UofM's Journal Title search tool. If the article is available online, you'll be offered a link to it. If the journal is available in the Libraries' collections in print or in microform, you'll be told so and offered a link to the catalog record where you can check to see if the actual issue is available. [NOTE: information on all print/microform holdings may not yet be loaded into the catalog; any incomplete titles will include a note indicating this. Ask a librarian or check the shelves.



A portion of a list of references with ArticleLinker icons



ArticleLinker pointing to several online sources of an article

b. ILLIAD

If the UofM does not have access to an article, whether online or in print, you can request it through interlibrary loan using the ILLIAD program. It is particularly useful to make requests like this from your RefWorks account.

Notice that the Search Criteria displays all of the citation information. When there are no online articles available, ILLIAD appears as one of the Additional Options. Login to ILLIAD with your UUID and password, and RefWorks automatically populates the request form saving you the work of keying in all the bibliographic data. (Some, but not all, databases automatically populate; using RefWorks in combination with ArticleLinker to initiate orders ensures that all databases automatically populate.)

The screenshot shows the 'Article Linker' page on the University of Memphis website. The search criteria are displayed as follows:

Search criteria:		Refine or change search terms
Article: Examining the Claims of Google Scholar as a Serious Information Source		
Author: White, B.		
Journal: The New Zealand Library & Information Management Journal		
ISSN: 1177-3316	Date: 2006	
Volume: 50	Issue: 1	Page: 11

Below the search criteria, a message states: "Sorry, no holdings were found for this journal. Please see additional options below for finding this journal."

The 'Additional options for acquiring full-text:' section includes the following links:

- Library Resources and Services: [University Libraries' Catalog Classic](#), [ILLiad \(use to request Interlibrary Loans\)](#)
- Other Resources: [WorldCat \(use to find material in other libraries\)](#), [Oxford Reference Online \(use to find quick answers\)](#)

At the bottom, there is a search box for full-text journals at the University of Memphis, with a dropdown menu set to 'Title begins with' and a 'Search' button.

ArticleLinker screen: showing the ILLIAD option.

[N.B. Instead of opening and printing pdfs while I'm searching, I have found it easier to import material into RefWorks for later review. Once in RefWorks I can open the material that is available online and place any interlibrary loans at that time—K.C.]

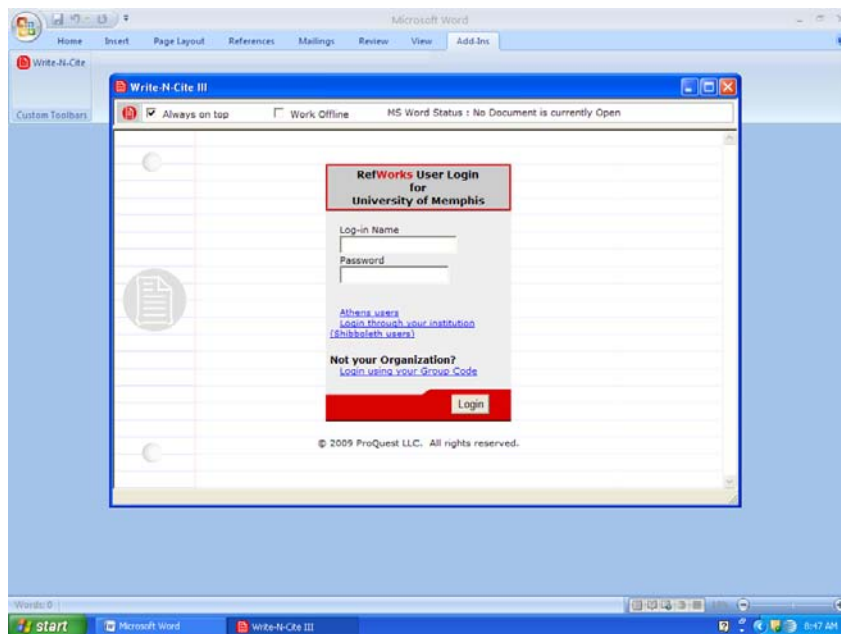
VIII. Working Offline using WriteNCite III

a. Working offline (WNC III only, WINDOWS only)

With WriteNCite III, it is possible to work offline. While you cannot add new references to the RefWorks database, you can work on a paper without having to login.

To work offline, you will need

1. To login and download WNC III, if you don't have it already (be sure to select "Allow working offline" when setting up the download)
2. launch WNC III and log in; you need to be online to be able to download
3. be sure you have added the output styles you will be working with to your Favorites list
4. from the WNC III Tools menu, choose Create/Update Offline database
5. click create
6. data will be downloaded
7. click "work offline"

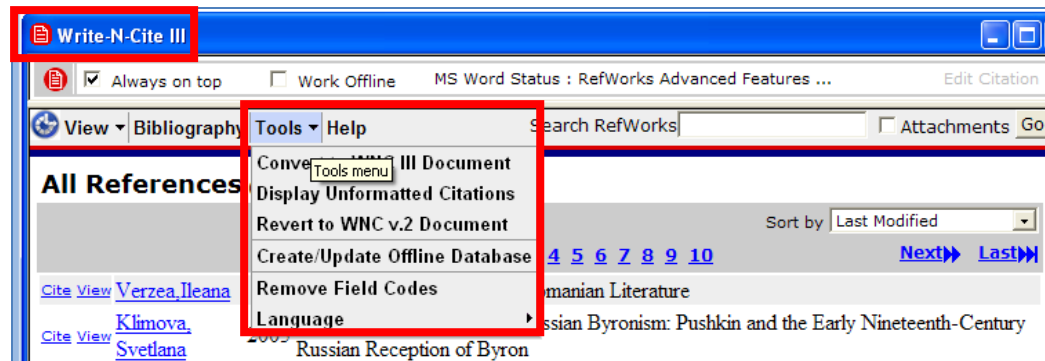


Write-N-Cite III: note icon in Word under Add-ins, note work offline selector

Be aware that if you make changes to your RefWorks online database, you must download again, to incorporate those changes.

b. Formatting and unformatting documents

If you need to change a document formatted in WNC III to WNC II (to share with a MAC user, for instance), use WNC III Tools to do so.



WNC III Tools: options for converting a document; WNC II does not display a Tools tab

If you want to strip out all WNC coding (and with it the ability to format the document) to get a plain text document, use "Remove Field Codes."

[NOTE: WNC III is far more complex than WNC II. Unless you want offline working capability, you may want to continue using version II.]