



Search, Save, Store, and Share A Key Features Resource Guide

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RefWorks 2.0

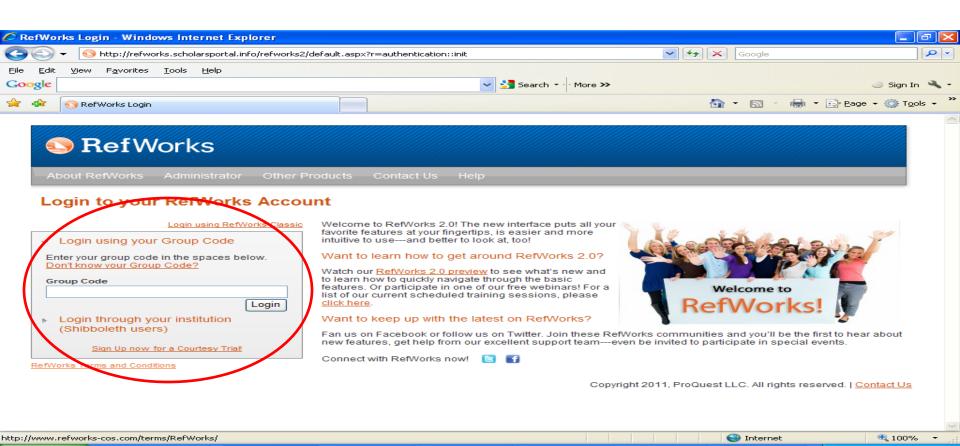
https://refworks.scholarsportal.info/refworks2/

- Bibliographic management program (bibliography can be created in almost any style)
- Reference List can be shared with other RefWorks users (RefShare)
- User-friendly (format a paper and create a bibliography/reference list in one step using Write 'n Cite!)
- Create unlimited folders (and subfolders) with unlimited references of research results, available online and accessible from virtually anywhere with an Internet connection!



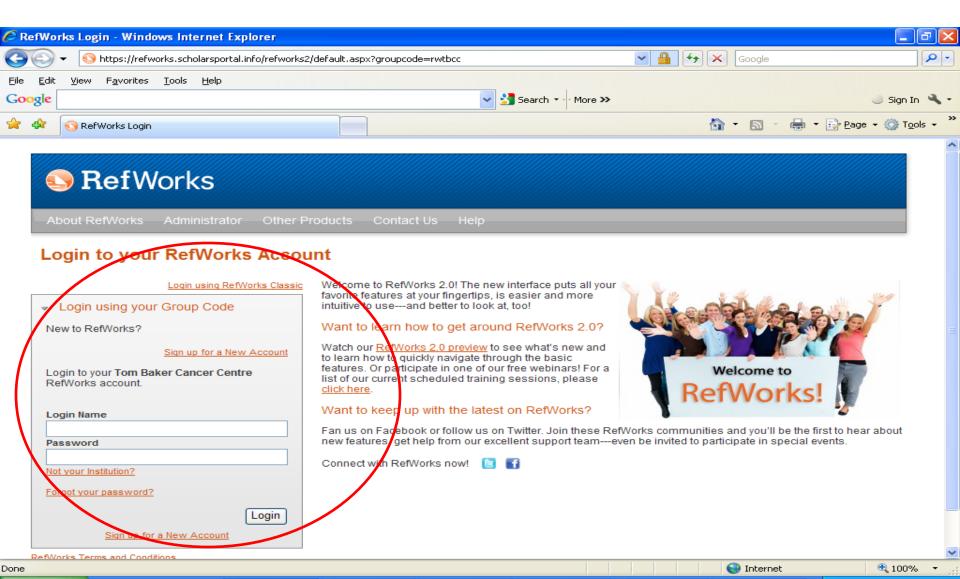
Launching into RefWorks From Home

 If using RefWorks offsite, you must enter the Group Code before proceeding. Note that the group code is case-sensitive.





Creating a RefWorks Account





Signing Up for a RefWorks Account

- Click on Sign up for a New Account link
- ALL fields must be filled in
 - RefWorks is e-mail authenticated according to the institution licensing the product. Therefore, please ONLY use your AHS e-mail address when registering.
- Area of Focus: (select from drop-down menu)
- Type of User: (select from drop-down menu)
- Click on the Create Account tab

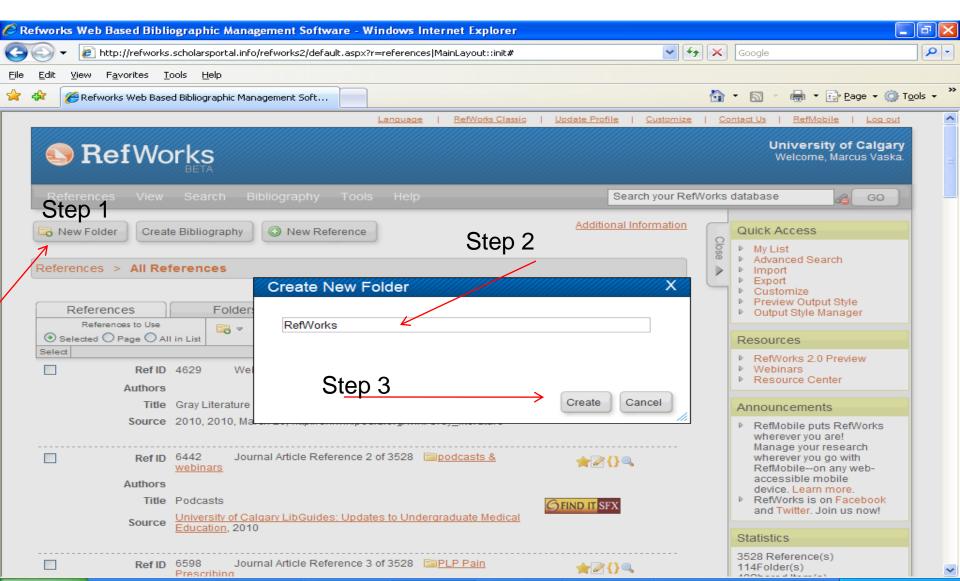


Creating Folders

- It is extremely important to create folders FIRST (before searching), because "the Last Imported folder (i.e. RefWorks server) contains ONLY references from your most recent data import that have not been filed in other folders!"
- Click on the New Folder tab.
- Enter file name (i.e. RefWorks); in the Create New Folder text box; click on the Create tab.
- After creating a new folder, you will be returned to your main RefWorks account home page. To verify that the folder exists: View > View Folder [the folder you just created should now be listed]
- RefWorks imposes NO LIMITS on how many folders or references you can have in your account



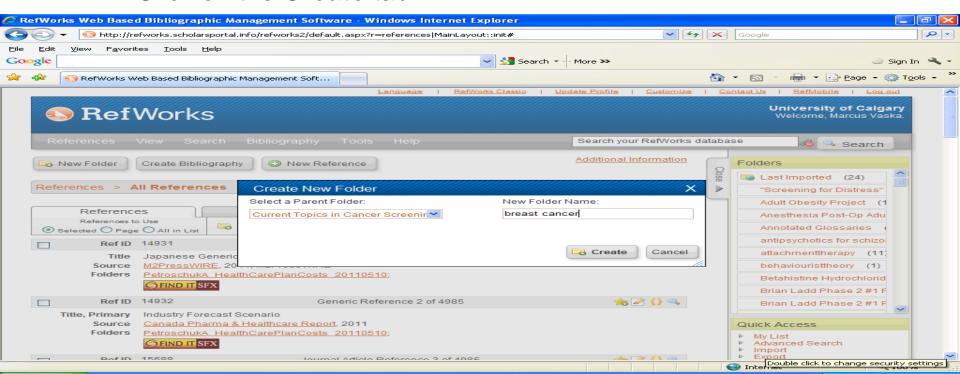
RefWorks: Creating Folders





Creating Subfolders

- Click on the New Folder tab
- Click on the Create Subfolder link
- Input the name of the subfolder, and choose which Parent
 Folder (drop-down menu) the subfolder will be located in.
- Click on the Create tab.





Sample Topic

Occupational exposure to asbestos, a cancer-causing agent

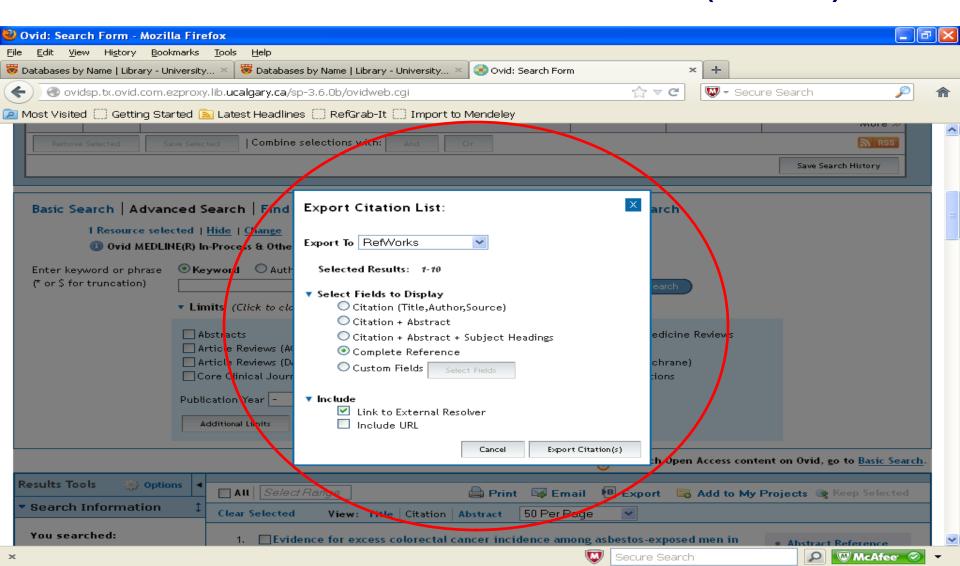


Direct Export MEDLINE→RefWorks

- Select desired results (place a check mark in the boxes next to the result number)
- In the Results Tools area, click on the Export tab.
- In the Export Citation List window, select RefWorks from the "Export to" drop-down menu, Complete Reference from the "Select Fields to Display" section. Include link to External Resolver.
- click on the Export Citation(s) tab.



Direct Export MEDLINE→RefWorks (cont.)



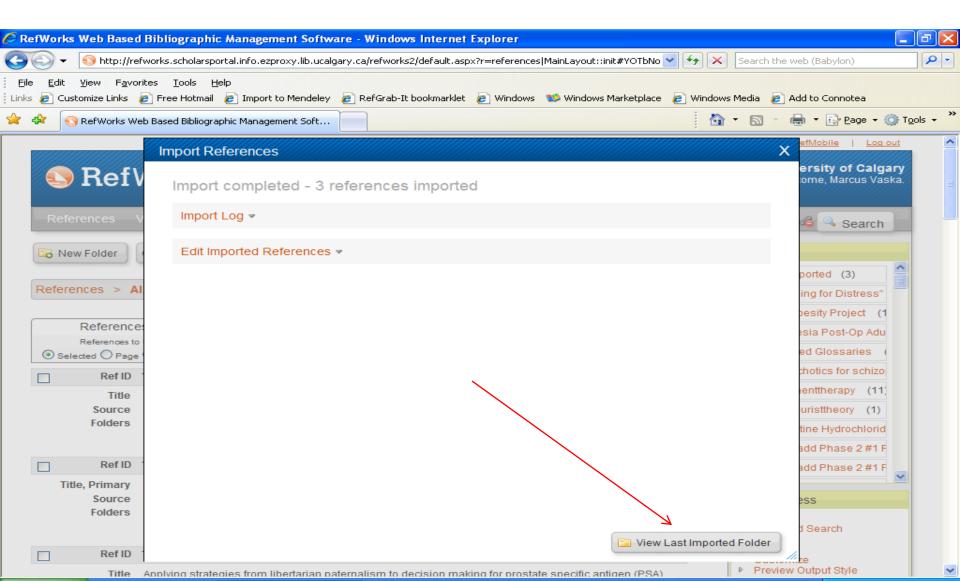


Direct Export MEDLINE→RefWorks (cont.)

- A message should appear on the Import References screen, indicating that the references have been imported.
- At this point, the references are residing in the Last Imported folder. To move them to a folder in your account, click on the View Last Imported Folder tab.



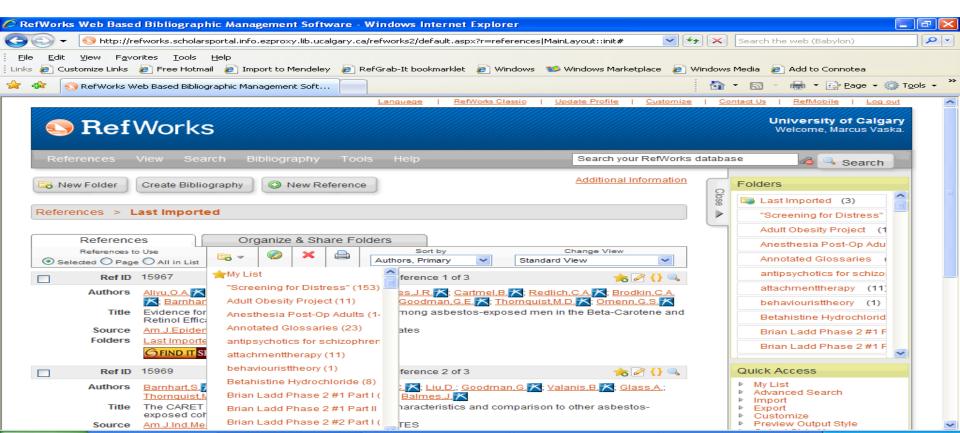
Last Imported Folder





Last Imported Folder

 From the Last Imported Folder, place the selected reference(s) in the desired folder.





Direct Export CINAHL→RefWorks

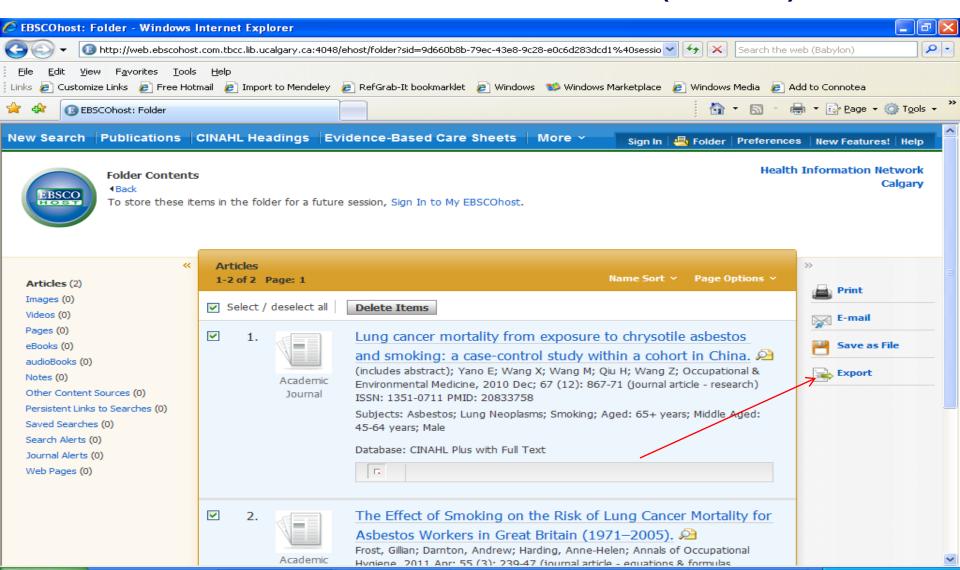
 Select desired results by clicking on the Add to Folder link.

Click on the yellow Folder icon.

 In the Folder Contents window, select the desired article(s), and click on the Export icon.



Direct Export CINAHL→RefWorks (cont.)



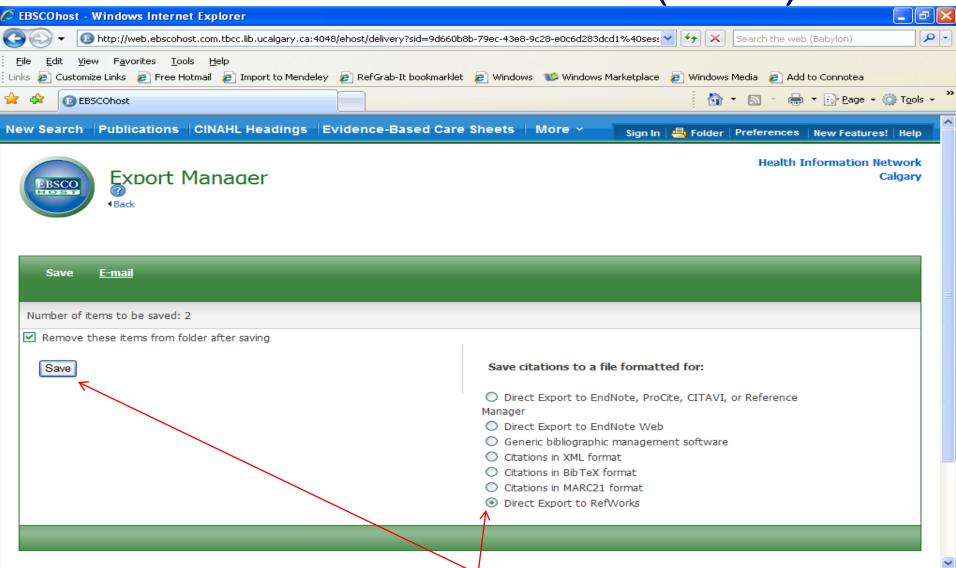


Direct Export CINAHL→RefWorks (cont.)

- In the Export Manager window:
 - Select the appropriate bibliographic management program (i.e. Direct Export to RefWorks)
 - Check the box, "remove these items from folder after saving"
 - Click on the Save tab



Direct Export CINAHL→RefWorks (cont.)



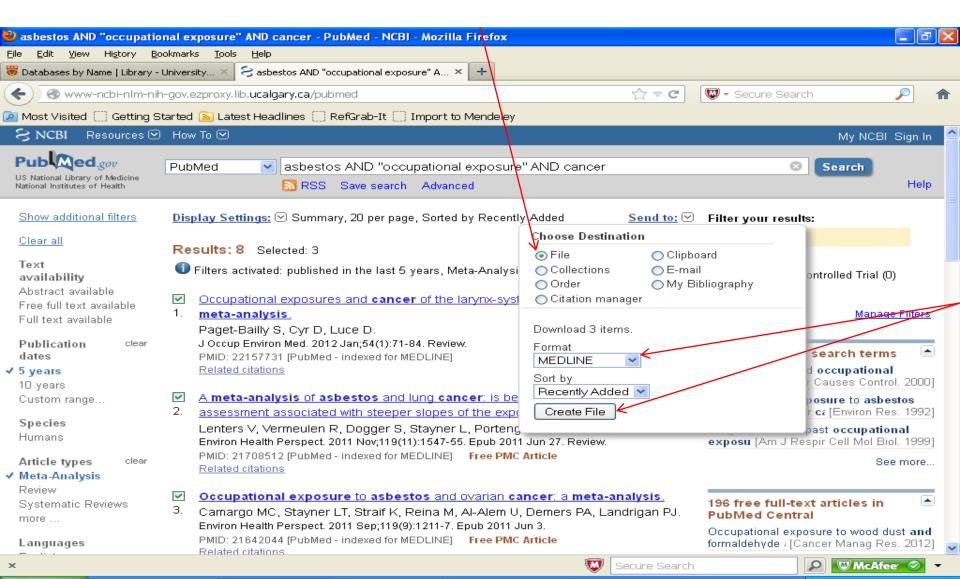


RefWorks & PubMed

- In your search results, select the citations that you would like to import into RefWorks
- From the Send to drop-down menu, select the File radio button under the Choose Destination option.
- Select MEDLINE from the Format drop-down menu
- Click on the Create File tab.
- A File Download dialogue box will now appear, prompting you to either save or open the file
- Save the text file (.txt) (Desktop, My Documents, USB flash drive)
 - Rename your file to something more meaningful (i.e. malaria.txt)
 - The file extension must be in .txt format, otherwise the citations will not import into RefWorks
 - The text file can be saved on a USB memory stick as well



RefWorks & PubMed (cont.)



PubMed: Saving the Results into a Text (.txt) File

File Download



Do you want to open or save this file?



Name: pubmed_result.txt

Type: Text Document

From: www.ncbi.nlm.nih.gov.ezproxy.lib.ucalgary.ca

<u>O</u>pen

<u>S</u>ave

Cancel

Click on Save, rename the file (if desired), and selected the location

(Desktop, My Documents, USB key)

where the file will be stored

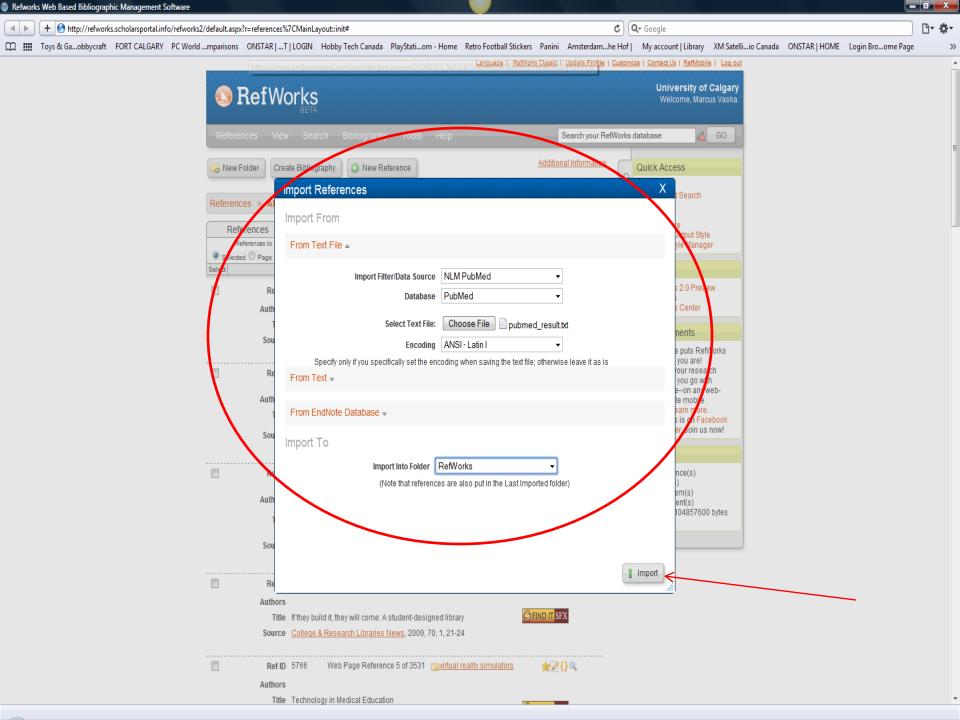


While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?



Importing Sources Into RefWorks PubMed Step #1

- Log in to your RefWorks account
- Click on References →Import
- Select NLM PubMed from the Import Filter/Data Source drop-down menu.
 PubMed should now automatically appear in the Database drop-down menu below.
- Browse and Select the Text File (.txt) on the desktop where the PubMed results have been saved. Once selected from the location where the file is being stored (Desktop, My Documents, USB Key, etc.), this file name should automatically appear.
- In Import Into Folder drop-down menu, specify which folder (i.e. RefWorks) the file should be sent to
- Click on the *Import* tab





Importing Sources Into RefWorks PubMed Step #2

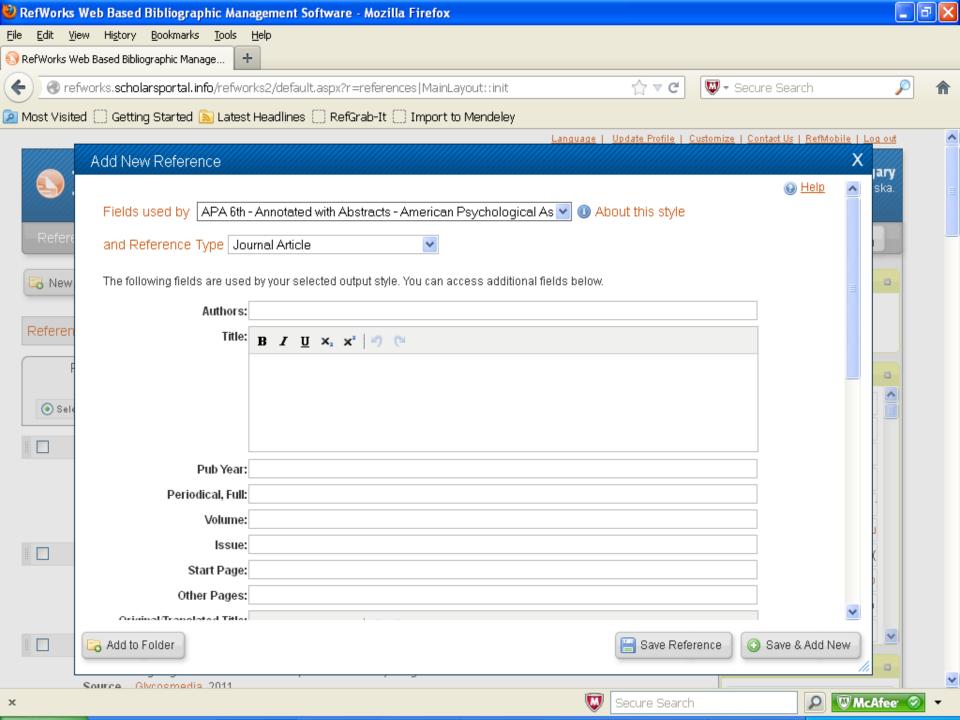
- Click Import
- When receiving the message that the file has been imported successfully, you still need to move the references from the *Last Imported Folder* to the desired folder in your own account
- Click on View Last Imported Folder
- Select "all in list", and choose the desired folder from the dropdown menu. A screen containing the message "are you sure you want to put the three selected references into the [name] folder" will appear. Click on OK, and you will receive a confirmation message that the files have been successfully moved to the folder indicated.



Exploring RefWorks

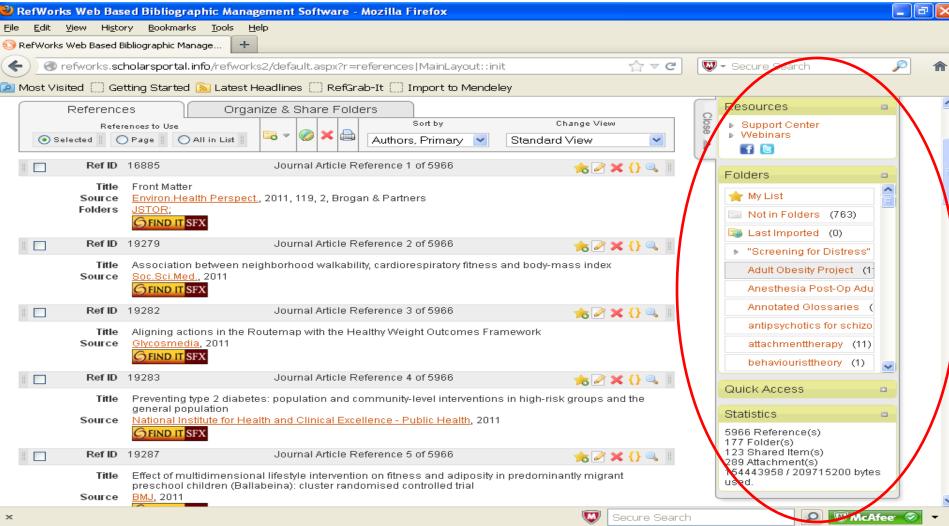
References: Entering References Manually

- New Reference tab (or References→Add New)
- Under Fields Used By, select the desired citation style (APA, MLA, Vancouver, etc.), or Access Output Style Manager for a list of 1000s of journals!
- Under Reference Type, select the type of reference
- Type in information in the required fields
- Remember to Save the Reference!





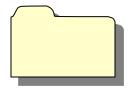
Quick Access



20



Exploring RefWorks Organize & Share Folders



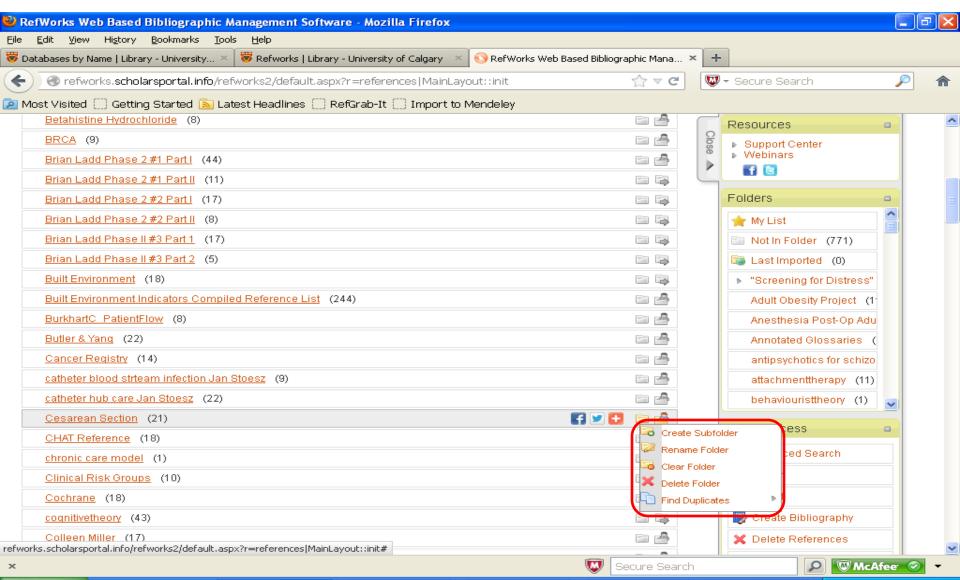
- Create subfolders, rename, clear, or delete folders, check for duplicates
- CAUTION: If you accidentally clear a folder, these deleted references will be available (for a limited time):

View → Deleted References

 WARNING, if you accidentally delete an entire folder, ALL content within this folder is lost!



Organize & Share Folders Options





A Word on Duplicates

- Exact Duplicates
 - Absolute exact copy of a reference (character by character)
- Close Duplicates
 - Any discrepancies between abbreviation vs.
 full-form of journal title, page numbers, etc.
 will show up as a close match
- Search for duplicates within a particular folder or across your entire account

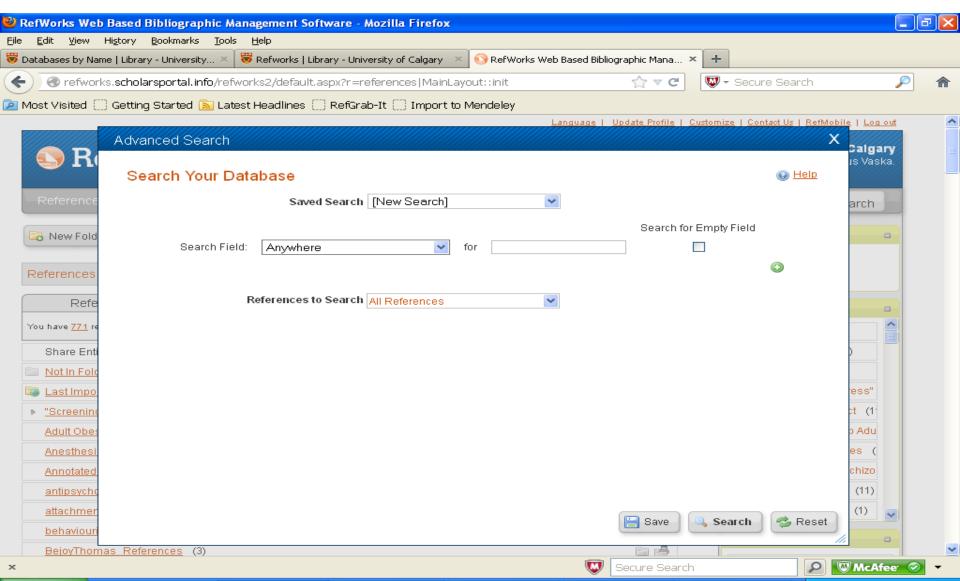


Exploring RefWorks Searching Within Your Account

- Click on the Search menu tab
- You can search for citations within your account by:
 - Author
 - Descriptor
 - Periodical Title
- It is now possible to search by document title, publication year, abstract, etc. by selecting Advanced from the Search menu tab. In addition, search strategies may be created and saved by combining multiple search fields together. Attachments (.pdf, .txt, and .doc file names) within your account are searchable as well

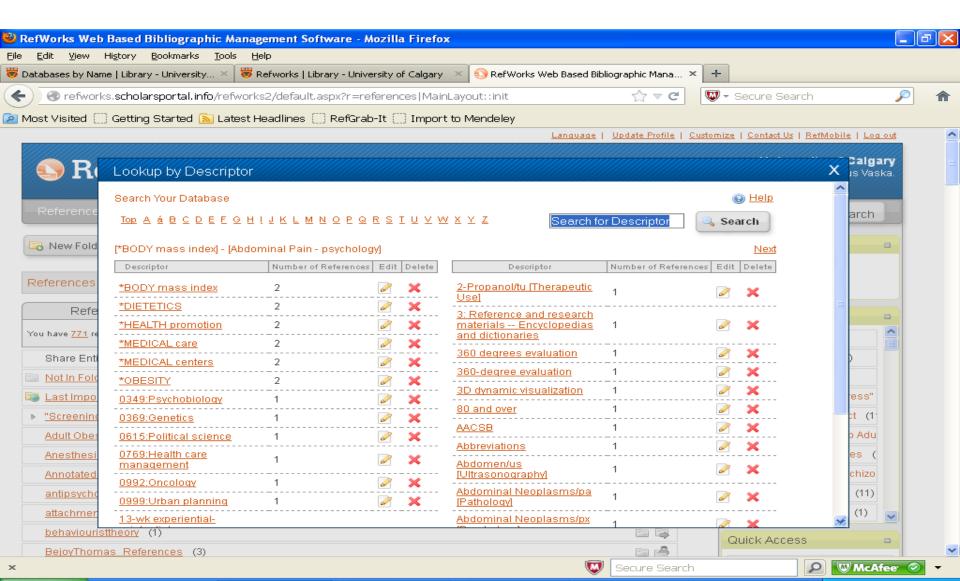


Search Your Database





Search by Descriptor



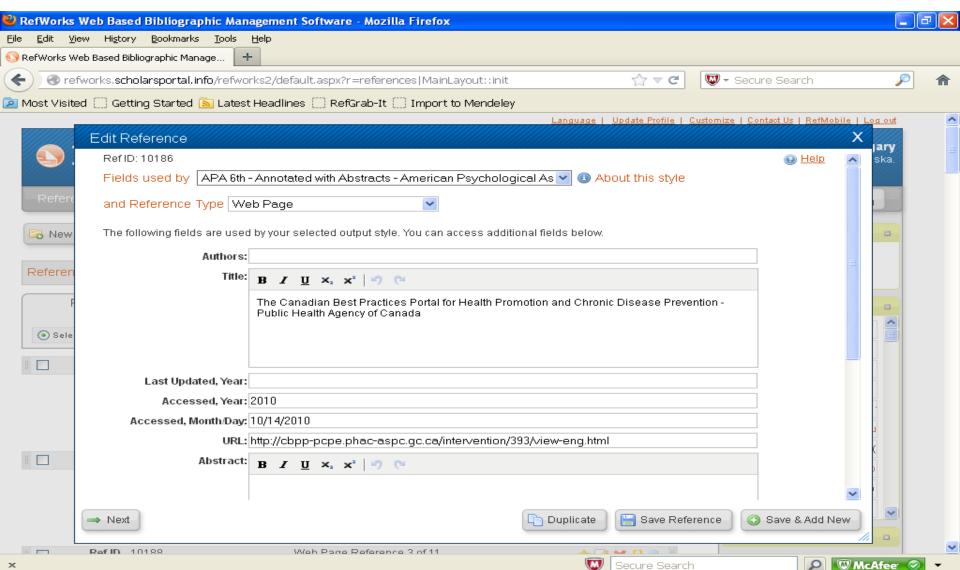


Exploring RefWorks Editing References

- Any reference within a folder may be edited by clicking on the **Pencil** icon.
- Although RefWorks captures the primary fields used by a specified citation style (including an abstract, where available), the option exists to add additional information in each reference (notes, customized fields, descriptors, etc.)
- Always remember to Save Reference if making any changes!



Edit Reference



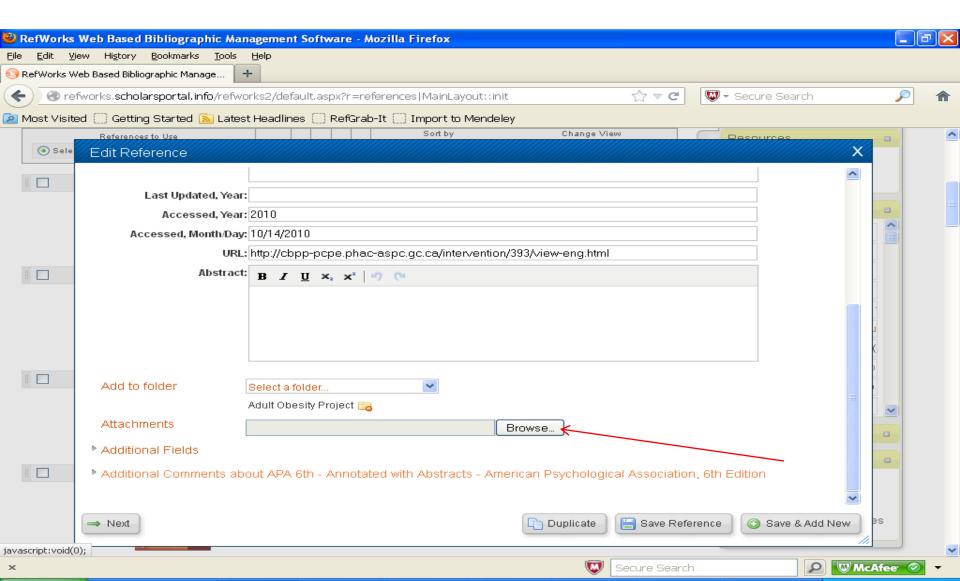


Exploring RefWorks Adding Attachments

- Attach PDF, Word (.doc), Text (.txt), or PowerPoint (.ppt) files to references
- View → Folder, and select the folder you wish to add an attachment to
- From the list of References displayed, click on the pencil (edit) icon next to the references for which the attachment is to be added
- Click on Choose File, select the desired file, and click on the Add Attachment tab
- Attachment size limit per file: 20MB [standard]
- Attachment size limit per account: 100MB [standard]



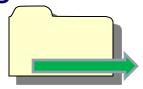
Adding Attachments





Exploring RefWorks

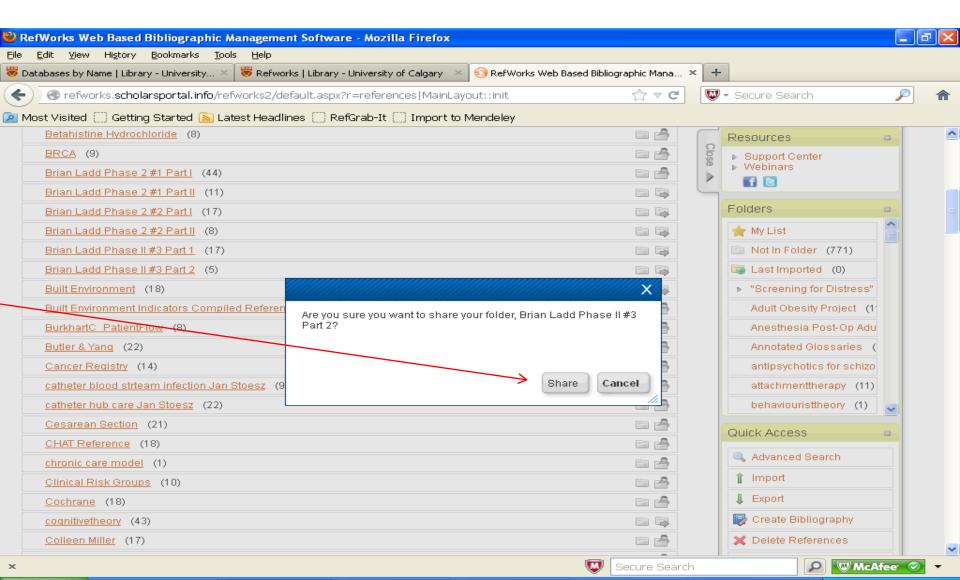
Sharing Folders: RefShare



- Click on the Organize & Share Folders tab.
- Select the folder to be shared by clicking on the Share Folder icon (yellow folder with green arrow), followed by the Shared Folder Options link.
- In the **Shared Folder Options** screen, under the **Share Information** heading, include a Title and, if desired, a brief synopsis of the folder in the Information field.
- Note: Leave the default checked fields as they are under the Limitations heading (note that the option to include attachments is NOT the default standard. This box must be checked and the preferences saved in order to take effect. Also, the user's e-mail should automatically appear in the email box. If not, it must be filled in before proceeding.
- Once all changes have been saved, click on either the Share Link or Email this Share.
- In the Send E-mail screen, fill-in the recipients e-mail address, and click on Send E-mail

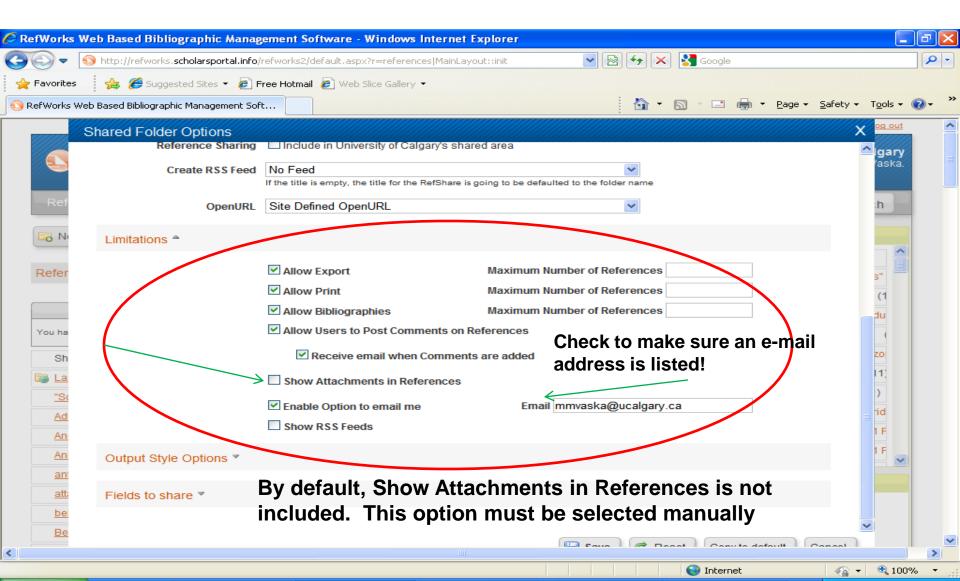


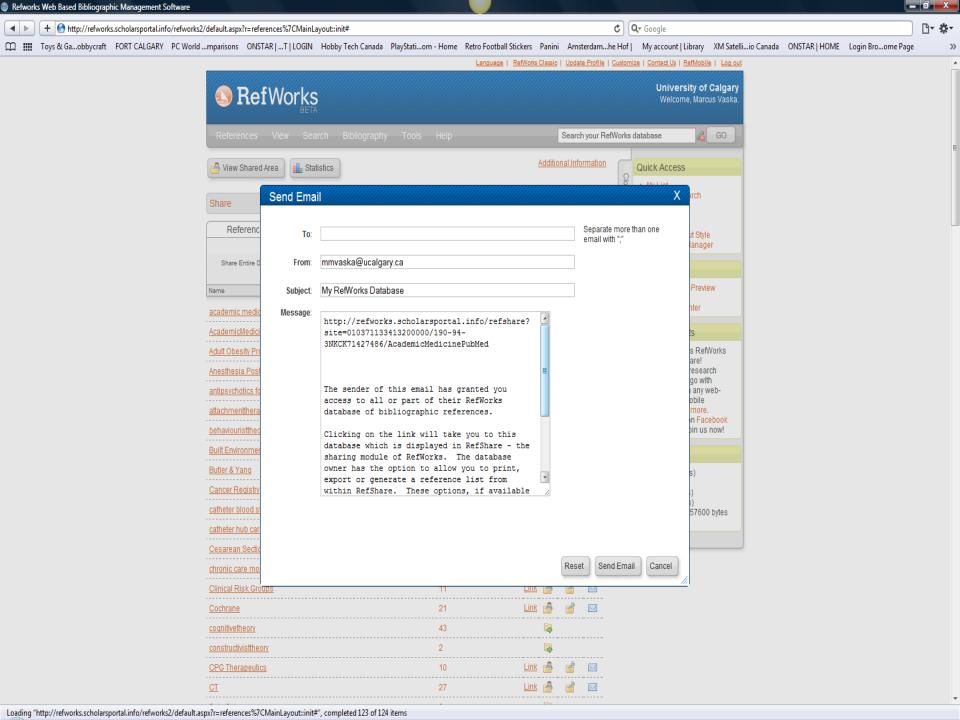
RefShare Permission





RefShare







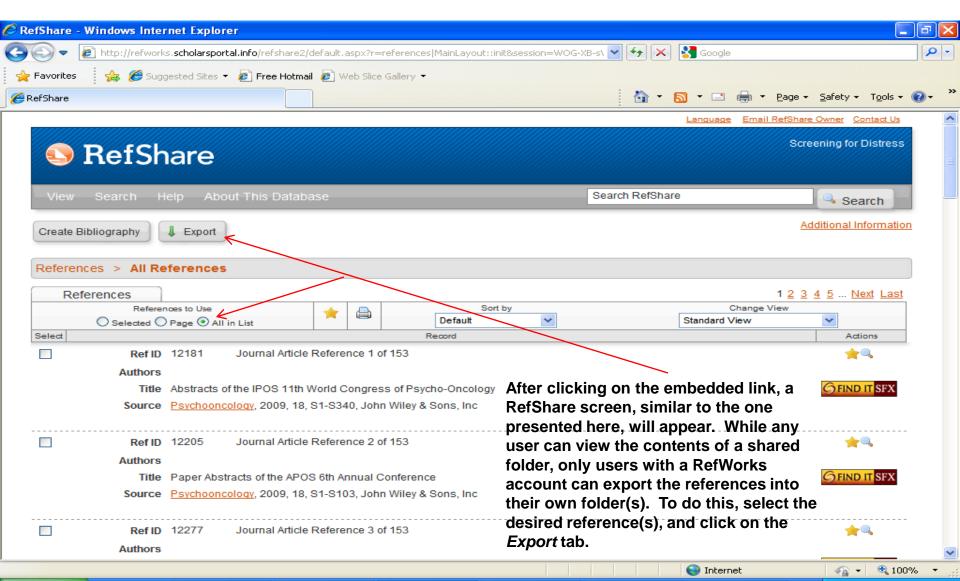
When sharing a RefWorks folder, the recipient receives an e-mail similar to the following: Click on the embedded link to view the folder

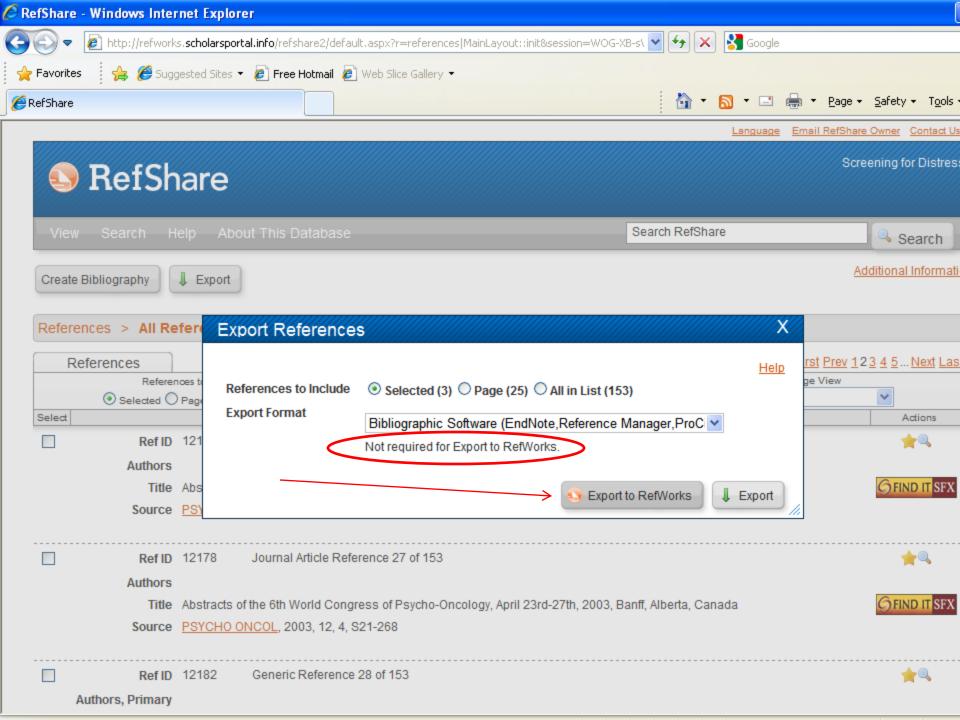
http://refworks.scholarsportal.info/refshare2?site=010371133413200000/190-94-3NKCK71427486/NixonN_SubspecialtyInternalMedicineResidents_20120905

The sender of this email has granted you access to all or part of their RefWorks database of bibliographic references. Clicking on the link will take you to this database which is displayed in RefShare - the sharing module of RefWorks. The database owner has the option to allow you to print, export or generate a reference list from within RefShare. These options, if available to you, will appear in the main viewing area of RefShare. Additional information on this database, which is provided by the database owner, can be found by clicking About This Database from the menu bar. For more information on how to use RefShare, click on Help from the RefShare menu bar.



RefShare (cont)







Exploring RefWorks

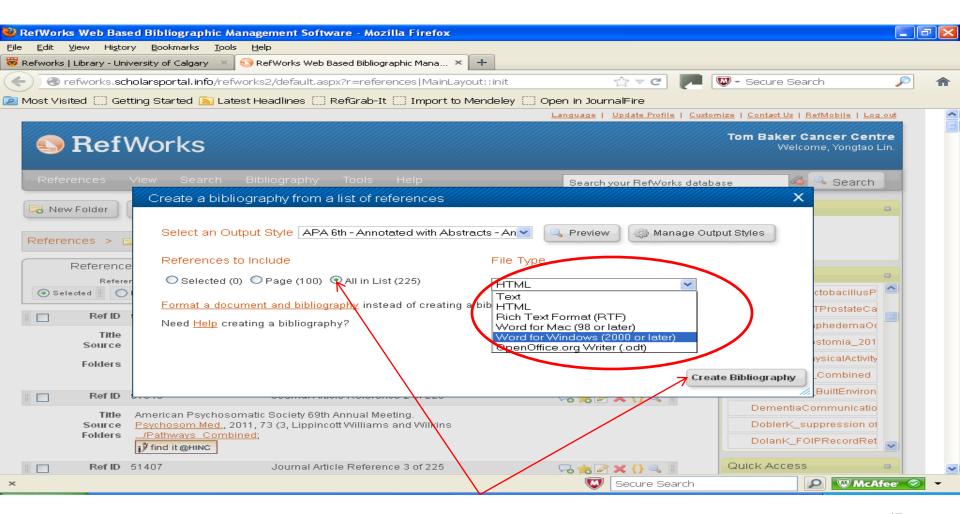
Format Bibliography from List of References

- Click on the Create Bibliography tab
- Choose the desired Output Style from the drop-down menu
- Under References to Include, ensure that the All in List radio button is selected
- From the File Type drop-down menu, select Word for Windows (or Word for Mac)
- Click on the Create Bibliography tab



Exploring RefWorks

Format Bibliography from List of References



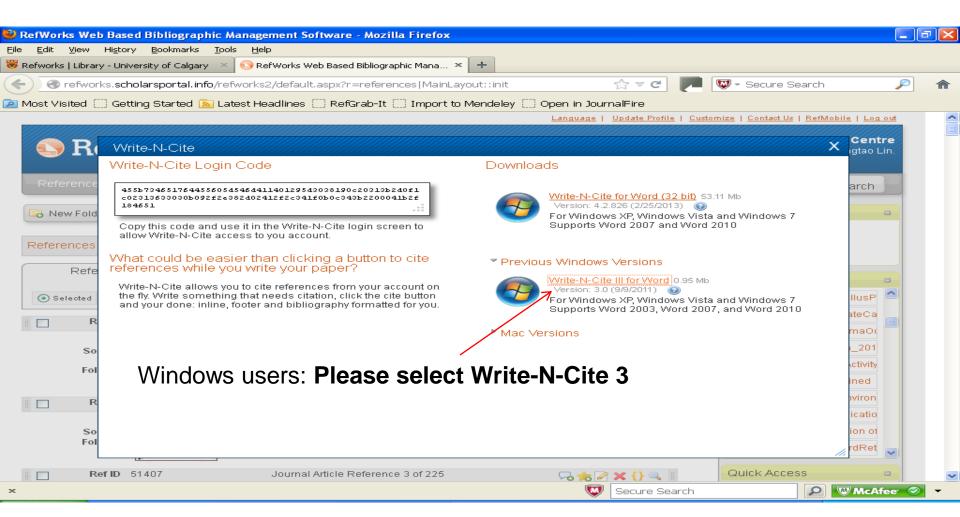


Exploring RefWorks Tools: Write-N-Cite

- **Tools Write-N-Cite** (you will be prompted to download a small plug-in, i.e. an .EXE file). Please follow installation instructions carefully
- Write-N-Cite 4, the default and latest version available is not recommended at this time, due to various compatibility issues that often occur. Therefore, please use Write-N-Cite 3
- Write-N-Cite 3 was designed for MS Word 2007 and MS Word 2010, running Windows Vista, and Windows 7 operating systems. However it is compatible with MS Word 2003 and Windows XP as well.
- A Write-N-Cite version for Mac users is also available (click on the Write-n-Cite for Mac link).
- Please close MS Word BEFORE installing the Write-N-Cite plug-in

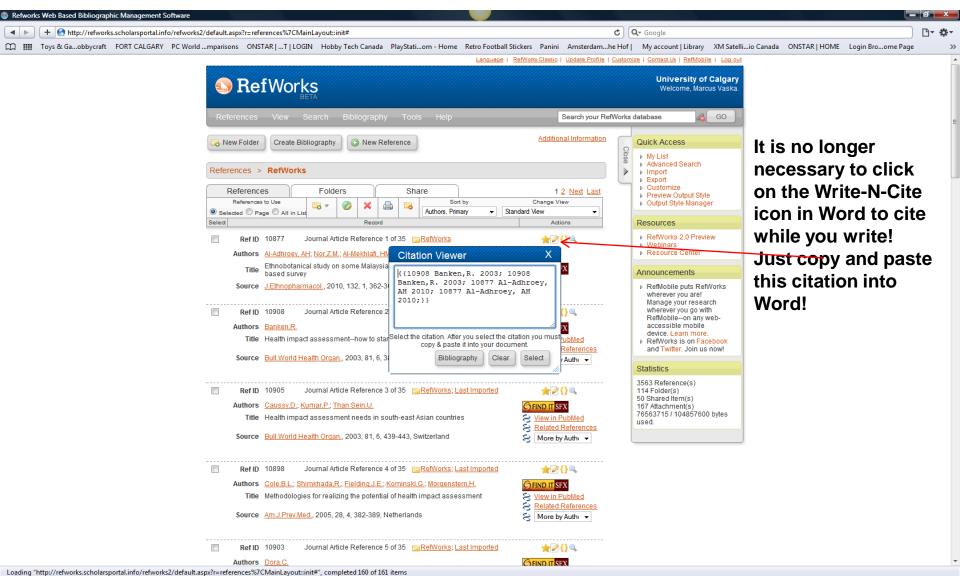


Exploring RefWorks Tools: Write-N-Cite





Write-N-Cite 2.0





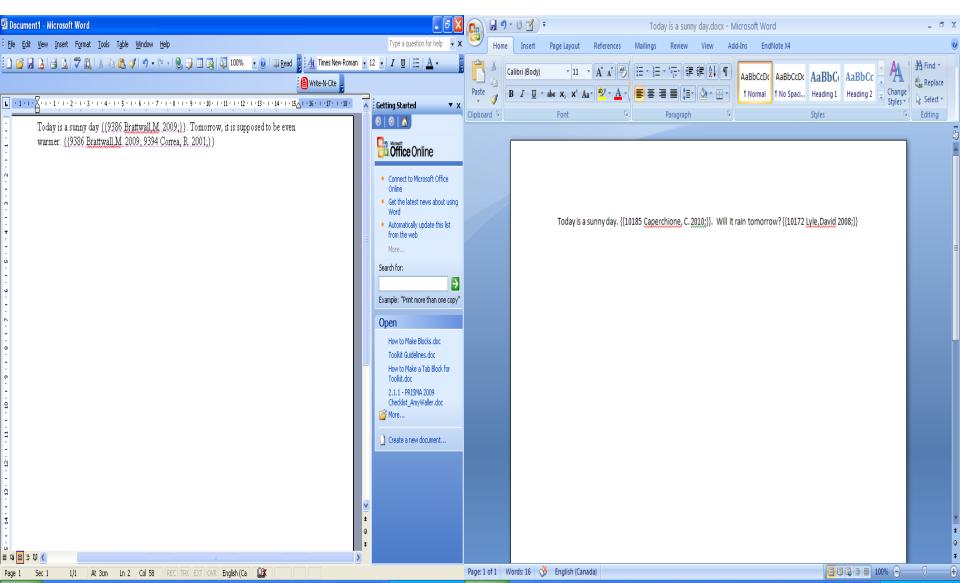
Write 'n' Cite Reminders

 In-text citations: copy and paste the RefWorks reference in the squiggly brackets directly into the Word document. Repeat for each and every citation!

 Save the Word document (with the squiggly brackets) as a separate file!



Write 'n' Cite (Word 2003, Word 2007)



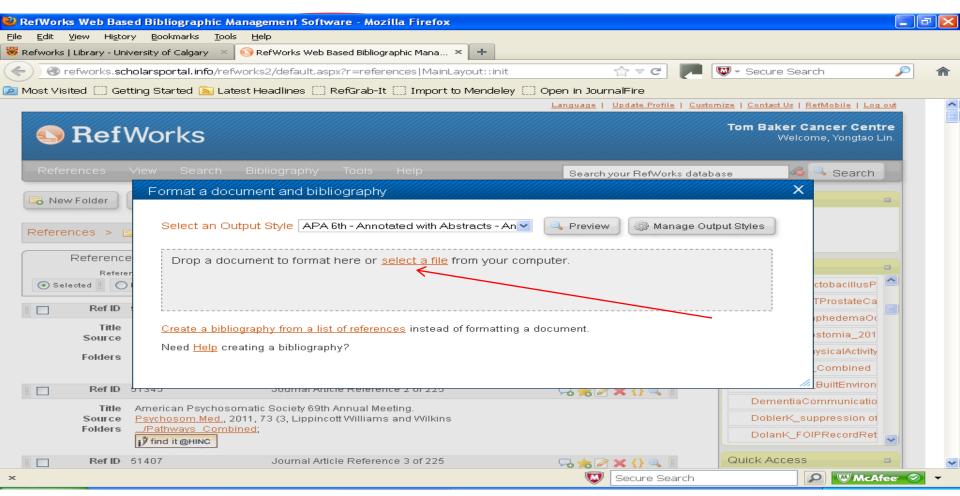


Formatting a Document and Bibliography

- Click on the Create Bibliography tab
- Choose the desired Output Style from the drop-down menu
- Click on the Format Document & Bibliography link
- Browse and retrieve the desired document with the squiggly brackets
- Click on the Create Bibliography tab
- A message indicating "Bibliography Complete" should appear. Open the Word file.



Formatting a Document & Bibliography





Write-N-Cite: A Final Word

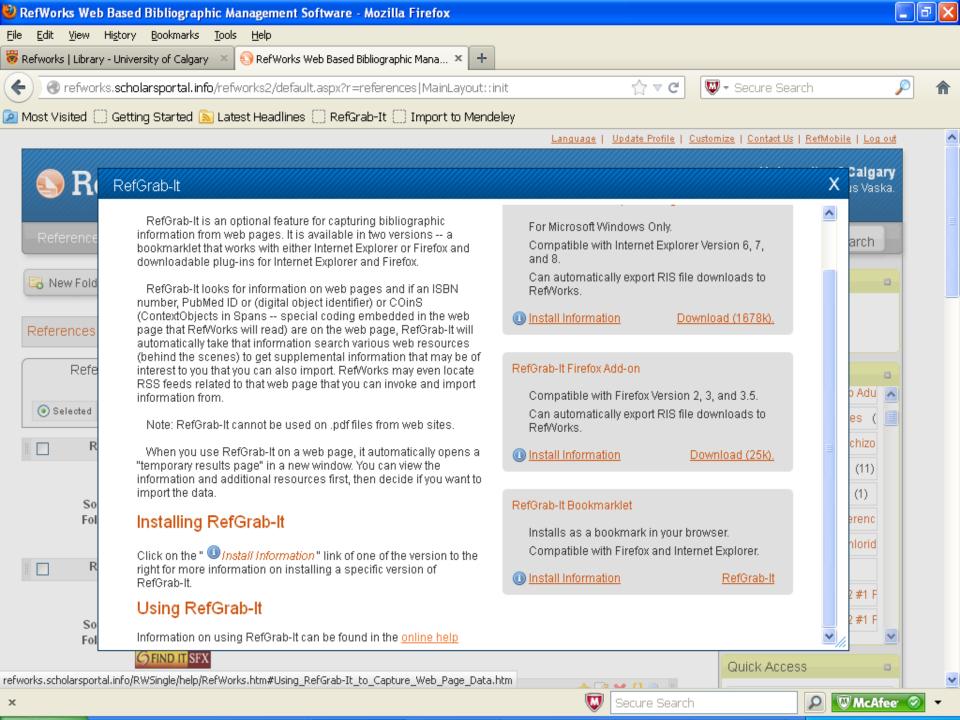
- Upon completion of the Format document and bibliography option, the generated Word document will be indicated as **Final** before the file name. This file can be edited just as in word, however...
- Do not alter any of the in-text citations in the "Final" file. This must be done ONLY in the original squiggly brackets file, and then the format document and bibliography option MUST be repeated to generate the new, updated Word document



Exploring RefWorks

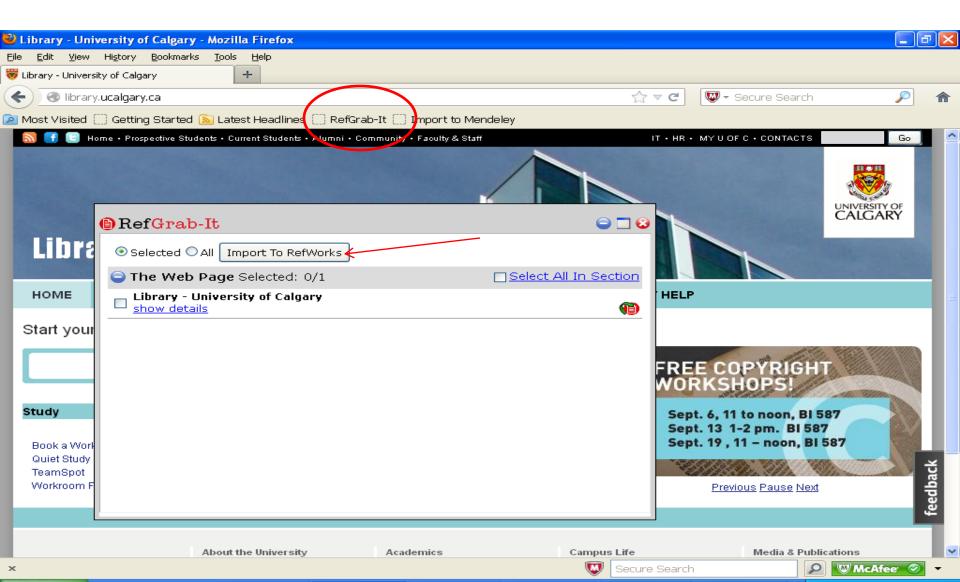
Tools: RefGrab-It

- Captures bibliographic information from web pages, which can then be imported into a RefWorks account
- To install RefGrab-It: *Tools → RefGrab-It* (you are given the option of installing RefGrab-It as a plug-in or as a bookmarklet)
- Please follow the on-screen instructions with regards to how to install the plug-in or bookmarklet.
- **note: installing RefGrab-It as a bookmarklet is recommended, as the plug-in is currently only compatible with Internet Explorer and Firefox browsers (not available for a Mac)**
- Once RefGrab-It is installed, locate the desired web-page:
 - Plug-In: Right-click on the page that you would like to import, click on the RefGrab-It link
 - Bookmarklet: Select the RefGrab-It bookmarklet from your Favorites (Internet Explorer) or Bookmarks (Mozilla)



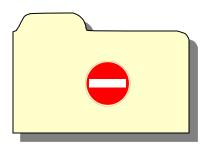


RefGrab-It Demonstration



Transferring References Across Folders/Subfolders

 If transferring references from one folder to another, click on Remove from Folder icon (yellow folder with "do not enter" icon), NOT the red X (or this will delete the record from your entire account!

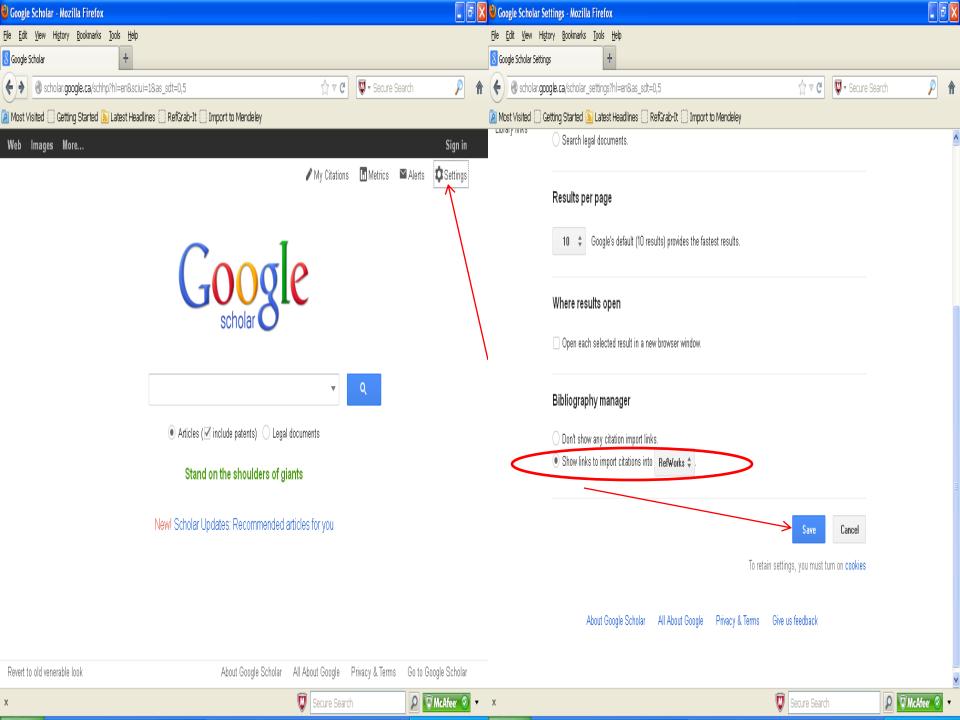


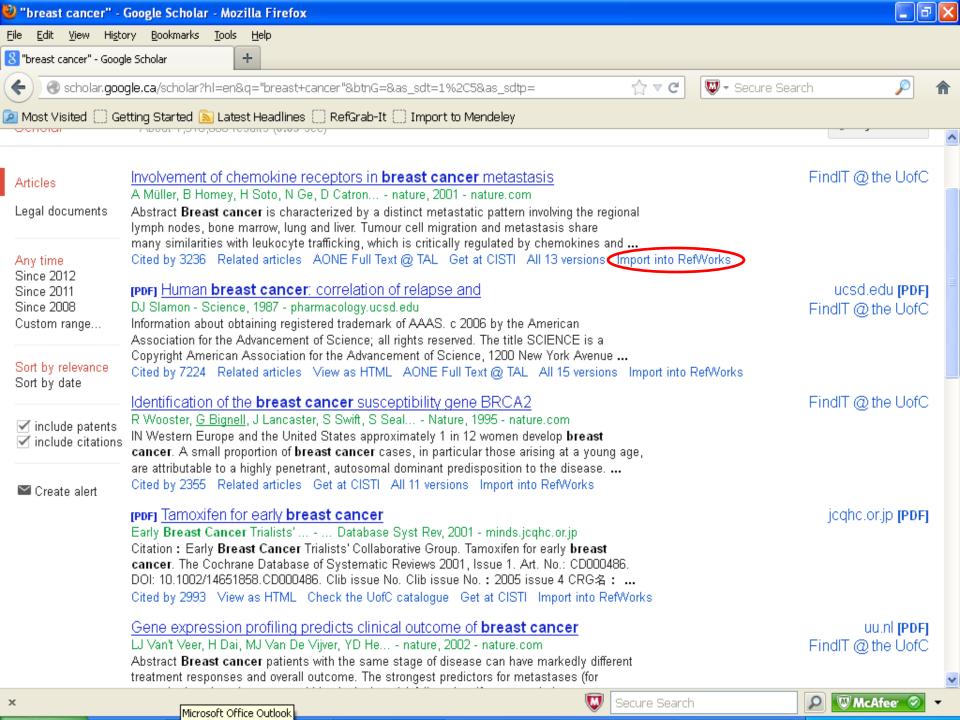


Google Scholar

http://scholar.google.ca/

- References from Google Scholar can be exported, on an individual basis, directly into RefWorks
- In Google Scholar, click on Settings
- In the Scholar Settings window, scroll down to Bibliography Manager; select RefWorks from the dropdown menu, and click on the Save tab.
- Perform search; each retrieved result in Google Scholar will contain an Import into RefWorks link. By clicking on the link, the record will automatically be exported into RefWorks.







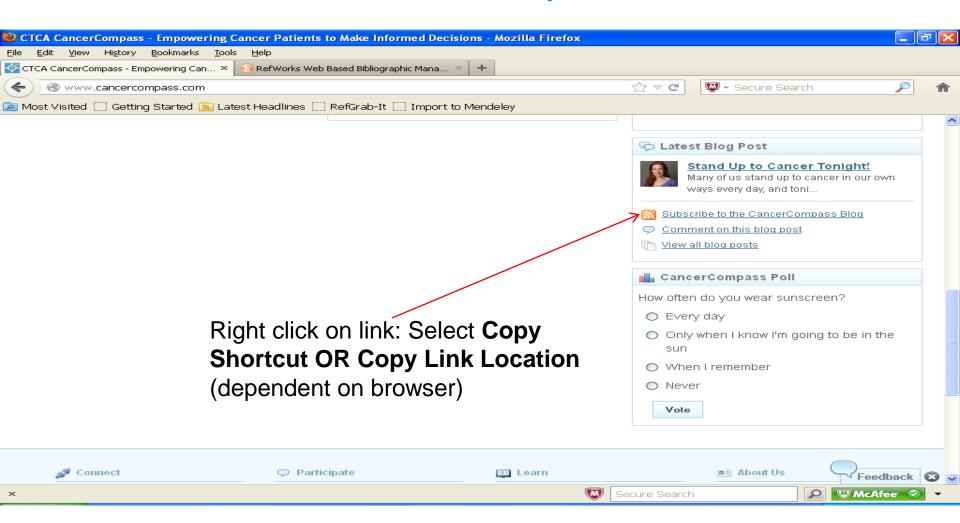
RSS Feeds

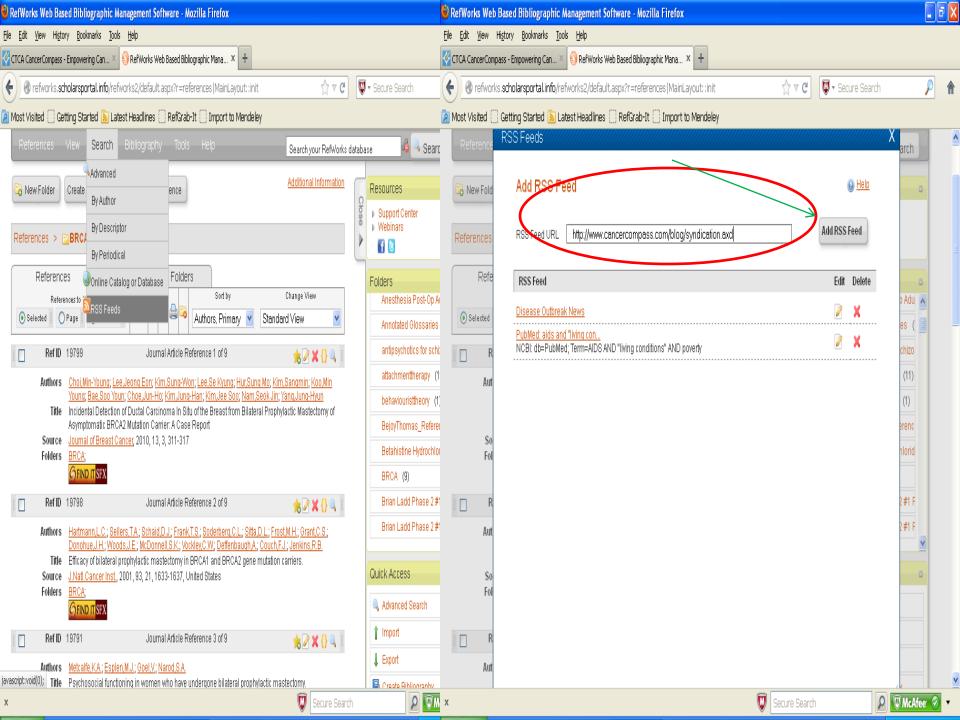
- Locate desired RSS feed
- Right click on RSS Feed icon/link and select Copy Shortcut/Copy Link Location (dependent on browser)
- In RefWorks, select RSS Feed from Search menu
- Paste shortcut into text bar and click Add RSS Feed button
- Confirm RSS feed by clicking OK. Feed results displayed in new window. Select references to import into RefWorks account->click Import

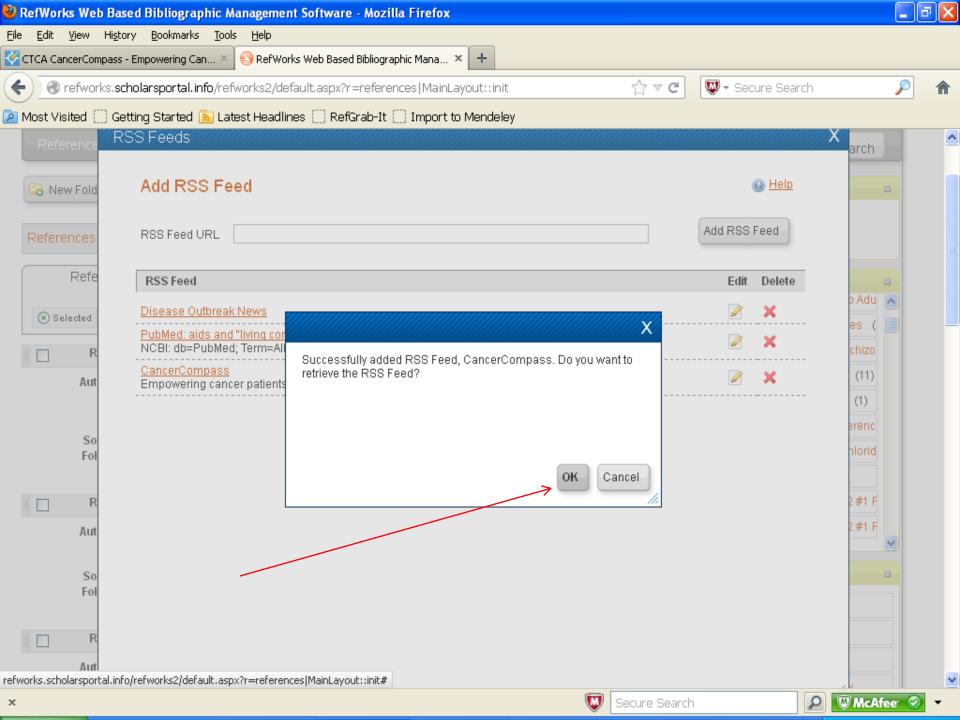


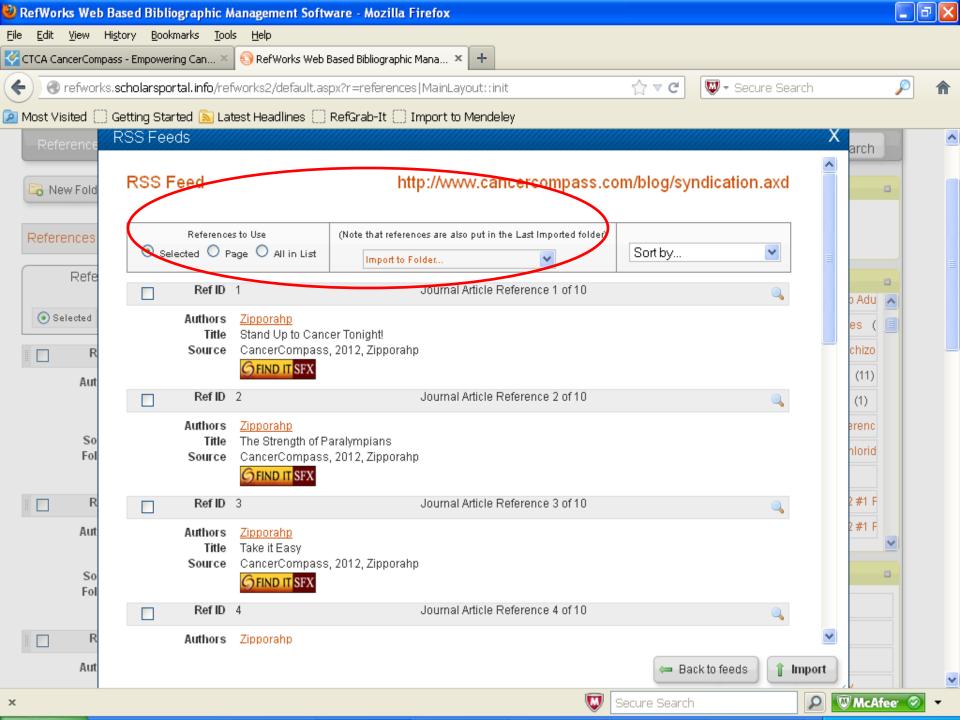
RSS Feed Example: Cancer Compass

www.cancercompass.com











Troubleshooting

- Please be consistent with regards to using the same version of Word when working with Write-n-Cite
- "Reference ____ was not found in your database"
 - http://unmc.libguides.com/content.php?pid=25174&si
 d=181492
- Should direct export not work in Ovid or EBSCO databases, saving references in RIS format is a universal standard that will work



Quality & Healthcare Improvement

Achieving Quality Together

Knowledge Management



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