RefWorks Refresher – April 30, 2013
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Access: https://refworks.scholarsportal.info/refworks2/

Group Code:

Creating Folders: *New Folder* tab

Direct Export-Ovid:
1. Select desired results (place a check mark in boxes next to result number)
2. In **Results Tools** area, click on **Export** tab
3. In **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**.
4. Click on the **Export Citation(s)** tab.

Direct Export-Ebsco:
1. Select desired results by clicking on the **Add to Folder** link
2. Click on the yellow **Folder** icon
3. In the **Folder Contents** window, select the desired article(s), and click on the **Export** icon
4. 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

Manual Export-PubMed
1. In PubMed, select the citations to import into RefWorks
2. From the **Send to** drop-down menu, select the **File** radio button under the **Choose Destination** option
3. Select **MEDLINE** from the **Format** drop-down menu
4. Click on the **Create File** tab
5. A **File Download** dialogue box will now appear, prompting you to either save or open the file
6. **Save** the text file (.txt) [rename your file to something more meaningful]
7. In RefWorks, click on **References**→**Import**
8. Select **NLM PubMed** from the **Import Filter/Data Source** drop-down menu. PubMed should now automatically appear in the **Database**

drop-down menu below.

9. 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, this file name should automatically appear.

10. In the **Import into Folder** drop-down menu, specify which folder the file should be sent to

11. Click on the **Import** tab

12. When receiving the message that the file has imported successfully, you still need to move the references from the **Last Imported Folder** to the desired folder in your own account

13. Click on **View Last Imported Folder**

14. Select "all in list", and choose the desired folder from the drop-down 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.

Duplicates:	**Organize and Share Folders tab**→yellow folder (note distinction between **exact** and **close** duplicates
Searching within Account:	Search by author, descriptor, periodical title
Editing References:	**Pencil** icon
Adding Attachments:	**Pencil** icon, **Add Attachment** tab Note: 20 MB/file, 100MB/account
RefShare:	**Organize & Share Folders** tab 1. Select folder to be shared by clicking on **Share Folder** icon (yellow folder with green arrow), followed by the **Shared Folder Options** link. 2. 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 e-mail box. If not, it must be filled in before proceeding. 3. Once all changes have been saved, click on either the **Share** link or **Email this Share.** 4. In the **Send Email** screen, fill in the recipient's e-mail address, and click on **Send Email.**

Format Bibliography

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

Write-N-Cite:

1. Please use Write-N-Cite III
2. It is no longer necessary to click on the Write-N-Cite icon in Word to cite while you write! Just click on the curly brackets (RefWorks field codes) in the desired folder and copy the citation into Word!
3. **In-text citations:** copy and paste the RefWorks reference in the squiggly brackets (field code) directly into the Word document. Repeat for each and every citation!
4. Save the Word document (with squiggly brackets) as a separate file

Formatting Document & Bibliography

1. Click on the **Create Bibliography** tab
2. Choose the desired **Output Style** from the drop-down menu
3. Click on the **Format Document & Bibliography** link
4. Browse and retrieve the desired document **with the squiggly brackets**
5. Click on the **Create Bibliography** tab
6. A message indicting "Bibliography Complete" should appear. Open the Word file.
7. Upon completion of the **Format Document & 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**

RSS Feeds:

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

Troubleshooting

1. Please be consistent with regards to using the same version of Word when working with Write-N-Cite
   a. If errors experienced when formatting document & bibliography, **Save file down to Word 2003**.
2. "References __ not found in your database"
   a. This error occurs when either a duplicate reference is removed and/or a reference used for a citation is not in a specified folder in your account. Since each and ever reference in RefWorks has its own Reference ID (Ref ID), the above error can only be corrected manually.
   b. See http://unmc.libguides.com/content.php?pid=25174&sid=181492 for full details.
3. Should direct export not work in Ovid or EBSCO databases, saving references in RIS format is a universal standard that will work