

**RefWorks 2.0  
Fundamentals  
Workbook**

(updated Jan. 2012)

# RefWorks 2.0

## Fundamentals Workbook

### Introduction

The workbook is designed to guide users through some of the basic features of using RefWorks.

We suggest using this workbook as a post-training handout and/or as a companion piece to the RefWorks tutorials for self-directed study.

- Task 1:** Set-up an account
- Task 2:** Direct Import from Google Scholar
- Task 3:** Direct Import from ProQuest
- Task 4:** Import Data from a Saved Text File
- Task 5:** Add New Reference Manually
- Task 6:** Search Online Database
- Task 7:** Search Library Catalog
- Task 8:** Creating Folders and Moving Information
- Task 9:** Create a List of References in Preferred Output Style
- Task 10:** Create a Bibliography with Write-N-Cite III for Windows
- Task 11:** Create a Bibliography without Write-N-Cite

## RefWorks User Workbook

### Task 1: Set-up an account

**1.** Visit your library website and click on the RefWorks Login Link (Alternatively visit [www.refworks.com/refworks](http://www.refworks.com/refworks))

**2.** Click on **Sign up for a New Account**.

**3.** Fill in the form, click **Next**.

**4.** Fill the **User Information** form to complete your account set up.

**5.** Click **Create Account**.

**6.** Congratulations you now have a RefWorks

### Task 2: Direct Import from Google Scholar (<http://scholar.google.com>)

[Web](#) [Images](#) [Videos](#) [Maps](#) [News](#) [Shopping](#) [Mail](#) [more](#) ▼

Google scholar

"parkinson disease" tremor

Search

[Advanced Scholar Search](#)

[Scholar Preferences](#)

Scholar

Articles and patents

anytime

include citations

Results 1 - 10 of about 38,900. (0.03 sec)

[Unilateral thalamic deep brain stimulation for refractory essential tremor and Parkinson's disease](#)

[tremor](#)

W Ondo, J Jankovic, K Schwartz, M Almaguer, RK ... - *Neurology*, 1998 - AAN Enterprises

From the Departments of Neurology (Drs. Ondo and Jankovic, and K. Schwartz and M.

Almaguer) and Neurosurgery (Dr. Simpson), Baylor College of Medicine, Houston, TX. ... Address

correspondence and reprint requests to Dr. Joseph Jankovic, 6356 Fanning Drive, Suite ...

[Cited by 134](#) - [Related articles](#) - [BL Direct](#) - [All 4 versions](#) - [Import into RefWorks](#)

[Diagnostic criteria for Parkinson disease](#)

DJ Gelb, E Oliver, S Gilman - *Archives of Neurology*, 1999 - *Am Med*

... Although neurologists generally agree that the clinical diagnosis of

requires identification of some combination of the cardinal motor signs

**tremor**, and postural instability, few have attempted to develop rigorous

[Cited by 841](#) - [Related articles](#) - [BL Direct](#) - [All 5 versions](#) - [Import into RefWorks](#)

[Combined \(thalamotomy and stimulation\) stereotactic surgery for](#)

[Parkinson disease](#)

AL Benabid, P Pollak, A Louveau, S ... - *Stereotactic and Funct Neurosurg*, 1987 -

... goto top of page Key Words: VIM thalamic nucleus; Stereotaxy; P

Stimulation. goto top of page Abstract. ... During this procedure, it has

high-frequency (100 Hz) stimulation of VIM was able to stop the extra

[Cited by 385](#) - [Related articles](#) - [All 4 versions](#) - [Import into RefWorks](#)

1. From the Google Scholar search screen click on **Scholar Preferences**
2. At the bottom of the screen, in **Show links to import citations into**, select **RefWorks**. **Save** your preference
3. Search results will now display an **Export to RefWorks** link
4. Conduct a search on **"Parkinson's disease" tremor** and export the first record by clicking on the **Import into RefWorks** link

*Note:* Make sure cookies are enabled to allow setting of preferences in Google Scholar

## RefWorks User Workbook

### Task 3: Direct Import from ProQuest

Note: You can substitute a different vendor for this exercise. The complete list of Direct Export partners is available from: <http://www.refworks-cos.com/refworks/DEPartners/>. Check the RefWorks online help for detailed instructions for a specific vendor.

The image shows a ProQuest search results page for 'Parkinson's Disease and tremor'. The search results are filtered to 'Scholarly journals' and show 9641 results. A list of results is displayed, with the first result selected. An 'Export' dialog box is open, showing 'Items selected: 20' and 'Export to: RefWorks'. The dialog box also includes a 'Continue' button and a 'Cancel' button. A text box with a list of instructions is overlaid on the right side of the image, with arrows pointing to the corresponding steps in the screenshot.

1. Conduct a search for **Parkinson Disease and tremor**
2. For each record you want to export, click on the check box to the left of it
3. Click on Export
4. Select Export to RefWorks from the drop down box and then click on Continue
5. Your records will be imported into your **Last Imported** folder in RefWorks

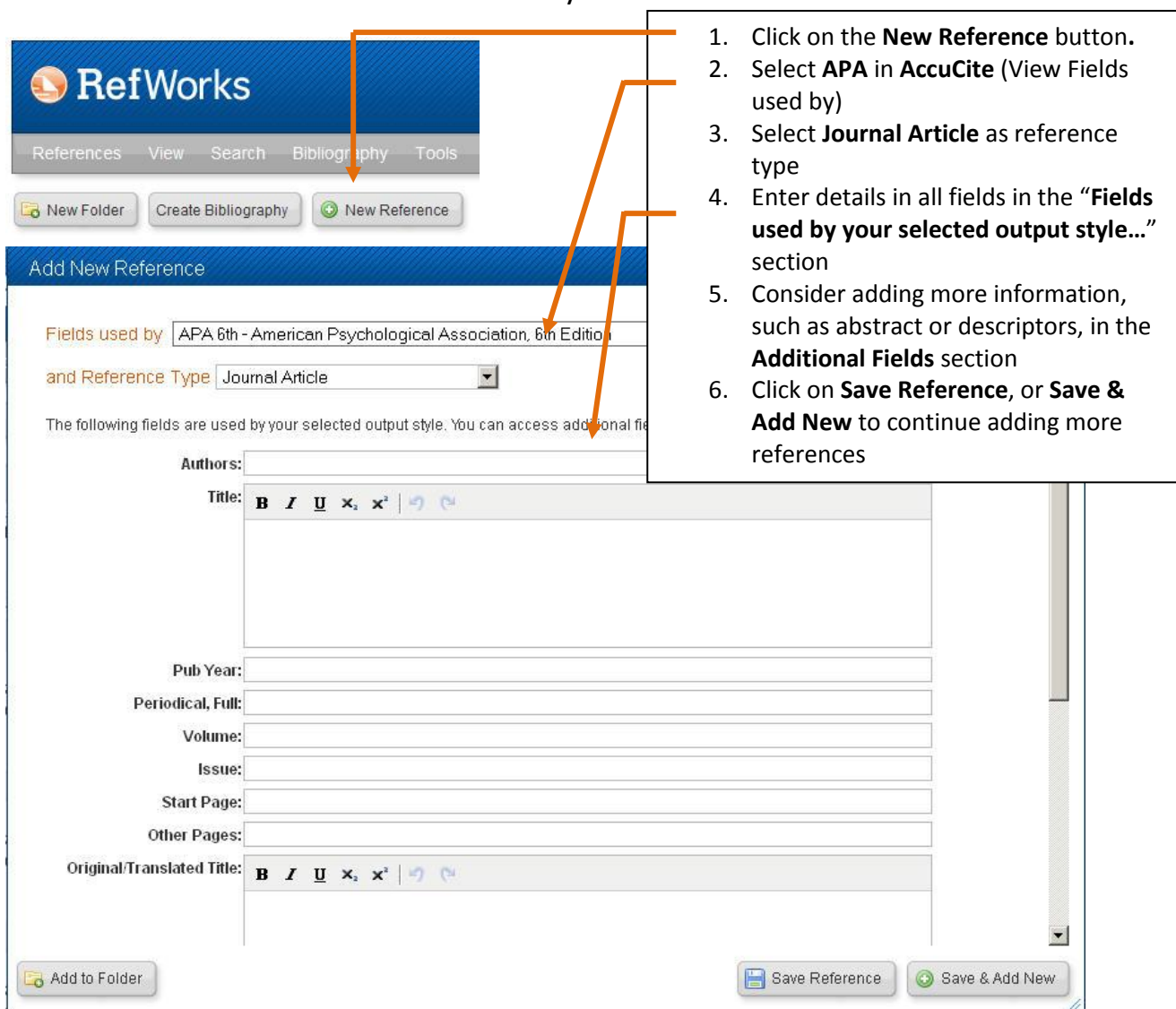
**Task 4:** Import Data from a Saved Text File

*Note:* You can substitute PubMed for one of the many hundred other databases supported by RefWorks. A full list is available at <http://www.refworks-cos.com/refworks/ImportFilters/>

The screenshot shows the PubMed search results for "parkinson disease" and tremor. Two results are selected with checkboxes. An orange box highlights these results. A "Send to" menu is open, showing options like File, Clipboard, Collections, E-mail, and Order. The "File" option is selected, and the "Format" is set to MEDLINE. Below this, the RefWorks "Import References" dialog is shown, with "From Text File" selected. The "Import Filter/Data Source" is set to NLM PubMed, and the "Database" is PubMed. The "Select Text File" field shows a file path, and the "Encoding" is ANSI-Latin I. The "Import To" section shows "Import Into Folder" set to "Specify Folder (optional)". An "Import" button is at the bottom right.

1. In a separate browser window open PubMed and carry out a simple search on **"Parkinson's disease" and tremor**
2. From your search results, select items to save by clicking the **checkbox** to the left of the appropriate citations
3. In the **"Send to"** menu select **File**, Format **Medline** and click on **Create File**
4. In RefWorks, select **References > Import** from the toolbar
5. Select **NLM PubMed** as the data source and **PubMed** as the database
6. Browse to find the text file you saved to your computer and click **Open**
7. Click **Import**. Your records should appear in the *Last Imported Folder*

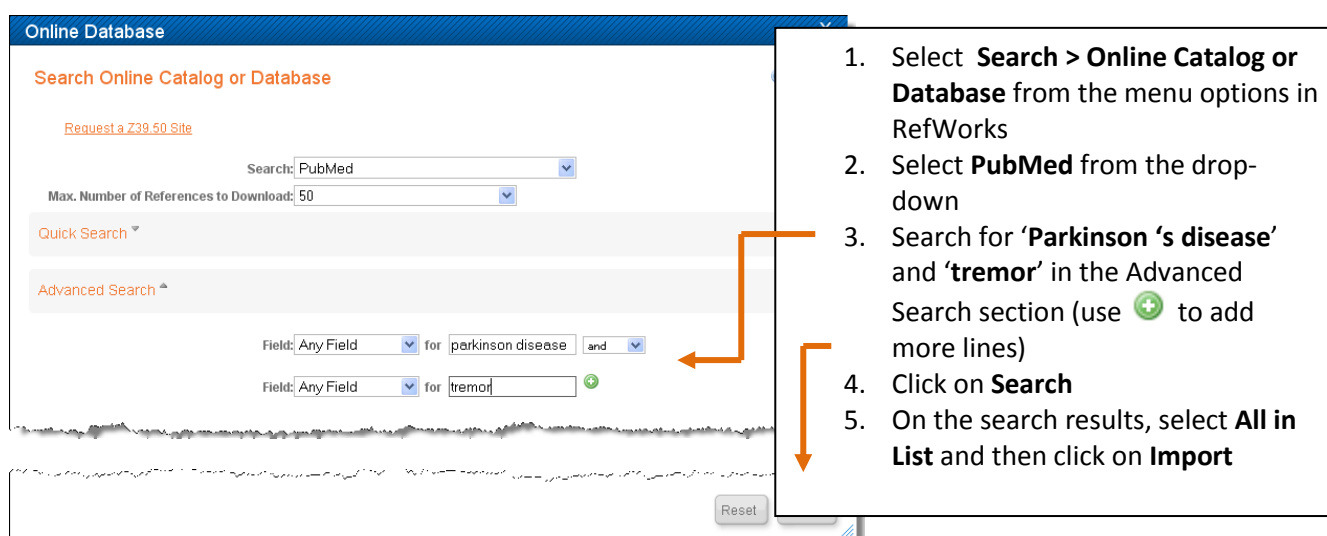
## Task 5: Add New Reference Manually



The screenshot shows the 'Add New Reference' form in RefWorks. The form is titled 'Add New Reference' and has a blue header. Below the header, there are navigation tabs: 'References', 'View', 'Search', 'Bibliography', and 'Tools'. Below the tabs, there are three buttons: 'New Folder', 'Create Bibliography', and 'New Reference'. The 'New Reference' button is highlighted with an orange arrow. The form contains several fields: 'Fields used by' (set to 'APA 6th - American Psychological Association, 6th Edition'), 'and Reference Type' (set to 'Journal Article'), 'Authors:', 'Title:' (with a rich text editor toolbar), 'Pub Year:', 'Periodical, Full:', 'Volume:', 'Issue:', 'Start Page:', 'Other Pages:', and 'Original/Translated Title:' (with a rich text editor toolbar). At the bottom, there are three buttons: 'Add to Folder', 'Save Reference', and 'Save & Add New'. A list of instructions is on the right, with orange arrows pointing to the 'New Reference' button, the 'Fields used by' dropdown, the 'Reference Type' dropdown, and the 'Save & Add New' button.

1. Click on the **New Reference** button.
2. Select **APA** in **AccuCite** (View Fields used by)
3. Select **Journal Article** as reference type
4. Enter details in all fields in the “**Fields used by your selected output style...**” section
5. Consider adding more information, such as abstract or descriptors, in the **Additional Fields** section
6. Click on **Save Reference**, or **Save & Add New** to continue adding more references

## Task 6: Search Online Database

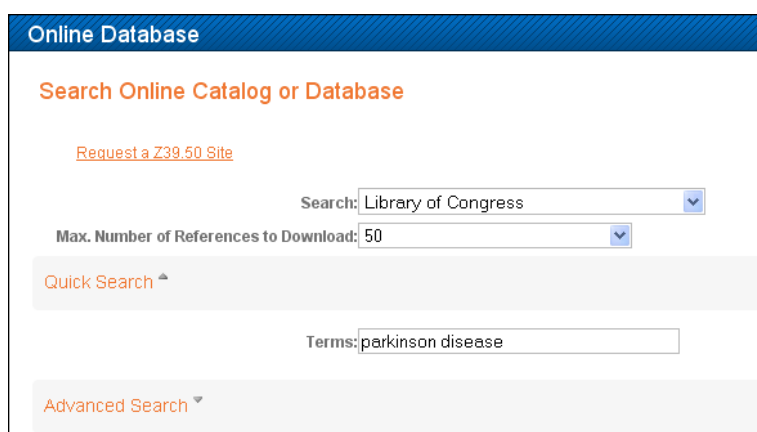


The screenshot shows the 'Online Database' search interface in RefWorks. The page title is 'Online Database'. Below the title, there is a section titled 'Search Online Catalog or Database'. There is a link for 'Request a Z39.50 Site'. The search field is set to 'PubMed'. Below the search field, there is a dropdown for 'Max. Number of References to Download' set to 50. There are two search options: 'Quick Search' and 'Advanced Search'. The 'Advanced Search' section is expanded, showing two search criteria: 'Field: Any Field for parkinson disease and Field: Any Field for tremor'. There is a plus sign (+) to add more lines. At the bottom, there is a 'Reset' button. A list of instructions is on the right, with orange arrows pointing to the 'Advanced Search' section, the search criteria, and the 'Search' button.

1. Select **Search > Online Catalog or Database** from the menu options in RefWorks
2. Select **PubMed** from the drop-down
3. Search for '**Parkinson 's disease**' and '**tremor**' in the Advanced Search section (use + to add more lines)
4. Click on **Search**
5. On the search results, select **All in List** and then click on **Import**

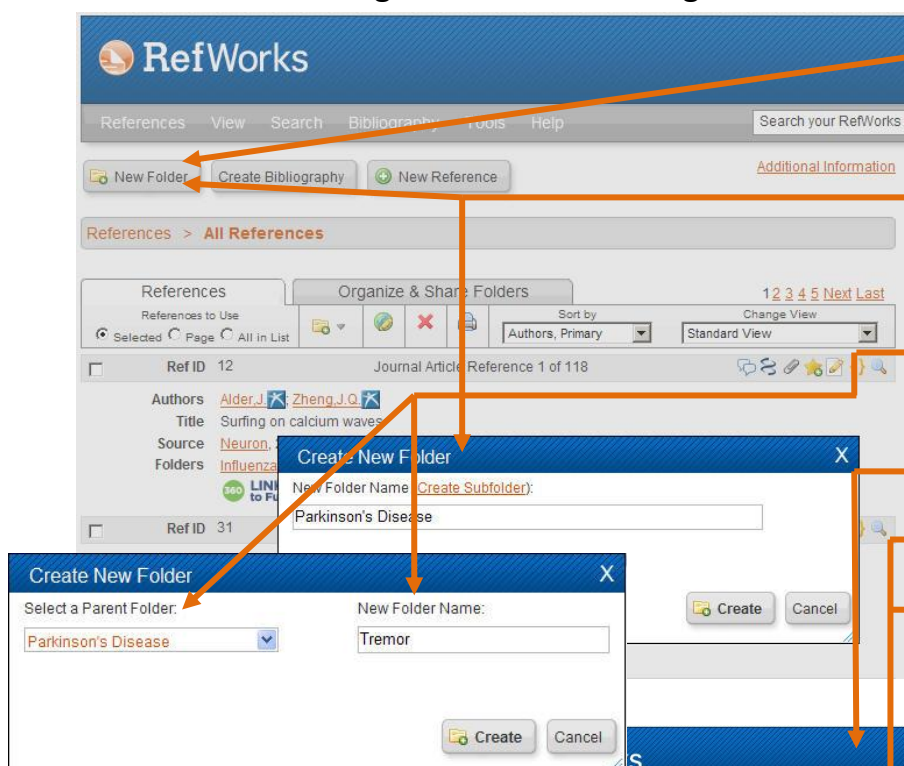
## RefWorks User Workbook

### Task 7: Search Library Catalog

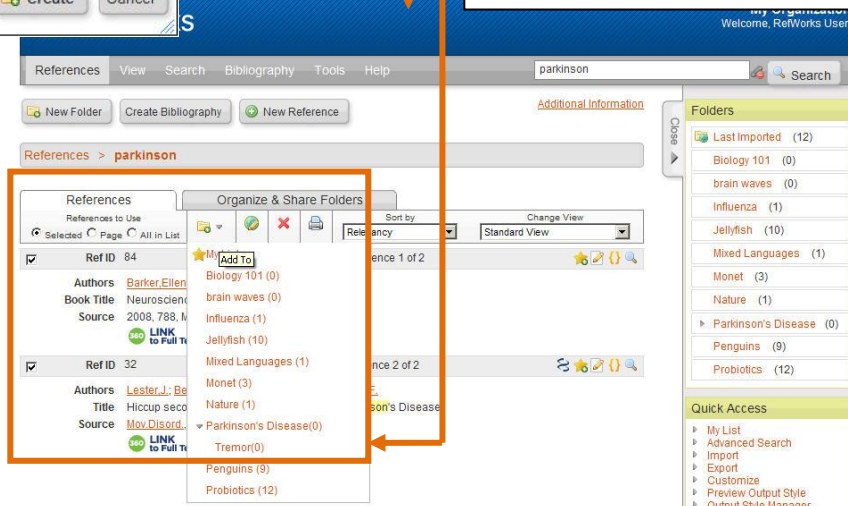


1. Click on **Search > Online Catalog or Database**
2. Select **Library of Congress** from the drop-down
3. Search for **'Parkinson disease'** in the Quick Search box
4. Click on **Search**
5. On the search results, select several references and then click on **Import**

### Task 8: Creating Folders and Moving Information



1. Click the **New Folder** button
2. Name it **Parkinson's Disease** and click **Create**
3. Create a sub-folder called **Tremor** (click **New Folder** then **Create Subfolder** link).
4. Select **Parkinson's Disease** as the parent folder and enter **Tremor** in the **New Folder** box. Click **Create**.
5. In RefWorks **Quick Search**, search for **Parkinson**.
6. Select **All in List** under "References to Use".
7. Add to the folder **Parkinson's Disease**.
8. In RefWorks **Quick Search**, search for **tremor** and move them into the subfolder labeled tremor



**Task 9:** Create a List of References in Preferred Output Style

**Create Bibliography**

[List of Output Styles](#) [Request New Output Style](#)

Output Style: APA 5th - American Psychologic

[Output Style Manager](#) [Preview Output Style](#) [Edit](#)

Format Paper and Bibliography

Format a Bibliography from a List of References

File Type: Word for Windows (2000 or later)

Document Formats Supported: Word, Open Office, RTF, Text, and HTML

References to Include:  All References  My List  Parkinson Disease

Create Bibliography

1. In RefWorks, click **Bibliography**.
2. Select **APA 5<sup>th</sup> – American Psychological Association** as the output style.
3. Select the **Format a Bibliography from a List of References**
  - a. Select **Word for Windows** as **File Type**.
  - b. Select **Parkinson’s Disease** in the **References to Include** Folder drop-down box.
  - c. Click on **Create Bibliography**.

A list of properly formatted references will be created as a Word file for you to save, print, or email as required.

**Helpful Hint: Output Style Manager**

**Output Style Manager**

Nature Search

Show Search Results

Your favorite output styles are your primary means of output style in RefWorks.

List of Output Styles

Nature  
Nature Biotechnology  
Nature Genetics  
Nature Immunology  
Nature Neuroscience  
Nature Reviews Cancer  
Nature Reviews Drug Discovery  
Nature Reviews Genetics  
Nature Reviews Immunology  
Nature Reviews Microbiology

Preview Output Style

Favorites

APA 5th - American Psychological Association,  
APA 6th - American Psychological Association,  
Chicago 15th Edition (Author-Date System)  
Council of Science Editors - CSE 7th, Citation-Se  
Council of Science Editors - CSE 7th, Name-Yea  
Harvard  
Harvard - British Standard  
MLA 7th Edition  
Uniform - Uniform Requirement for Manuscripts  
Vancouver

Remove All

By default RefWorks only shows a small number of Output Styles as your “Favorites”. Select **Bibliography > Output Style Manager** to adjust your favorites list.

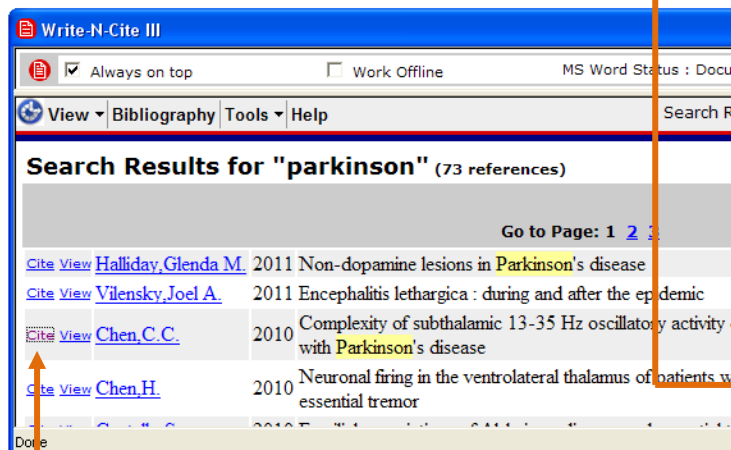
1. Either browse or search for the styles you would like to add to your list of Favorites.
2. Select the particular style in the “List of Output Styles” box.
3. Click the right arrow to make it a ‘favorite’.



**Task 10:** Create a Bibliography with Write-N-Cite III for Windows

OurDissertation

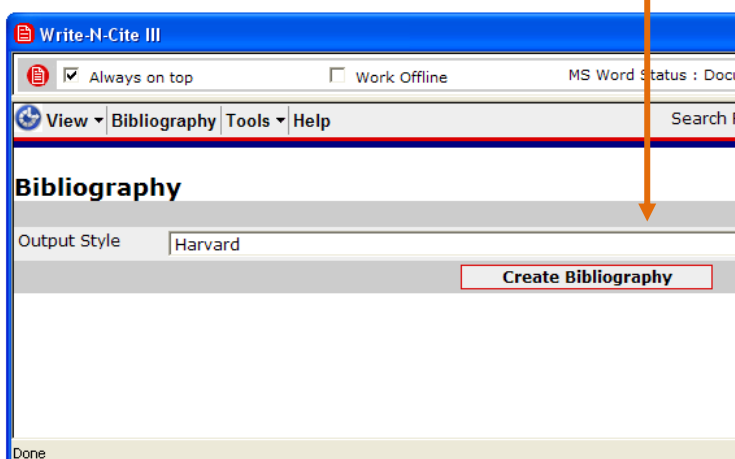
This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite. **{18 Chen,C.C. 2010}** How to insert single and multiple citations and how to create a bibliography.



OurDissertation

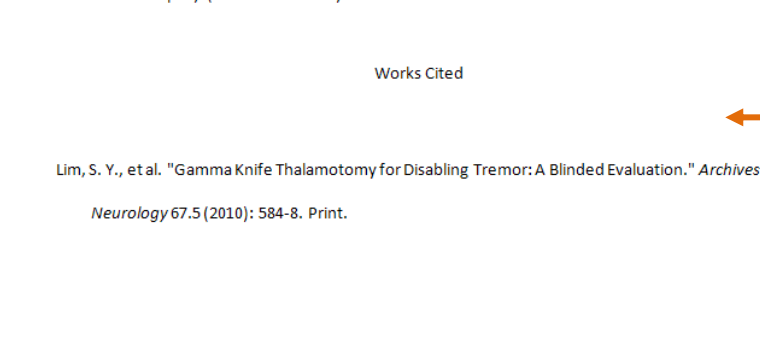
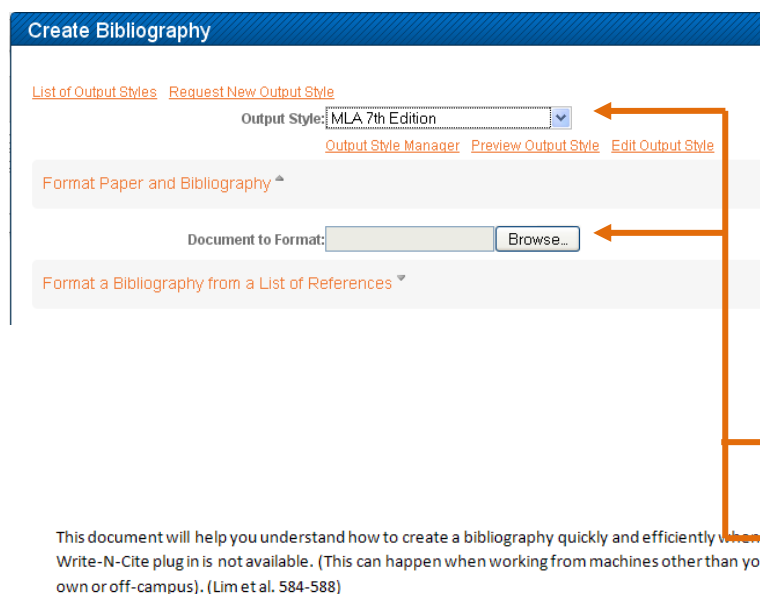
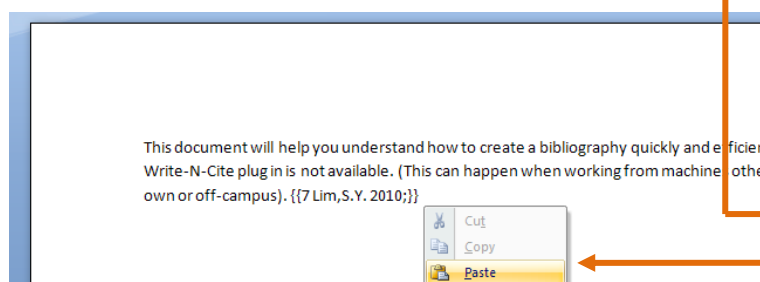
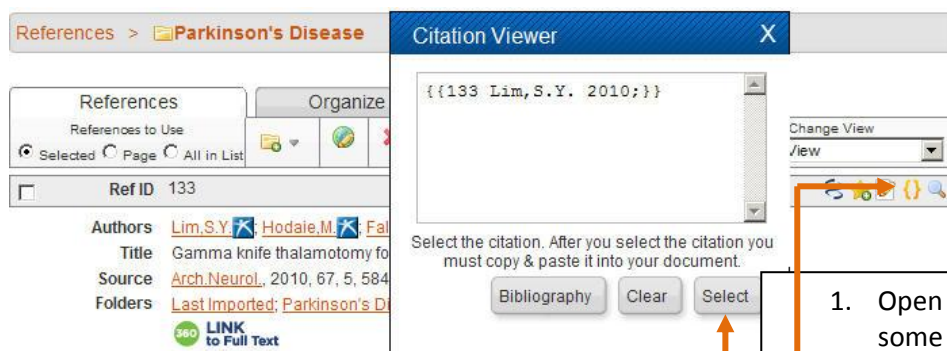
This document will help you understand how to create a bibliography quickly and efficiently using Write-N-Cite. **{Chen et al. 2010}** How to insert single and multiple citations and how to create a bibliography.


Chen, C.C., Hsu, Y.T., Chan, H.L., Chiou, S.M., Tu, P.H., Lee, S.T., Tsai, C.H., Lu, C.S. & Brody, D.R. (2010) "Complexity of subthalamic 13-35 Hz oscillatory activity directly correlates with clinical impairment in patients with Parkinson's disease", *Experimental neurology*, vol. 224, 234-240.



1. Open **Microsoft Word** and type some text
2. Launch the **Write-N-Cite III** plug in on the Word toolbar or from the desktop icon
3. Login to your RefWorks database
4. Select **Always on top** to keep Write-N-Cite visible
5. Do a **quick search** for **Parkinson**
6. In Word document, place your cursor in the text, **where you want to insert the citation**
7. Back in Write-N-Cite, click on the **Cite** link next to the record that you want to cite
8. Save your document to your computer as **rwcite** (File > Save As)
9. Back in the Write-N-Cite Window, click on **Bibliography** and choose **Harvard** as the output style, then click on **Create Bibliography**
10. Your document will be formatted. Save it (File > Save)
11. Return to your formatted document and continue typing text and add a few more citations. You can include more than one citation placeholder in the same grouping (known as citing multiple sources)
12. Repeat the bibliography creation selecting a different output style from the Bibliography area in Write-N-Cite III. Your document will be re-formatted in the new style. Save it (File > Save)

**Task 11:** Create a Bibliography without Write-N-Cite



1. Open your word processor and type some text
2. In RefWorks do a quick search for **Parkinson**
3. Choose a reference and click on its Cite  icon
4. A box will open with the RefWorks temporary citation placeholder
5. Click on the **Select** button and copy the placeholder (e.g. CTRL+C)
6. In your document, place your cursor where you want the citation to appear and use the word processor's **paste** function (e.g. CTRL+V) to insert the citation placeholder into your document
7. Repeat the previous steps with another citation, or multiple citations, placing them elsewhere in the text (make sure to **Clear the Citation Viewer** first!)
8. Close and save your document as **Parkinson** (file type must be either .doc, .odt or .rtf)
9. In RefWorks click on **Create Bibliography**
10. Choose **MLA 7<sup>th</sup> Edition** as the output style
11. Select the **Format Paper and Bibliography** section
12. Browse to locate your file as the **Document to Format**
13. Click on **Create Bibliography**
14. You now have a second document, with formatted citations and a bibliography. Save the document as **Final - Parkinson**