Managing References - RefWorks Part 1
Information Skills Practical Workshop
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RefWorks is a Web based bibliographic management software package that allows you to store and manage your references, and to create formatted bibliographies and papers.

Guidance on using RefWorks is provided on our web page at
www.abdn.ac.uk/library/learning-and-teaching/for-students/refworks

This exercise is designed to work through the basics of using RefWorks and covers the following:

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STEP 1: Register a RefWorks account

1.1. If you do not have a RefWorks account:

− Go to RefWorks at **www.refworks.com/refworks**

− Click on **Sign up for a New Account**, complete and send the registration form.

− RefWorks will send you an e–mail confirming your access details.
NB. Keep this message on file as it includes the access code for off–campus use.

− You will be able to use your account immediately after submitting your registration – leave this browser window open.

1.2. If you do have a RefWorks account:

− Go to RefWorks at **www.refworks.com/refworks**

− Login with your RefWorks login name and password – leave this browser window open

STEP 2: Create a folder to organise references

It is a good idea to organise your references in folders to make it easier to keep track of references needed for particular pieces of work. A reference is always held in your personal database until you delete it – once a record is deleted the RefWorks ID number associated with it is deleted and is never re-used. A reference exists in your main database and can be filed in more than one folder, or in no folder at all.

This section shows you how to set up a folder for the workshop exercise.

1. Click on the **New Folder** button.

2. Name the folder – **test jet lag**, then click on **OK**.

3. **Log out** of RefWorks.

STEP 3: Plan your search

We are not covering this in our workshop today. Hints on how to do this when you begin your own searches another time are available in the Appendix at the end of this worksheet. You do not need to follow them today.

Please use the example given so that you can spend time looking at how RefWorks works and also have records in your RefWorks account in readiness for RefWorks Part 2.

STEP 4: Import records from Scopus – 1-step process

Several databases allow you send records straight to your RefWorks account, e.g. Scopus, Ovid (Medline) and Web of Knowledge (Web of Science). This workshop exercise uses Scopus to demonstrate how to use this feature. Follow the example to search Scopus.

Exercise:

1. **IMPORTANT:** Make sure you are logged out of RefWorks (top right hand side of the RefWorks screen)
2. Go to **http://www.scopus.com/**
3. On the **Document Search** screen: Click on **Add search field** to ensure that you have 2 search boxes in which to type your search terms   In the first box type the following, *exactly* as given: **athlet* or sportsm***   In the second box type the following, *exactly* as given: **"jet lag" or jetlag**
4. Click on **Search**.
5. The **Document results screen** will now be displayed presenting a list of records that match your search criteria. If youhave typed in the search terms exactly as given above you will have 60+ results   Tick the checkbox to the left hand side of 10 records.   In the grey navigation bar just above the headers in the Document results section click on the **Export** button.

6. On the **Output: Export, Print, Email or Create a Bibliography** screen set it as follows:
     Section 1: make sure the **Export** radio button is selected
     Section 2: Export format – **RefWorks direct export**
         Output - **Abstract format**
     Click on **Export**.

7. A separate window will open and you may be prompted to login to RefWorks.   Once you have logged in, a status screen will open indicating that an import is arriving from Scopus. The records will automatically drop into your **Last Imported Folder** in RefWorks.   Click on the **View Log** button to check that there are no problems with the records.   Click on **View Last Imported Folder** button.
8. To file your records in the **test jet lag** folder you created in Step 2 on page 1 of this worksheet: Click on the **All in list** radio button (above the results)   Click the **folder** icon beside the **All in List** button, scroll down the drop-down menu and select **test jet lag**.   A small box will open in the bottom right-hand corner telling you that this is completed (the records have been successfully filed in that folder).
9. Above the list of results in RefWorks, click on the **Folders** tab.   Scroll down to the folder called **test jet lag**. Click on the title. You will see that your records have been successfully filed in this folder.   Click on the **Folders** tab, then the folder called **Last Imported**.

STEP 5: Importing records by another method

Refer to the **Import Methods** handout with this workshop pack and select another database e.g. Web of Knowledge/Science. Search across this database, using the same search terms as for the Scopus search, and export the records to your RefWorks account. File these records in your **test jet lag** folder.

For future reference import instructions for many Aberdeen University databases are available online at **http://www.abdn.ac.uk/library/documents/guides/rfw/importing.pdf**

STEP 6: Good housekeeping – removing duplicate records

You may not find duplicates today but it is good practice to run a check for duplicates regularly - preferably every time you import records. Removing newly imported duplicates of records you already have avoids potential confusion later on.
Never delete records that you know you have already cited in your work – only the later duplicates.

1.	In your main RefWorks account click on the **View** menu, scroll down to **Duplicates**, click on **Close match**.
2.	The duplicate records are displayed. RefWorks automatically selects the newest record to remove (higher reference ID number) because you are more likely to have used the first (older) record.
3.	Click on the **Edit** icon (pencil and piece of paper) to view the full details of a record. It is possible to cut and paste information from one record into another, e.g. cut abstract information from a newer record and paste into the older one.
4.	When you are satisfied that you are ready to delete the selected records click on the **Delete** button located at the top of the results list.
5.	**A CAUTIONARY NOTE:** Once the records are deleted you cannot retrieve them without going out to databases, repeating your searches, and pulling the records back into RefWorks.

STEP 7: Creating a standalone bibliography (list of references)

If you are required to produce a reference list for your supervisor or a standalone bibliography RefWorks can create these in a wide range of output styles or formats. The bibliographies can be produced for your complete personal database or for named folders within your database.

In this exercise you will create a standalone bibliography from the records in your **test jet lag** folder.

Exercise:

1.	In RefWorks, click on the **Create Bibliography** button.
2.	Select the **Output Style**, for this exercise choose **Harvard – British Standard**, from the drop–down list.
3.	Make sure that the second option - **Format a Bibliography from a List of References** – is selected (to select, click on the small arrow beside the option heading)
	For **File Type** – select **Word for Windows (2000 or later)**
	Under **References to Include** click on the **Specific Folder** radio button and select your **test jet lag** folder
	Click on the **Create Bibliography** button
4.	**Save** your bibliography to your **H:drive**
	On MS Word go to the **File** menu – then **Save As** and navigate to where you want to locate your document. Call it **testbib.doc** or **testbib.docx**.
	You can modify or print off your *testbib.doc* document as required
5.	You must always proof read the bibliography created by RefWorks as it may not always produce a perfect result. The software relies on the accuracy of the input from external sources (database suppliers, or, you if the reference has been manually input!) and the ability of the RefWorks filters to translate the references correctly. Some errors may creep through and it is your responsibility to read and correct them.
6.	The RefWorks output styles/formats work to broad international standards but there can be wide variation in the formatting of a named style. Your lecturer may specify *Vancouver* or *Harvard* style but not the exact *Vancouver* or *Harvard* style as produced by RefWorks. Check with your lecturer or supervisor on their requirements.
	If the preferred style does not match the format produced by RefWorks you can manually modify the bibliography after it has been created or you can edit the RefWorks style to produce the format you require. More guidance on this is provided in our User Guide at **www.abdn.ac.uk/library/documents/guides/rfw/refworks_userguide.pdf**
7.	**IMPORTANT:** **Keep the test folder created in these exercises for use in the RefWorks Part 2 exercises**

Help and advice

If you have any problems with accessing RefWorks or using any of the features please contact the IT Service Desk. Email: servicedesk@abdn.ac.uk. Tel: 01224-273636 (phone for 24 hour/7 days a week service)

The Information Consultants can also help with any subject specific difficulties:

Arts & Humanities	Medicine & Biomedical Sciences
Janet MacKay j.i.mackay@abdn.ac.uk tel. 01224 272572	Mel Bickerton m.bickerton@abdn.ac.uk tel: 01224 437876
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Appendix: Plan your search

When you start work on your own assignments you must plan your searches before you start. Here are some tips on how to do this:

What do you want to find information on?

Sample essay
"Discuss the impact of rapid long distance travel on the sports performance of athletes."

- Think about your **keywords**

- Use **truncation** – to catch singular and plural forms, spelling differences and word endings

- Consider how to link the keywords using Boolean operators – **and/or**

- In a table take a note of the keywords that you might use in your search (see example below):

Concept/Idea 1	circadian rhythm*	**or**	biological clock
Concept/Idea 2	jetlag	**or**	jet lag
Concept/Idea 3	athlet*	**or**	sportsm*

and (vertical arrow linking the concepts)

Use this table to plan your own search:

Concept/Idea 1		**or**	
Concept/Idea 2		**or**	
Concept/Idea 3		**or**	

and (vertical arrow linking the concepts)