
Exercise 1: Create a RefWorks Account and Create a New Folder.

1. *Create your own individual account.*

NOTE: If you already have a RefWorks account, you may skip Part 1.

- a. Go to **www.refworks.com**
- b. Click **Login** (left side), then **Sign up for an Individual Account**.
- c. Fill in the information requested on the left side. **Password** can be anything you wish.
- d. Select a **Type of User** and **Area of Focus**. (This is required, and is used by RefWorks solely for statistical purposes).
- e. Enter the **code** into the appropriate box.
- f. Click **Register**. You should be logged into your new RefWorks account.

2. *Create a folder*

- a. Go to **Folders > Create New Folder**.
- b. Give your folder a name.
- c. Click **OK**.
- d. In the next exercise you will import references into this folder.

~ ~ **END of Exercise 1** ~ ~


Exercise 2: Import References into RefWorks.

2.1 *Import references from PubMed*

PubMed is the best article database for most public health topics


- a. Open a new browser window or tab and go to PubMed:
http://uclibs.org/PID/17708
» (Using this URL provides access to *UC-eLinks: your key to online articles!*).
- b. Enter *asthma/ethnology* into the search box and click **Search**.
» The term after the / is a *subheading* (aka *qualifier*). Subheadings help refine your search. More info at **www.lib.berkeley.edu/PUBL/pubmed.html**
- c. Select any 3 citations by clicking in (checking) the box to the left of each.
- d. In PubMed, click the **Display Settings:** drop-down menu link (near top-middle), select **MEDLINE**, and click **Apply**.
- e. Use your browser's **Select All** function, then **Copy**, or **Ctrl C**.
- f. In RefWorks, go to **References > Import**.
- g. In the drop down menu labeled **Import Filter/Data Source**, choose **NLM PubMed**
- h. For **database**, keep the default, **PubMed**

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- i. In the **Import References into Folder** drop down menu, choose your folder.
 - j. Put your cursor in the box below **Import Data from the following Text** and use your browser's **Paste** function, or **Ctrl V**
 - k. Click **Import** (at bottom of screen)
 - l. Click **View Last Imported Folder** to see the citations you just imported. Under **View > Folder > [YourFolder]** to see these references, and any others that are in this folder after you do the remaining exercises.
 - m. Note that there is always a **UC-eLinks icon**  next to each reference in RefWorks. Click one and see if the article is available online. If not, there will be a link to search for the journal title in the library catalog.
 - n. Notice also the **View in PubMed** and **Related Documents** links in each reference in RefWorks that was imported from PubMed. Clicking either of these will take you back to PubMed.
 - o. The **View** link (right side of each reference, near the UC-eLinks icon) will open the complete reference in RefWorks – you will see the abstract, subject terms, etc.

2.2 *Import references from OskiCat*

OskiCat is the UCB library catalog

- a. Open a new browser window or tab and go to OskiCat, **http://oskicat.berkeley.edu**.
- b. Keep the default search type **Keyword(s)** and search for *health disparities*.
- c. In the list of results, check the box to the left of any 3 records.
- d. Click  (above the list of items).
- e. Click the **View Saved** button near the top of the window.
- f. Click **Export Saved**.
- g. Select **End-Note/RefWorks** under **Format of List**.
- h. Select **Screen** under **Send List To**.
- i. Click **Submit**.
- j. Use your browser's **Select All** function, then **Copy**.
- k. Open another browser window or tab and access your RefWorks Account.
- l. Click **References** from the drop-down menu and select **Import**.
- m. In the drop-down menu next to **Import Filter/Data Source**, choose **University of California at Berkeley**.
- n. For **Database**, choose **University of California Berkeley (OskiCat) (EndNote/RefWorks)**.
- o. In **Import References into Folder**, choose your folder.
- p. Select the radio button next to **Import Data from the following Text**.
- q. Put your cursor in the box below **Import Data from the following Text** and select **Edit > Paste** in your browser.

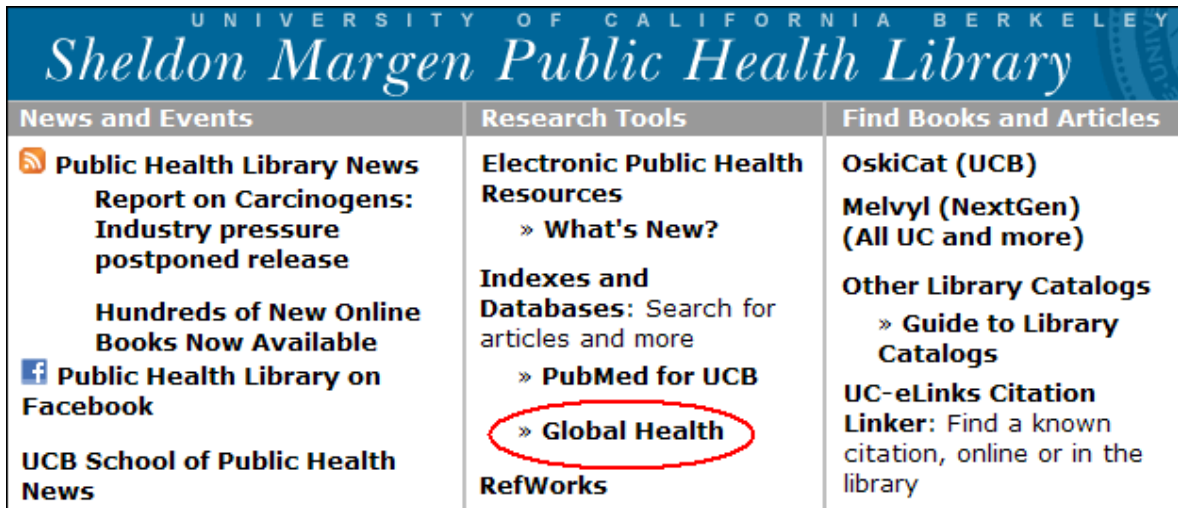
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- r. Click **Import** (bottom of page).
- s. Take a look at the citations you just imported to verify there is no missing data.

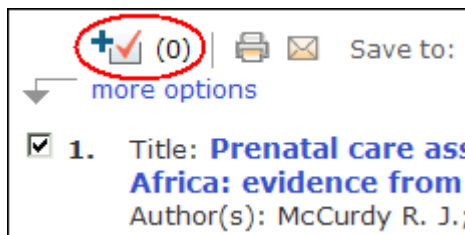
2.3 Import references from Global Health

Global Health is the best database for articles, etc., [from](#) or [about](#) other countries

- a. Open a new browser window and go to Global Health:
www.lib.berkeley.edu/PUBL; click **Global Health**:



- b. Enter *Lesotho* into the first search box, change the drop-down menu on the right from Topic to **Descriptors**, and click the **Search** button.
 - » This ensures your term is searched as a *geographic entity*
- c. Select any 3 citations by clicking in the **check box** to the left of each.
- d. Click (above the citation list) to add these citations to your **Marked List**:



- e. Click the **(3)** next to the Marked List symbol to see your marked records.
- f. Scroll down a bit and check the box next to *Abstract*.
 - » You may check any additional boxes if you want those fields exported into your RefWorks database

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- g. Click **RefWorks** near the top right.
 - » RefWorks will open and your 3 citations will import automatically. This “direct export” method is available in several databases and is the quickest way to add citations to RefWorks. However, you can not control the destination folder.
 - h. Click **View Last Imported Folder**
 - i. To the right of the text *References to Use* (at the top left), select **Page**.
 - j. Click the *Put in Folder ...* drop down list, and add these references to your folder. If successful, you will see:

Successfully put 3 references in the [YourFolder] folder.

2.4 Manually Enter a New Reference into RefWorks

- a. In RefWorks, go to **References > Add New Reference**.
- b. In the **In Folder(s)** menu, select your folder.
- c. In the **Ref Type** drop-down menu, choose *Web Page*.
- d. Enter the following information (*note that you need not enter text in each and every field when adding a new reference to your database*):
 - Source Type: Electronic
 - Authors: California Department of Public Health
 - Title: CDPH Channel
 - Accessed, Year: 2011
 - Accessed, Month/Day: 08/17
 - URL: <http://www.youtube.com/CAPublicHealth>
- e. When you are done, click **Save Reference** (near the top).
- f. You will get an error message: “One or more author names were not entered in the recommended format...” – click **OK**. You should see:

This reference has been saved.
- g. Click **Back to Reference List** to see the reference you just added. Note the URL is a live link.

2.5 Import references from Melvyl: Importing a single record

- a. Open a new browser window and go to Melvyl, using the link on the Public Health Library home page, www.lib.berkeley.edu/PUBL; click **Melvyl (All UC and more)**
- b. Enter *Public health: past, present and future* into the search box and click **Search**
- c. In the **Format** box on the left side, check the box next to **Book**.

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- d. Click the title, *Public health: past, present and future* to see the complete record
- e. Click **Cite/Export** near the top of the record
- f. Click Export to RefWorks in the middle of the box that appears
- g. You will be prompted to log on to RefWorks, if you are not already logged on. RefWorks will open in a new window and the citation will automatically import.

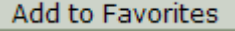

To import a list of records from Melvyl requires creating an account. See www.lib.berkeley.edu/BIOS/ref_import.html (scroll down to *Melvyl*) for details

~ ~ **END of Exercise 2** ~ ~

Exercise 3: Using Write-N-Cite.

To use Write-N-Cite with RefWorks, you must download a small utility program to your computer. Make sure virus protection software and/or firewall are set to allow the use of Write-N-Cite. **See handout for instructions.**

→**NOTE: Do not do this now because Write-N-Cite is already installed on the computers in this classroom.**

- a. In RefWorks, go to **Tools > Output Style Manager**.
 - ✓ On the left side are all the styles RefWorks makes available. On the right is a place for your “**Favorites**.”
- b. Choose any 4 styles on the left side (one at a time) to add to your Favorites: Click on the style name and then click 
- c. Open Microsoft Word:
 - ✓ Windows key > Programs > MS Office > Word
- d. Type *My test document*, and **save** the document to the **desktop**.
- e. Click the **Write-N-Cite** icon  in the Word toolbar; a browser window will open. If there is a message asking if you want to display the *nonsecure items*, click **Yes**
 - ✓ You may need to log on again, using your username/password
 - ✓ The top of the Write-N-Cite window shows the name of the Word document that is active in RefWorks.
- f. Click the word **Cite** to the left of any of the references.
 - ✓ **Do not close the Write-N-Cite window**
 - ✓ If your RefWorks database gets to be large, you may need to use the **Search RefWorks** box at the top right of the Write-N-Cite window to find the desired reference
- g. If you go back to Word, the reference will be in a **temporary** status, e.g. **{{6 Young,Charles S. 1998;}}**
 - ✓ This is a reference placeholder, and is not what the reference will look like on your final document. (The **6** is the RefWorks database **reference number**).

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- h. Make sure your cursor is at the **end** of the sentence (after the temporary citation in {brackets}, and type another sentence. Add another reference using the same method as above.
 - i. Go back to the Write-N-Cite window and click **Bibliography** (top left).
 - j. Choose any **Output style** from the drop-down list.
 - k. Click **Create Bibliography**. Do not navigate to your Word document yet. You should soon see the message: **Your document has been processed in [output style name] style with no errors.**
 - ✓ Wait until you see this message before viewing your Word document.
 - ✓ If you get *another* message, let your instructor know.
 - l. Go back to your Word document to see the formatted manuscript.
 - ✓ Add or delete references, or change the output style of your document, at any time.
 - ✓ Always allow a few seconds after clicking **Bibliography** to view your Word documents.

~ ~ **END of Exercise 3** ~ ~

EXTRA CREDIT: Add a file to a reference in RefWorks

1. Click **Edit** on any reference in your RefWorks database.
2. Click **Browse...**, to the right of the **Attachments** box.
3. Locate the file you wish to attach: *Use the Word document you created for Exercise 3.*
 - ✓ You can attach a PDF, spreadsheet, or any other file type located on your computer or a shared or portable drive.
4. Click **Add Attachment**. You will see a thumbnail of the attachment file type in the Edit Reference view.
5. Click **Save Reference**, then **Back to Reference List**
 - ✓ You will see a *paper clip icon* in the reference (near the top right) indicating a file is attached. Click **View** or change the database view to **Full View** to access the attachment.

~ ~ **END of Exercises** ~ ~

Please take a few minutes to complete an online evaluation at:

www.surveymonkey.com/s/refworks081711

~ ~ *Additional RefWorks information is on the following pages* ~ ~

Additional RefWorks Features and Information

~ RefGrab-It ~

RefGrab-It lets you import web pages into your RefWorks database as references.

1. Install **RefGrab-It** in your browser. Go to **Tools > RefGrab-It**
2. When viewing a web page you wish to import into your RefWorks database, click the **RefGrab-It icon** in your browser toolbar or favorites list.
 - ✓ RefWorks will identify the **Title** and the **URL** of your current webpage and give the option to import it (with the *Ref Type = Web Page*) into your RefWorks account.
 - ✓ If an **ISBN, PubMed ID, COinS, or DOI** exist on the web page, **RefGrab-It** will automatically search various web resources behind the scenes to get supplemental information, so you will be able to import it with the correct Ref Type
 - ✓ When using **RefGrab-It** on a web page, it automatically opens a *temporary results page* in a new window. You can view the information, and then decide if you want to import the data into your RefWorks database
 - ✓ More information, including download instructions, is available in RefWorks: see **Help > Getting References Into Your Account**

~ Sorting References ~

Sort the references in your RefWorks database by primary author, publication year, title, and more by using the drop-down menu labeled **Sort by** near the top right of the database display.

~ Sharing References ~

1. In **Tools**, select **Share References**.
2. Choose a **folder** or your **entire database**.
3. Make **permission** selections.
4. You can email the URL of the shared folder/database from here if desired. Use a URL shortener (eg tinyurl.com) if desired.

~ Globally Editing Data in Reference Fields ~

Global Edit adds/edits information to any particular field in a *selected group* of references, e.g. when tagging specific citations to a particular project or paper in a User Defined field.

~ Globally Editing ... continued on next page~

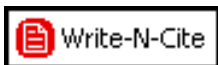
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1. **Select** the references you want to edit:
 - o specific ones (by placing a check in the box to the left of each), *or*
 - o the page or the entire list (by selecting either of these options in the **References to Use:** menu, near the top of the RefWorks window).
2. Click **Global Edit** near the top center of the RefWorks window
3. Select the field you want to edit from the drop-down list.
4. Type in the data you want to add to the field in the box below, using the optional formatting, if desired.
5. Select the desired option for handling the field if it **already contains data**.
6. Click **Add** then **OK**.
7. You should see a message indicating the edit was successful.

~ **Downloading Write-N-Cite** ~

1. Select **Write-N-Cite** from the **Tools** drop-down menu at the top of the RefWorks window.
2. Click **Click Here...** to download the plug-in. (Scroll down for Mac version)
3. Click **Save** if another window appears and save the file to a location you will remember.
4. Close RefWorks.
5. Click the RefWorks plug-in (**wnc3inst.exe**) to start installation.
6. If asked to restart your computer, click **OK**.
7. After the computer restarts, open Word (or close and re-open, if Word was open already during the install) and you will see the red **Write-N-Cite button** on the toolbar:



~ **Using Write-N-Cite: The Basics** ~

1. Launch **Write-N-Cite** within Microsoft Word by going to **Tools**, then **RefWorks Write-N-Cite**, or by simply clicking on the **Write-N-Cite** icon on the Word toolbar
 - ✓ You may need to log on using your RefWorks logon to access Write-N-Cite
 - ✓ At the top of the Write-N-Cite window, you should see the name of your Word document. *It is best to have only the one Word document you are working on open.*
2. To add a citation to your document, click the **Cite** link next to the appropriate reference(s) in the Write-N-Cite window
 - ✓ To change the citation or delete it, delete it directly in Word. You can either replace the citation or add a new one.
3. When finished adding citations, go to the Write-N-Cite window and click **Bibliography** (near the top).

~ *Using Write-N-Cite... continued on next page* ~

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4. Choose the desired **Output Style**.
 - ✓ If the desired Output Style is not on this list, go to your RefWorks database window and select **Tools > Output Style Manager**. Select the desired style(s) on the left pane and add to your “**Favorites**” on the right pane.
 5. Click **Create Bibliography**. You will see a message: *Your document has been processed in [output style name] style with no errors.*
 - ✓ Wait until you see this message before viewing your Word document. Your document will now be formatted in the desired style.

~ Using RefMobile ~

Log on to www.refworks.com/mobile on any web-connected mobile device. You will have access to all your folders and references. Use **Smart Add** to add a reference to your database with a quick search and one click. RefMobile requires you to log in with the UC Berkeley **Group Code**, found on the RefWorks login page or at www.lib.berkeley.edu/BIOS/reflogin.html (CalNet authentication required)

~ Using RefWorks from Off-Campus ~

If you are off-campus and *not* using either the proxy server or VPN, you must enter a **group code** when logging in to RefWorks. The login page has a link to access the current group code. Accessing the group code requires CalNet authentication, see above.

~ Further Help ~

RefWorks Quick Start Guide

http://www.refworks.com/Refworks/help/RefWorks_Quick_Start_Guide.pdf

RefWorks Online Tutorials

Log on to RefWorks, go to Help > Tutorial > and choose the tutorial you wish to view.

RefWorks Online Help

<http://www.refworks.com/Refworks/help/Refworks.htm#>

RefWorks Help and Tutorials

<http://www.lib.berkeley.edu/PUBL/endnote.html#RefWorks>

RefWorks Importing Tips

http://www.lib.berkeley.edu/BIOS/ref_import.html

RefWorks 2.0 Preview, Tutorials, and more

<http://www.refworks-cos.com/RefWorks2.0/>