

RefWorks for Business: Advanced Workshop

Advanced Searching and Lookups

Advanced Search

There may be times when you want to do a detailed search for references stored in your RefWorks database. That's when *Advanced Search* is helpful.

- Go to the *Search* menu > click *Advanced Search*

Lookups

Lookups are alphabetical indexes of some of the fields in each record (author, descriptor, periodical). Once you locate the term you are looking for, you can:

- View all the records related to that term
- Edit the term in those records (all at the same time)
- Delete that particular information from that field only

- Go to the *Search* menu > click *Lookup by Author*

Viewing, Sorting, and Printing References

Viewing References

You can change how your references are displayed by using the *Switch to* drop down menu. You also have the option of adding up to three display styles of your own choice:

- Go to *Tools* menu > select *customize*
- Chose up to three output styles from the drop down list

Sorting References

You can change the order in which your references are displayed by clicking on the *Sort by* pull-down menu on the top right corner of your main RefWorks page. You can also specify the sort order in which you wish your references to appear by default.

- Go to the *Tools* menu > select *Customize*
- Chose a default *Sort* option

Printing References

The difference between using the *Print* button and creating a bibliography is that the *Print* option will produce a list of references printed in whatever order you have selected in the *Sort by* drop-down menu. A bibliography, on

the other hand, will be sorted in the order required by a particular citation style.

- Select the references you want to print
- Click the *Print* button
- Select an output style and click *Print*

Editing Multiple References

The *Global Edit* function allows you to modify a specific field of information for a group of selected records.

- Open a folder
 - Select "All in list"
 - Click the *Global Edit* button
 - Select the *field to edit* from the drop-down menu (e.g. *Descriptor*)
 - Then type the information you want to add (e.g. Internet Marketing)
- Note:** to make global edits to specific author's names, descriptors or periodical names, use the *Edit* feature in *Lookups*

In addition to being able to edit a single field across multiple records, there is also an option to edit four fields of information related to references gathered electronically.

- Open the folder containing the records you retrieved from **Business Source Complete** this morning
- Click the *Global Edit* button
- Click *Electronic Source Related Fields* and the screen will refresh to show the following four fields:
 - *Data source (data vendor) = EBSCO Publishing*
 - *Database = Business Source Complete*
 - *Links (URL of the root page of the database) = go to Morris record, copy & paste record*
 - *Date Retrieved = today's date*
- The *Electronic Source Related Fields* are really important if you are citing electronic information in your bibliography

Capturing Data from a Webpage with Ref Grab-It

RefWorks has made it easy to import data from a webpage by using *Ref Grab-It*, a downloadable tool that works with your browser. If an *ISBN* number or *DOI* (Digital Object Identifier) exist on the page, *Ref Grab-It* will automatically search various web resources to get supplemental information that may be of interest to you. *Ref Grab-It* may also locate RSS feeds related to that webpage. Note that *Ref Grab-It* reads web pages; it cannot read PDF files displayed from web pages.

Checking for Duplicates

If you are importing references from a variety of sources, you may find that you have imported some of the exact same data. Checking for duplicates allows you to get rid of unwanted data and save yourself confusion later. RefWorks offers two ways to check for duplicates – *Exact match* and *Close match*.

- Click the *View* menu
- Mouse over *Duplicates* and select *Exact Match*
- *Exact match* pulls up references where the author, title, and year of publication fields are all the same
- **Hint:** if you have duplicate records in multiple folders, make sure you assign the record that you are keeping to all of the folders in which you want it to appear. Another hint: check to make sure that none of the records you are deleting are “in use” in a document you are working on. If RefWorks cannot locate the *RefID* (because the record has been deleted), your document will not format properly.
- Select the records you wish to delete, and click the *Delete* button. These records are now removed from your database, in all folders in which they appeared.
- *Close match* duplicate checking is done by comparing a combination of author names, titles, and year of publication. It is a loose comparison, and so may result in a display of references that are not exact matches. This allows duplicates to be found even if there are minor errors or discrepancies in the data.

Formatting Footnotes and Endnotes with RefWorks

Sometimes you may be required to use a citation style that uses footnotes or endnotes instead of in-text citations. For example if you are using the *Chicago Manual of Style*, you may be required to cite your sources using endnotes. RefWorks will format your endnotes or footnotes for you.

- Open a folder in your RefWorks database.
- In order to get RefWorks to format your endnotes for you, you are going to have to know the *RefIDs* for all the sources you want to cite; an easy way to have this information at your finger tips is to go into *One line/ Cite View*. Click *One line/ Cite View* in the *Switch to* pull down menu. A new window will open with just the title, authors, and publication dates of all the references in that folder.
- Open a Word document and write a sentence.
- In the Word document, click the *References* tab, then *Insert Endnote*.
- Go to the *One line/ Cite View* window, and click *Cite* from beside one of the references.
- The citation viewer will open in a new window, which will contain a citation placeholder. When you create the bibliography, RefWorks inserts the reference into the footnote in the correct format. Click

- select citation, then right mouse click and copy. Click clear after you have copied the citation.
- Return to your paper and paste the citation placeholder beside your newly created endnote.
 - Write another sentence and insert another endnote and citation.
 - When you are finished, you must save the Word document before formatting your bibliography and endnotes.
 - Click the *Bibliography* button on the citation viewer or the *One line/ Cite View* page.
 - Select an output style – e.g. *Chicago 15th edition Notes & Bibliography*
 - Click the radio button beside *Format paper and bibliography*
 - Select your document from the *Browse* window
 - Click *Create Bibliography*
 - RefWorks will create a new document that will include the formatted endnotes and bibliography. Its name will be *final-[name of your original document]*.

Citation Switch for Footnotes

Some output styles require that a specific page be included in a footnote or endnote, overriding the page numbers you have in your database. You can manually instruct the program to include or override page numbers in the footnote or endnote through the use of a switch.

- Inside the citation placeholder, add a switch (/s) and a new page number. For example, an endnote citation with a switch would look like `{{1 Jacobs /s43}}`. The formatted endnote will include the page number you have specified.

Sharing References using RefShare

RefShare is a module of *RefWorks* that allows you to easily share a folder of references or your entire *RefWorks* database.

- In the *Folders* menu, click *Share Folders*.
- You can share a folder by clicking the *Share Folder* button next to the name of the folder you want to share.
- This brings you to the *Shared Folders Options* page where you have many options on how you want to share your research.
- You will see a URL created specifically for your folder. This URL is what you give to others to access your shared research; clicking on the link will let you preview your shared folder. You can easily e-mail this link by clicking the *Email* button beside the URL.
- You must select at least one *Output Style* option.
- Give your folder a title and provide some descriptive information.
- In the *Reference Sharing Options* area, you can choose to include your folder or database in *McMaster's shared area*. This allows you to post your references to a webpage where everyone will be able to see and access. You can also pick a category from the drop down box. At McMaster, we have categories by subject area.

- Click *Save* at the bottom of the page.
- To view your shared folder, click the URL in the *Reference Sharing Options* area.
- Notice that you have many of the same options in your toolbar as you do in RefWorks database.
- Detailed information on the features available in a RefShare folder is available in the RefShare tutorial, *Using RefShare*, available in the *Help* menu.
- To see McMaster's RefShare area, go to the *View* menu, and click *RefWorks Shared Area*. Here you will see not only folders you share, but folders shared by others at the university.