OCCTH903 Tip sheet: Using RefWorks to Manage References

**Getting Started**

We recommend using Legacy RefWorks when you are working on a larger review project. (Legacy RefWorks is what the old version of RefWorks is now called).

Even if you currently have a Legacy RefWorks account and already have references in there, **create a new account just for this review**. You can have multiple Legacy RefWorks accounts associated with the same email. A RefWorks account entirely dedicated to this project will make functions like de-duplication and recording your total numbers of references for your report easier.

Sign up for Legacy RefWorks at [http://guides.library.ualberta.ca/refworks/home](http://guides.library.ualberta.ca/refworks/home). Click on Legacy RefWorks.

**Step 1: Export ALL references from your final search in each database.** [See next page for Additional info for exporting references directly from databases]

*Remember to choose Legacy RefWorks (not Proquest RefWorks or New RefWorks) whenever you’re asked which version of RefWorks you would like to export to.*

Create a New Folder (using the New Folder button) to house the results from each database you searched. Give each folder the name of the database you searched (e.g., Medline). Once you import your search results from a database into RefWorks, move those references into the appropriate folder (*To do this: Select "All in List" from the "References to Use" section of the tabbed bar immediately above the first reference. Then hover your mouse over the yellow folder icon, also in the tabbed bar. A list of available folders will show and you select the one you want*).

Check the number beside the folder, to make sure all the references were imported successfully.

Moving results from each database into separate folders is a good idea because if you have to repeat a search in one database, it’s easy to delete the references in only that folder and re-import the new results.

*Once you have downloaded all references, note the total number of search results for your project. You can add up the numbers next to each folder you created. To see all references in your account: View > All References*
Additional info for exporting references directly from databases

Step by step instructions for downloading from most databases into Legacy RefWorks:
https://www.RefWorks.com/RefWorks2/help/Exporting_from_Data_Services_and_Importing_into_RefWorks.htm  Sometimes generic instructions are listed for an entire interface (platform) e.g. EBSCOhost or OVID, rather than for the specific databases (e.g. Medline on EBSCOhost, or OVID PsycInfo)

In each database, whenever you have the option, export “Citations and Abstracts” or “Complete Reference” (versus Citation only). You need the abstract to help you in the screening process, to decide which references are relevant for your full text review.

Step 2: Remove Duplicates
This can be time consuming if you have lots of references, but it is a necessary step.

Warning: Before removing any duplicates make sure the radio button is on "Selected" (NOT "All in List") in References Tab – References to Use" immediately above the first reference

Start by View > Duplicates > Exact Duplicates. This finds all duplicates that are exact matches. Click on the red X immediately above the first reference to delete all the duplicates on the first page and then you will need to do it for each page.

Next, View > Duplicates > Close Duplicates. This finds the duplicates that are close but not exact. Unfortunately you cannot just automatically delete these. Sometimes articles with a part 1 and part 2, or a conference abstract and a full article look like the same reference. You need to go through each of the close duplicates one by one. Skim them to see if the page numbers match. If page numbers are the same, the references are likely duplicates. If the page numbers don’t match then look a little more closely. For records that aren’t actually duplicates, uncheck the reference so it doesn’t get deleted. You will need to keep unchecking that reference every time RefWorks resets the page, so pay close attention while doing Close Duplicates.

Once you have removed all duplicates, note the total number of abstracts you will be screening after duplicate removal. View > All References to see all of your references together.

If you accidentally delete something, go to View→ Deleted References to retrieve it. Select the item(s) then click on the green arrows icon to restore the deleted reference(s).
Step 3: Screen (read through) abstracts to decide which ones you will review in full text

Create a folder called "Relevant" or "Full text".

Change view (This is done in the Drop down menu in the tabbed bar immediately above the first reference) from Standard View to "Full View" to see the abstract of each article.

Using your inclusion/ exclusion criteria to decide which articles are relevant to your research question, move each relevant reference into the "Full Text" folder. Do this instead of deleting the non-relevant articles so that you can go back to check if your search captured a particular reference if anyone asks you about your search results.

Step 4: Citing References in your final report

Go to the RefWorks Library Guide: http://guides.library.ualberta.ca/refworks/home. Click on:

- Write-N-Cite with Legacy RefWorks [Note: this does not work with Mac - see alternative below]

If you are using a Mac with Word 2016, prefer to use Google Docs rather than MS Word OR are having trouble downloading the software to your computer, check out this alternative to using WNC: https://www.refworks.com/rwsingle/help/Using_One_Line_Cite_View.htm