



RefWorks II: Creating Your Personal Database

Add references to your RefWorks database through various methods:

- downloading via **find it STANFORD**
- importing directly from an online database
- importing from a saved text file
- manually entering information
- searching remote databases from within RefWorks
- importing data from RSS feeds
- grabbing information from webpages with RefGrab-It

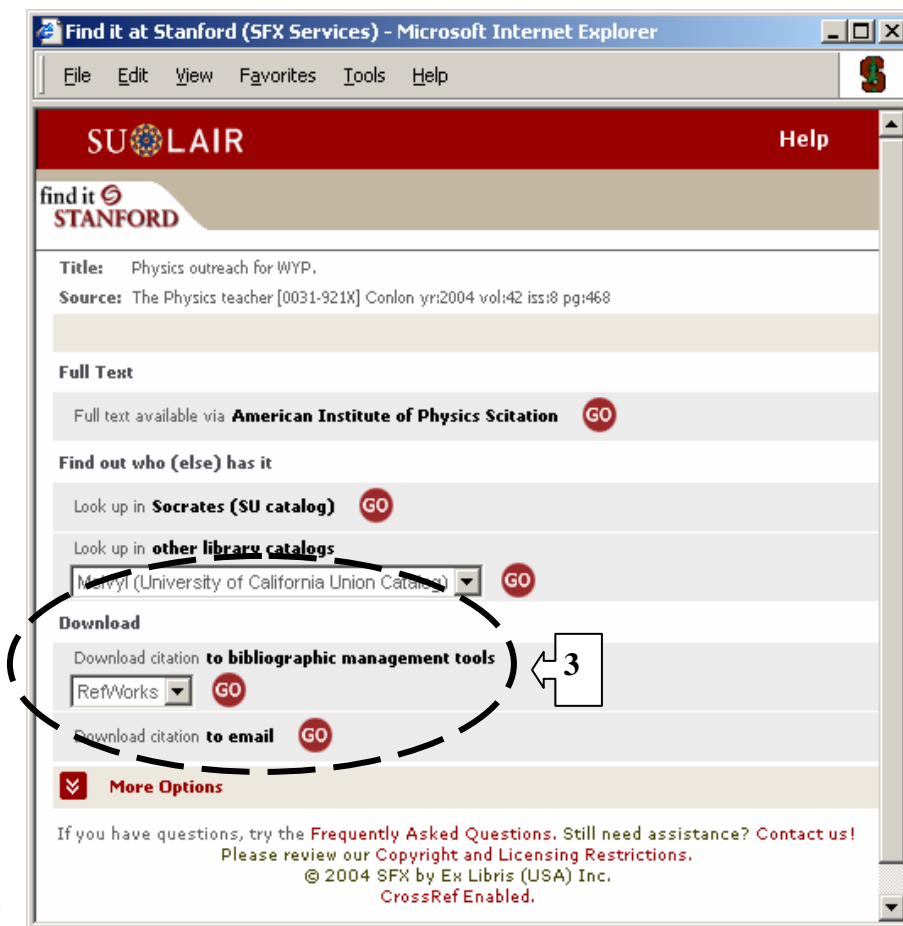
1. Creating your Database: **find it STANFORD**

The **find it STANFORD** button found in many Stanford-licensed databases includes the **Download** option to move a selected citation into RefWorks.

1. Obtain a search result in the online database
2. Click on the **find it STANFORD** button
3. Under the

Download option, select **RefWorks** from the pulldown menu, and click **Go**.

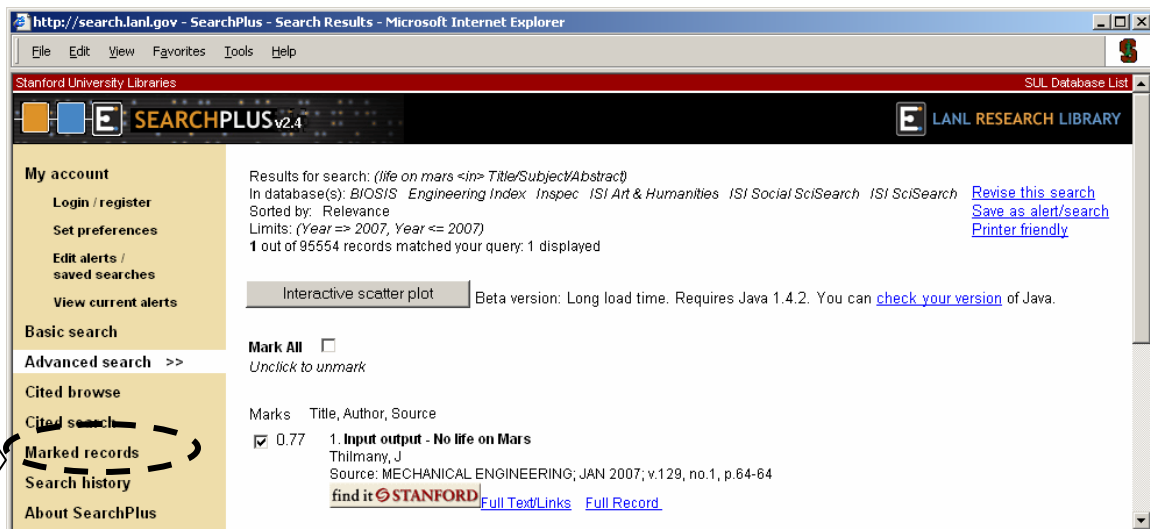
4. If not already logged in, RefWorks will launch and prompt you to log in.
5. Reference will be automatically imported into the **Last Imported** folder
6. In RefWorks, click on **View Last Imported Folder** to confirm the reference loaded correctly



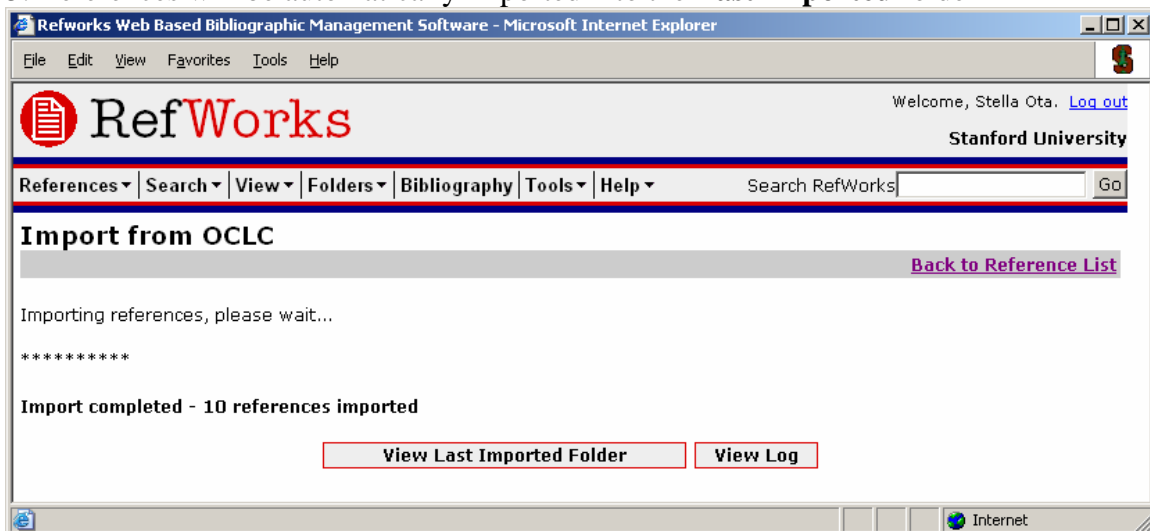
2. Creating your Database: Direct Import

A “direct import” feature for RefWorks is available in several Stanford-licensed online databases. This feature allows a single record or a selection of several records to be imported into RefWorks with a single button click. Details on importing vary slightly for each database but the general directions are below.

1. Obtain a search result in the online database
2. Mark records to be imported into RefWorks
3. Select **Marked Records**, **View/Print/Email**, **Export**, **RefWorks**, or similarly labeled option to begin copying your selected reference into RefWorks. If you need help, select the **Help** link in the online database.



4. If not already logged in, RefWorks will launch and prompt you to log in.
5. References will be automatically imported into the **Last Imported** folder



6. Click on **View Last Imported Folder** to confirm the references loaded correctly

3. Creating your Database: Importing a Text File

Most online databases allow references to be saved as a tagged text file. RefWorks can import the text file via “filters” to translate each database’s field tag into the corresponding RefWorks field, e.g. “AU” translates to “author”. Each database requires a separate filter. General directions for importing via filters are below.

1. Obtain a search result in the online database
2. Mark records to be imported into RefWorks
3. Download or save the records as a text (*.txt) file in “tagged” or other appropriate format. See the database’s **Help** for the recommended format to use for RefWorks.
4. Log in to RefWorks
5. From any window, under the **References** menu, choose **Import**

5 →

6 →

9 →

10 →

6. For **Import Filter/Data Source**, select the database company
7. For **Database**, select the name of the database
8. For **Import References into**, if you do not want references added to the default **Last Imported** folder, select a folder
9. For **Import Data from the following Text File**, click **Browse** to select your file
10. Or, copy and paste your text file content into the **Import Data from the following Text** box
11. Click **Import** at the bottom of the window
12. Click on **View Last Imported Folder** to confirm references loaded correctly.

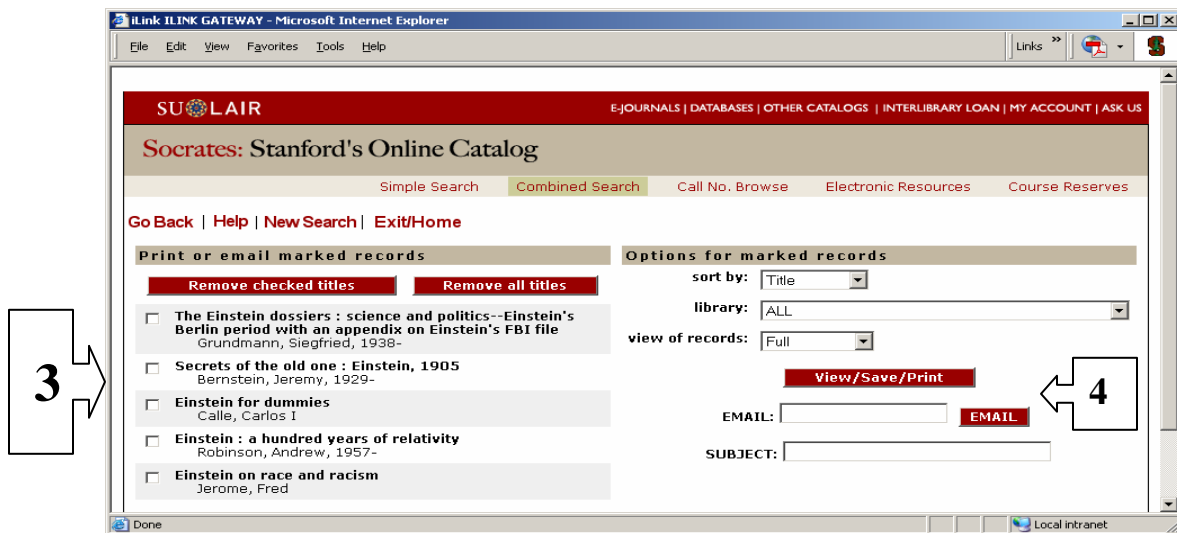
3.1 Creating your Database: Importing a Text File from Socrates

Records from Socrates can be imported by using a filter. However, three caveats:

- Socrates can only format 50 records at a time
- Library/Location (e.g. GREEN/Bender Room) information will not import
- Call number imported may not be the correct call number

First, format records for output from Socrates:

1. In Socrates, mark the desired records for output by clicking on the **Mark** button for the record.
2. After marking records, click on **Email/Print/Save** above the search results.



3. Confirm that desired items are included in the list of marked records.
4. Choose **View/Save/Print** or **Email** to obtain formatted records.

Then, import records into RefWorks

5. Login to your RefWorks account
6. Under the **References** menu, choose **Import**
7. For **Import Filter/Data Source**, choose "SIRSI Library Software"
8. For the **Database** pulldown, choose "Stanford University's Online Catalog (Socrates)"
9. a. Click **Browse** and select the saved text file
or
b. Paste formatted records from the View/Save/Print or Emailed Socrates display into the **Import Data from the following Text** box
or
c. Copy and paste a single record into the **Import Data from the following Text** box
[Note: any call numbers and URLs in the record will fail to transfer with this method]
10. Click on **Import**
11. Confirm that references loaded correctly

4. Creating your Database: Entering References Manually

1. Log in to your RefWorks account
2. From any window, under the **References** menu, choose **Add New Reference**
3. *Optional* If you know what output style you might use, select it from the **View required fields for** drop-down menu.
4. For **In Folder(s)**, select a desired folder to place the reference. A “?” will appear next to the selected folder until the reference is saved.
5. For **Ref Type**, select the type of reference. The fields will then change to only those appropriate to that reference type. A green “✓” will appear next to required/recommended fields if an output style was selected under **View required fields for** at the top

The screenshot shows the RefWorks web interface in Microsoft Internet Explorer. The browser title is "Refworks Web Based Bibliographic Management Software - Microsoft Internet Explorer". The page header includes the RefWorks logo, the user name "Welcome, Stella Ota.", and a "Log out" link. The navigation menu includes "References", "Search", "View", "Folders", "Bibliography", "Tools", and "Help". A search bar is present with the text "Search RefWorks" and a "Go" button. The main content area is titled "New Reference" and includes a note: "✓ indicates fields used by your selected output style." Below this, there are buttons for "Save Reference" and "Save & Add New", and a link for "Back to Reference List". The form fields are as follows:

- View fields used by:** A dropdown menu set to "APA - American Psychological Assi".
- In Folder(s):** A dropdown menu set to "Specify Folders (if any)".
- Ref Type:** A dropdown menu set to "Journal".
- Source Type:** A dropdown menu set to "Print".
- Authors:** A text input field with a green checkmark and a note: "Separate each author with \";\"; See detail".
- Title:** A text input field with a green checkmark and formatting buttons: B, I, U, x², x₂.
- Periodical, Full:** A text input field with a green checkmark.
- Pub Year:** A text input field with a green checkmark.
- Volume:** A text input field with a green checkmark.
- Issue:** A text input field with a green checkmark.
- Start Page:** A text input field with a green checkmark.
- Other Pages:** A text input field with a green checkmark.
- Original/Translated Title:** A text input field with a green checkmark and formatting buttons: B, I, U, x², x₂.
- Database:** A text input field with a green checkmark.
- Retrieved Date:** A text input field with a green checkmark.
- Periodical, Abbrev:** A text input field.
- Pub Date Free Form:** A text input field.
- Descriptors:** A text input field with a note: "Separate each descriptor with \";\"; e.g. Diet; Health Behavior".
- Abstract:** A text input field with a green checkmark and formatting buttons: B, I, U, x², x₂.

Numbered callouts are present:

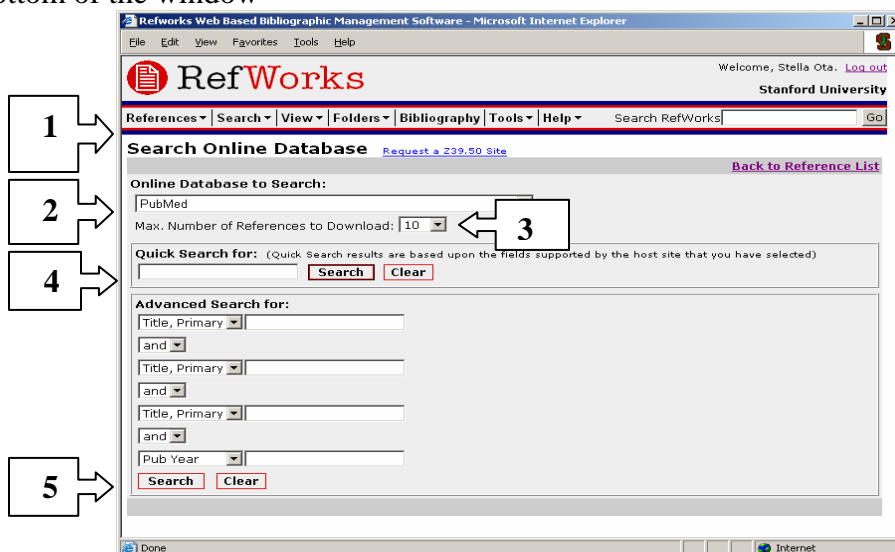
- Callout 2 & 8 points to the "References" menu.
- Callout 3 points to the "View fields used by:" dropdown.
- Callout 4 & 5 points to the "In Folder(s)" and "Ref Type" dropdowns.
- Callout 7 points to the "Save Reference" button.

6. Enter information for the reference
7. Click **Save Reference** when done
8. To view the reference, choose **View** from the top **Folders** menu and select the folder

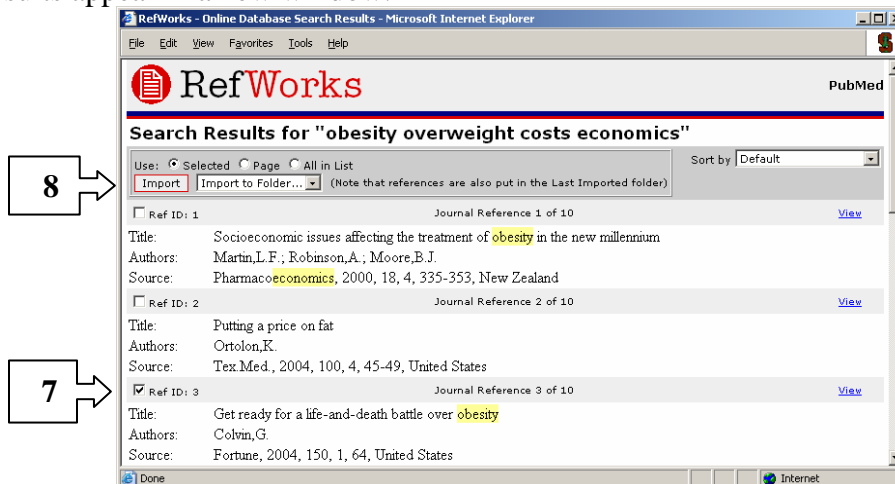
5. Creating your Database: Searching Remote Databases from within RefWorks

Most public databases, such as library online catalogs, implement a Z39.50 standard protocol which allows you to use the RefWorks interface to search the remote database and save references directly into RefWorks. *Note: Searches performed through RefWorks may lack the precision and functionality available through the database's own interface*

1. From RefWorks, under the **Search** menu, choose **Online Catalog or Database**
2. Select the remote database to search from the **Online Database to Search** list
3. Adjust the **Max. Number of References to Download**
4. For a **Quick Search**, enter terms and then hit the **Search** button to the right
5. For a Boolean **Advanced Search**, enter search terms and hit the **Search** button at the bottom of the window



6. Results appear in a new window.



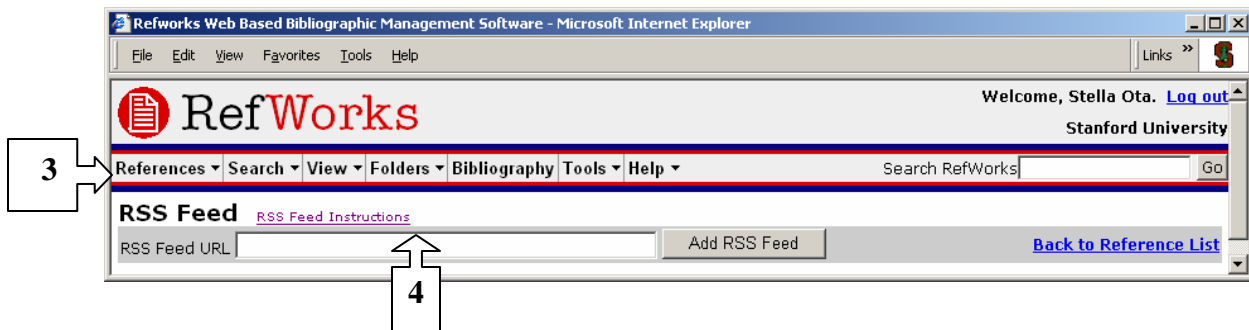
7. Select references to import (click to place checkmark in box)
8. Select folder (optional) and click **Import**
9. To confirm the reference imported correctly, choose **View** from the top **Folders** menu and select the folder

6. Creating your Database: Importing Data from RSS Feeds

RefWorks has an integrated RSS Feed Reader. Moving headlines, short descriptions, and other information in the RSS Feed into RefWorks is a simple one-button click. First the feed must be added to the RefWorks RSS Feed Reader. Then the RSS news item is easily imported from the Feed Reader into your database of citations.

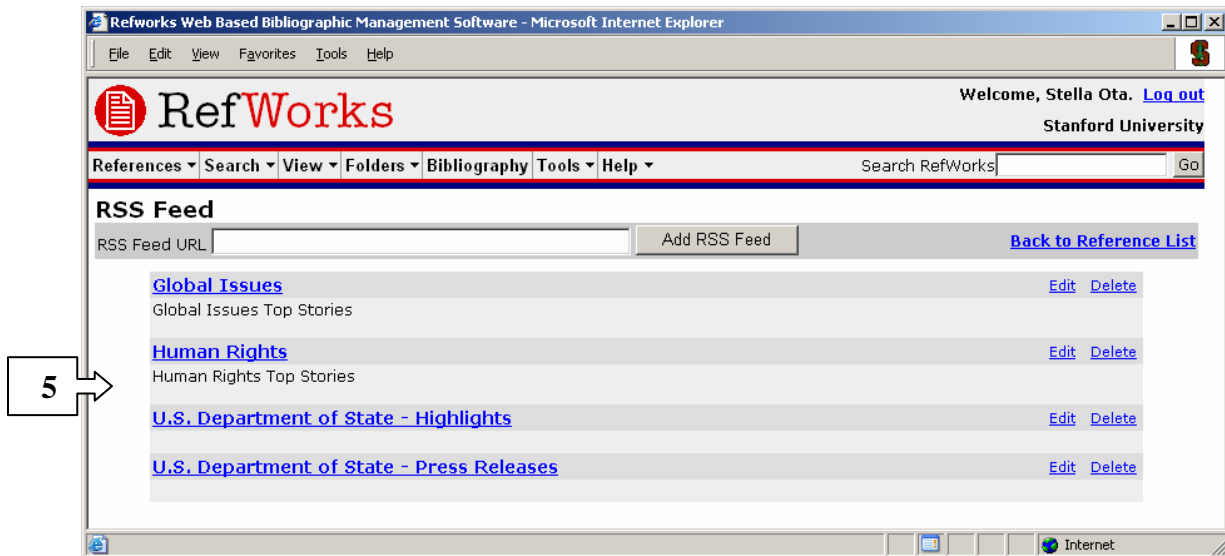
First, to add an RSS Feed to RefWorks:

1. Locate the RSS feed you wish to include.
2. Copy the RSS feed's URL
3. From RefWorks, under the **Search** menu, choose RSS Feed



4. Paste the shortcut into the RSS Feed URL box and click on **Add RSS Feed**

5. Once added, the RSS Feeds will be listed alphabetically by the feed title, as provided by the feed itself. The list will display below the **Add RSS Feed** button. Also included is the feed's description, if provided by the feed itself.

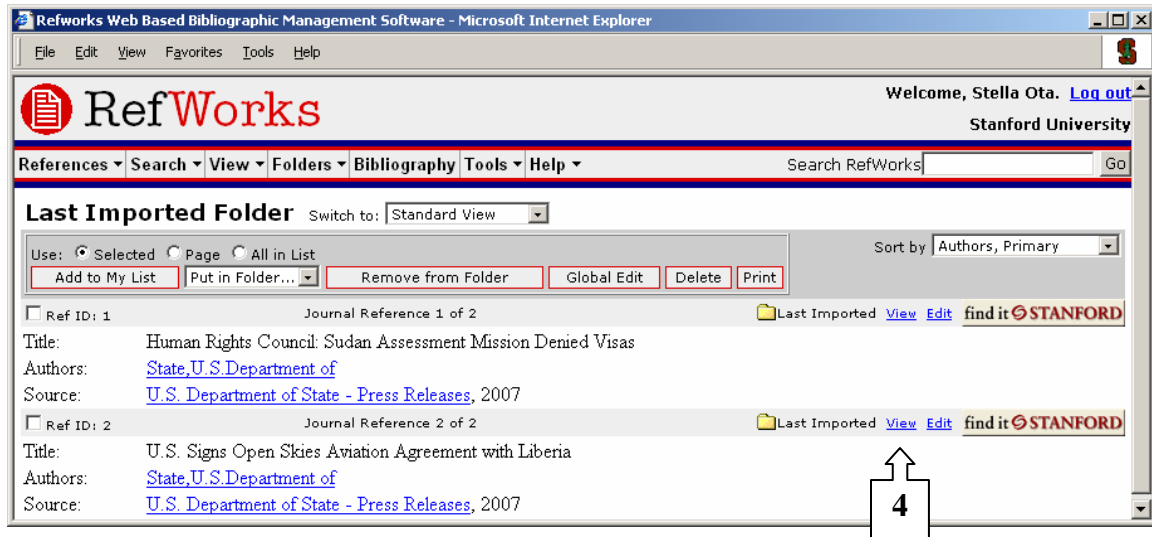


Then, to add a news item from an RSS feed into your database:

1. From the RefWorks RSS Feed page, click on the name of the feed.
2. A new RefWorks window opens, containing RSS feed “articles”.
3. Checkmark the individual references to move into your citation database. Or move a selected amount of the references via the radial buttons above the **Import** button.



4. To confirm the reference imported correctly, choose **View**



7. Creating your Database: RefGrab-It

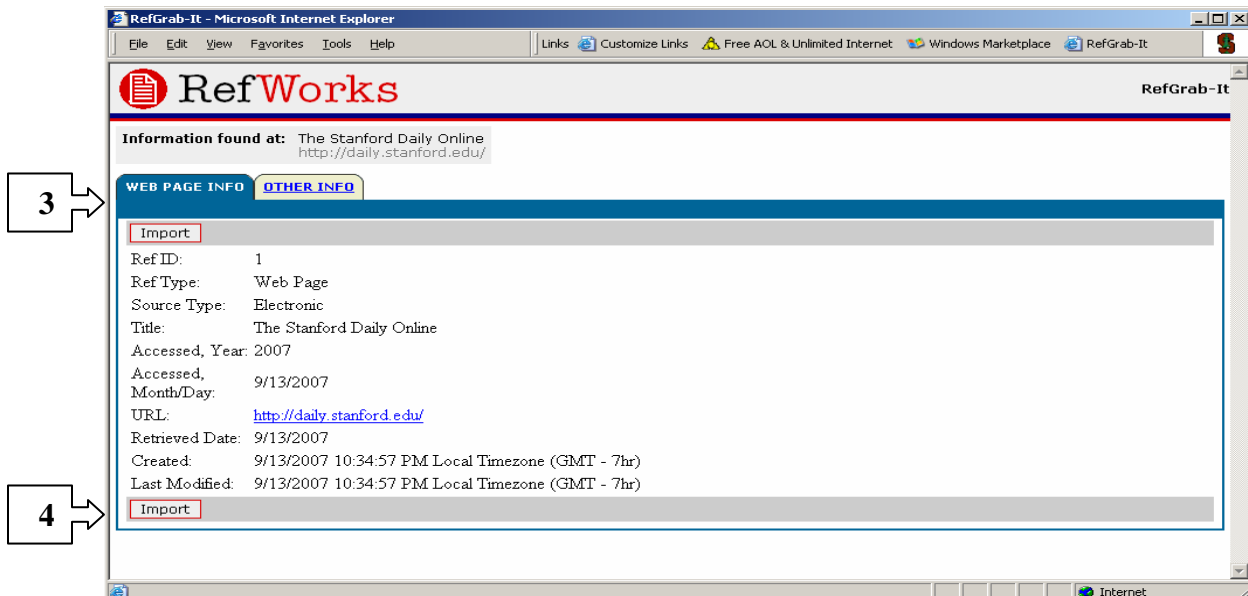
RefGrab-It works with your browser to capture bibliographic information (i.e. URL, page title, date accessed) about a specific webpage.

To use RefGrab-It:

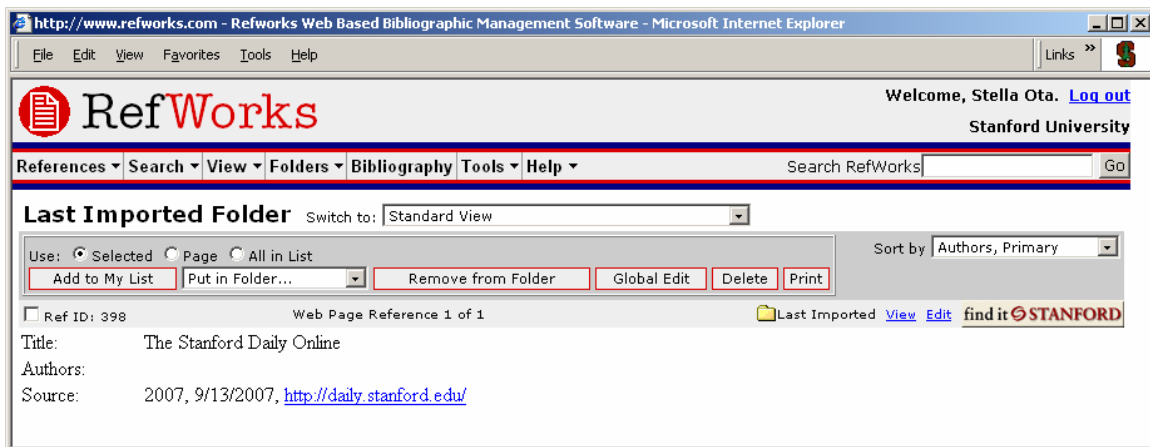
1. Download and install the program by selecting **RefGrab-It** from the **Tools** menu in your RefWorks account. For Windows-based machines, compatible browsers are Internet Explorer or Firefox. For Mac systems, Firefox and Netscape browsers may be used. Once installed, **RefGrab-It** is available from your browser's toolbar or bookmarks.
2. From a webpage of interest, to obtain the bibliographic data on that webpage, click on RefGrab-It in the browser toolbar or in the bookmark list.



3. A "temporary results page" opens in a new window. This page shows you:
 - o URL to the web page
 - o basic information gathered from the web page
 - o supplemental information that RefGrab-it has found related to the webpage's content

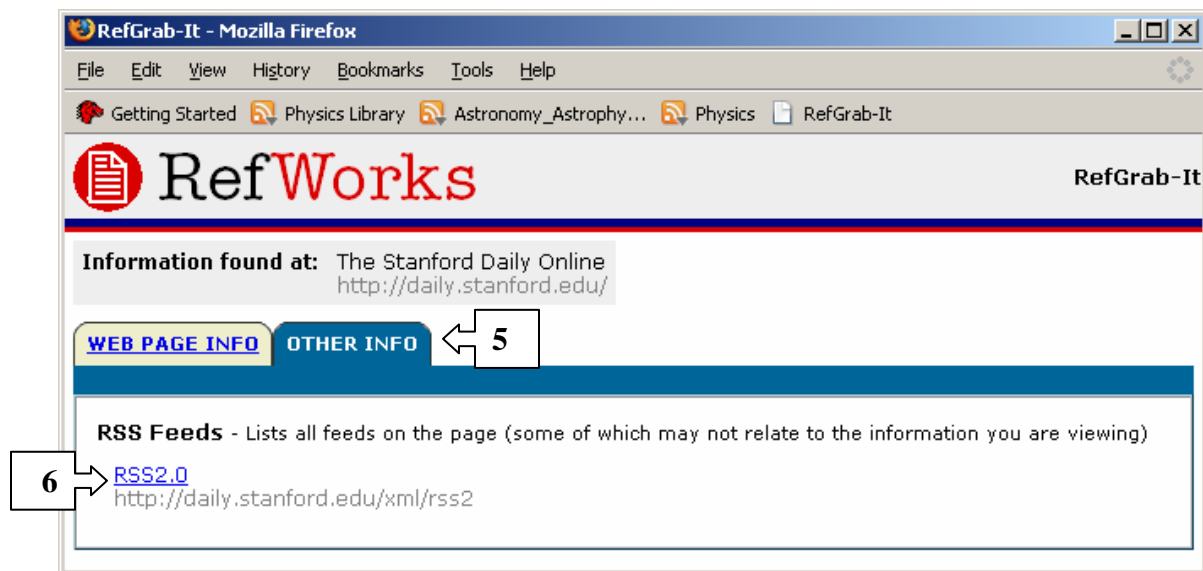


4. Click the import button to add this information to your RefWorks account. If you are not logged in to your account, you will be prompted to log-in. Otherwise, your records will appear in the Last Imported folder.



5. There may be an **Other Info** tab on your temporary results page. This tab display links to additional information such as:

- Books (ISBNs included on the web page you selected)
- Articles (Additional information found from PMIDs on the web page)
- Digital Objects (Includes information found based upon DOIs on the web page)
- RSS Feeds (Lists all feeds on this page--some of which may not relate to the information you are viewing).



6. Select any of the additional information you wish to view by clicking on the appropriate link. You will have the option to import any of the other information RefGrab-It locates. Note: RSS Feeds you wish to keep will need to be copied and added from within your RefWorks account.

SKO 2007.09.13