Getting started with New RefWorks

Contents

Create a RefWorks Account

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• Find RefWorks in the Eresources A to Z list.

(https://my.cumbria.ac.uk/Student-Life/Learning/Resources/Eresources/RefWorks/)

• Click on **Access the eresource**

If you are **already logged in** to the University (e.g. have logged into the student hub or OneSearch), you are directed to the **Start using RefWorks** page - see Step1, below.

If you are not logged in to the University network, you will be directed to the usual University login page, where you log on as normal with your University email and password.

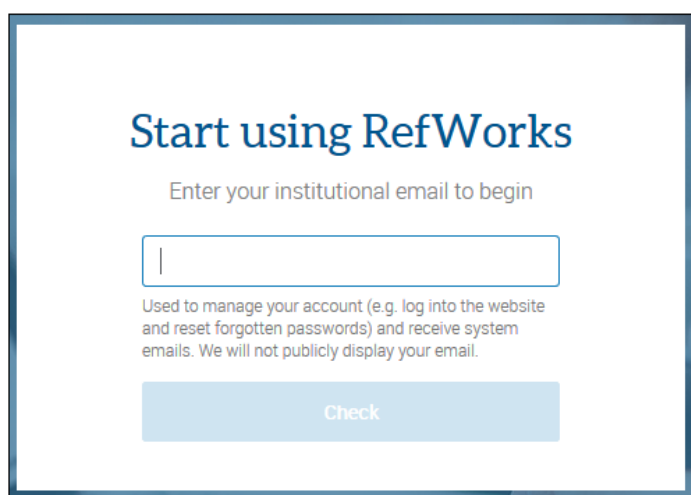If you are directed to the Reworks login page. **Use login from my institution**.
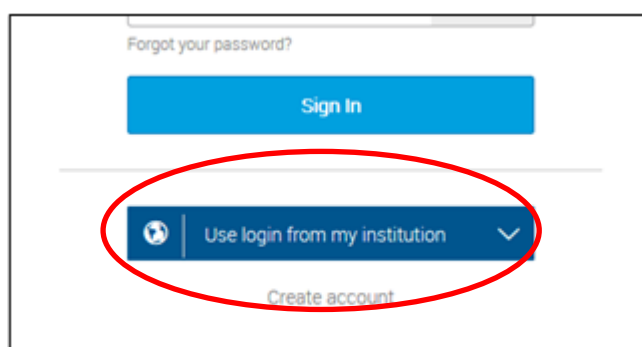
Select **Login from my institution**.

Find and select Cumbria on the list.

You will then be taken to the Start using Refworks screen below.

1. Set up your account in the **Start using Refworks** box.

Sign in with your University email e.g S1234567@uni.cumbria.ac.uk.

And **"Check" Or "Please create my account"**

2. Accept the RefWorks cookies.

3. Enter your details and follow the on-screen instructions to complete your registration. You are logged in to your new account and can start using RefWorks.

From now on when you access Refworks and you are already logged on to the University network, your account will open automatically. If you haven't yet logged on then you will get the usual University logon box. If you end up on the Refworks login page use the Institutional logon, as above.

Managing References

The next step is to start collecting your references.

5 steps to efficient reference collecting.

1. **Import the references**
2. **View them in citation view**
3. **Edit them to correct or add missing details**
4. **Add a link or upload any pdfs**
5. **Move them into your folders**

1. Direct import

There are several ways to import references, this guide will start with a direct import from OneSearch. Other ways to import from different resources are given later on.

- Run your search in OneSearch.

- Select the **"** cite option to open up the options menu and select RefWorks.
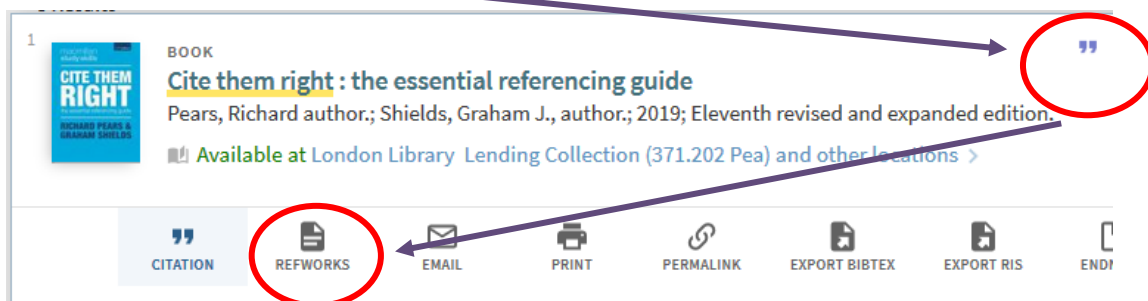
- You will be asked which version you want to use.

- Tick **Don't ask me this again** to stop seeing this message every time you import.
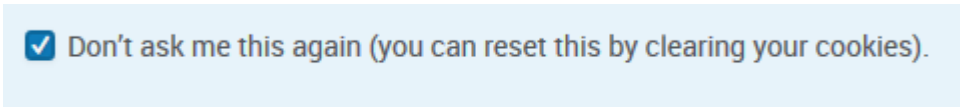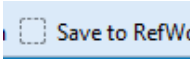
When you import Refworks opens up another Tab, so you do end up with multiple tabs. Importing generally works best when you have already opened up your Refworks account.

Refworks always imports your references into a "**Last imported**" folder
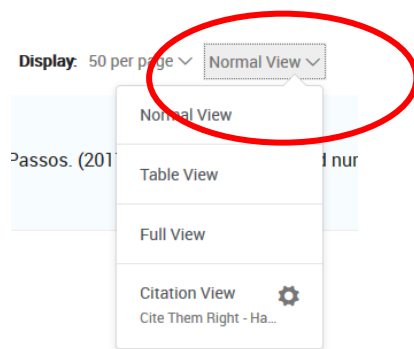
Click [OK] **to see the references**

OR "Save to RefWorks"

- Select Tools from [⋮] on the top menu.

- Then [Install Save to RefWorks]

- Drag it to your Favourites bar. [⬚ Save to RefWorks]

Then when you find something on the Internet that you want to add click on "**Save to refworks**". This works in OneSearch, for individual pdfs, lists of articles or web pages. RefWorks creates the reference for you including a link back to the resource. You just need to select the right one and [Save to RefWorks (1)]
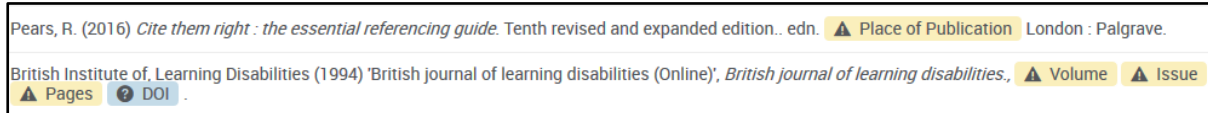
2. View in Citation view

- Select **Citation view** (click on **Normal view** at the top right)

Display: 50 per page ⌄ | Normal View ⌄

Normal View

Passos. (201... ...d nur

Table View

Full View

Citation View ⚙
Cite Them Right - Ha...

Click on the Cog to search for your preferred referencing style: **Cite Them Right – Harvard** is the main University style but some subjects will use other styles**.**
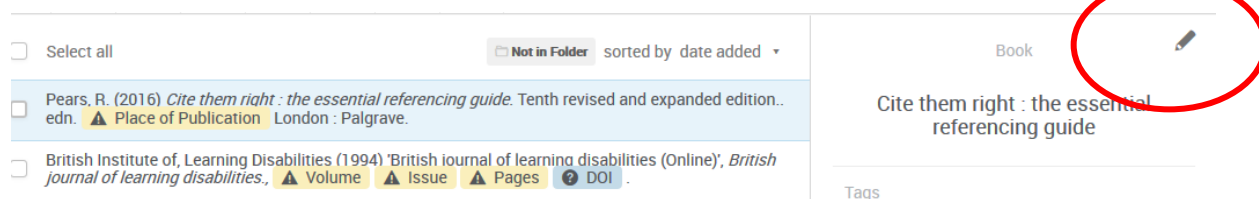
You will only need to do this the once – it will then save it.

This will display your references in *Cite them right* format and highlight any missing sections.

Pears, R. (2016) *Cite them right : the essential referencing guide.* Tenth revised and expanded edition.. edn. ⚠ Place of Publication London : Palgrave.

British Institute of, Learning Disabilities (1994) 'British journal of learning disabilities (Online)', *British journal of learning disabilities.,* ⚠ Volume ⚠ Issue ⚠ Pages ❓ DOI .

Yellow for parts that should be there and Blue for optional information such as edition or Doi. You will need to check that the information hasn't been added in a different field e.g. the place of publication is included in the publisher information, as in the first example above, so there is no need to add it again. This is where you need to know your referencing style.

3. Edit the record

- Click on the record you would like to edit to see the full details menu on the right side of the screen. Click on the **edit 'pencil'** icon in the upper right pane.

- Make any changes. For example, the correct format for the edition of this book is 10th edn. The edn is included in the reference template so you just need to replace "Tenth revised and expanded edition" with 10th for it to display correctly.

- **Save** your changes.

> RefWorks just formats the information that it has. The way that information is pulled across and presented depends on the original source and varies.
> So it's important to have a good grasp of *Cite them right* format so that you can see where changes need to be made.
>
> It is easier to make these changes as you go along and still have the original source to hand to supply any missing information that hasn't carried over. If you use the RCM to manage the references in your essay it will generate the reference based on this data and can't be corrected in your final assignment

Some things to watch out for

- **OneSearch** doesn't always bring across all of the authors, you may have to add them.
- The Author field should be Surname, First name. If these appear in the wrong order change them around.
- Sometimes it imports an email address as well as the name – delete it.
- If you have a source with multiple authors, these need to be separated with semi-colons.
- Edition information needs to be numeric e.g. 10th NOT Tenth. RefWorks adds the **edn.** suffix automatically for you.
- For the place of publication, check that it is a city (usually London for Great Britain) and not just GB.
- Check the Start and finish page numbers have not also brought across the number of pages as well. If it does – delete them.
- In the most recent (11th edn.) of *Cite them Right* all ebooks and ejournal articles are referenced in the same manner as print books and print journal articles. Therefore journal articles do not need a DOI, Link, Database, or Retrieved Date and should be print. The Citation view will highlight the DOI as missing – just ignore it.
- You can see if a record is going to be referenced as online by checking this field.
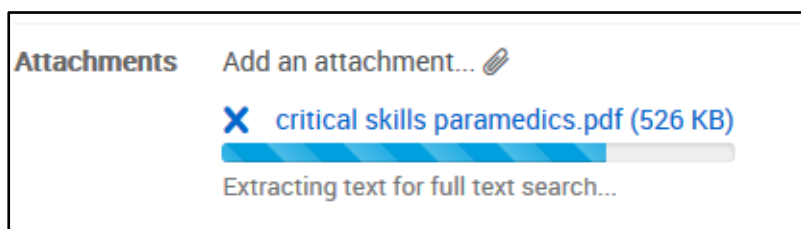
4. Add a link or pdf

- References imported from OneSearch bring a link back to see which database holds it.
- References imported directly from the databases such as CINAHL or ScienceDirect bring a link to the article direct.
- ***Save to RefWorks*** sometimes brings the pdf as well.

To add a link
- Paste the "Permalink" (found on the article) into the URL field

To add a pdf
- Download the pdf and store on your desktop
- Click on add an attachment in the edit box
- Browse for the pdf and **add it**. This stores the pdf with the record. It takes a while but the "still working" line displays after it has actually loaded.

Attachments   Add an attachment... 📎

X   critical skills paramedics.pdf (526 KB)

Extracting text for full text search...

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Annotating pdfs

If you [Read] the saved pdf in RefWorks you are able to highlight and add comments.

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5. Move it to a folder

Create and use folders to keep your references organised by topic.

- Click My Folders, then click on Add a Folder. Name the folder. Click Save.
- Your folders are listed in in the left column. Click on the folder name to open.
- Drag and drop your references from *last imported* to the folder of choice.
- To make a sub-folder, rename, delete: click on the 3-dot More icon associated with the folder.
- References that are not in a folder will be found in **All Documents**.
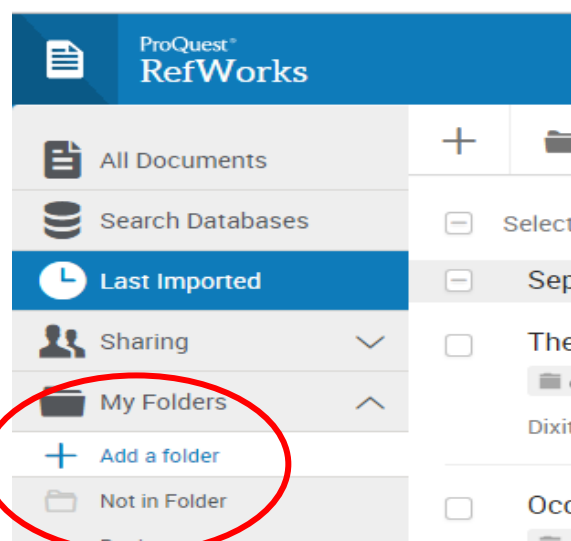
Importing from other sources

Ebsco databases such as CINAHL and Education Source

- Carry out your search.
- Select a few articles that might be useful by clicking on the **Folder** icons. View your Folder (top right) to see the list.

- In the "Folder" tick the items you want to export to RefWorks and select the **Export icon**

- Select the "**Direct Export to RefWorks**" option and **Save**.


Other databases will work in the same way as this, just look for a **Save** or **Export** option and select RefWorks. Or use "**Save to RefWorks**" page 4.

Importing from OneList (The online reading list system)

1. First you need to set up the link between the two systems

    English
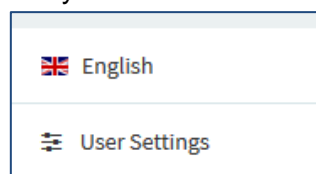
    User Settings

    - Log into OneList to access User Settings.

    - Select RefWorks as your Citation Manager

    Citation Managers

    RefWorks
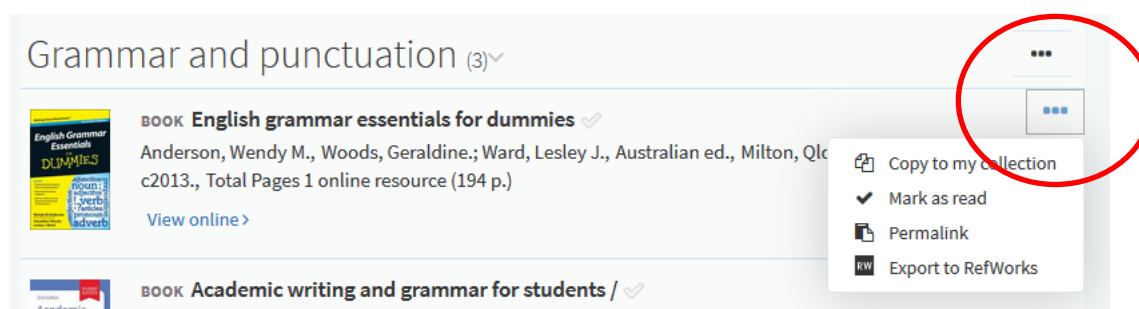
    ○ Legacy RefWorks
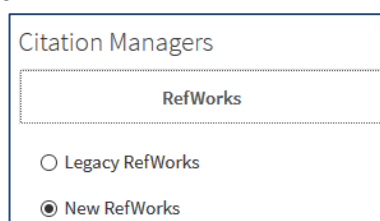
    ⦿ New RefWorks

    and select "New RefWorks".
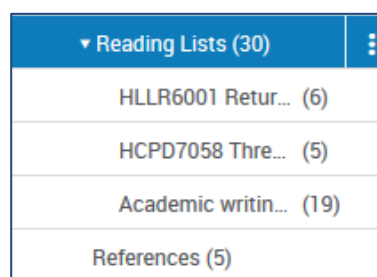
    - Enter your RefWorks Log on details.
      NB. This must be your RefWorks direct login, not your University network account.

    - You can also give your folder a name e.g. Reading lists.

2. Now you can import whole lists, sections or individual citations.

    - For each level just look for the 3 dots on the righthand side.

    Grammar and punctuation (3)⌄   •••

    BOOK **English grammar essentials for dummies** ✓
    Anderson, Wendy M., Woods, Geraldine.; Ward, Lesley J., Australian ed., Milton, Qld
    c2013., Total Pages 1 online resource (194 p.)
    View online ›

    ⧉ Copy to my collection
    ✓ Mark as read
    ⧉ Permalink
    RW Export to RefWorks

    BOOK **Academic writing and grammar for students /** ✓

    - Select *Export to RefWorks*

    ▾ Reading Lists (30)   ⋮
    HLLR6001 Retur… (6)
    HCPD7058 Thre… (5)
    Academic writin… (19)
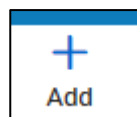   References (5)

    - RefWorks will create a list with the correct
      module code for each list or module in the
      Reading List folder.
    - Individual citations will go in the *References* folder

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NB. there is sometimes a time lag in the folders appearing, you may need to refresh.
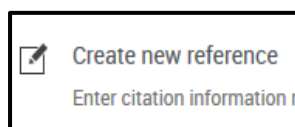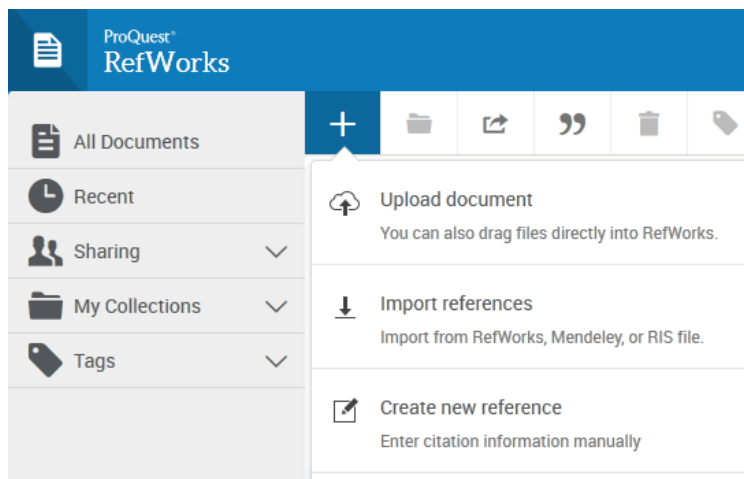Also these are the same records as OneSearch and maybe incomplete, so edit them.

Other ways to add content

- Choose the add reference icon at the top of the page

Three options: "**Create new reference", "Upload document**" and **"Import references**".

Manually enter the bibliographic details.

- Select the material type from the drop down menu.

NB. For Government reports etc. accessed on the internet use the "Report" option as this includes the URL and date accessed fields. For print materials use "monograph".
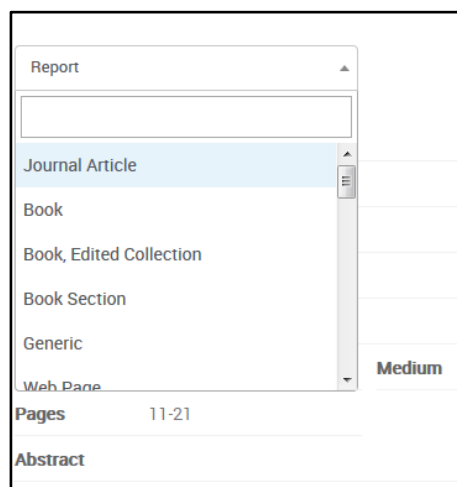
- Fill in the fields, as you type RefWorks will try and guess your reference and make suggestions.

When the suggestion is appropriate you can select the title and click 'save'.

If there are not matching suggestions, you can continue to fill out the fields manually and click 'save' and add your reference to a folder.
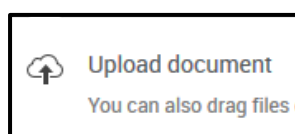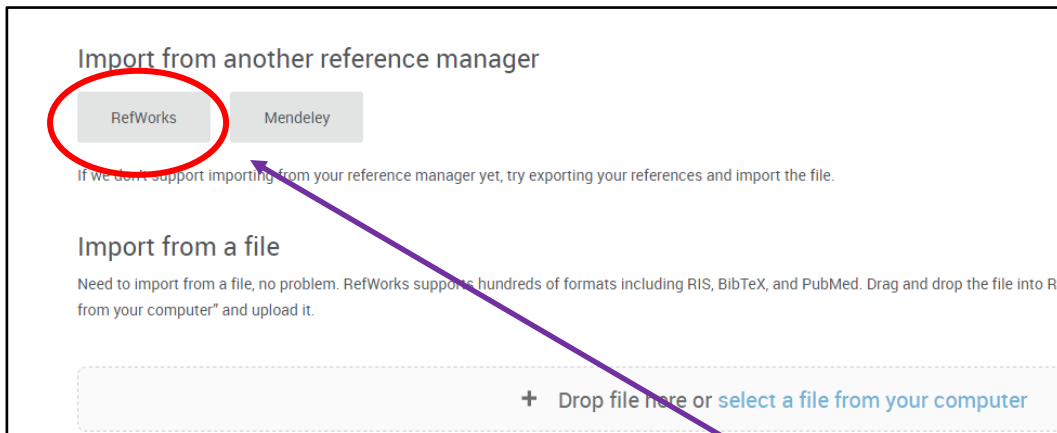
Browse for a saved document and upload.

Once selected it will create the reference and if the document is a pdf it will add it to the record.
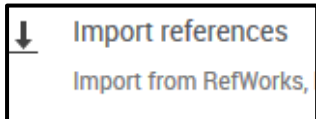
Import a set of references from a text file.
You will need to have converted it to RIS format first. You can download free software such this from the EPPI Centre.

Importing Legacy RefWorks references

- You can import your references from your Legacy RefWorks account by selecting **RefWorks** from the screen above.

- You will be asked to **Authorize** access to your legacy RefWorks account.
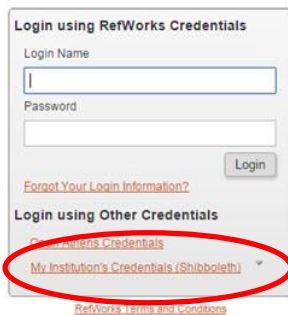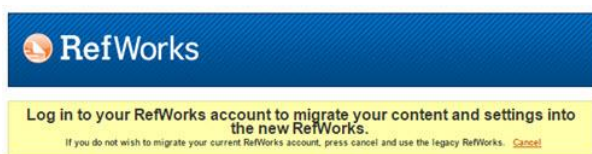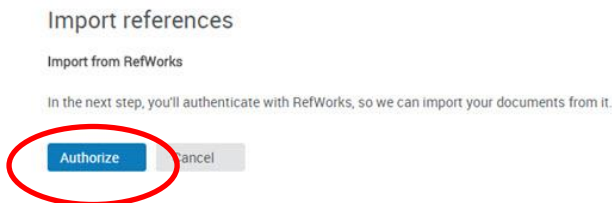
Enter your Legacy Refworks login.

You need to use the Institutional login option.

Your items will be imported into RefWorks. You will be notified if any items were NOT copied.
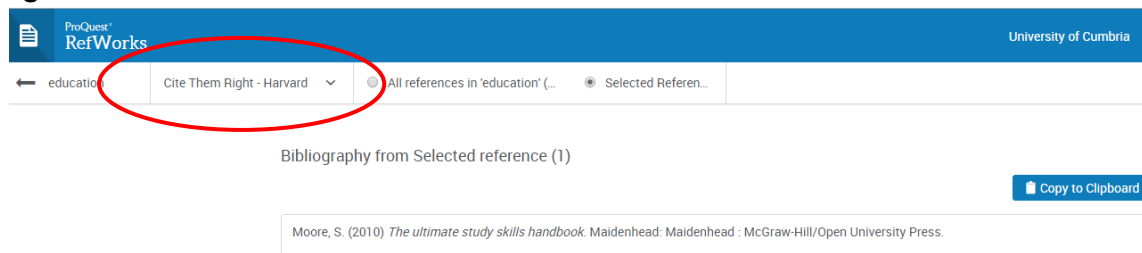
Create a Bibliography (Reference list) using RefWorks

- <u>Select the folder or references</u> you want to use in the bibliography.

- Click on **99** in the menu bar

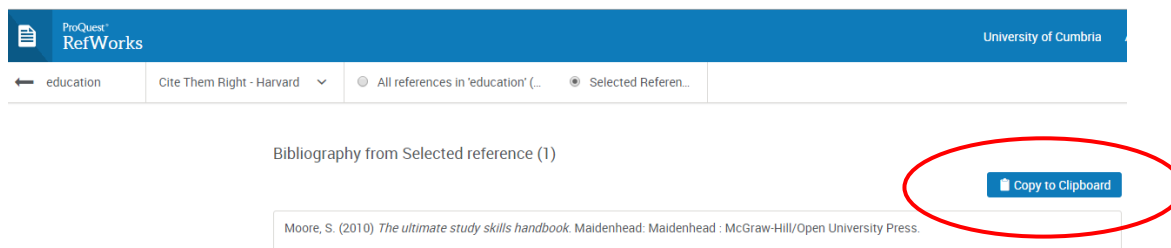- Then click on **Create Bibliography**.

- Select (or change) the style with the style menu. Most students will need *Cite them right*.

- Click on **Copy to Clipboard** and paste the bibliography into Word, Google Docs, or other software.
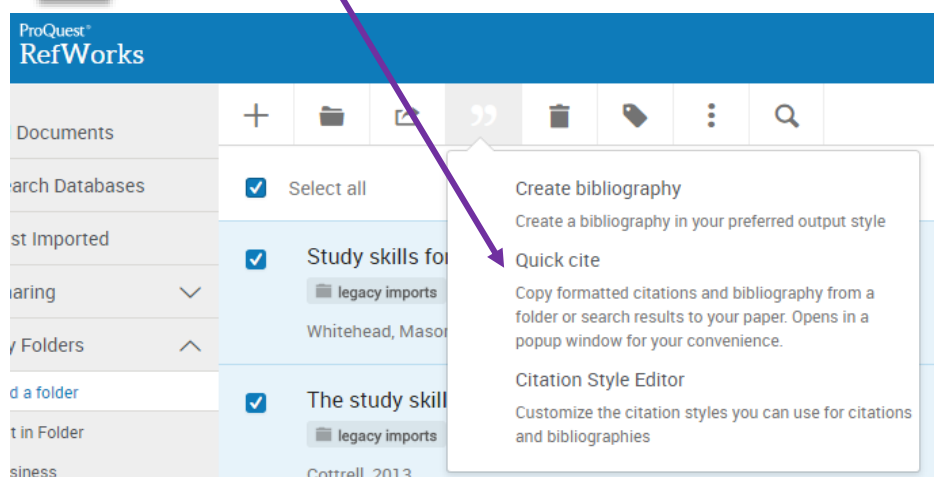
Working with citations in your documents
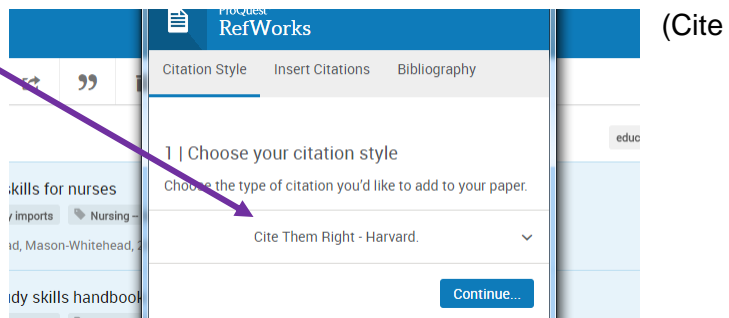
Create individual citations to insert in your assignments

- <u>Select the folder</u> that holds the references for your assignment.

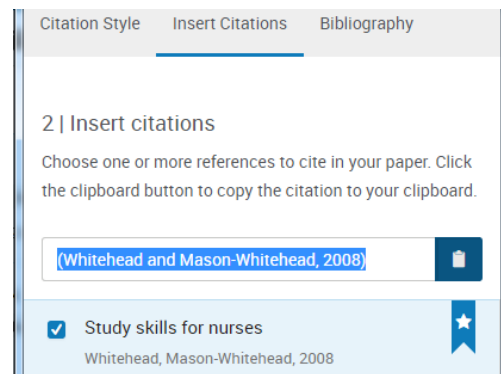- Click on **99** to select '**Quick cite**'

11

- Choose your citation style. (Cite them right)

- **Continue**

- You will get a list of your references which you can select from

- RefWorks generates the citation which you can copy by selecting the clipboard button and then paste into your document.

- At the end of your assignment you can

Continue to bibliography

This will create a reference list of everything you have cited, which you can paste onto your document

NB. Always check the references to make sure the entries have been formatted in the correct style, (no system is perfect!).

Citation tools

RefWorks provides a number of other citation tools you can use to do the job above for you – no copy and paste! Which one depends on whether you are using a PC or a Mac, Word or Google docs, which Windows and which version of Word. **The RCM is loaded on Word on all university Computers or university downloaded Office365 .**

To use the RCM you need to set up an alternative Password in Settings (see next page)

This is a general guide to which tool to use but see the RefWorks user guide for more detail.

Pre Word 2016 on PC or Mac	Write-n-cite	A download from RefWorks that has to be installed. Therefore not available on University PCs.
Word 2016 on a PC	Write-n-cite or RCM	
Word 2016 on a Mac	RCM	An Add-on found in the Microsoft store, which is currently disabled on University PCs.
Word 2019 or Office 365	RCM	An Add-on found in the Microsoft store, which is currently disabled on University PCs.
Google Docs	Google Doc	https://gsuite.google.com/marketplace/app/proquest_refworks/8958631058

Guide to Using the Reference Citation manager (RCM)

Guide to Using Write-n-Cite.

Other features

Click on your name to access the drop down menu and access Settings and Tools.
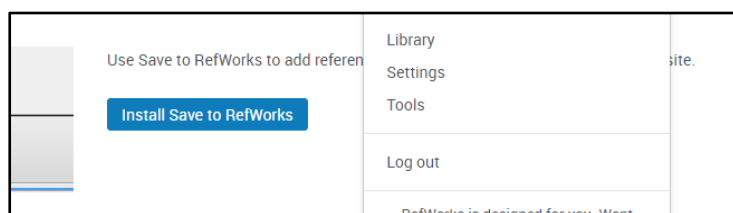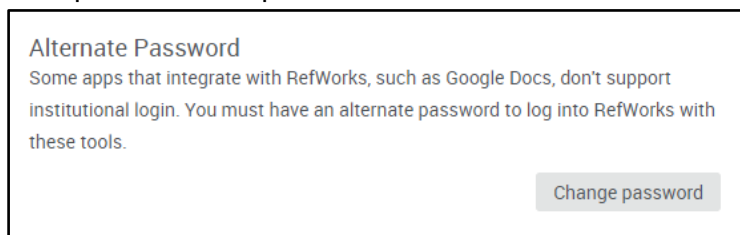

Tools

From here you can install:

- **'Save to RefWorks'** to add references and full-text to RefWorks from any website.
- **'Cite references in your word processor'** options. Here you can install Write-n-cite and the Google docs Add-on.
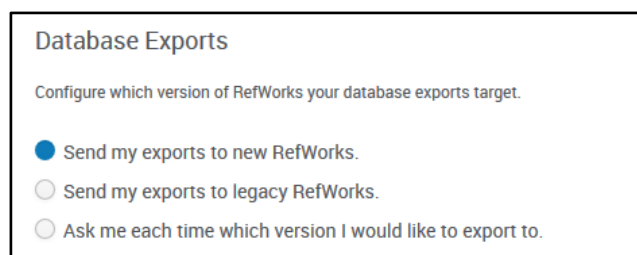
Settings

In here you can:

- Update your record
- Set up an alternate password to use the RCM.

- Turn off the Legacy OR New RefWorks option when importing references

- See your storage

Alumni

Change your account when you leave the University. This will give you access to your account for as long as the University subscribes to RefWorks.

- o Click on your name to access **Settings**
- o Under your *Profile* select *Role* and change to *Alumni*.
- o If you have Associated your account with your University Login (Credentials), *Remove Credentials*.
- o Change your email address to a personal one (you won't have access to your University one!)

For any questions about alumni accounts, please contact Libsys@cumbria.ac.uk.
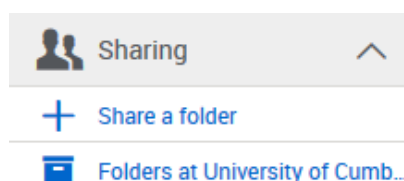
Projects

Projects allows you to create discrete, higher level collections that can contain folders. Maybe useful for reviews. Go into *Manage projects* to create one and access further information in the knowledge centre.

Tip. Make sure you are in the right Project when you Add references or work on a document.
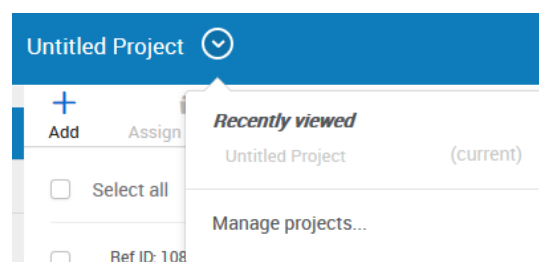
Share folders

Useful for joint research projects

- Click on Sharing _____ and Share a folder.
- Browse and select your folder
- Then either create a Public link to send – this is read only and can be viewed by people without a RefWorks account.
- or "invite" where you can give people with RefWorks accounts editing rights.
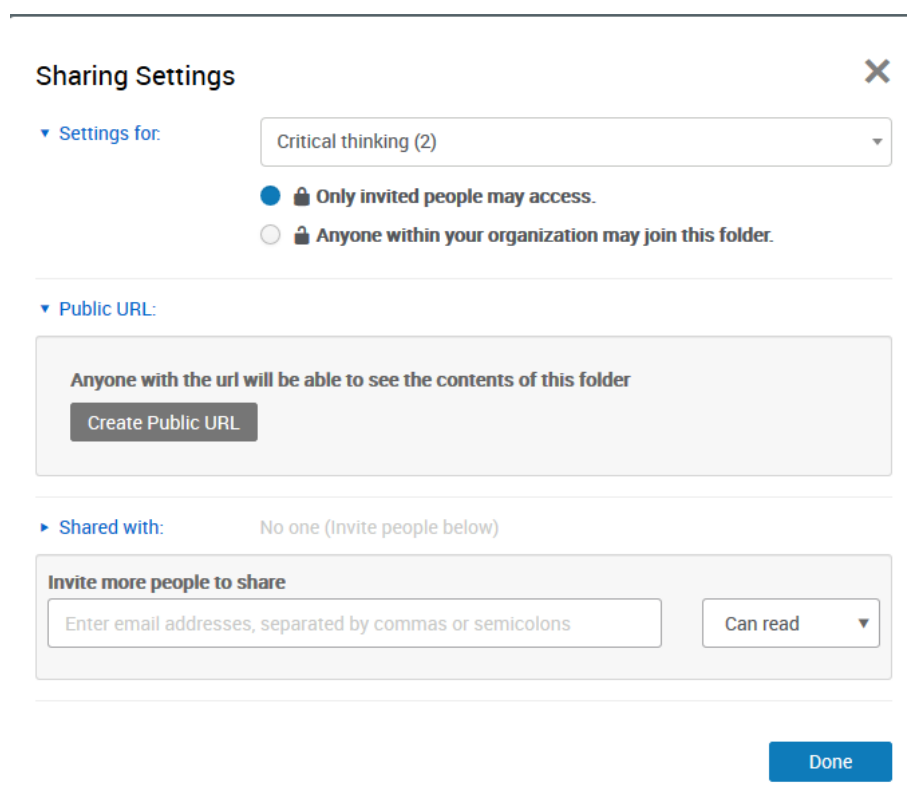
If someone has shared a folder with you it will appear in *My Folders* and you will need to accept the access.

For more information, additional features and details see the Knowledge centre
https://knowledge.exlibrisgroup.com/RefWorks/Product_Documentation/RefWorks_User_Guide