Refworks

—

Advanced Guide

ProQuest
RefWorks

RefWorks tips and tricks

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Always ensure that before you send references from the source that you already have RefWorks open in your browser to receive the references.

Exporting book records from the EHU library catalogue

You may have used books available in EHU library and wish to cite them.

If you select the item in the library catalogue and then use the **save** button > select RefWorks in the export selection and **save** then the item will be sent to your RefWorks account

Export

Endnote Web   Endnote Desktop   Refworks   RIS

If you wish to send multiple book records you can curate a list and export in 1 batch. On the book record use the dialogue box to create a list. Add subsequent items to this list -or create multiple lists if you wish.

Evaluating research: methodology for people who need to read research

By Dane, Francis C., 1952
Paperback. English. **Publi**

This title is intended to hel
and describes how to eval

Save

Add Evaluating research: methodology for people who need to read research to list

New list

Save

Export

Endnote Web   Endnote Desktop   Refworks   RIS

When you have curated your list, scroll up to the top of the page to

🔒 My Saved Lists (1)   Please note that unless you are logged into your library account these saved lists will not be retained in your library record

Then scroll down to the export section; select RefWorks from the drop-down menu and **save**

Export as   Refworks ▼   **Export**

British Library as a source

During your research you may have borrowed books on inter-library loan from the British Library or have used books that are not in EHU library. By using the British Library export function, you can use the information to create records in your RefWorks account. **If your items are not available in this source, then you would have to manually create a record yourself.**

If you visit https://www.bl.uk/ and select their main catalogue search. Then select the advanced search and use the dialogue boxes to enter the information about the text you require and **search**
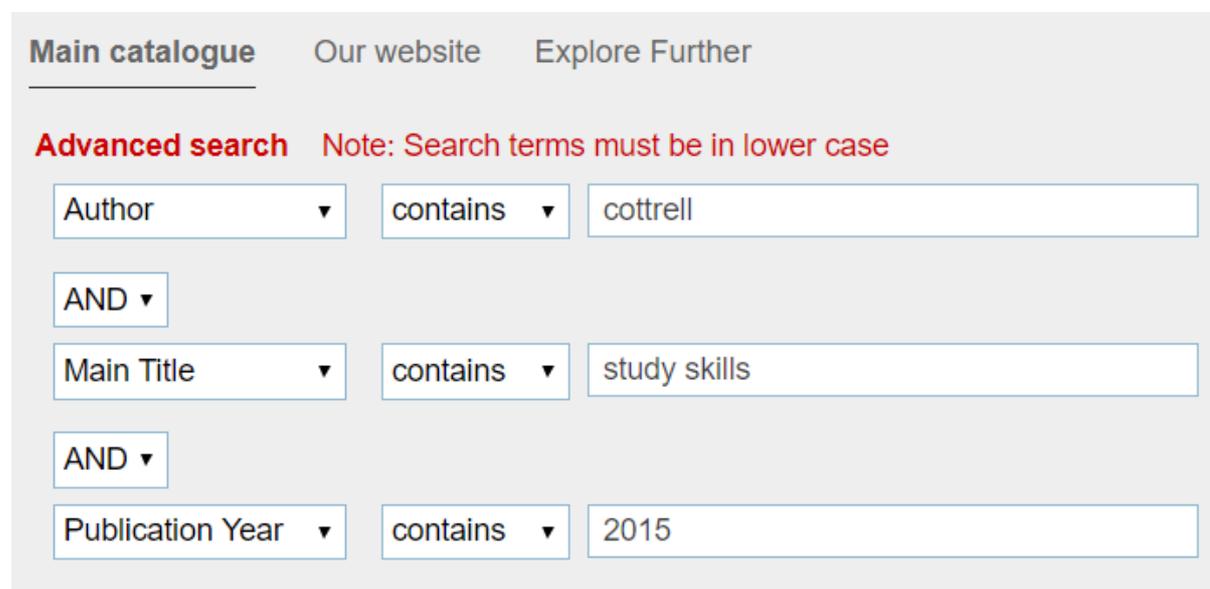
This will display any item records that match your search request. Look at the records to identify the specific text/edition that you require and then click on the details of this item.

On the righthand side the actions button expands and there is a link to send to RefWorks. Please not that you may need to edit this reference in RefWorks as not all the information transfers into the right fields. We advise that you do this at the same time that you export the record/s as you still have the original source record open to check the details.

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Adding notes

As well as annotating the full text document that you have attached to the RefWorks item record (if the document version is compatible), you can also add notes to the item record. This is useful for example for documenting the reasons why you collected the reference/what you might use it for in your work.

If you select a specific item record the metadata fields record will be visible on the righthand side of your screen. Select the edit record function- this will enable you to edit the record

Scroll down to the Notes free text box where you can enter any information you wish to record. Remember to save the record

Bulk editing

As well as adding notes directly onto the full text or in the item record notes you may want to annotate multiple items with the same message, for example that you imported them on a specific date for a specific search. Using bulk editing ensures that the same message is repeated on all the selected records and saves you time.

First select the batch of references/folder that you wish to annotate

From the toolbar select tools

 and then bulk edit

Bulk edit

+ Add   ⊗ Delete   ✎ Replace

● Add to a selected field ▾

○ Add to electronic source fields

Add data

In the add to selected field drop-down, select the field you wish to annotate. This would usually be the notes field as other fields may be used by RefWorks for metadata information required for the reference. You can then type the information that you require into the free text box. **Ensure that you retain the 'leave existing data alone' as you may already have added text to the notes field previously.**

Bulk edit

+ Add   ⊗ Delete   ✎ Replace

● Notes ▾

Applies to all selected reference types.

Field: Notes

If field already contains data

● Leave existing data alone
○ Overwrite existing data
○ Append to existing data

Then **add**. It will come up with a verification message

☑ **Add data**   ✕

Are you sure you want to add data to your selection? Up to 12 references will be affected. This cannot be undone.

No   Yes

Tags

When you bring item records into RefWorks, if the originating database has added keywords or tags to the item these will come across as part of the data and will be visible on the item record in normal view mode/looking at the individual item metadata record. If there are multiple tags use the + to expand

Ref ID: 949

Wu,Ejean; Yang,Shu Ching. (2016). Examining the impact of

🏷 Academic achie…   🏷 Computers in e…   🏷 English languag…   🏷 +9

These are useful as you can search the tags field (see advanced searching below) or you can create your own tags to annotate clusters of records. Please note that if you select text for tags, be aware that these words may already exist in records that you have brought into RefWorks, but you may not wish to tag for this specific purpose. So you might want to add tags to records or create personalised tags, if so on the toolbar select

🏷

Add Tags

Type in your text, select create tag for… and save.

Tags can always be deleted from item records by using the x in the specific tag

Advanced searching

This is useful if you are not sure of the exact details of the reference that you wish to locate in your RefWorks references.
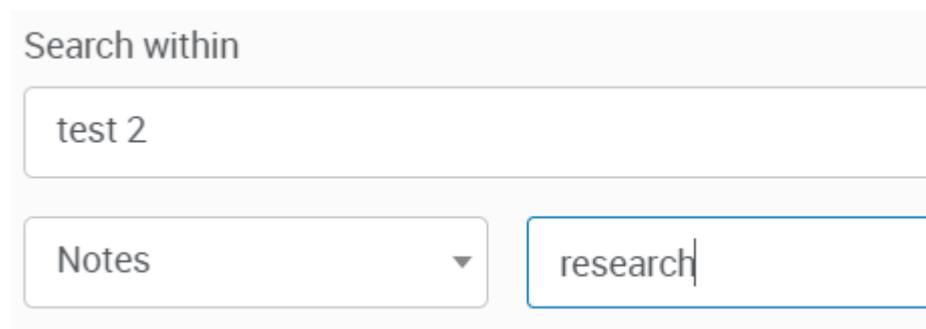
In the toolbar select search> this will reveal the advanced search link

In the drop-down box select the folder you wish to search. If you cannot remember which folder the items are located then select 'anywhere'
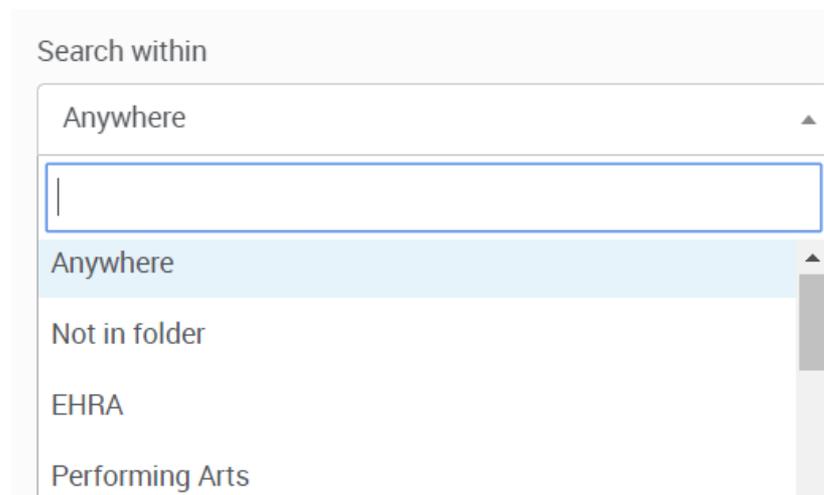
Then select which field you wish to search, for example the author, or the title, or the tags assigned to the record, or within your notes field


It will then display all the records that match your search criteria.

Checking accuracy of data

To check whether your references have the correct data there are 2 ways of doing this:

1. In RefWorks if you scroll to the bottom of the page and using the drop-down menu select 'citation view', the full reference of your item records will be displayed. Ensure that you have selected the correct referencing style i.e. Edge Hill Harvard
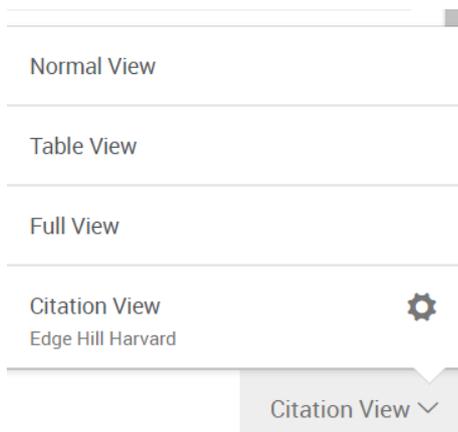
This will lay the reference out in the correct format for your specific style to enable you to verify all the elements required for that item are present and in the correct order. In the Citation view RefWorks helpfully flags up any data it expects to be present in this item type in yellow in order for you to check against your original import source. The information may not be present in the original record. If the data is in your original source we advise that you manually edit the RefWorks record

RefWorks also flags up additional data in blue. This will vary depending upon the reference style you utilise. The additional data will not be used if your reference style does not require it.

2. Create a bibliography of your newly imported items/items in a specific folder in your reference style so you can check all the reference elements are present.
   On the toolbar- select create bibliography> create bibliography.

Ensure you have selected the required reference style

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Bibliography from Selected references (6)

Copy to Clipboard

ALAVI, M., ARCHIBALD, M., MCMASTER, R., LOPEZ, V. and CLEARY, M., 2018. Aligning theory and methodology in mixed methods research: Before Design Theoretical Placement. *International Journal of Social Research Methodology.* 21 (5), pp. 527-540. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=131257710&site=ehost-live&scope=site.
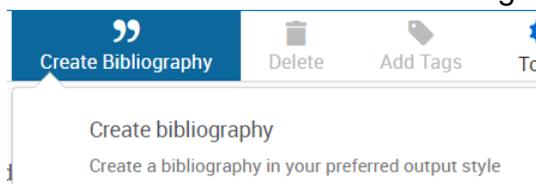
KIPANYULA, M. J. and SIFE, A. S., 2018. Global Trends in Application of Stereology as a Quantitative Tool in Biomedical Research. *BioMed Research International.* 2018, pp. 1-9. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=131742002&site=ehost-live&scope=site.

LETUÉ, F, MARTINEZ, M., SAMSON, A., VILAIN, A. and VILAIN, C., 2018. Statistical Methodology for the Analysis of Repeated Duration Data in Behavioral Studies. *Journal of Speech, Language & Hearing Research.* 61 (3), pp. 561-582. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=128509579&site=ehost-live&scope=site.

LIANG, L. and GUOYU, Z., 2018. Research Methods of American Scholars Studying the China Road. *International Critical Thought.* 8 (3), pp. 386-395. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=132112163&site=ehost-live&scope=site.

PAYNE, Y. A. and BRYANT, A., 2018. Street Participatory Action Research in Prison: A Methodology to Challenge Privilege and Power in Correctional Facilities. *Prison Journal.* 98 (4), pp. 449-469. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=130918799&site=ehost-live&scope=site.

RIVERA, D. and ARANGO-LASPRILLA, J., 2017. Methodology for the development of normative data for Spanish-speaking pediatric populations. *NeuroRehabilitation.* 41 (3), pp. 581-592. Available from: http://edgehill.idm.oclc.org/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=aph&AN=125971341&site=ehost-live&scope=site.

Duplicates

When you are importing records from multiple databases you may have duplicate records. You can remove duplicates but please ensure that you do not delete a record that you have cited already otherwise your word document reference list may be compromised. You can search within specific folders or all your references

On the toolbar select

Then

Find duplicates

Search your library for duplicate documents.
This feature is not available for shared folders.

There are 2 methods to search: **Exact Match** will only return items where the records are identical

Find duplicate references

✕

● All references in 'Performing Arts (332)'

○ All references in 'All Documents'

Exact Match ▼

In this method, RefWorks compares the titles, authors, and publication dates in a reference. The data must match exactly. RefWorks ignores the case of letters and numbers and the order of author names. We also match elements that appear empty (e.g. 2009 and Jan 2009 in date would still match)

Find Duplicates

Often, if you bring items from different databases the metadata may be formatted differently. As RefWorks is just a software programme and does not 'read' the text using the **Close Match** enables you to identify whether items are the same and remove the duplicates once you have checked the records to ascertain that they are indeed duplicates.

When removing duplicates please check that you are removing the one/s you wish to remove. RefWorks 'ticks' a duplicate (i.e. subsequent record of the item). If you have added the full text to a record you may wish to retain this one in preference to another, so untick and tick the one you wish to remove.
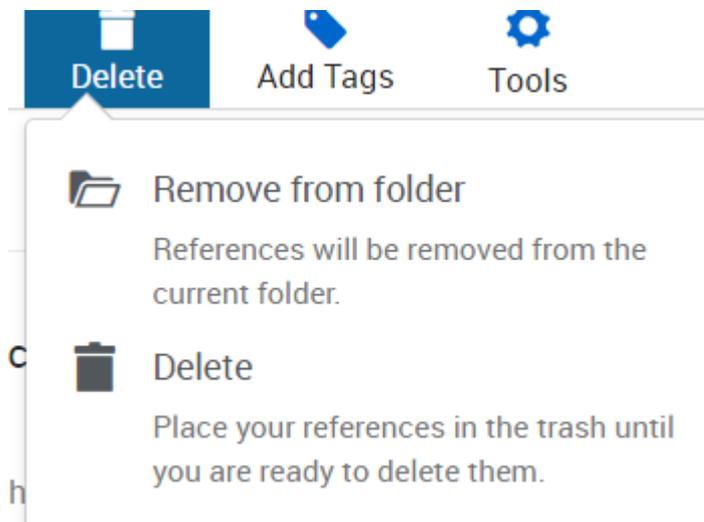
Find duplicate references ✖

● All references in 'Performing Arts (332)'

○ All references in 'All Documents'

Close Match ▾

> In this method, RefWorks compares the titles, authors, and publication dates in a reference. The data are weighed for their similarity. If enough items are similar, RefWorks will suggest it as a match. Publication dates are identified even where elements appear empty (e.g. 2009 and Jan 2009 in date would still match).

You can then use the delete tab on the toolbar to delete

Delete   Add Tags   Tools

📁 **Remove from folder**
References will be removed from the current folder.

🗑 **Delete**
Place your references in the trash until you are ready to delete them.

If you just remove from folder the item will still remain in your references. If you use the delete then it will go in your trash and be removed.

Google Scholar

If you use Google Scholar to locate references, you can export the individual references to RefWorks. In Google Scholar, go to the 3-bar menu icon and select settings

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Then in the bibliography manager use the drop-down to select RefWorks and save.

In the item records you will then see an option to export to RefWorks.

Postgraduate conception of research methodology: implications for learning and teaching

B Daniel, V Kumar, N Omar - International Journal of **Research** & ..., 2018 - Taylor & Francis

This qualitative inquiry investigates postgraduate students' conceptions of **research methodology** and how it contributes to their learning. It explores factors likely to motivate student choice of **research methodology** and challenges in understanding **research** ...

☆ ⁹⁹   Cited by 4   Related articles   All 3 versions   Import into RefWorks

Please note that if google updates their platform this linkage will be removed; you will need to reset.

Editing your in-text citations

When you use the Write n Cite tool to insert references you may wish to edit them; either to add a page number as you have quoted directly, or you have decided to use the authors name or year within the body of your text and therefore do not need this information cited twice.

For example:

In 2014 (Manzano, Ziegler & Bennett) indicated…

According to Bennett (2013) ….

"It is now evident that GCs and GH play an important role in modulating insulin sensitivity in humans, as exemplified in the endocrine syndromes of cortisol and GH excess and deficiency" (Yuen, Chong & Riddle 2013:652)

So, when you insert your citation, in the dialogue box you can use the tick boxes to amend your citation to hide year or hide author and ok.

Author	Year	Title
Chandorkar, A G	2010	Research methodology in medical sciences
Duffy, Mark R	2009	Zika Virus Outbreak on Yap Island, Federated

Edit References
- ☐ Hide Year
- ☐ Hide Author
- ☐ Suppress Pages
- ☐ Override Pages:
- ☐ Make Footnote
- ☐ Bibliography only

Prefix: [ ]   Suffix: [ ]

Preview Citation ──── (Edge Hill Harvard):

(Duffy, Chen, Hancock et al. 2009)

Compose Citation

Duffy, Mark R, 2009, Zika Virus Outbreak on Yap Island, Federated States of …

☐ Override Default Ordering   OK   Cancel

To add a page number or page range use the suffix box. You will need to ensure that you type this as your specific referencing style requires

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Revising your citation/s

You may wish to revisit your citations as you have edited your document and now wish to exclude the date/author. However, if you manually edit your in-text citations this will interfere with the software programme and you will see errors in your document.

In order to edit your in-text citation, right click inside your citation and select edit citation
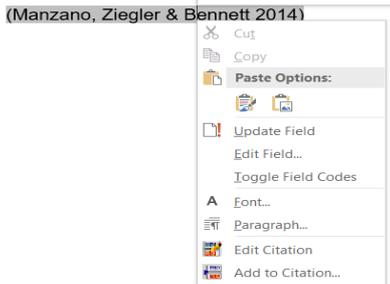

You will be taken back to the dialogue box that was visible where you inserted your citation and you can edit using the relevant tick box to hide author or year in your in-text citation.

Creating a stand-alone project reference library.

It might be that you want to have a list of references totally separate from the rest of your references for a specific reason, for example for a systematic review.

In your RefWorks account at the top you will have
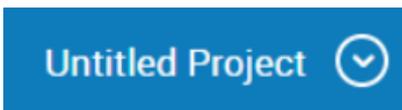
If you use the drop down >**manage projects** you can then create a separate location for reference collection

You can 'toggle' between your RefWork projects as required