

RefWorks User Guide

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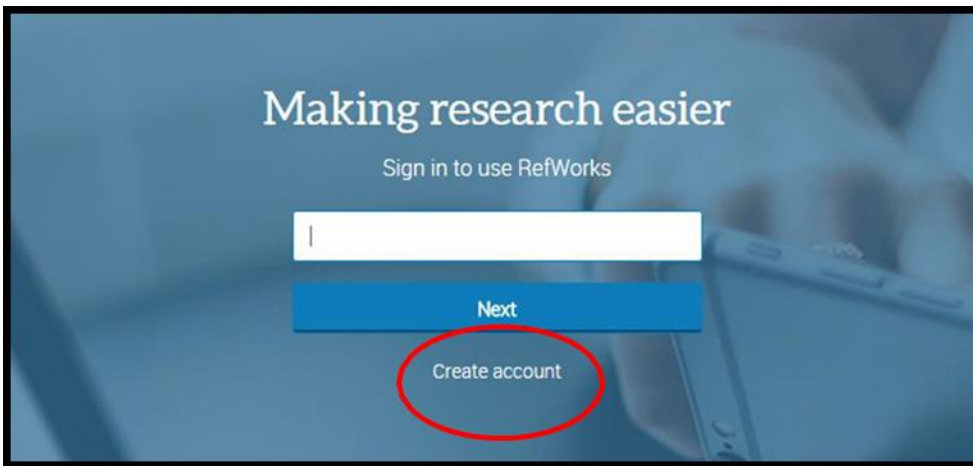
RefWorks

ProQuest RefWorks is designed to help organise your research and store bibliographic information all in one place. This information can then be used to generate reference lists and citations in the appropriate format.


Create an account

Access RefWorks via the library catalogue www.ehu.ac.uk/library and select the RefWorks icon.

Once in RefWorks select the “create account” link.



Complete sign up ensuring you use your Edge Hill University email address. Your RefWorks log-in details are personal to you, so be careful to remember them as Learning Services cannot keep a record of this data.

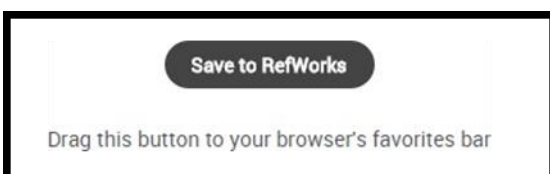
Once signed in, RefWorks training, YouTube tutorials and more support is available via the help icon at the top right of the screen. 

Save to RefWorks Tool (Optional browser add-on)

The Save to RefWorks Tool enables you to add references and full-text to RefWorks from any website.

Navigate to the Tools menu (gear icon) in RefWorks to set it up. Select ‘tools’ from the menu, and then ‘install Save to RefWorks’ from the list. Note: you can skip this optional step and still use RefWorks.

This will generate the ‘Save to RefWorks’ button. Simply drag the button onto your favourites toolbar in your internet browser.



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To do this, you must first ensure that the bookmarks/favourites toolbar on your browser is open. Instructions for Internet Explorer, Firefox and Google Chrome can be found in the appendix of this guide. You will find further guidance in RefWorks about how to set up and use the Save to RefWorks tool.

When you have completed a database search, select the records you want to add to RefWorks, then click the **Save to RefWorks** button to send them to your RefWorks account.

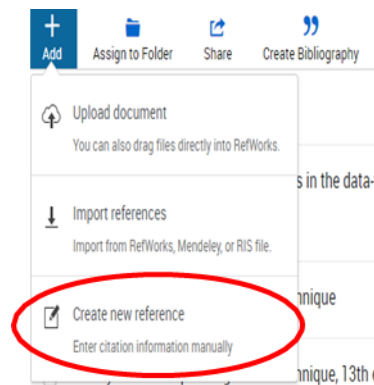
The references will appear in RefWorks in the **Last Imported** folder.

Adding References

Manual Creation

Manual creation of a record isn't something you need to do very often, but if you have a tricky reference, you can add it yourself. Simply click on the + button and select 'Create new reference'.

You can then select from the drop-down menu the type of reference you wish to add. RefWorks will automatically display the fields you need to fill in. RefWorks will try and identify your reference and autocomplete the fields.

A screenshot of the 'Create new reference' form in RefWorks. At the top, there is a '+ Drop file here or select a file from your computer' button. Below it, a dropdown menu is open, showing 'Journal Article' as the selected option. Other options in the menu include 'Book', 'Book section', 'Generic', 'Web page', 'Report', 'Issue', 'Abstract', 'Retrieved From', and 'Notes'. The form also has fields for 'Volume' and 'Pages'.

The new reference will go into your **Last Imported** folder (unless you specify otherwise).

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Exporting references from the library catalogue

To export the details of a book to RefWorks, first go to the catalogue record for the book you need. There is a **Save** button. Clicking on this brings up a pop-up box. At the bottom you can select **RefWorks**.

You will see a choice of two RefWorks products where you can send your reference - you need to select the blue RefWorks icon on the right.

RefWorks confirms that your reference has been added and it will go into your **Last Imported** folder.

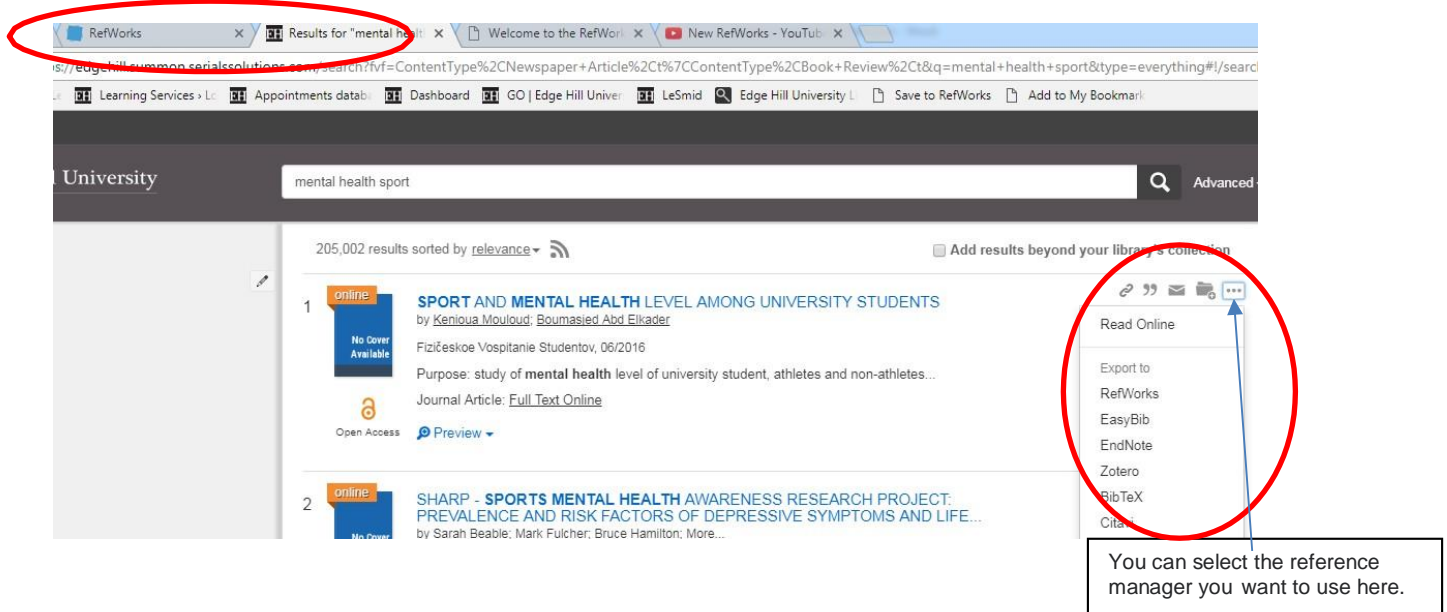
The screenshot shows a library catalogue record for the book "Handbook of obesity treatment" by Stunkard, Albert J., 1922-; Wadden, Thomas A. The record includes a description of the book, its publication details (Book. English. Published New York), and a star rating. A "Save" button is visible in the top right corner. A pop-up menu is open over the "Save" button, showing options: "Add to list", "New list" (with a text input field), and "Export". Under the "Export" section, there are three options: "Endnote Web", "Endnote Desktop", and "Refworks" (which is circled in red). A "Save" button is also visible at the bottom right of the pop-up menu.

Exporting references from an online database

If you are sending references from an online database to RefWorks, you need to be logged in to your RefWorks account and have the database open in the same browser.


Please note that every database will have a different way of saving articles to RefWorks. It is usually straight forward, but if not, the help function of the database will give you instructions.

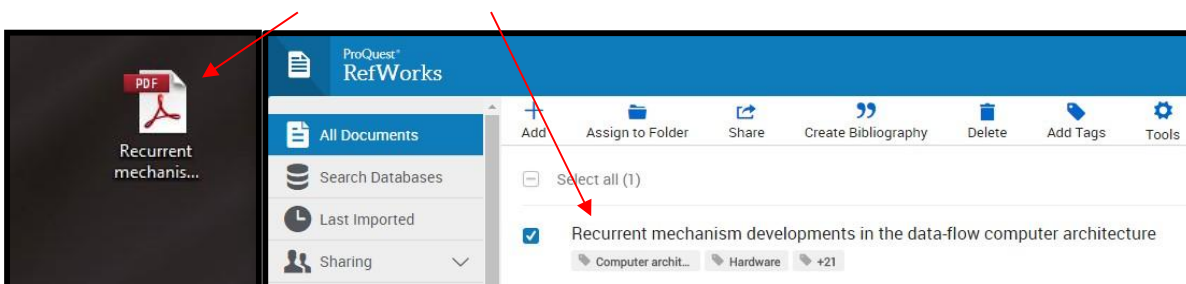
If you are using the **Discover More** search engine, click the three dots option to the right of the article record and select export to RefWorks.



You will see a choice of two RefWorks products where you can send your references **Always select the blue ProQuest RefWorks icon on the right.**

RefWorks confirms that your references have been added and they go into your **Last Imported** folder.

When your article's details are imported into RefWorks, download the full-text of the article onto your computer. Select the citation in your **Last Imported** folder and click on the  icon. You can then drag and drop the pdf file or upload it from your computer if you wish to store it in RefWorks (optional).



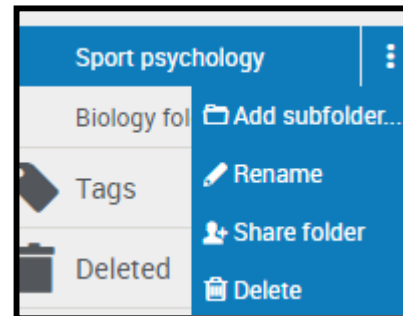
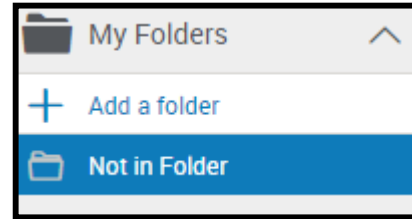
Folders

RefWorks allows you to organise References in folders.

To create a folder, simply click “My Folders” on the left-hand side of the page, then
+ Add a folder.

Name your folder and click “Save”. Your new folder will appear on the left-hand side of the page under “My Folders”. References can be added to more than one folder.

To add a subfolder, select a folder and click on the menu button to the right of the folder name. Select “Add subfolder” and give the new subfolder a name.



Using Folders to Organise Items

Adding to a folder: Once you have created a folder, you can organise your items.

From the **All Documents** or **Last Imported** view, click on an item and drag it into the folder of your choice, or select the items you want using the check-boxes and use the ‘**assign to folder**’ option at the top of the screen.

You drag items from one folder to another (the item will remain in the original folder as well). Click the folder name to view all the items within that folder.

Removing items from a folder: To remove an item from a folder, go to the folder and select the item(s) you wish to remove. Click the delete button. When you remove items from folders, they remain in RefWorks in the All Documents area.


Permanently deleting items from RefWorks: Go to the **All Documents** area, select the item(s) you wish to delete and click the **delete** icon.

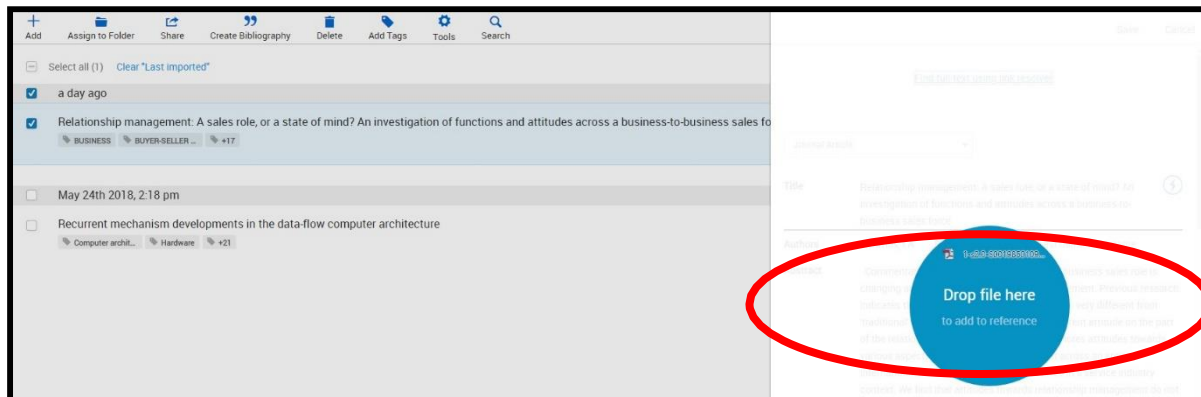
Please note that if you **delete items** from your **Last Imported** folder, they will be **permanently deleted** from your RefWorks library and all folders.

Using Tags: You can also add tags to references to organise your items further. You can even search using a tag in the RefWorks search box.

Reading a Document

RefWorks has a built-in document reader. You can read and access supported documents anywhere, with just a web browser.

To read documents, you must first bring the citation details and the full text into RefWorks (see above). Export the article's citation details into RefWorks and download the full-text of the article onto your computer. Select the citation in your Last Imported folder and click on the  icon. You can then drag and drop the file or upload it from your computer.



You can then click on the listed link to read the full text. If the item does not contain a document, the bibliographic data of the reference only will be displayed.



When reading a document, you have several options, all of which can be found on the tool bar on the top of the page:



On the left hand side you will find: zoom in and out; print; download document; highlight and add comments on the selected text.

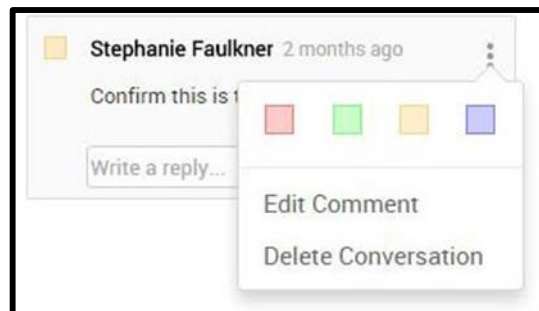
On the right hand side you will find the option to make document notes and to edit the references.

Annotating a Document



You can annotate any of your own documents saved in RefWorks. You may be able to annotate documents shared with you if you have been given permission to annotate and/or modify the document.

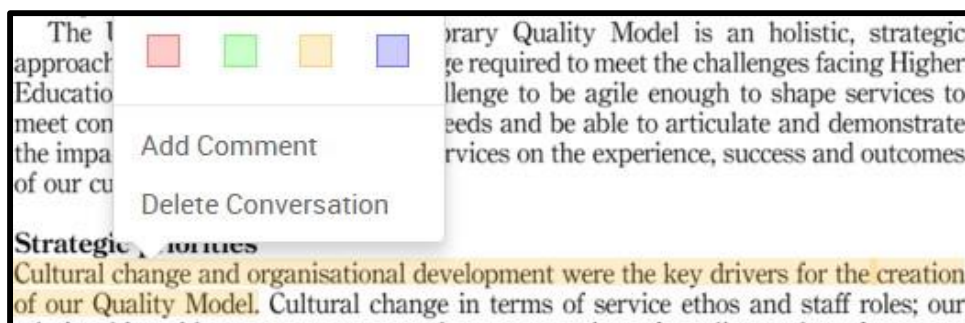
To annotate a document, click on the name of the item to open it in RefWorks. Click the letter A comment icon at the top of the page and select the text area you wish to comment on. Your comment will appear to the far right of the selected area. You have the option to change the colour of your comment by clicking on the colour of your choice in the comment itself. If you change the colour of your comment, the associated highlighted text annotation will be the same colour.



Comments can be edited or deleted at any time. To edit a comment, just click on the comment and make your changes. To delete a comment, click on the comment and click the “x” in the right-hand corner of the comment. Once you type a comment, it is automatically saved.



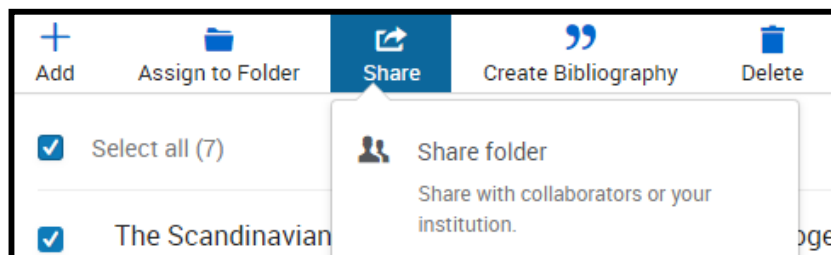
Highlighting: You can also highlight text within the document. Click the highlight icon and drag your mouse across the text you wish to highlight. To remove highlighting, click on the highlighted area and select Delete Conversation.



Sharing Documents and Collaborating

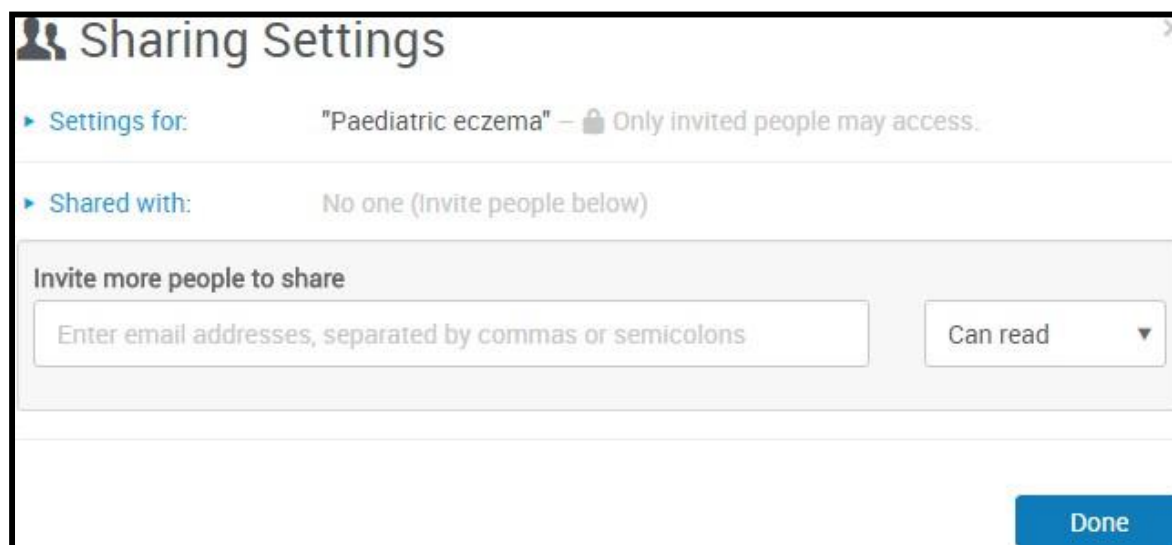
With RefWorks you can give your colleagues access to any of your folders, to allow you to collaborate on projects.

To do this, simply click on the folder you wish to share, click the **Share** button and choose **Share folder**.



Input your colleague's email address and assign rights to that person. They can either read, annotate or modify the folder. Your colleague will get an email, with a link included, which allows them to access your folder. They have the option to accept or reject this link.

If they don't have a RefWorks account, they can set one up on the spot. There is no limit to the number of folders that you can share, or the number of people you can invite to share them. When you share a folder, any sub- folders are also shared.

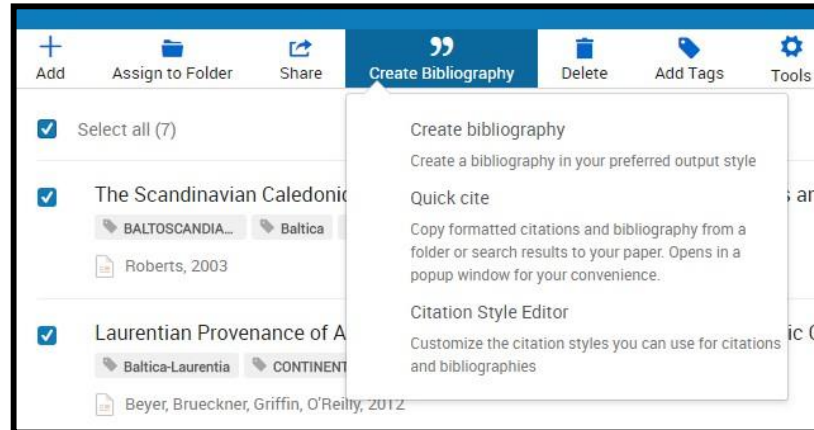


If you want to check who you've shared a folder with, hover over the folder you want to check. Then go to the **Share** option and click **Share folder**. You can change the rights at any time. You can also change the sharing from "private" to "institution", which gives everyone in your institution access to your folder. RefWorks allows for sharing outside your institution, as long as that person also has a RefWorks account.

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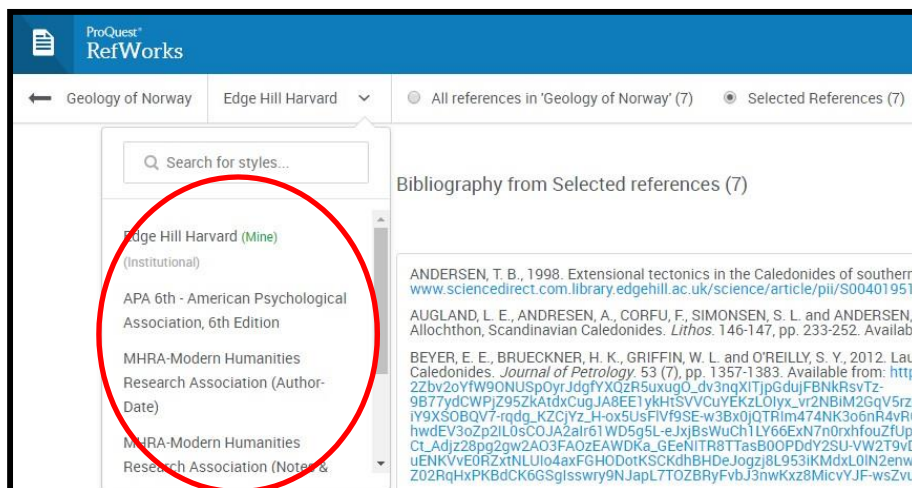
Creating a Bibliography

You can easily create a bibliography from your **All Documents** area or any RefWorks Folder. Go to the folder you want and click the **Create Bibliography** button and select **Create bibliography**.



You can choose to create a bibliography for selected references or for all references in the folder.

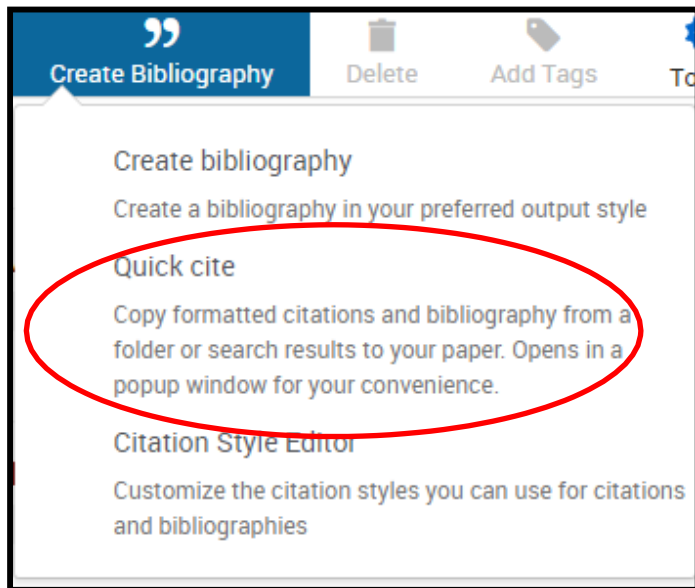
The Edge Hill Harvard referencing style is used by most departments and is based on Harvard British Standard. You can however also choose from the list of referencing styles in RefWorks.



You may need to enable pop-up blockers to allow your bibliography to appear on screen. **Please see the appendix for further details on how to set this up for your browser.**

Your formatted bibliography will then be displayed for you to copy and paste into any word processing software. You should always double-check the bibliography with your department's referencing style to ensure that it matches and for any incorrect formatting or missing information.

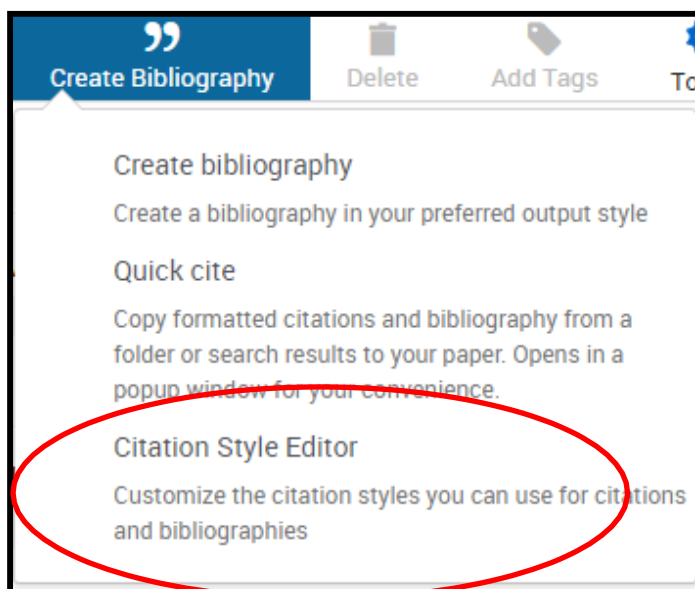
Quick Cite



Quick cite enables you to quickly create a reference list. It can be found in the Create Bibliography menu.

When you have selected the folder containing the papers you want to cite, you will be asked to choose your preferred reference style, then the references you want to reference. A bibliography is generated which you can paste into your document.

Custom Style Editor



If your preferred referencing style is not in RefWorks, you can use the Custom Style Editor to customise your citation style.

You can find information to help you do this in the help section of RefWorks (found via the

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question mark icon).

Cite in Microsoft Word: Write-N-Cite

If you are on campus, **EHU computers** have Write-N-Cite for Word in the **Application Catalogue**. The Application Catalogue can be found in the Start Menu. However, if you are a student on campus, you will need to use RefWorks Citation Manager on a university computer (see below pages 00-00 for instructions).

The screenshot shows the 'BROWSE BY' sidebar on the left with 'Referencing' selected. The main area displays search results for 'RefWorks Write-N-Cite Windows 10'. Below the table, there is a detailed view for the ProQuest version with an 'INSTALL' button.

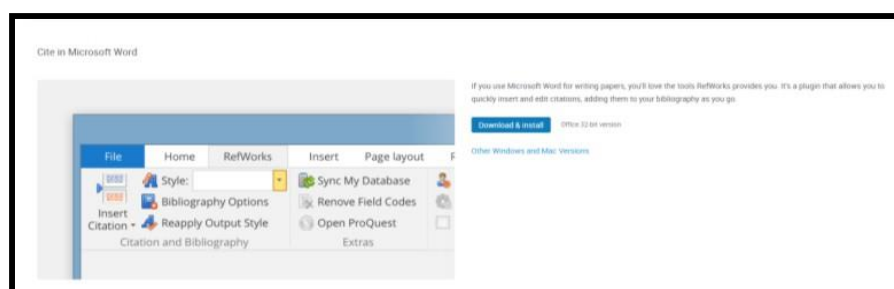
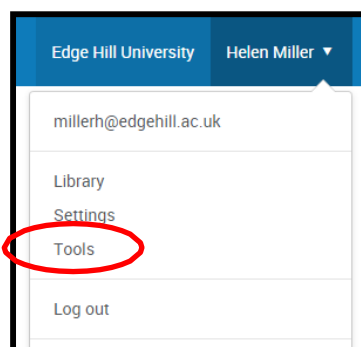
NAME	VERSION	PUBLISHER	CATEGORY	REQUIRES APPROVAL
RefWorks Write-N-Cite Windows 10	4.5.1608	ProQuest	Office, Referencing	No
RefWorks Write-N-Cite Windows 10	4.5.1540	ProQuest	Office, Referencing	No

ProQuest RefWorks Write-N-Cite Windows 10
No description available
More Details
INSTALL

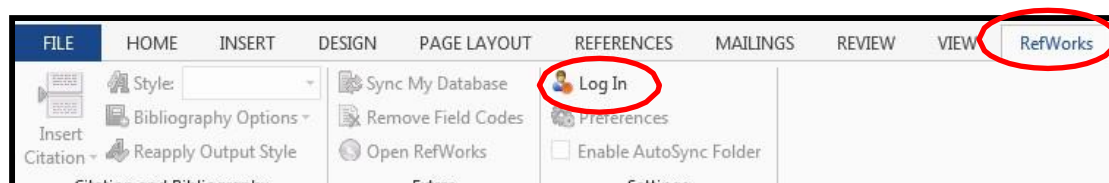
Search for **Referencing** in the Category menu.

Click on the option for **RefWorks Write-N-Cite Windows 10** and click Install.

If want to use Write-N-Cite on a **personal computer**, you need to **download it from RefWorks**. When you are logged into RefWorks click on your name in the top right-hand corner and select **Tools**. Scroll down the page to **Cite in Microsoft Word**. There are versions for Mac, as well as Windows, so choose the one that best suits your needs. **Mac users need to be aware that you must first install Java on your machine if you want to use this feature.**



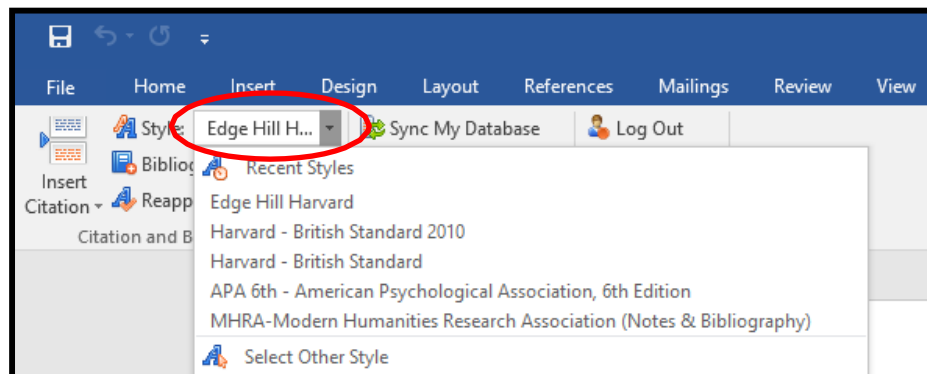
Once you have downloaded this, open a Word document. You will then see the RefWorks tab on the page. You need to log in to RefWorks, using your RefWorks username and password.



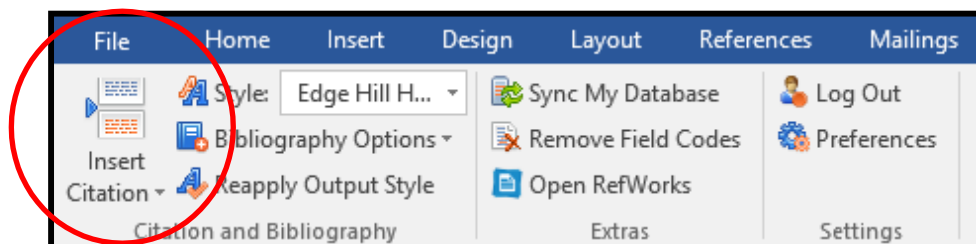
Login with your usual user name and password.

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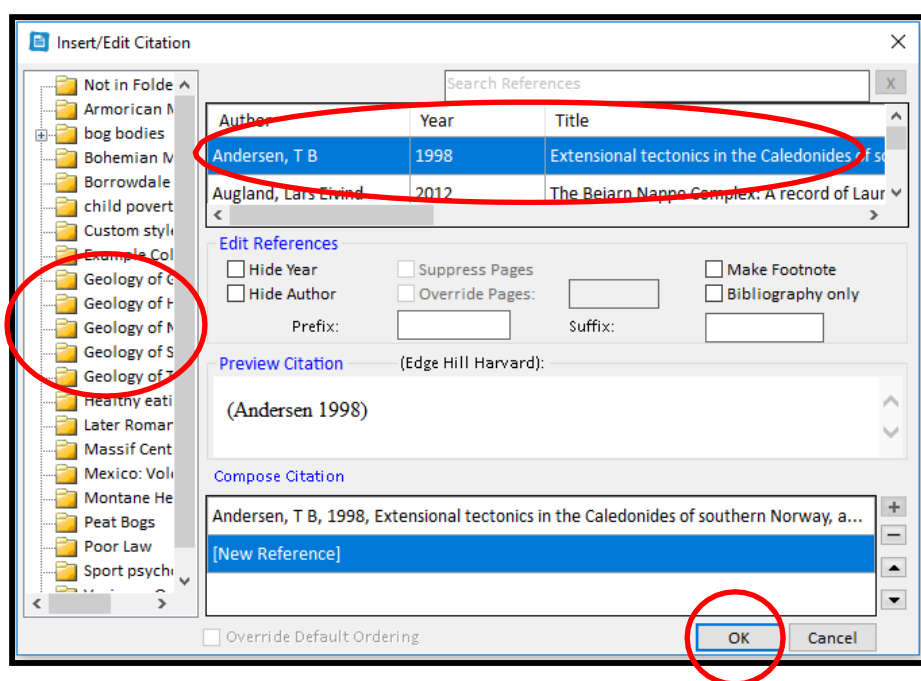
When you are logged in, you can set up your preferred referencing style: if in doubt check with the tutors in your department. If you cannot find your required style in the menu, log-in to your RefWorks account and set up your favoured style in the menu there. This will then sync with Word and update for you.



Type up your assignment as you normally would. When you wish to insert a citation, simply click the link in the top left-hand corner and choose "insert new".



Choose the folder and then the reference you want to insert and click ok.

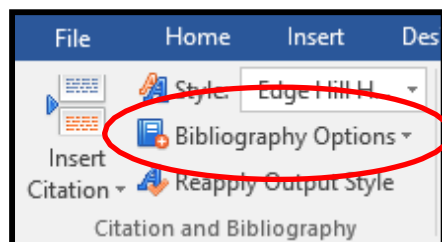


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When you are writing your essay, it might look a bit like this test document. Double check the format on each citation to ensure it matches your referencing guidelines.

This document has multiple references (Duncan et al. 2007, Raab 2015).
Here are some more references for this document (Woicik, Cislak 2013).
Here are some further references (Peacock 2016).

Once you have finished, click on Bibliography options in the menu and select **Insert Bibliography**.



Your assignment will now look like this. Always remember to double check against the referencing guide for any errors!

DUNCAN, S. H., BELENGUER, A., HOLTROP, G., JOHNSTONE, A. M., FLINT, H. J. and LOBLEY, G. E., 2007. Reduced Dietary Intake of Carbohydrates by Obese Subjects Results in Decreased Concentrations of Butyrate and Butyrate-Producing Bacteria in Feces. *Applied and Environmental Microbiology*. 73 (4), pp. 1073-1078.

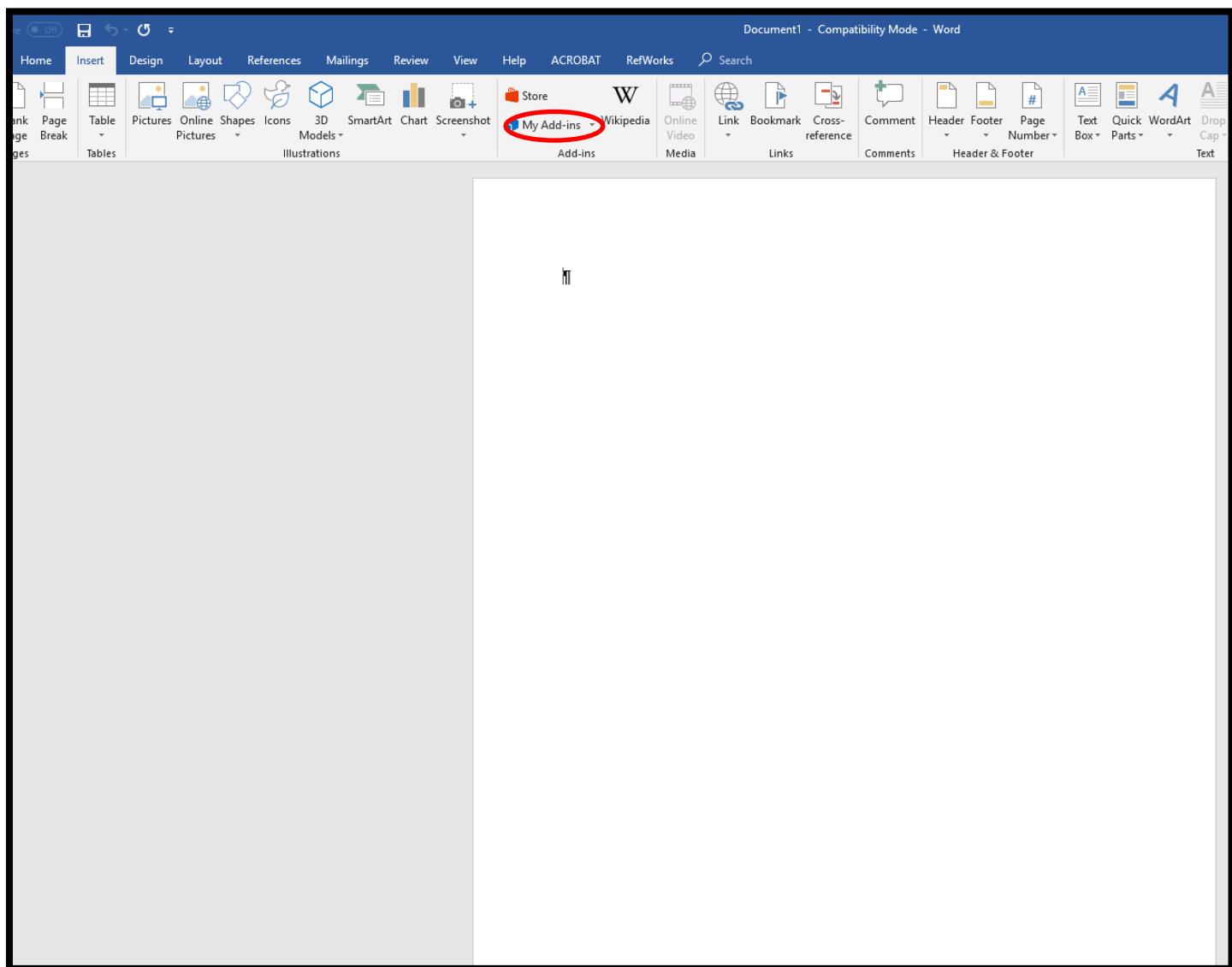
RAAB, M. Chris, 2015. Special issue of Psychology of Sport and Exercise. The development of expertise and excellence in sport psychology. *Psychology of Sport and Exercise*. 16, pp. 1-2.

WHYTE, L. A., KOTTECHA, S., WATKINS, W. J. and JENKINS, H. R., 2014. Coeliac disease is more common in children with high socio- economic status. *Acta Paediatrica*. 103 (3), pp. 289-294. Available from:
http://edgehill.summon.serialssolutions.com/2.0.0/link/0/eLvHCXMwnV3NahsxEB6SGEggNE3btNu4IEIOudjZXWm10tE1CTnEEPIDJpdIpWCD7FD7NzzCHnGPKIntFrXDg2E3BakHZBG0nwzmvkEwNN-3HtxJiCKsElaOosoyVRCITZL8rrM8rpStfXk-7e34mrMx2O1kqrTsEUsw2-0T_zpvbLdj9Gm9OkFZXFcGooO2MUmdNCOSbEFncHo9-iyX50kb1iZvczRAct4YBpak7Jmn16e0q-ZqXV603T6Q64tsCHImMU2-9PqrllfV_aB_fNdrP8ClgVzZoFtsubLjPF_gwCrzX-F8OEO5pWXh1odN5ozyeBmKx9XOJIPW1o4ziv8y4kpmtDxmf56eXSiRZITj9Dj_BjenJ9fDs154raFnU0rqlLbUxua1FFZolxmpDXdoCZS2Qlodc2sToyulEulk7vJKZ0ahf5LFcZ0ldcr34GNJWf3Tha_-q34AS-vayouuZ3UpnLKasSzS5zhgEYbnJZQQHrbKK-4ado2i9Gypw9UBN9JjQXtWJqxoqDsYHrCLqtZouwdefoC2mJhxbCaPyx0fZSNsl_dpbhCkYer6l-2k4fJ_V2-JxKKIHILt2FgYycWgkUER17zr4-nGFwM_MfPt3fdh21EeqJJnuvC1uLh0f1C-BUW5I_LGRnM.

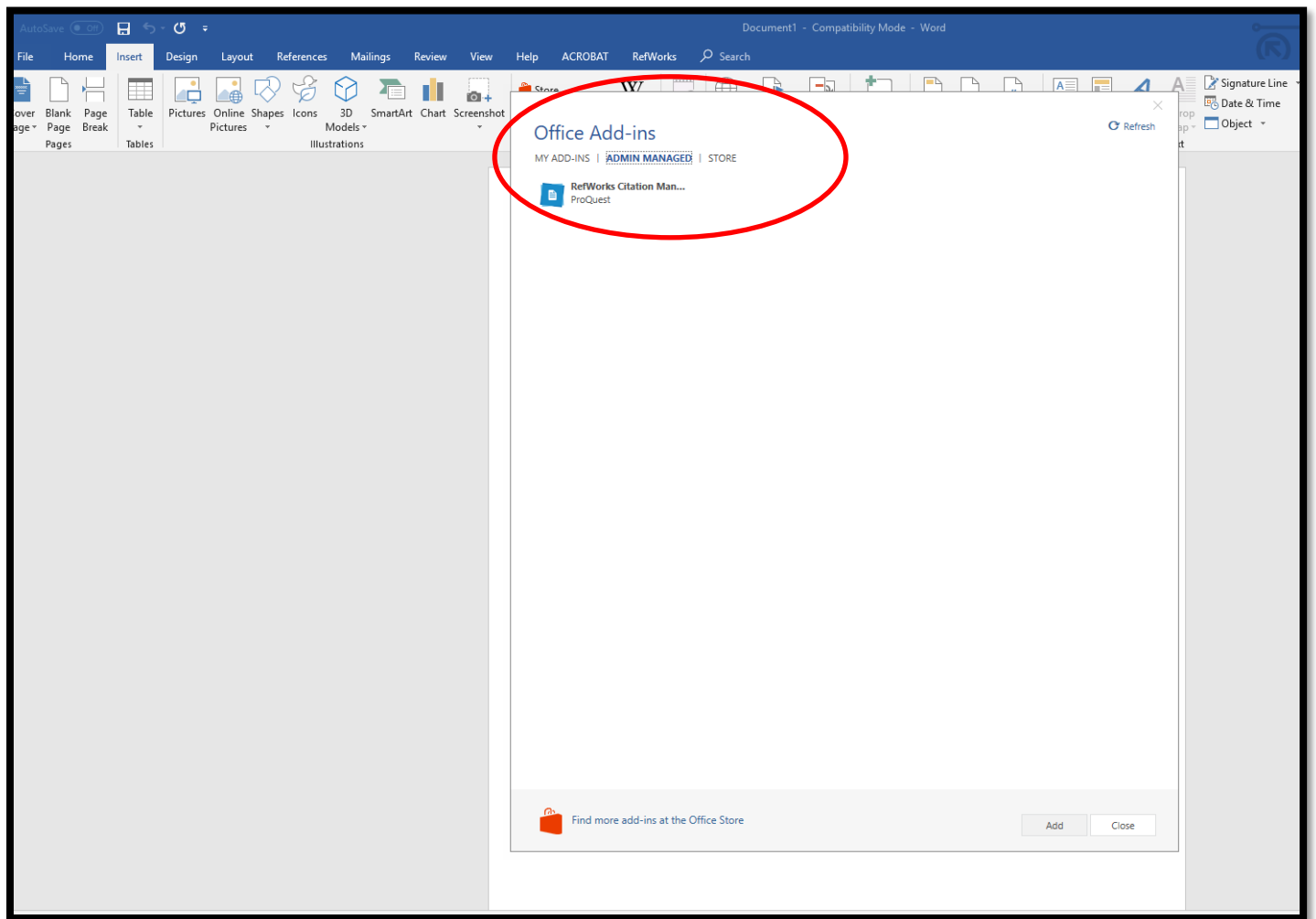
WOJCIK, A. and CISLAK, A., 2013. When appreciating nature makes One care less for human beings: The role of belief in just nature in helping victims of natural disasters. *Social Justice Research*. 26 (3), pp. 253-271.

Cite in Microsoft Word: RefWorks Citation Manager

If you are using Word 2016 or later, you can use RefWorks Citation Manager as an alternative to Write-N-Cite. If you are a student on campus you will need to use RefWorks Citation Manager rather than Write n Cite. If you are on campus you can get RefWorks Citation Manager from within Word, by clicking on Insert and then My Add-ins. A dialogue box will appear, and you should click on Admin Managed. You should then click on the option for RefWorks Citation Manager.

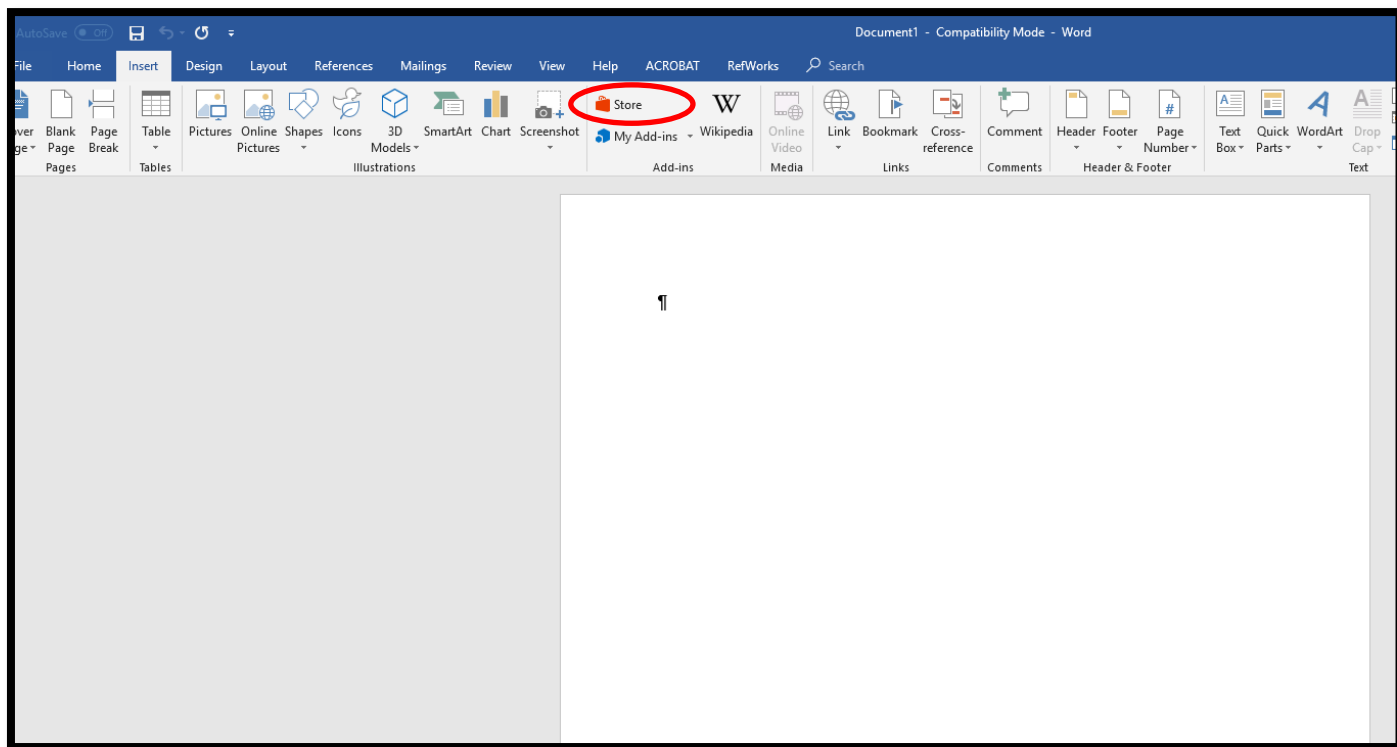


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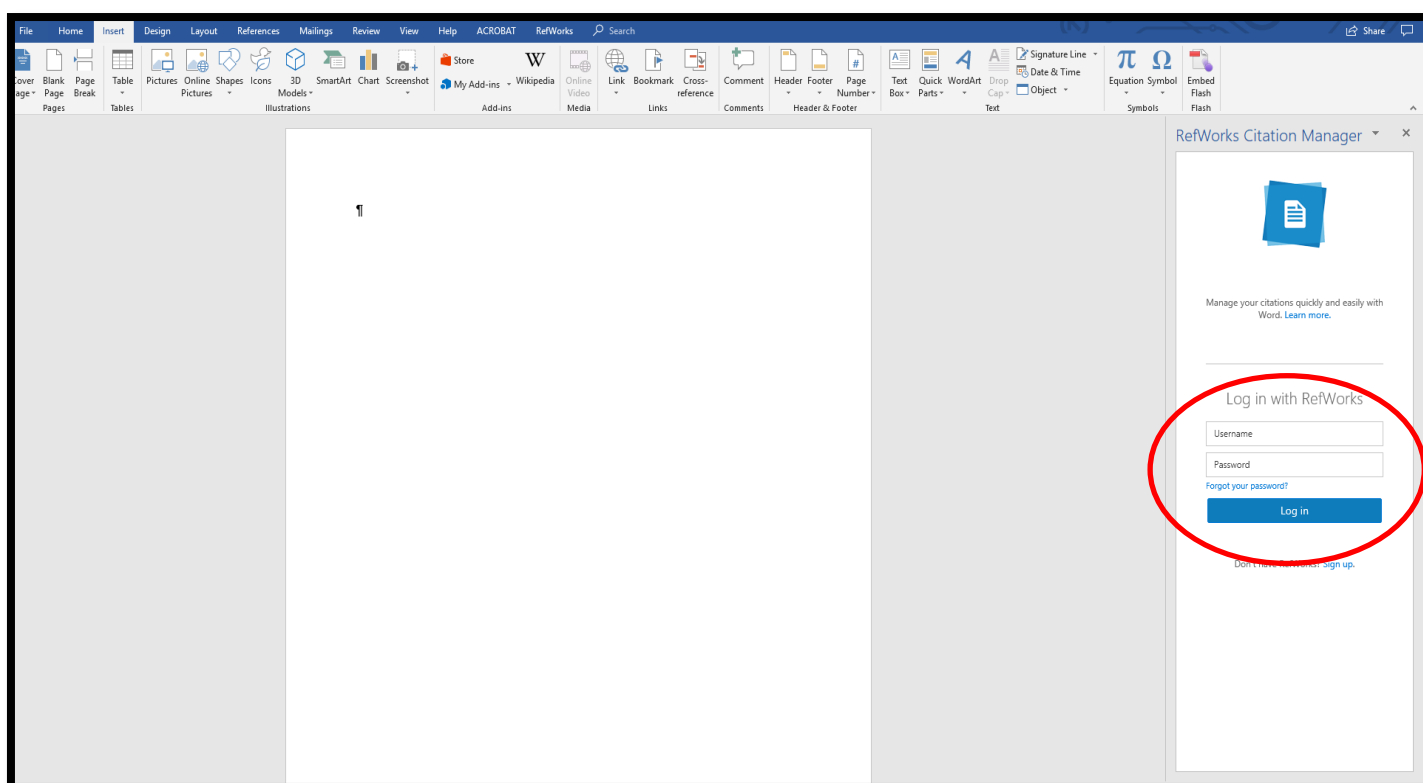


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If you are off campus, from within Word you should click on Insert and then Store. You will then need to search for RefWorks Citation Manager in the Microsoft Office Store and follow the necessary steps to download it.

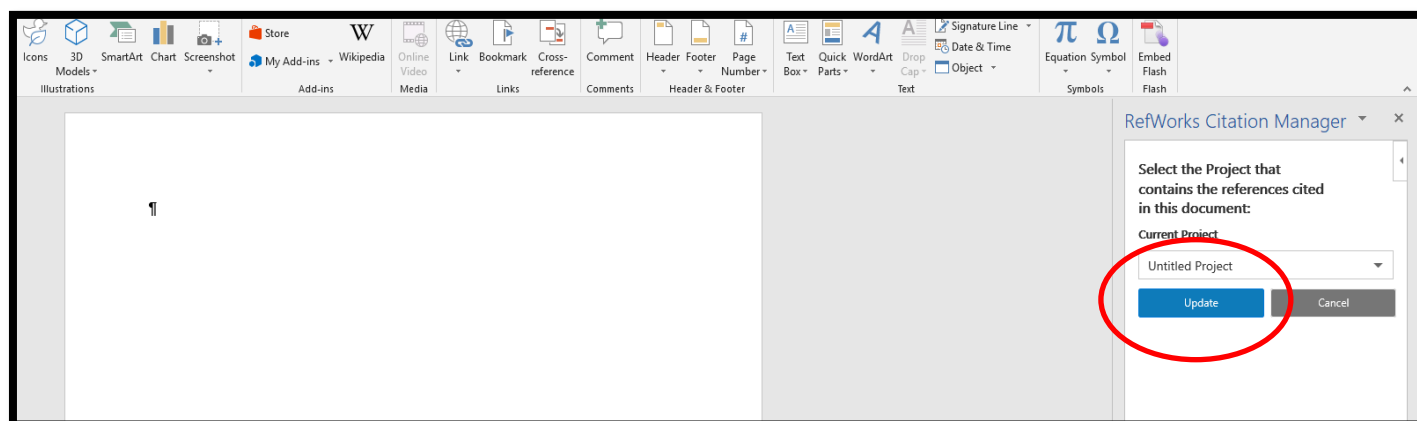


Once you have downloaded RefWorks Citation Manager Log in boxes appear on the right-hand side. You should log in with your RefWorks login details.

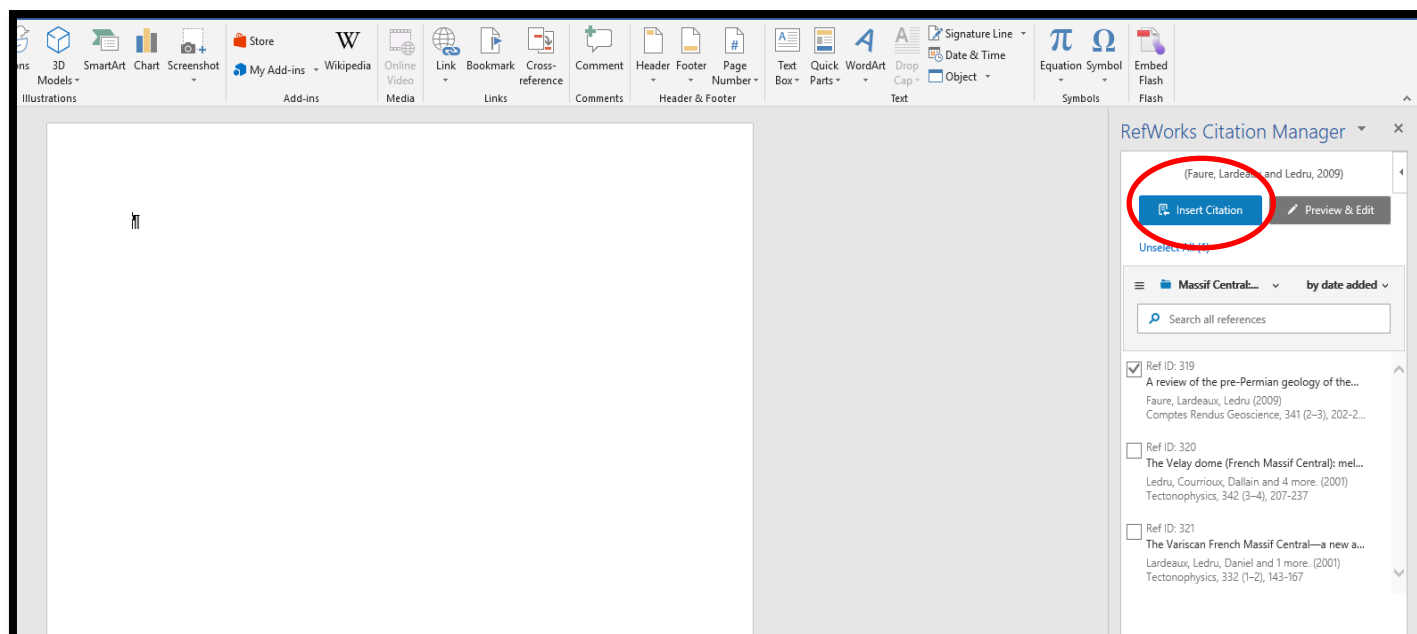


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If you have divided your references into a number of different projects, then select the relevant project from the drop-down list that appears when you click on the arrow next to Untitled Project. You then click on Update. If you have not divided your collection of references into different projects, you just need to click on Update and leave the selection as Untitled Project.

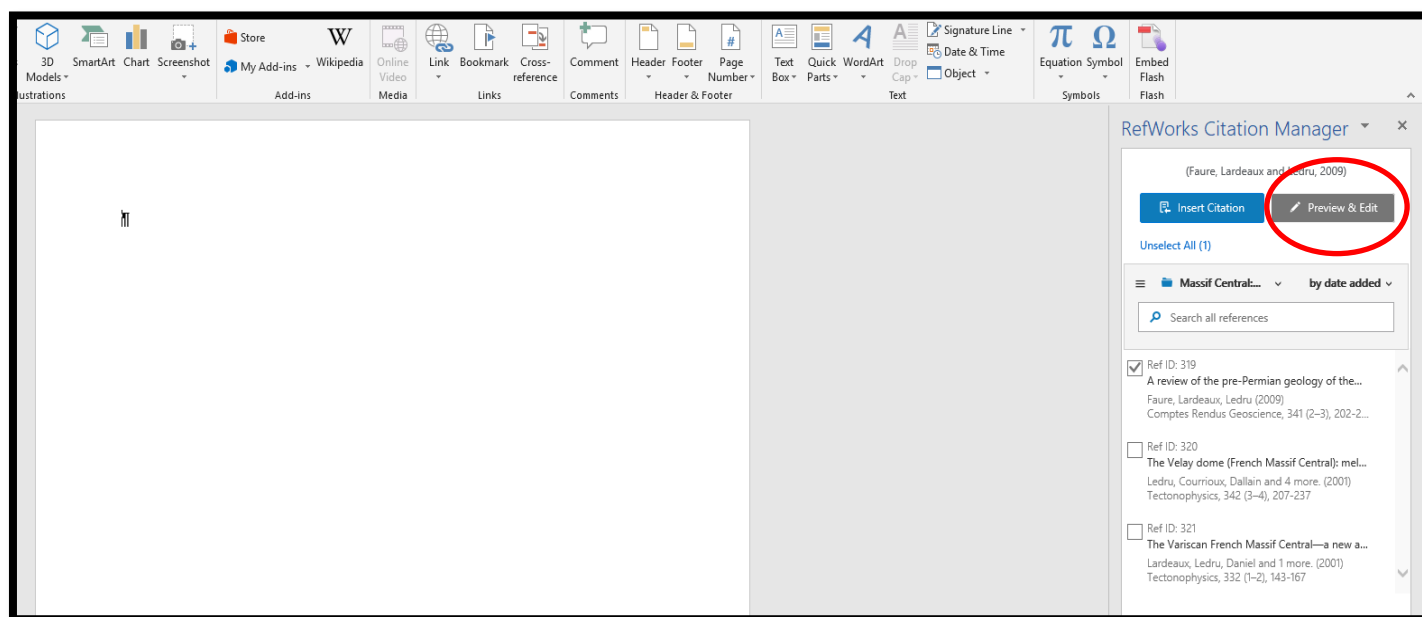


To add a citation, you can either select it from your list of references or, if you have too many, click on the drop-down arrow next to All References, and select the relevant folder. Once you are in the correct folder, select the required reference and click on Insert Citation. The citation will be added to your document. RefWorks Citation Manager will create the full reference for your reference list and will place this immediately after the citation. You can then cut and paste the full reference into your reference list or at the end of your document.

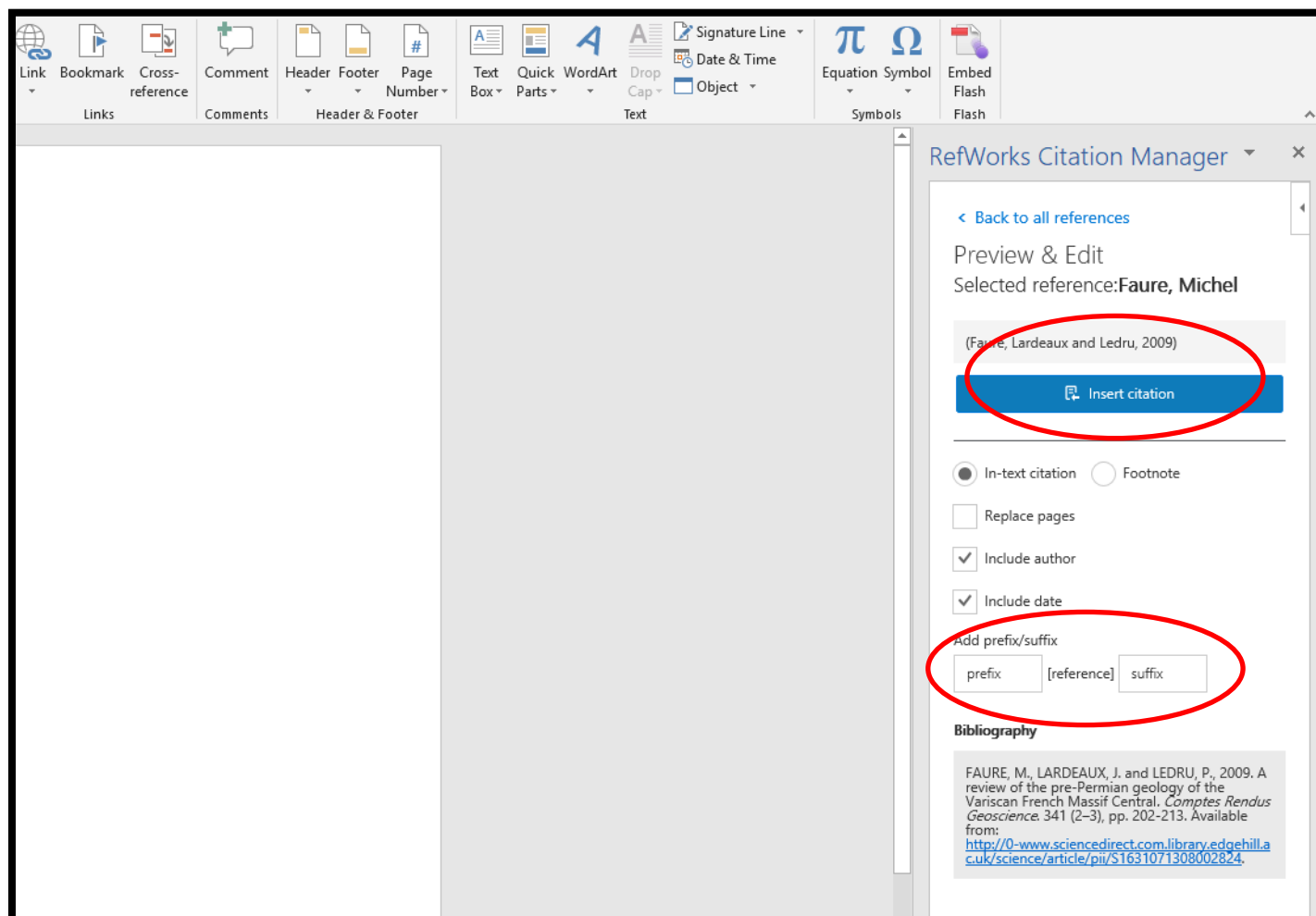


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If you are inserting a direct quotation into your document and need to add a page number to the citation when you select the reference, or if you are adding a secondary citation, click on Preview & Edit.

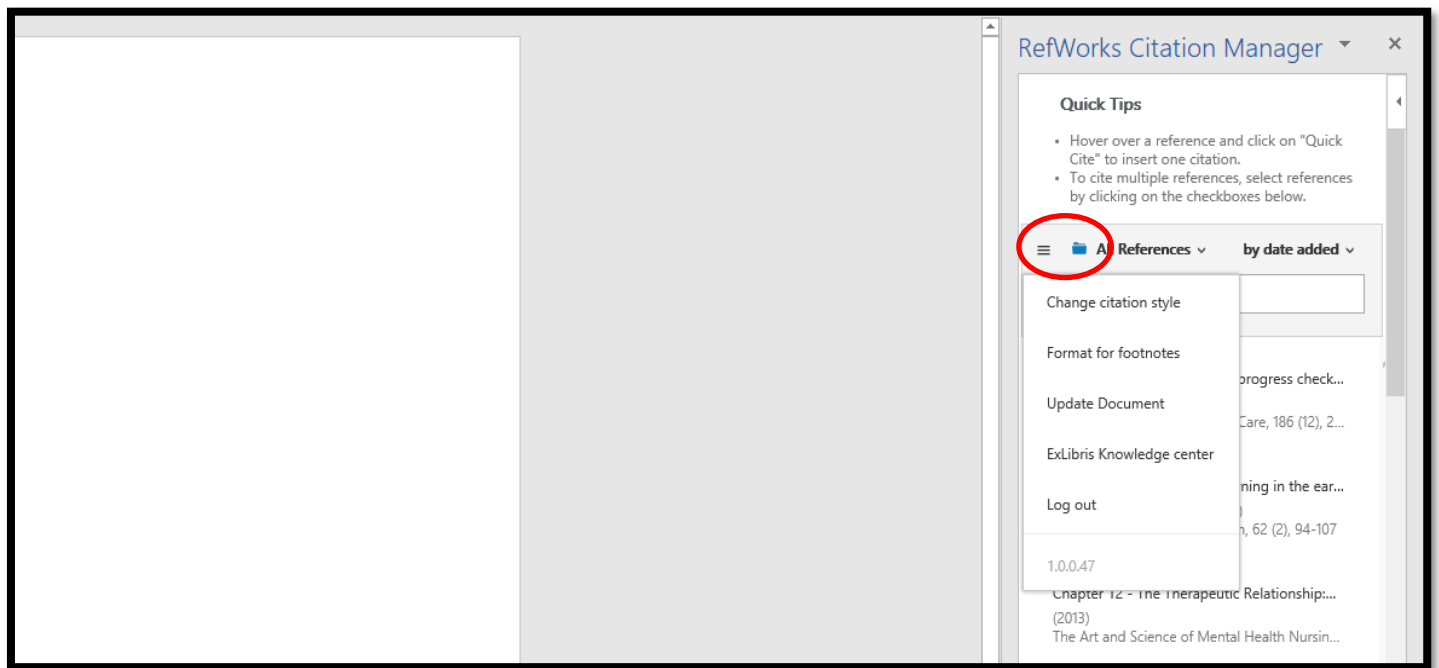


The following screen has an area called Add prefix/suffix. You can add the primary citation information in the prefix box (if you are secondary citing) and the page number(s) in the suffix box. Once you have added this information, click on Insert Citation.



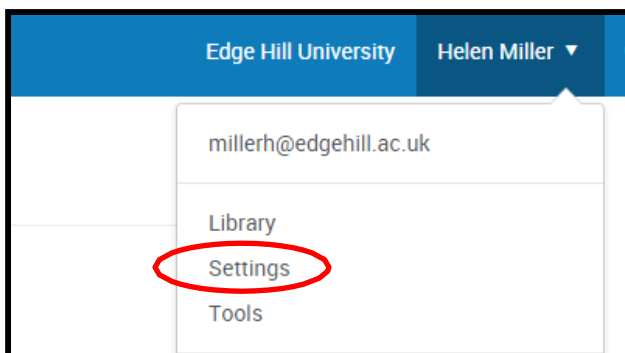
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If you click on the three horizontal lines in the left-hand corner, you can change your referencing style or log out.

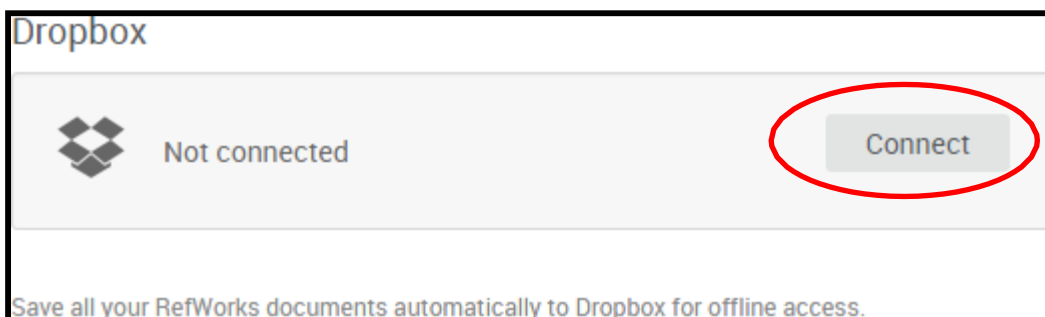


Syncing with Dropbox

If you already have a Dropbox account set up, you can sync it with RefWorks to push any of your saved documents to Dropbox. You can do this by clicking on your name and choosing Settings from the menu.



From there, scroll down the page and click on the Connect with Dropbox button, and enter your log-in details for that site. Your RefWorks documents will appear in the Dropbox Apps folder.



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You'll be asked to give RefWorks permission to create a folder in your Dropbox called "ProQuest RefWorks" in your Apps folder. This is where RefWorks will place a copy of your articles.

You can only store your own articles in Dropbox – articles in shared folders are not included.

After you first set up your connection from RefWorks to Dropbox, newly uploaded documents you save to RefWorks are automatically saved in Dropbox as well. When you remove a document from your RefWorks library, it will also be removed from Dropbox.

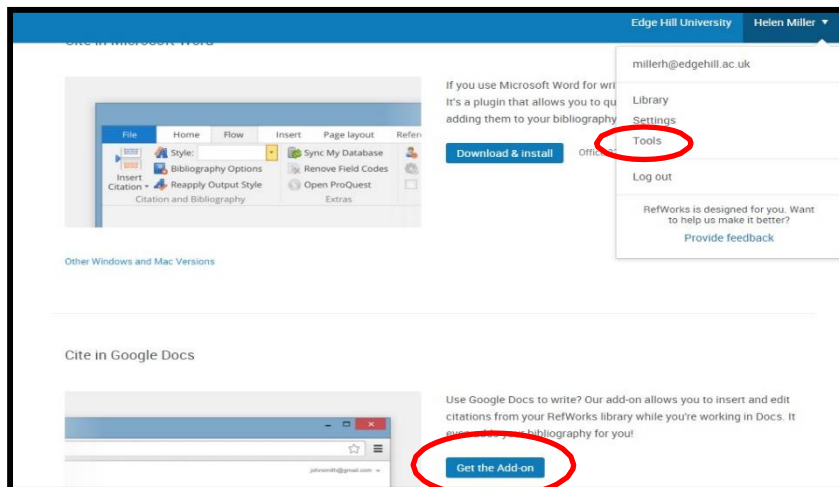
To disconnect your RefWorks account from Dropbox:

1. Log in to RefWorks.
2. Click your name, then select "**Settings**".
3. Scroll down and click the "**Unlink**" button in the Dropbox area of the page.

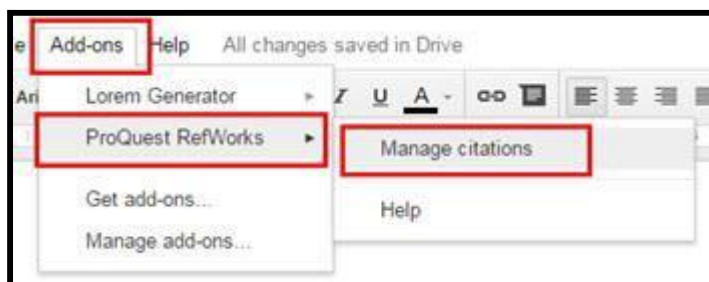
Appendix

RefWorks Add-on for Google Docs

If you are writing your document in Google Docs you can install an add-on to assist with citing references in your document and creating a bibliography. Click on your name and select tools from the menu, scroll down the page to '**Cite in Google Docs**'. Click on '**Get the Add-on**' button and install the free add-on.



Start writing and when you are ready to insert your first citation, select **Add-ons, ProQuest RefWorks, Manage Citations**



As you write your paper and insert your citations, you'll see your bibliography format in your document.

You can share your document with anyone who has a RefWorks account and in addition to adding and editing text to your document, they can also add in-text citations from their RefWorks account.

For further help with the Google Docs Add-in select the help icon at the top right of the screen.



Library & Learning Services

Browser bookmarks guidance Microsoft Edge

For sites that you want quicker access to, save them to your Favorites bar by clicking the **Add to Favourites bar** button.

If the Favorites bar is not visible, select the three dots icon button in top right-hand side of browser, select **Settings** and turn the radio button **Show the favorites bar** to **On**.



Import favorites and other info

Import from another browser

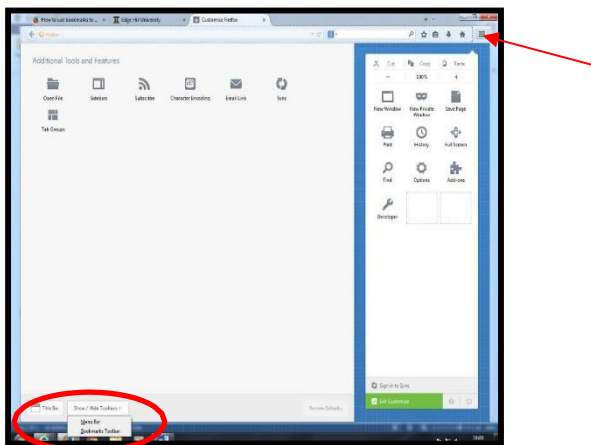
Favorites bar

Show the favorites bar



Firefox

Bookmarks Toolbar




1. Click the menu button and choose customise.
2. Click the Show/Hide Toolbars dropdown menu at the bottom of the screen and select *Bookmarks* tool bar.
3. Click the green exit customise button.

Library & Learning Services

Chrome

The bookmarks bar contains all your bookmarks and bookmark folders created in Google Chrome. You can dock the bar directly underneath the address bar at the top of the browser window for easy access to your favourite sites.

Dock the bookmarks bar

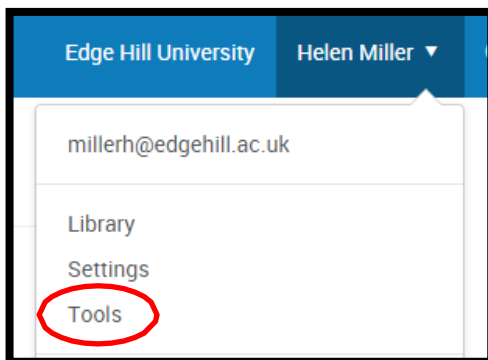
1. Click the Chrome menu  on the browser toolbar.
2. Select Bookmarks.
3. Select Show bookmarks bar.

You can also use the keyboard shortcuts **Ctrl+Shift+B** (Windows and Chrome OS) and **⌘-Shift-B** (Mac) to toggle the bar on and off.

Hide or undock the bookmarks bar

Right-click (or control-click on a Mac) the bookmarks bar and deselect **Show bookmarks bar**. When the bookmarks bar is undocked, you can always find it at the top of the [New Tab page](#).

Once you have your bookmarks bar visible you can set up RefWorks Tools.



Select 'Tools' and then click on the install button

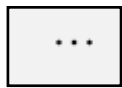
Install Save to RefWorks

Drag the 'Save to RefWorks' button to your bookmarks bar

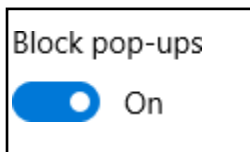
Save to RefWorks

Disabling Pop-up blockers

Microsoft Edge



Select the three dots button in top right-hand side of browser.
Go to settings, then advanced settings.
The pop-up blocker can be found in advanced settings.
If you want to see pop-ups, **Block pop-ups** is switched to **Off**.



Chrome



Allow all pop-ups
You can allow pop-ups by disabling the pop-up blocker.
Follow these steps:

Click the Chrome menu button.
Select settings
Click show advanced settings
In the **Privacy Section**, click the **Content Settings** button.
In the **pop-ups section**, select "Allow all sites to show pop-ups" Customise permission for specific websites by clicking manage exceptions.

Firefox



Go to Menu, then options, then content.
Select the pop-up windows.
Select the exceptions button, then select **address and allow**.