

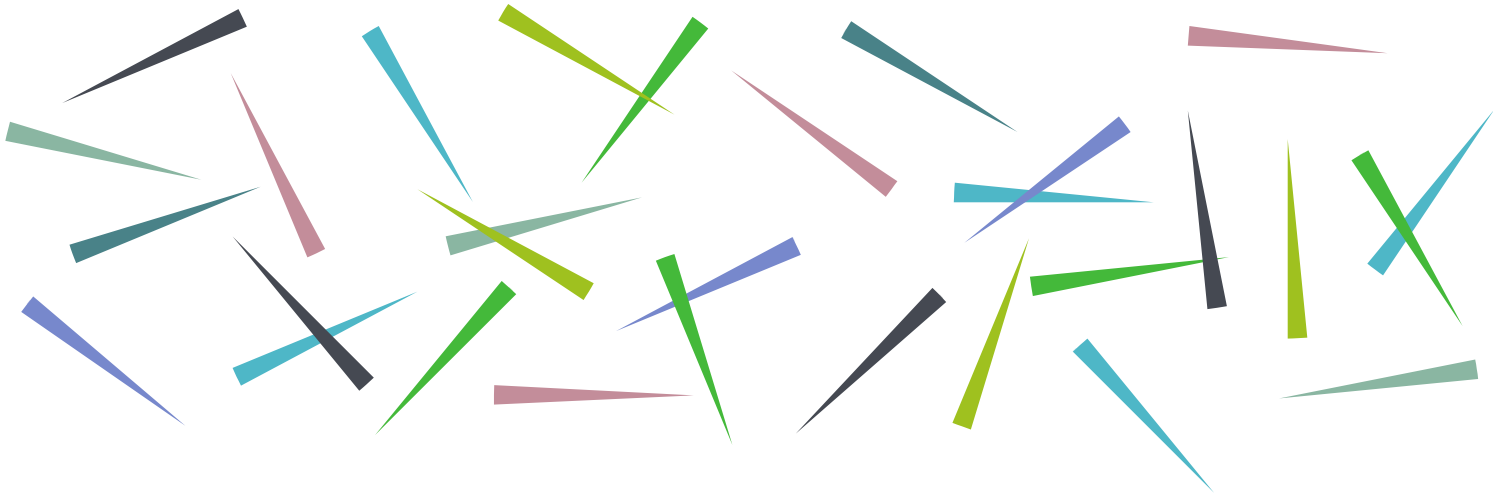
RefWorks User Guide

Library & Learning Services



Contents

Library & Learning Services.....	1
Contents	2
About RefWorks	4
Create an account	4
Save to RefWorks Tool (Optional browser add-on)	4
Adding References	5
Manual Creation.....	5
Exporting references from Discover More	6
Exporting references from an online database.....	6
Exporting references from the British Library	8
Exporting references from Google Scholar	9
Folders.....	11
Using Folders to organise Items	11
To Permanently delete an item from RefWorks, g	11
Reading a document.....	11
Annotating a document	13
Highlighting:.....	13
Advanced features of RefWorks	14
Bulk editing	14
Sharing Documents and Collaborating	15
Creating a Bibliography	17
Quick cite.....	18
Custom style editor.....	19
Using Refworks in Microsoft Word: RefWorks Citation Manager.....	20
Using Write-N-Cite.....	26
Appendix.....	29
RefWorks Add-on for Google Docs	29



Browser bookmarks guidance30

Microsoft Edge30

Firefox30

Google Chrome.....31

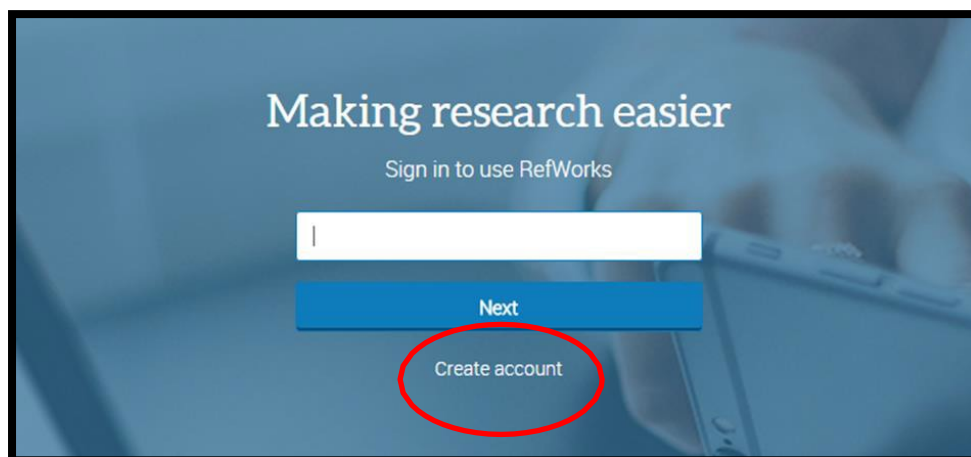
About RefWorks

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 Referencing section of the Uniskills webpages, at <https://www.edgehill.ac.uk/ls/uni-skills/referencing/>, or the Referencing tools page on the Research Support webpages at [Referencing tools - Learning Services \(edgehill.ac.uk\)](#) Click on the RefWorks banner and then the link located in the text.

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 Library & Learning Services cannot keep a record of this data.

Once signed in, RefWorks training, YouTube tutorials and more support are 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 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.

This will generate the **Save to RefWorks** button. Simply drag the button onto your favourites bar in your internet browser. Note: you can skip this optional step and still use RefWorks.

Save to RefWorks

Drag this button to your browser's favorites bar

To do this, you must first ensure that the bookmarks/favourites toolbar on your browser is open. Instructions for Microsoft Edge, 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.

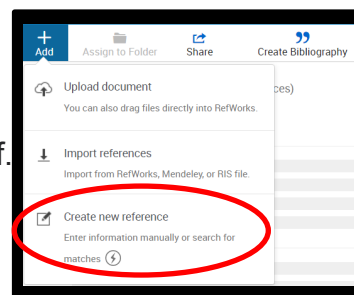
When you have completed a database search, select the records you want to add to RefWorks, then click the **Save to RefWorks** button to send them to your RefWorks account.

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 or a physical copy of a printed item, you can add it yourself. Simply click on the + Add button and select **Create new reference**.



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

A screenshot of the RefWorks 'Create new reference' form. The form has a header with 'Save' and 'Cancel' buttons. Below the header is a dashed box with the text '+ Drop file here or select a file from your computer'. A dropdown menu is open, showing a list of reference types: 'Journal Article', 'Book', 'Book section', 'Generic', 'Web page', 'Report', 'Issue', and 'Abstract'. The 'Journal Article' option is selected. To the right of the dropdown menu, there are input fields for 'Title', 'Volume', 'Pages', 'Retrieved From', and 'Notes'.

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

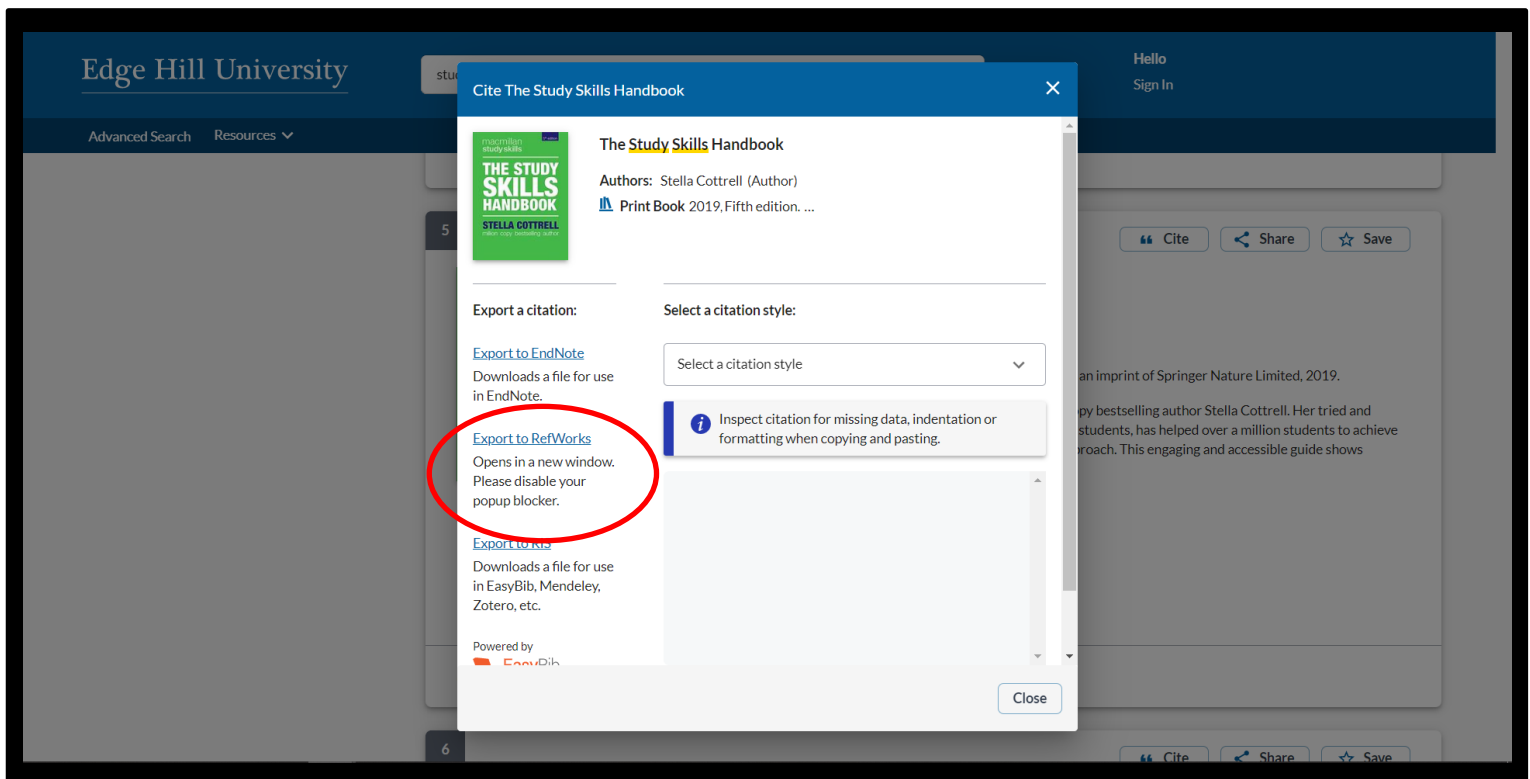
Library & Learning Services

Exporting references from Discover More

To export the details of a book or a journal article to RefWorks, first perform a search of Discover More. There is a **Cite** link in the record of the book or article. Clicking on this brings up a pop-up box. On the left-hand side, you can **Export to RefWorks**.

You will see links to two RefWorks products where you can send your reference - you need to select the blue RefWorks link at the top of the webpage. This says **yes, export to the newest version of Refworks**.

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



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 Scopus database, select the article, **click Export**.

Library & Learning Services

Scopus

Search Sources Lists SciVal

36,029 document results

TITLE-ABS-KEY (patient AND centred AND care) AND (LIMIT-TO (DOCTYPE, "ar"))

Edit Save Set alert

Search within results...

Refine results

Limit to Exclude

Open Access

All Open Access (13,995) Gold (5,533) Hybrid Gold (1,314) Bronze (3,548) Green (11,153)

Documents Secondary documents Patents

Analyze search results Show all abstracts Sort on: Date (newest)

Export Download View citation overview View cited by Add to List

Document title	Authors	Year	Source	Cited by
1 Perspectives of opioid use disorder treatment providers during COVID-19: Adapting to flexibilities and sustaining reforms	Treitler, P.C., Bowden, C.F., Lloyd, J., (...), Nyaku, A.N., Crystal, S.	2022	Journal of Substance Abuse Treatment 132,108514	0
2 Towards personalized dementia care through meaningful activities supported by technology: A multisite qualitative study with care	Goodall, G., Taraldsen, K., Granbo, R., Serrano, J.A.	2021	BMC Geriatrics 21(1),468	0

A pop-up page will appear, and you should click on **Ex Libris Refworks** and then **Export**.

Export document settings

You have chosen to export 1 document

Select your method of export

MENDELEY Ex Libris Refworks RIS Format CSV BibTeX Plain Text

What information do you want to export?

Citation information Bibliographical information Abstract & keywords Funding details Other information

Author(s) Author(s) ID Document title Year EID Source title volume, issue, pages Citation count Source & document type Publication Stage DOI Open Access

Affiliations Serial identifiers (e.g. ISSN) PubMed ID Publisher Editor(s) Language of original document Correspondence address Abbreviated source title

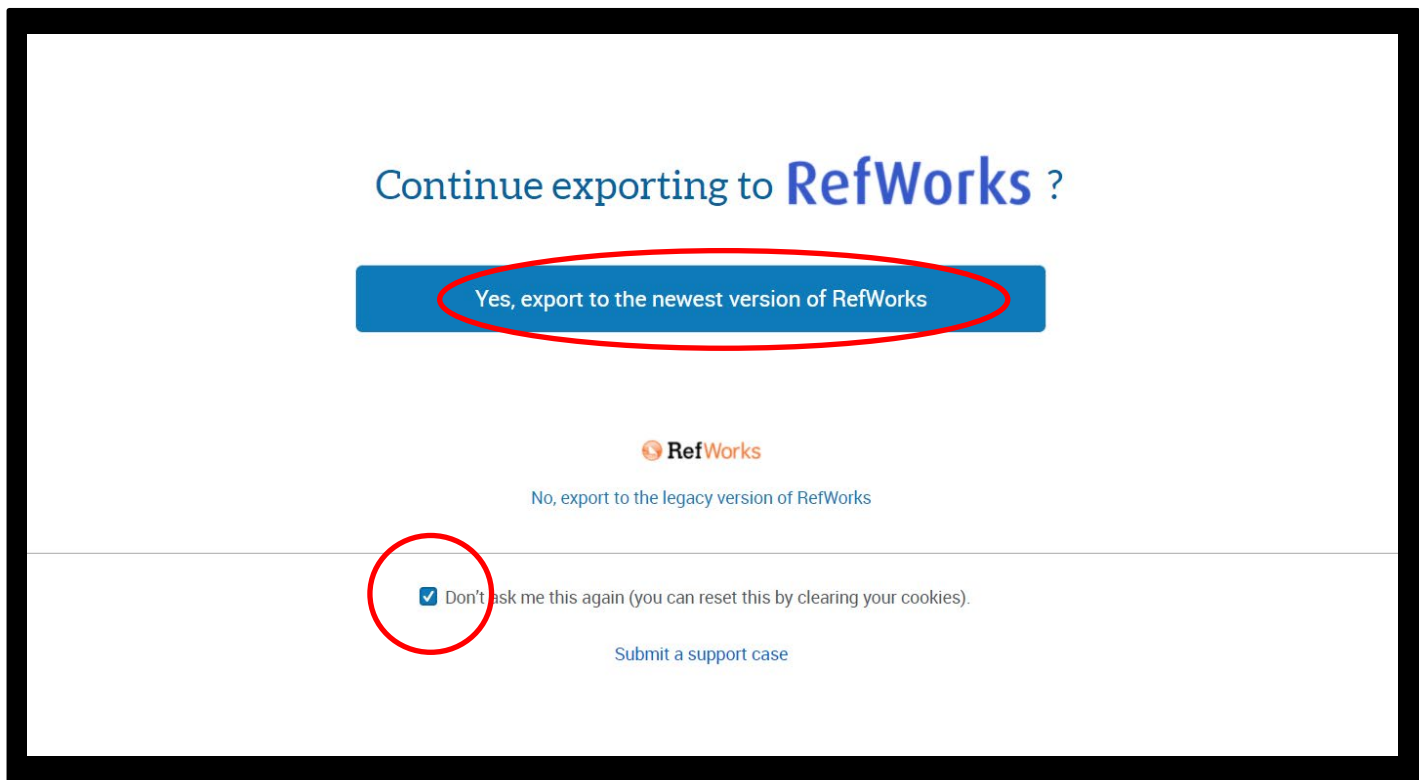
Abstract Author keywords Index keywords

Number Acronym Sponsor Funding text


Tradenames & manufacturers Accession numbers & chemicals Conference information Include references

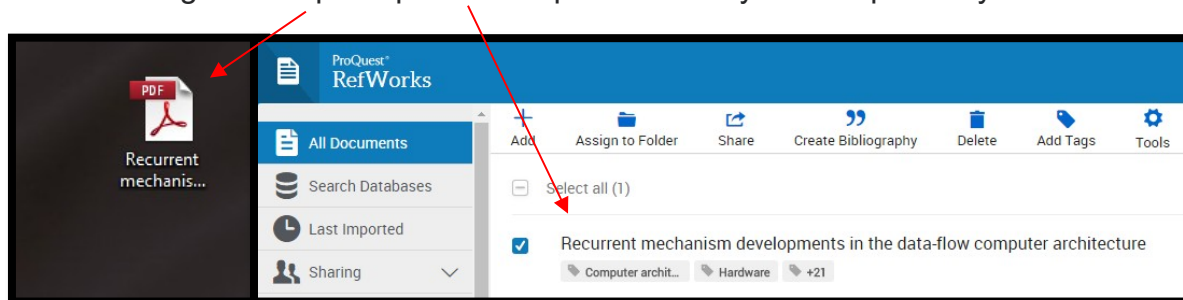
Cancel Export

You will see a choice of two RefWorks products where you can send your references. Always select **Yes, export to the newest version of Refworks**. You can also check the box that says **Don't ask me this again** (you can reset this by clearing your cookies). This means that this choice will not appear in future and your reference will automatically be exported to the newest version of Refworks.



RefWorks confirms that your references have been added to your **Last Imported** folder.

When your article's details are imported into RefWorks, you can download the full text of the article into your RefWorks library. 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.



This is an optional step you can take to include the full text of your references; you can also use the link to return to the original reference.

Exporting references from the British Library

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 the records you require are not on the British Library website, you can manually create them. (See page 5).

Visit <https://www.bl.uk/> and select their main catalogue search.

Library & Learning Services

[Main catalogue](#) [Our website](#) [Explore Further](#)

Advanced search Note: Search terms must be in lower case

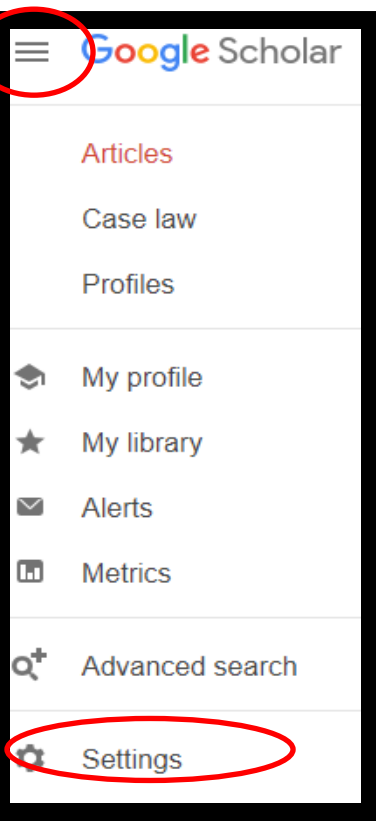
Author ▼	contains ▼	cottrell
AND ▼		
Main Title ▼	contains ▼	study skills
AND ▼		
Publication Year ▼	contains ▼	2015

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 note that you may need to edit this reference in RefWorks, it is easiest if you do this when you export the records, so you still have the original source record open to check the details.

Exporting references from 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 horizontal bar menu icon and select settings.



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

Bibliography manager

- ☐ Don't show any citation import links.
- ☒ Show links to import citations into RefWorks .

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

A Case Study on the Teacher Positive Leadership in a Junior High School

CC Hsieh, CM Yeh - ... of Teacher Education and Professional ..., 2021 - search.proquest.com

5 days ago - ... of teachers who are about to enter the education field, and hope that, through the exchange and sharing of this study, we could stir up more reflection and foresight in teaching with the current teachers, and add new energy to the research of teaching practice. The ...

☆ ⓘ **Import into RefWorks** ⓘ

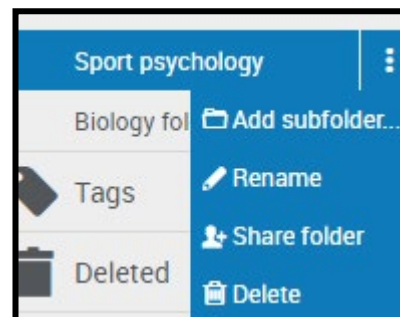
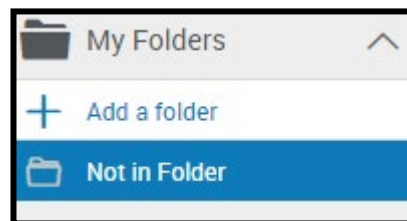
Folders

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

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

From the **All References** 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 checkboxes and use the **assign to folder** option at the top of the screen.

You can 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.


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.

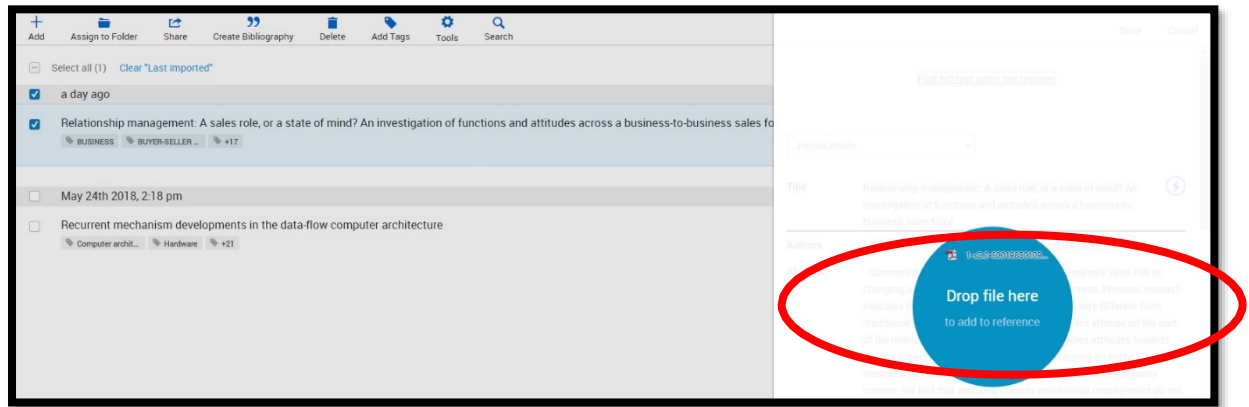
To Permanently delete an item from RefWorks, go to the **All References** folder, select the item(s) you wish to delete and click the **delete** icon. You will be asked to confirm that you want to do this as deleting items from the **All References** folder is a permanent deletion.

You can add tags to references to organise your items further and you can use those tags to search for references in the RefWorks search box.

Reading a document

RefWorks has a built-in document reader. You can read supported documents using 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.



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, 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

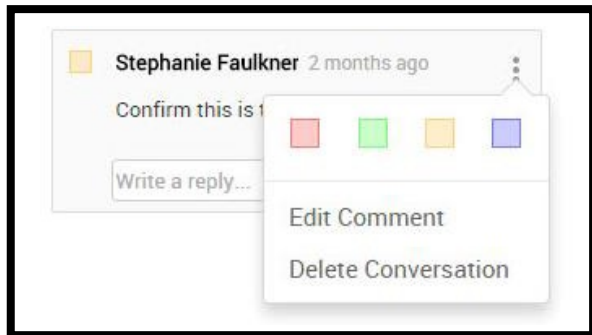


You can annotate any of your own documents saved in RefWorks. You may be able to annotate documents shared with you if you have been given permission to annotate and/or modify the document.

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.



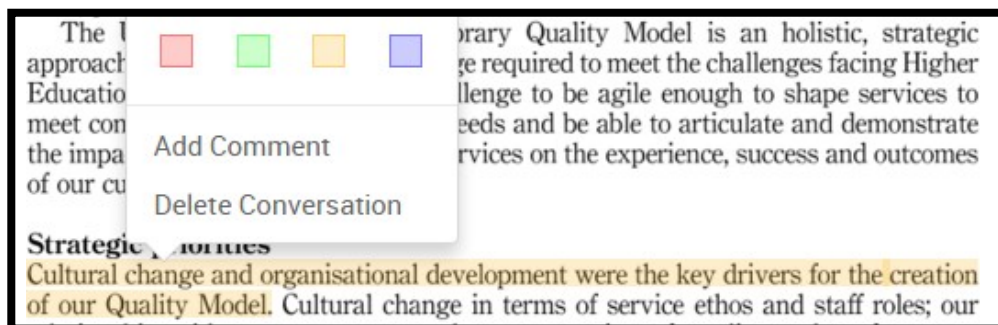
Select the text area you wish to comment on. Your comment will appear to the far right of the selected area. You have the option to change the colour of your comment by clicking on the colour of your choice in the comment itself.



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.

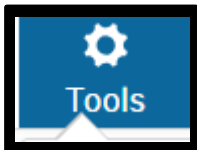


Advanced features of RefWorks

Bulk editing

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.

Select the batch of references or folder that you wish to annotate.
From the toolbar select tools



and then bulk edit

In the add to selected field drop-down, select the notes field and type the information that you require into the free text box. Ensure that you retain **leave existing data alone** as you may already have added text to the notes field previously.

Then **add**. It will come up with a verification message, select **Yes** to add the notes to your references.

✓ Add data



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

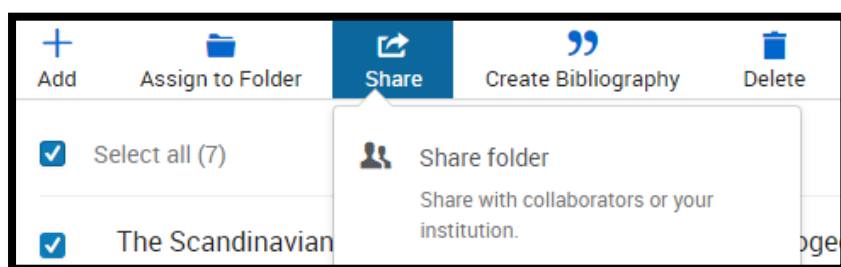
No

Yes

Sharing Documents and Collaborating

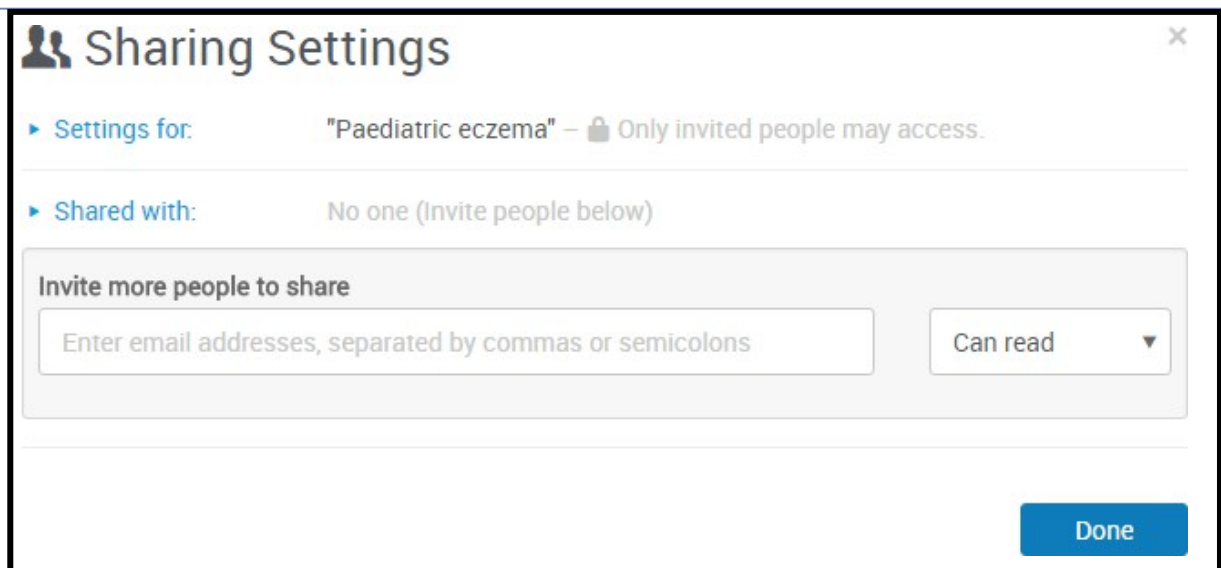
With RefWorks you can give your colleagues access to any of your folders, to allow you to collaborate on projects.

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.

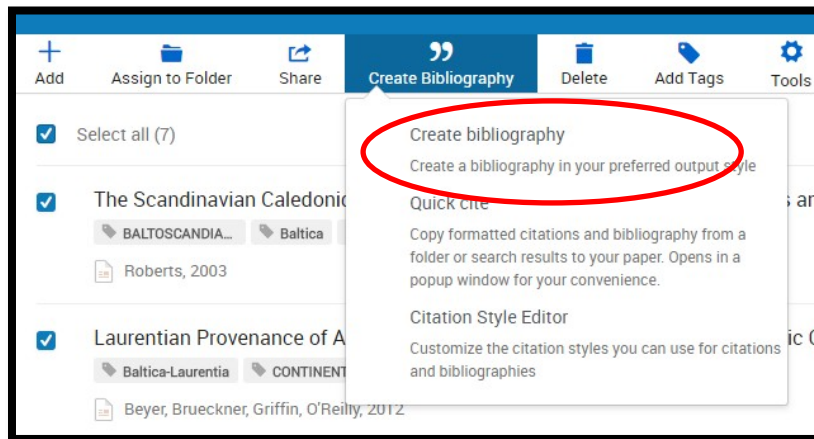


The image shows a 'Sharing Settings' dialog box with a close button (X) in the top right corner. It contains two sections: 'Settings for:' and 'Shared with:'. The 'Settings for:' section shows the folder name 'Paediatric eczema' and a lock icon with the text 'Only invited people may access.'. The 'Shared with:' section shows 'No one (Invite people below)'. Below these is a section titled 'Invite more people to share' which contains a text input field with the placeholder 'Enter email addresses, separated by commas or semicolons' and a dropdown menu currently set to 'Can read'. A blue 'Done' button is located at the bottom right of the dialog.

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.

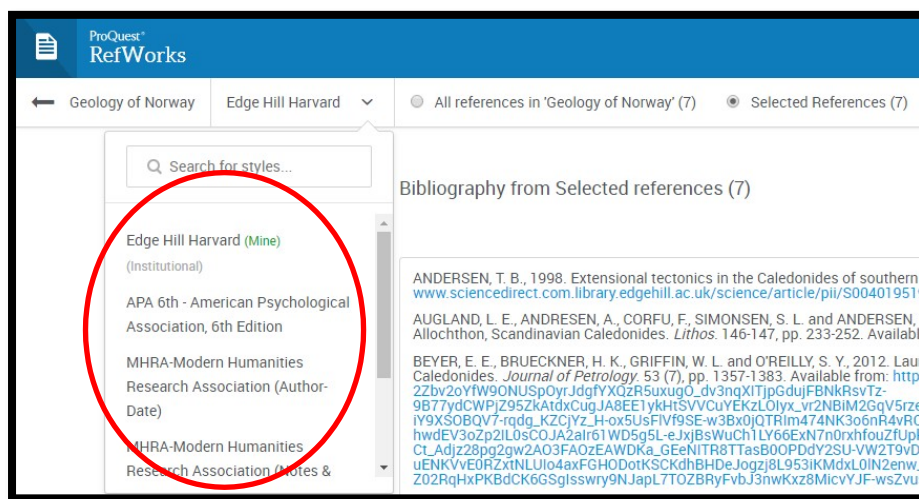
Creating a Bibliography

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



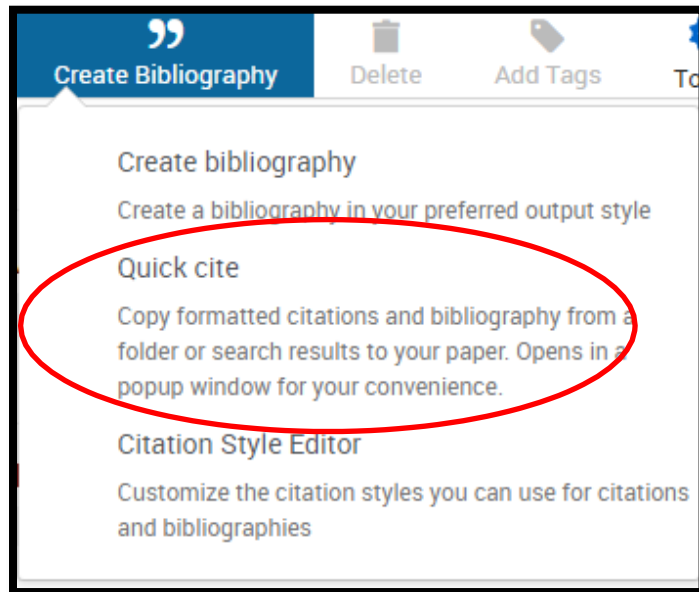
You can choose to create a bibliography for selected references or for all references in the folder.

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.



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.

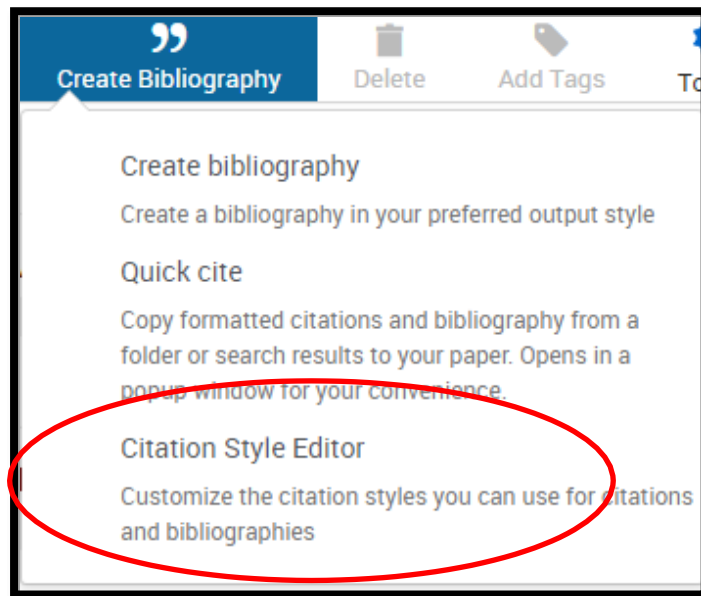
Quick cite



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

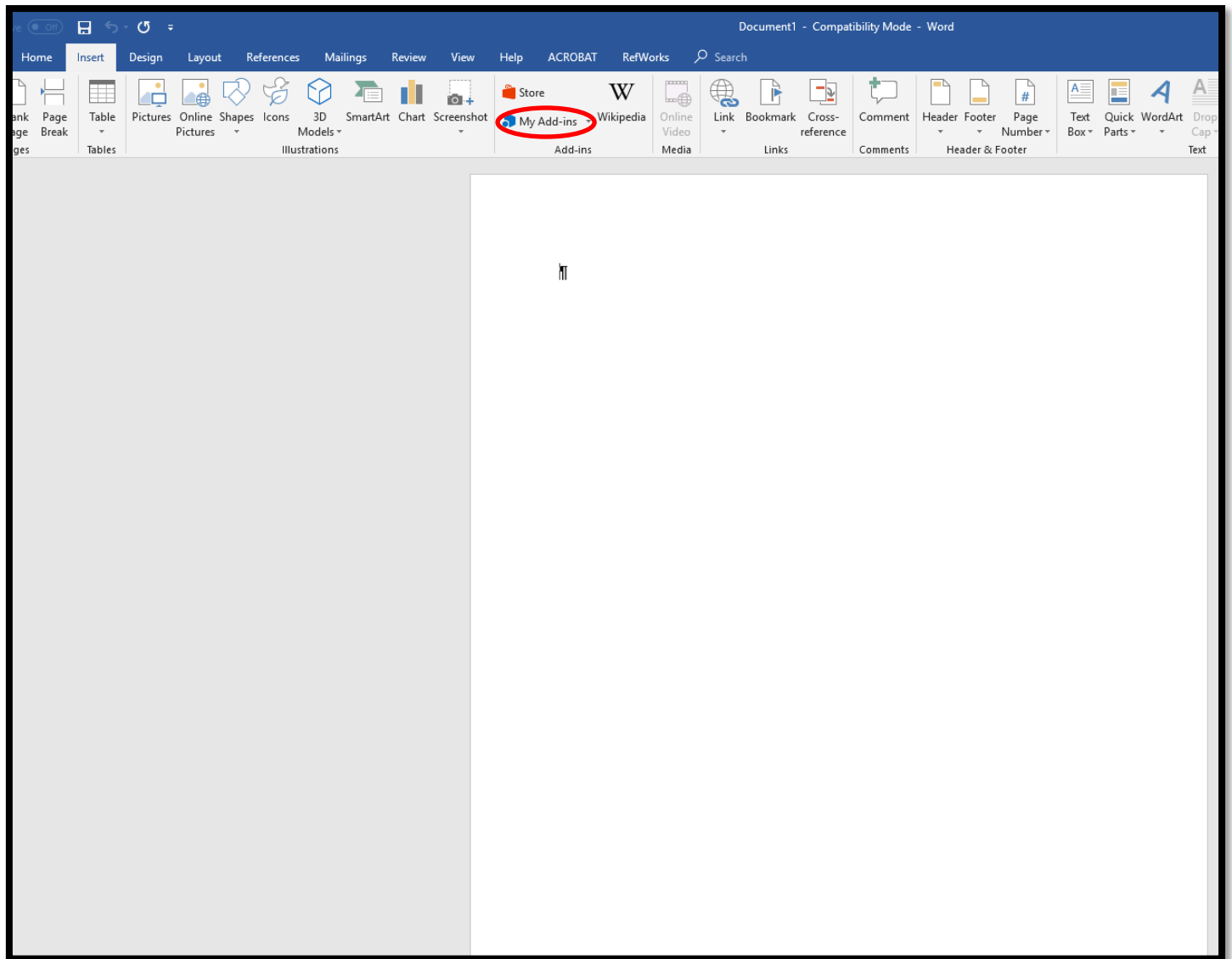


If your preferred referencing style is not in RefWorks, you can use the Custom Style Editor to customise your citation style.

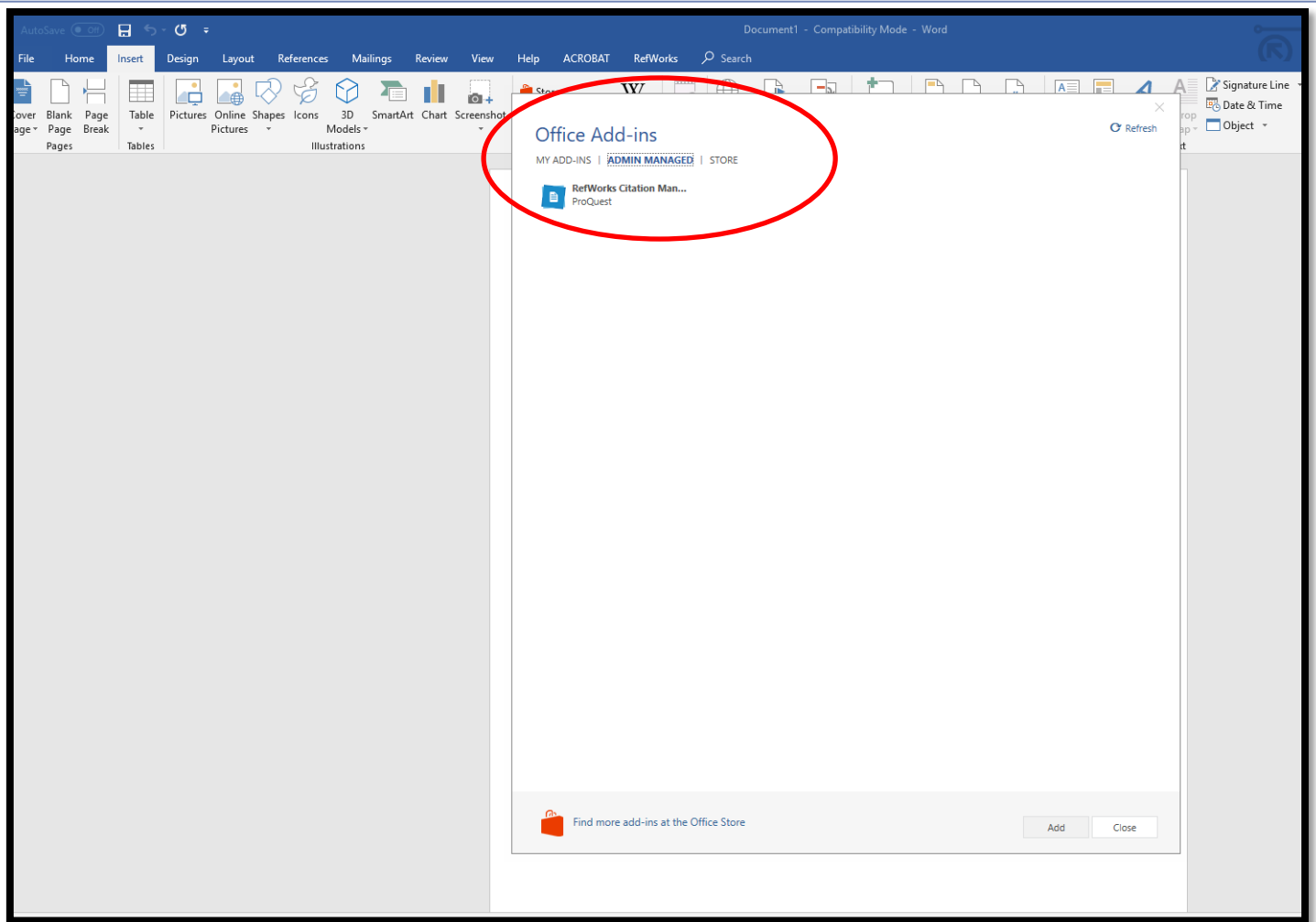
You can find information to help you do this in the help section of RefWorks (found via the question mark icon).

Using Refworks in Microsoft Word: RefWorks Citation Manager

If you are using an Edge Hill PC or laptop, you can use RefWorks Citation Manager to create your reference lists in Microsoft Word. 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.

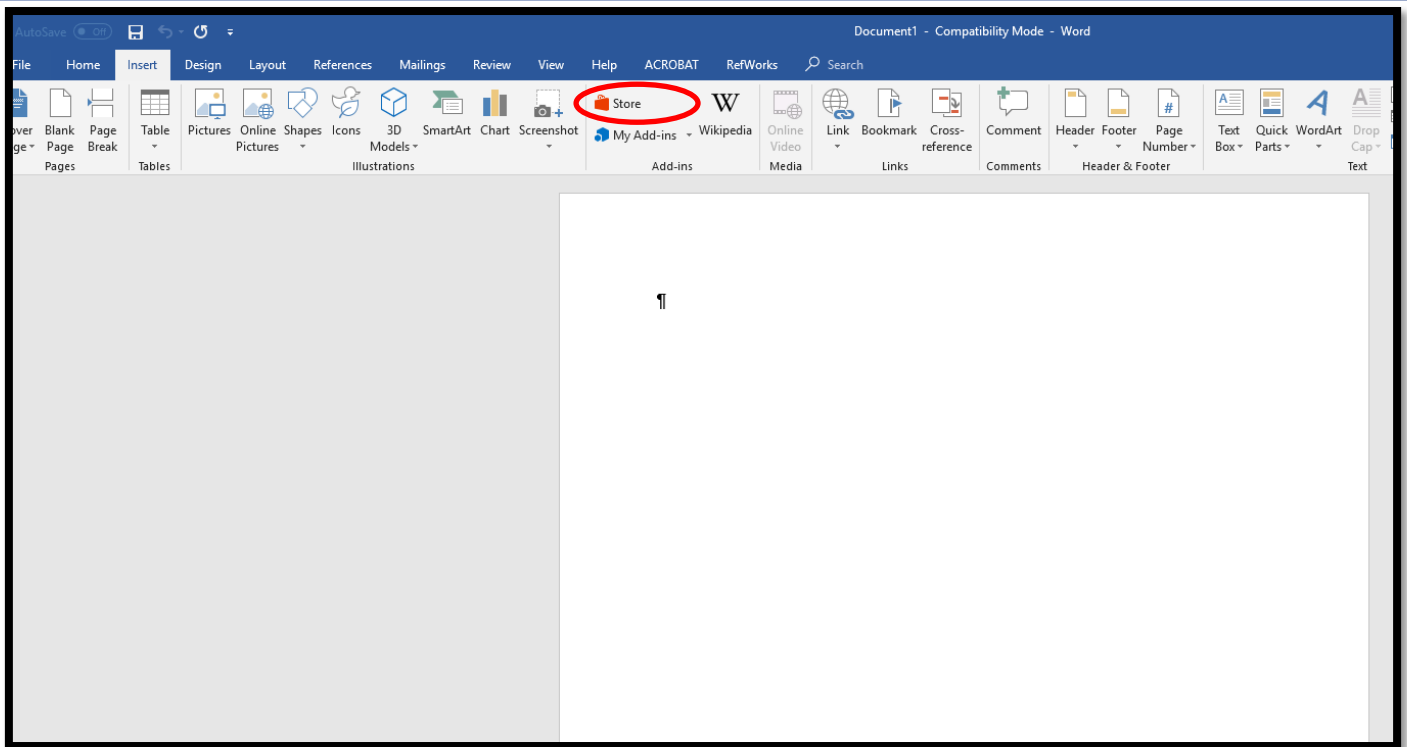


Library & Learning Services

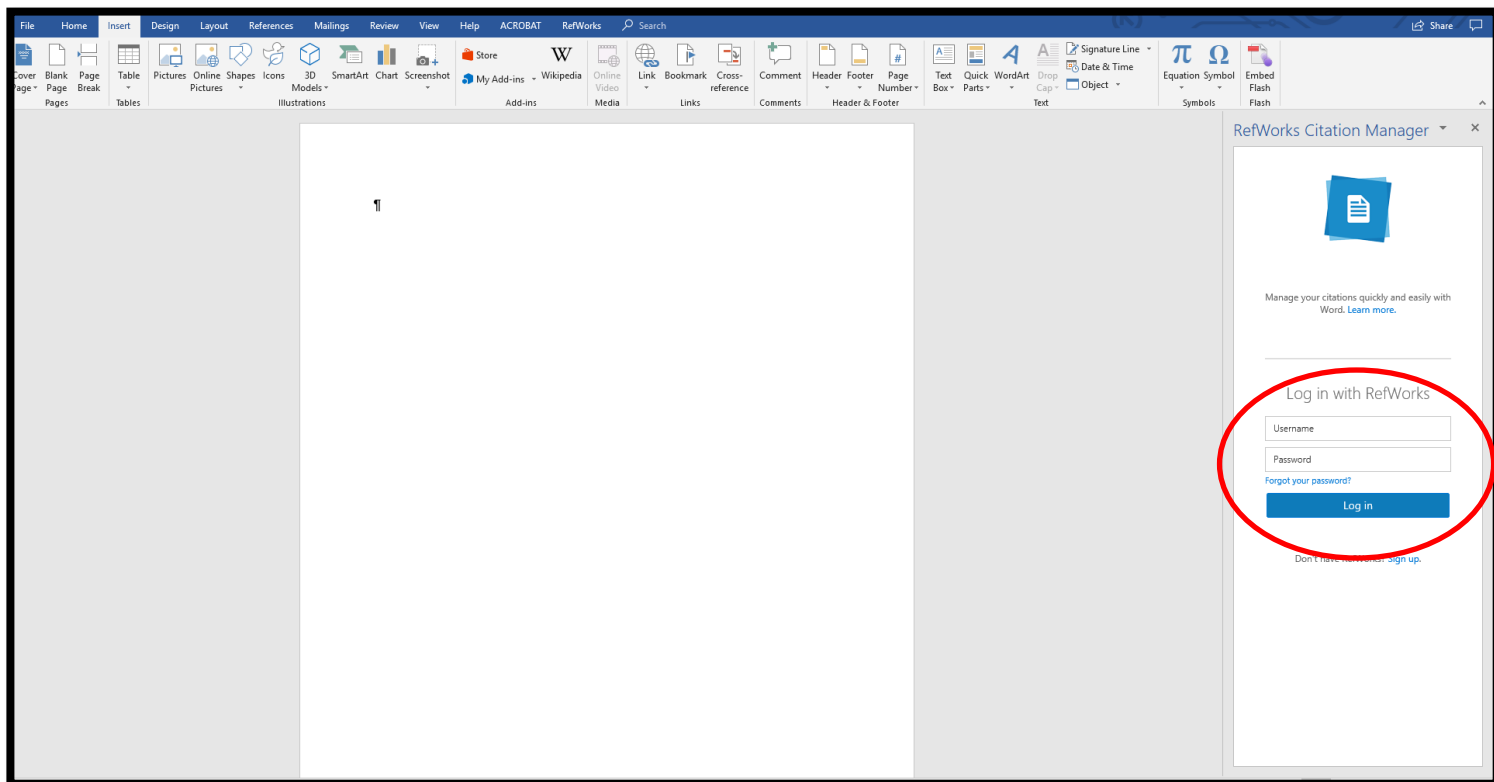


If you are off campus, from within Word you should click on Insert and then Store. You will then need to search for RefWorks Citation Manager in the Microsoft Office Store and follow the necessary steps to download it.

Library & Learning Services



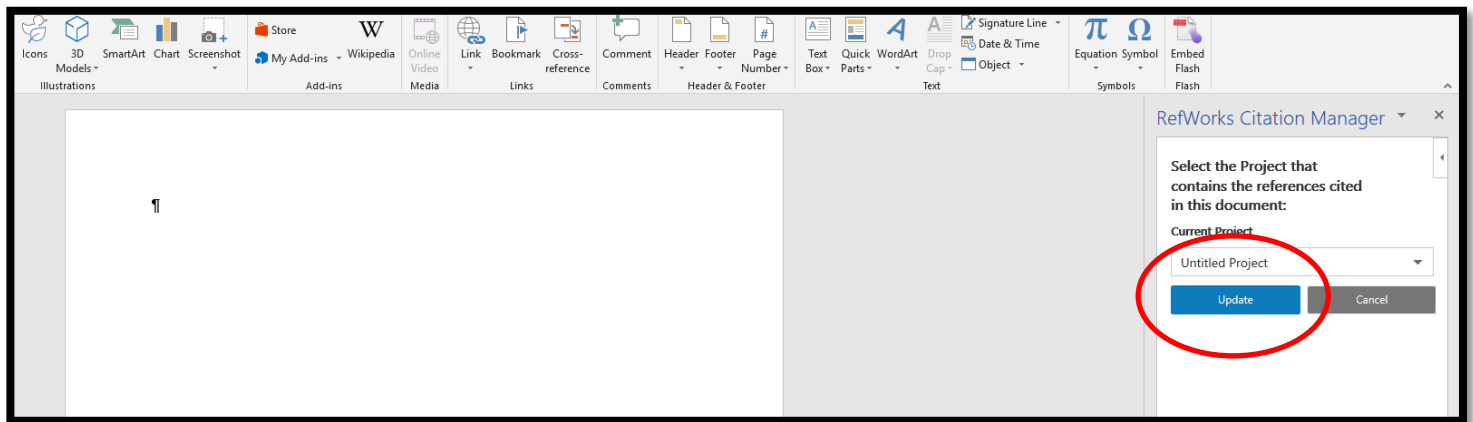
Once you have downloaded RefWorks Citation Manager Log in boxes appear on the right-hand side. You should log in with your RefWorks login details.



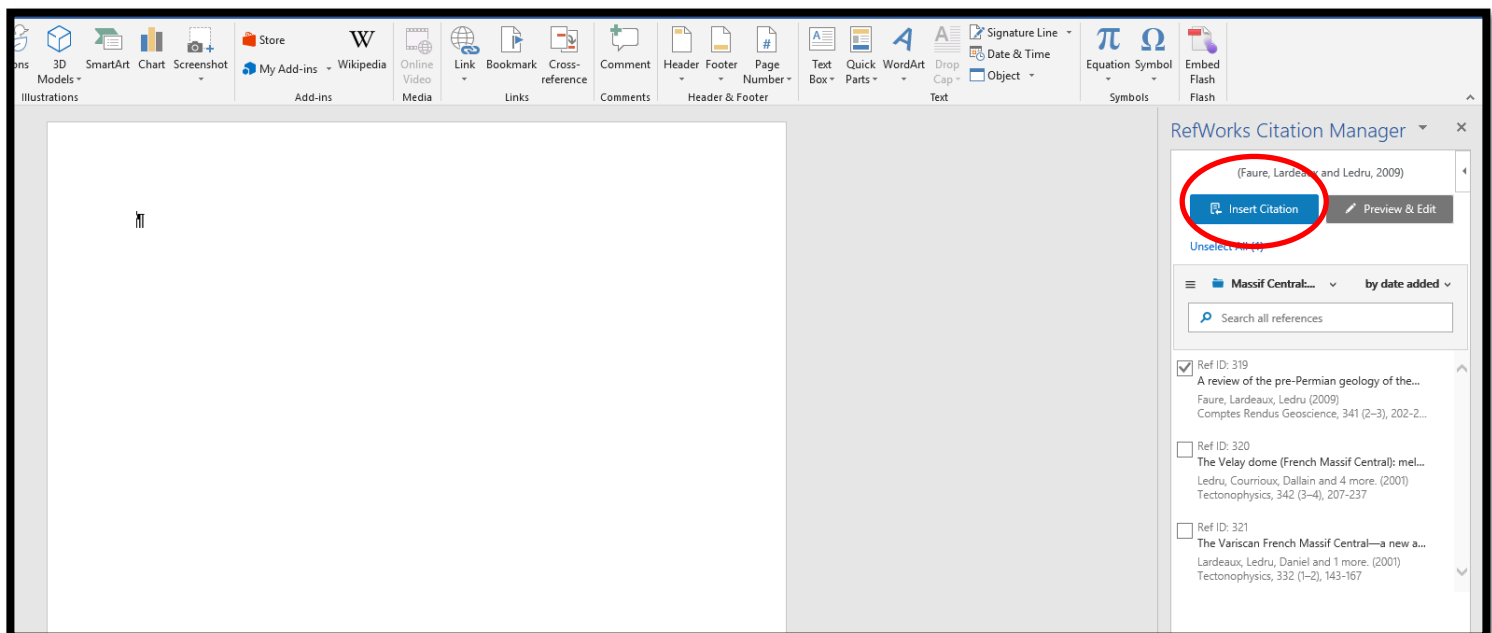
If you have divided your references into a number of different projects, then select the relevant project from the drop-down list that appears when you click on the arrow next to Untitled Project. You then click on Update. If you have not divided your collection of references into different projects,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

Library & Learning Services

click on Update and leave the selection as Untitled Project.

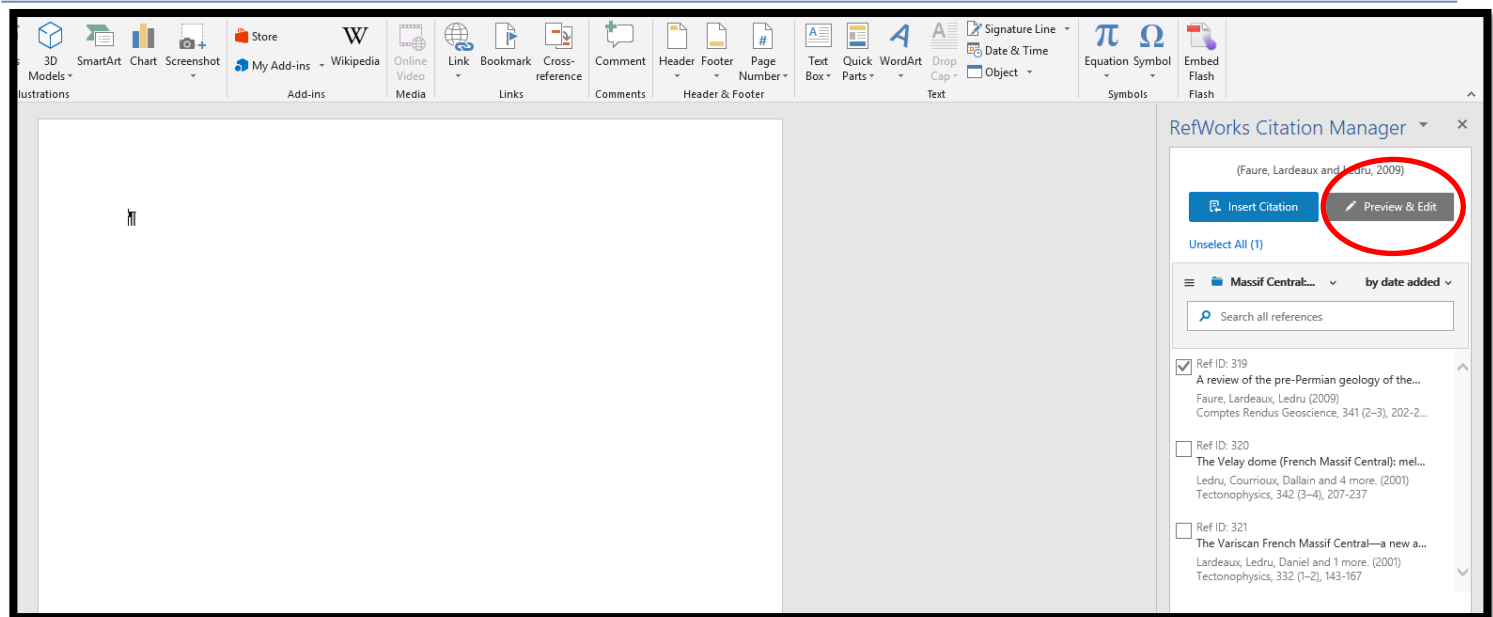


To add a citation, you can either select it from your list of references or click on the drop-down arrow next to All References and select the relevant folder. Once you are in the correct folder, select the required reference and click on Insert Citation. The citation will be added to your document. 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.

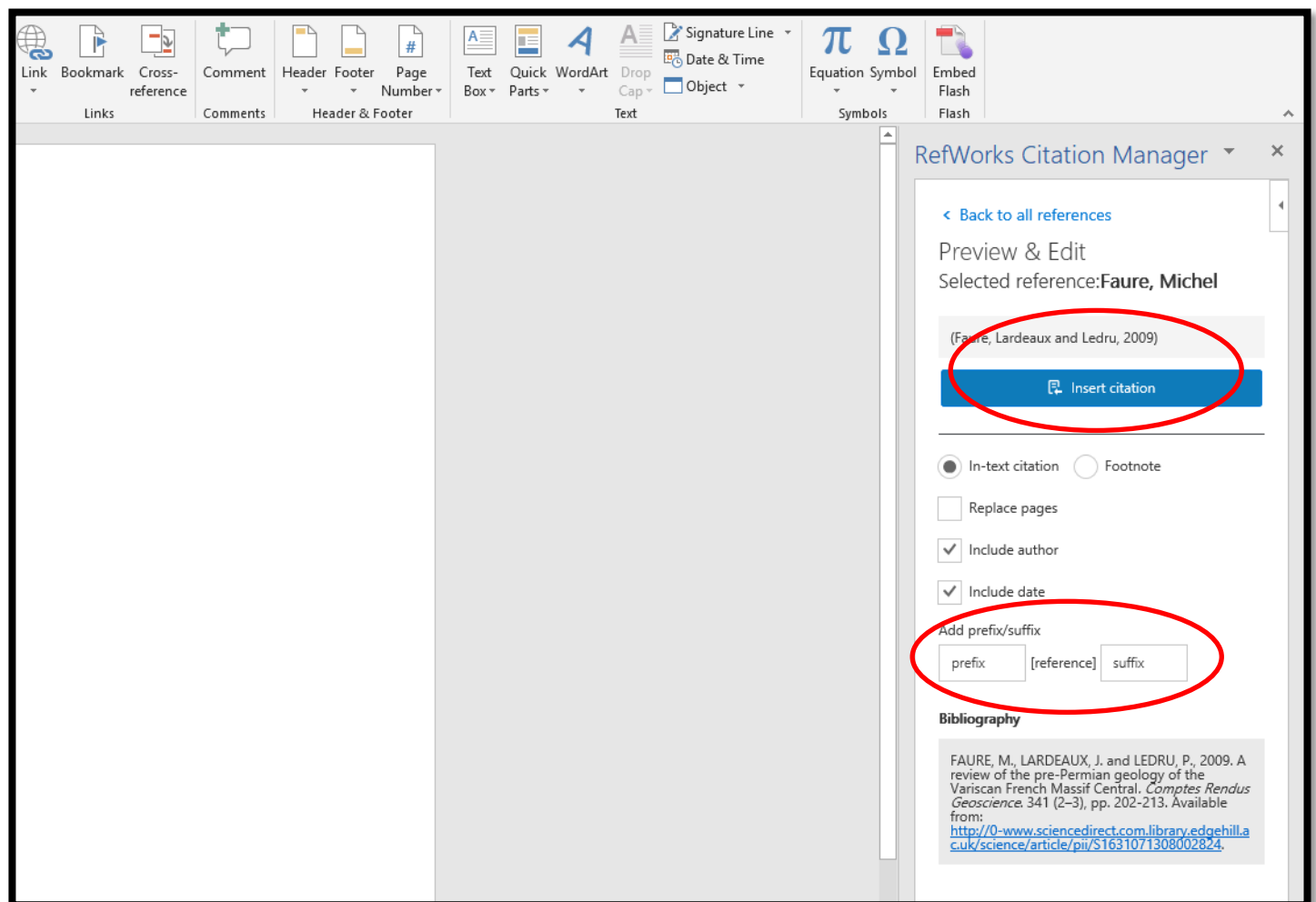


If you are inserting a direct quotation into your document and need to add a page number to the citation when you select the reference, or if you are adding a secondary citation, click on Preview & Edit.

Library & Learning Services

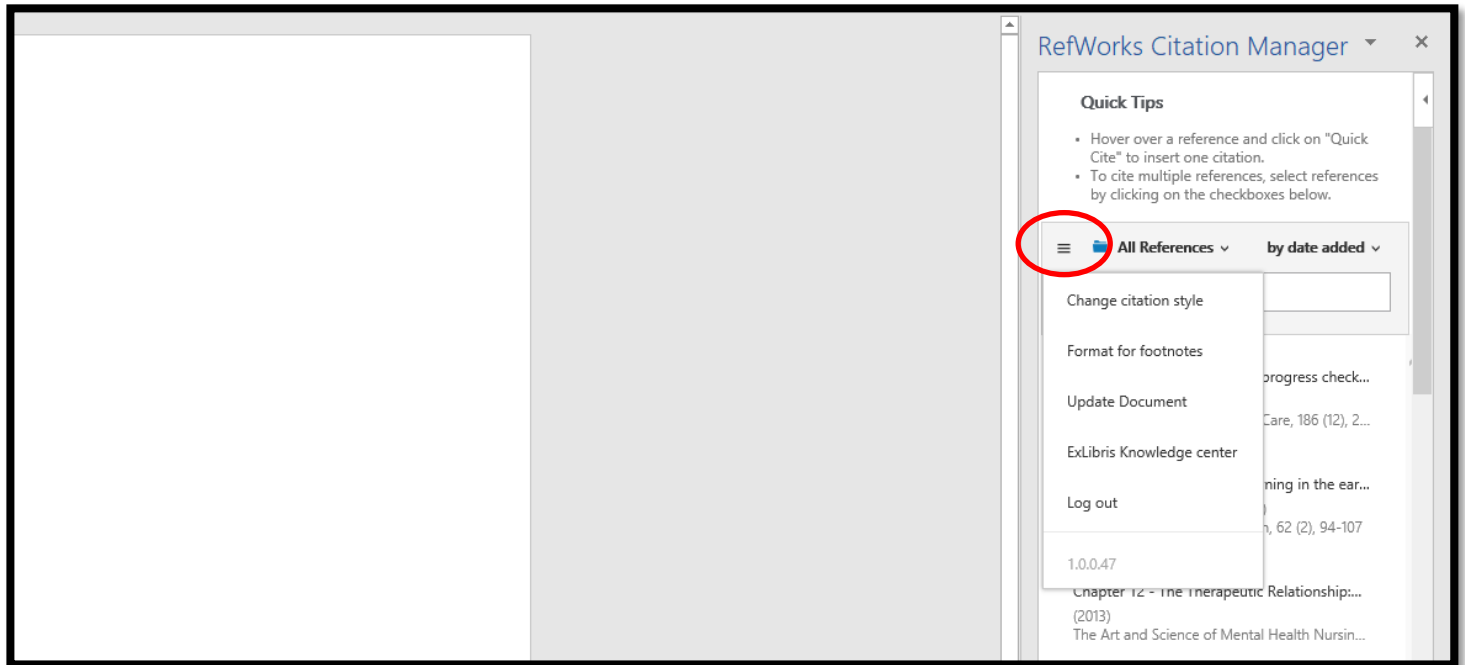


The following screen has an area called Add prefix/suffix. You can add the primary citation information in the prefix box (if you are secondary citing) and the page number(s) in the suffix box. Once you have added this information, click on Insert Citation.



Library & Learning Services

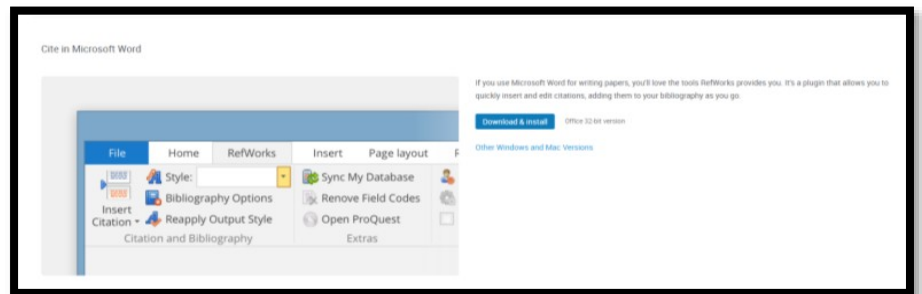
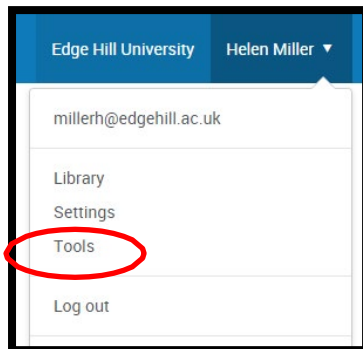
If you click on the three horizontal lines in the left-hand corner, you can change your referencing style or log out.



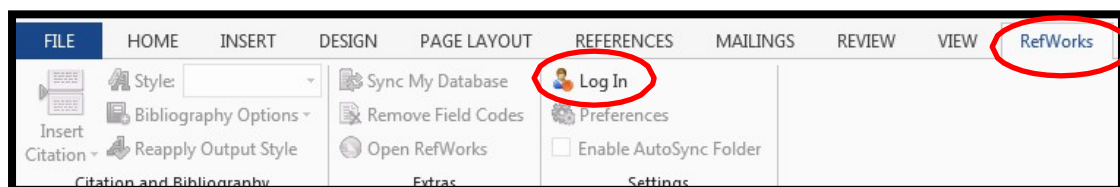
Please remember to check your citations and reference list against your style guide to ensure they are correct.

Using Write-N-Cite

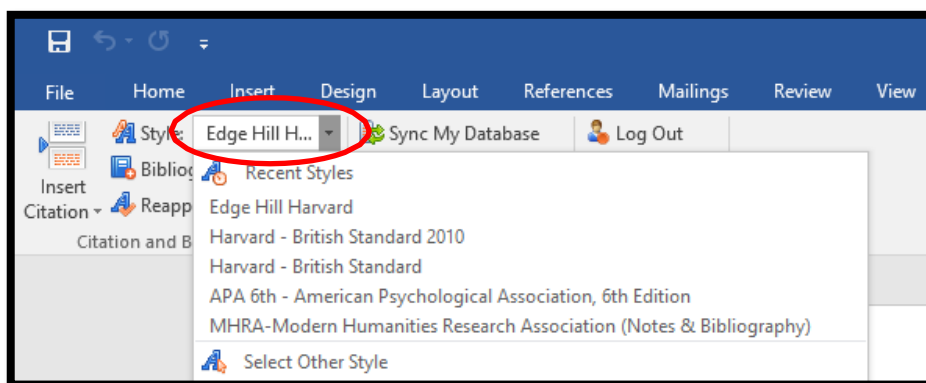
If you are using your own computer, you have the option to use Write-N-Cite instead of Reference Citation Manager. You need to download Write-N-Cite from the RefWorks website. When you are logged into RefWorks click on your name in the top right-hand corner and select **Tools**. Scroll down the page 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.**



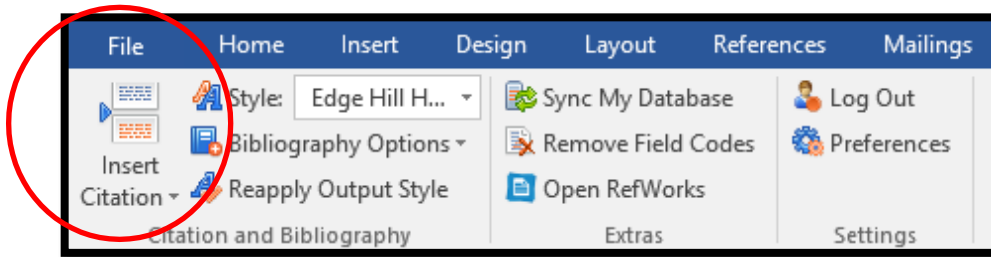
Once you have downloaded this, open a Word document. You will then see the RefWorks tab on the page. Login with your usual RefWorks username and password.



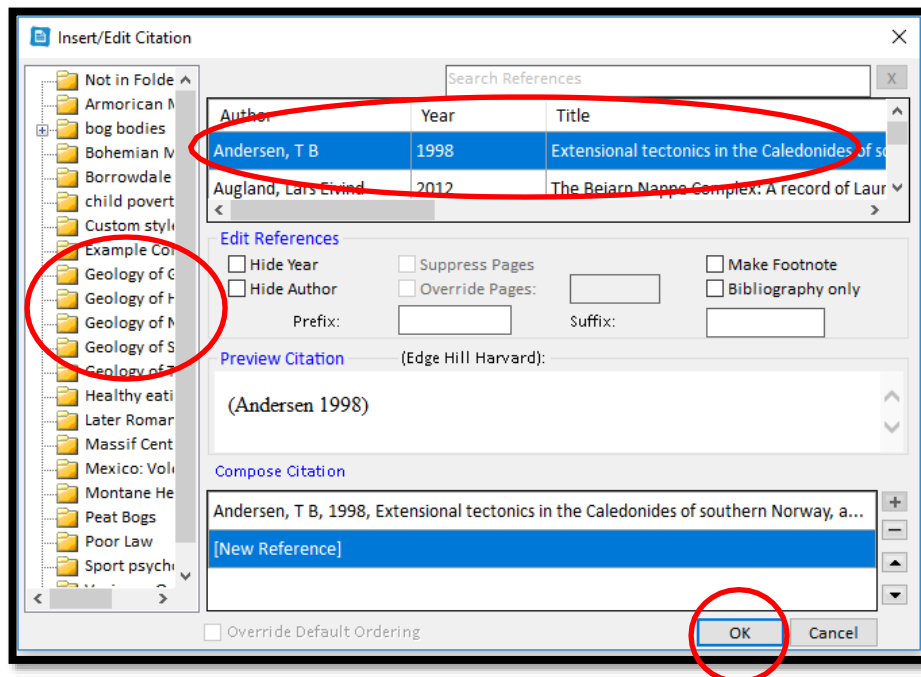
When you are logged in, you can set up your preferred referencing style: if in doubt check with the tutors in your department. If you cannot find your required style in the menu, log-in to your RefWorks account and set up your favoured style in the menu there. This will then sync with Word and update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



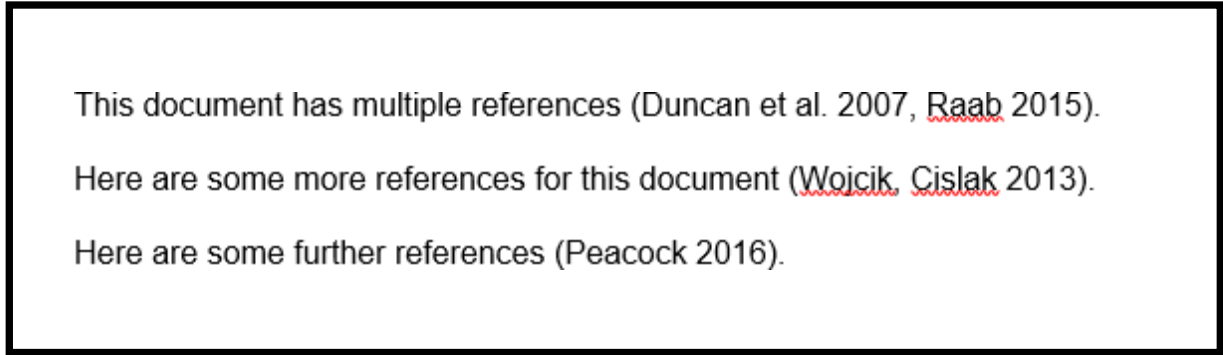
Type up your assignment as you normally would. When you wish to insert a citation, simply click **Insert citation** in the top left-hand corner and choose **insert new**.



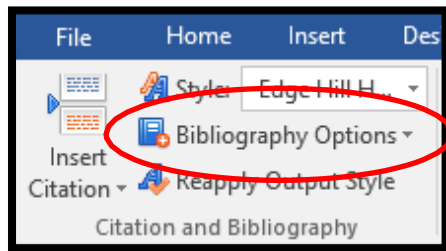
Choose the folder and then the reference you want to insert and click ok.



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.



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



Your assignment will now look like this. Remember to check the citations and reference list against the style guide you are using.

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.

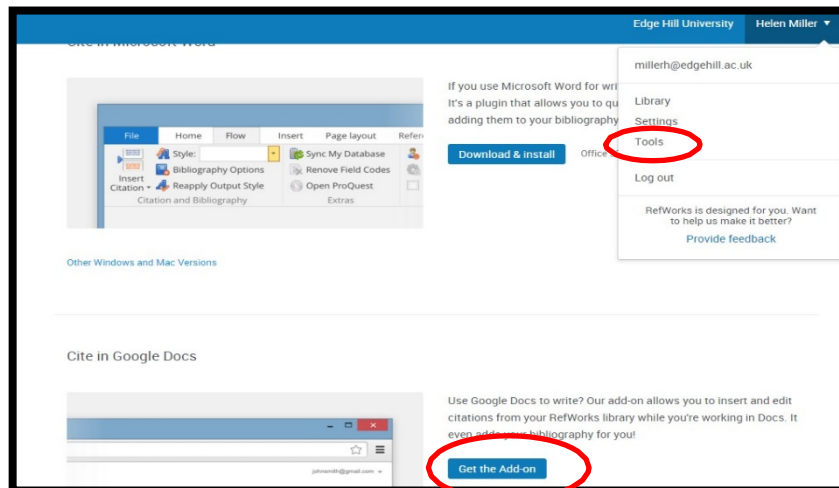
WHYTE, L. A., KOTTECHA, S., WATKINS, W. J. and JENKINS, H. R., 2014. Coeliac disease is more common in children with high socio- economic status. *Acta Paediatrica*. 103 (3), pp. 289-294. Available from: http://edgehill.summon.serialssolutions.com/2.0.0/link/0/eLvHCXMwnV3NahsxEB6SGEggNE3btNu4IEIOudjZXWm10tE1CTnEPPIDJpdldpWCD7FD7NzzCHnGPkIntFrXDg2E3BakHZBG0nwmvkvEwNN-3HtxJiCKsElaOosoyVRCITZL8rrM8rpStfXk-7e34mrMx2O1kqrTsEUsw2-0T_zpvbLdj9Gm9OkFZXFcGooO2MUmdNCOSbEFncHo9-iyX50kb1iZVczRAct4YBpak7Jmn16e0q-ZqXV603T6Q64tsCHImMU2-9PqrtilfV_aB_fNdrP8ClgVzZoFtsubLjF_gwCrzfX-F8OEO5pWXh1odN5ozyeBmKx9XOJIPW1o4ziv8y4kpmtDxmf56eXSiRZITj9Dj_BjenJ9fDs154raFnU0rqILbUxua1FFZolxmpDXdoCZS2Qlode2sToyulEulk7vJKZ0ahf5LFcZ0ldcr34GNJWf3Tha_-q34AS-vayooU3UpnLKasZS5zhgEYbnJZQQHrbKK-4ado2i9Gpypws9UBN9JjQXtWJqXgoqDsYHrCLqtZouwdefoC2mJhxbCaPyx0fZSNsl_dpbhCkYer6l-2k4fJ_V2-JxKKIHILt2FgYycWgkUER17zr4-nGFwM_MfPt3fdh21EqJJnuvC1uLh0f1C-BUW5l_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.

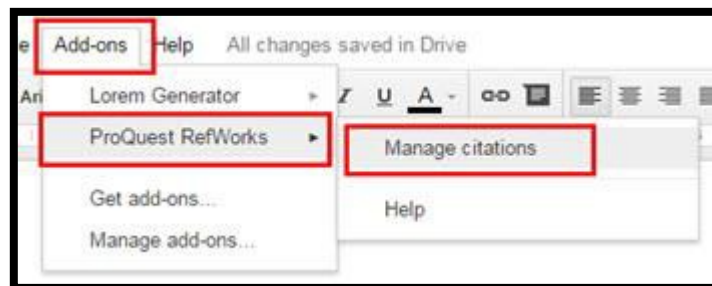
Appendix

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.

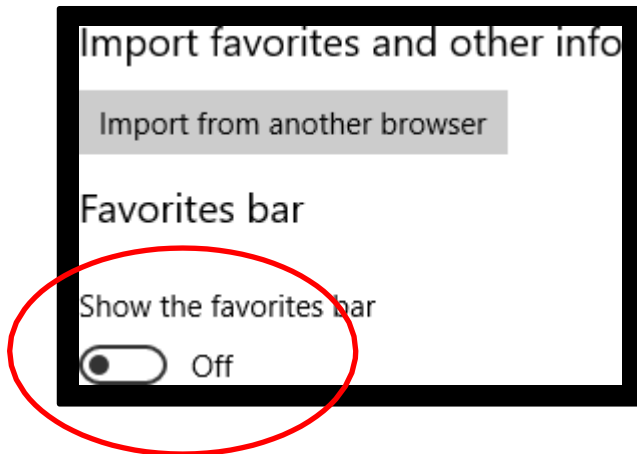


Browser bookmarks guidance

Microsoft Edge

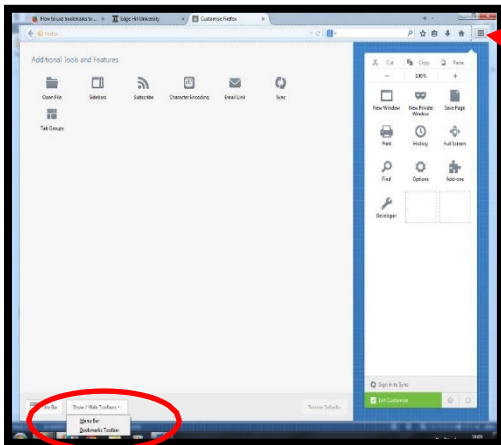
For sites that you want quicker access to, save them to your Favorites bar by clicking the **Add to Favorites bar** button.

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**.



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 toolbar.
3. Click the green exit customise button.

Google 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

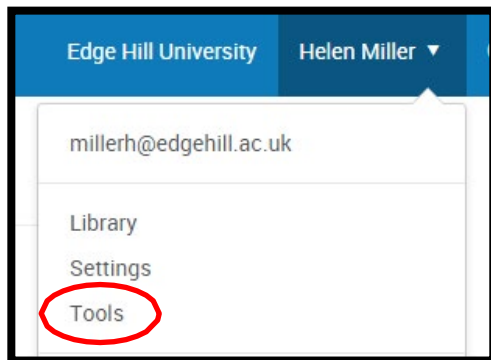
1. Click the Chrome menu  on the browser toolbar.
2. Select Bookmarks.
3. Select Show bookmarks bar.

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

