LIBRARY AND STUDENT SERVICES | University of Cumbria

Guide to using Legacy Refworks

Refworks is an online reference management system.

RefWorks

The Legacy version will cease in July 2017, being replaced with new Refworks. They are entirely different systems and you can have an account in each but if you are setting up a new account we would recommend that you do it in New Refworks at http://refworks.proquest.com

ProQuest® RefWorks

Getting started with Legacy Refworks

nb. In the most recent (10th edn.) of *Cite them Right* all ebooks and ejournal articles are referenced in the same manner as print books and print journal articles.

- Find RefWorks in the Eresources A to Z list.
  http://my.cumbria.ac.uk/StudentLife/Learning/Resources/Eresources/RefWorks.aspx

- Chose the Legacy version and Log in with your network username and password.

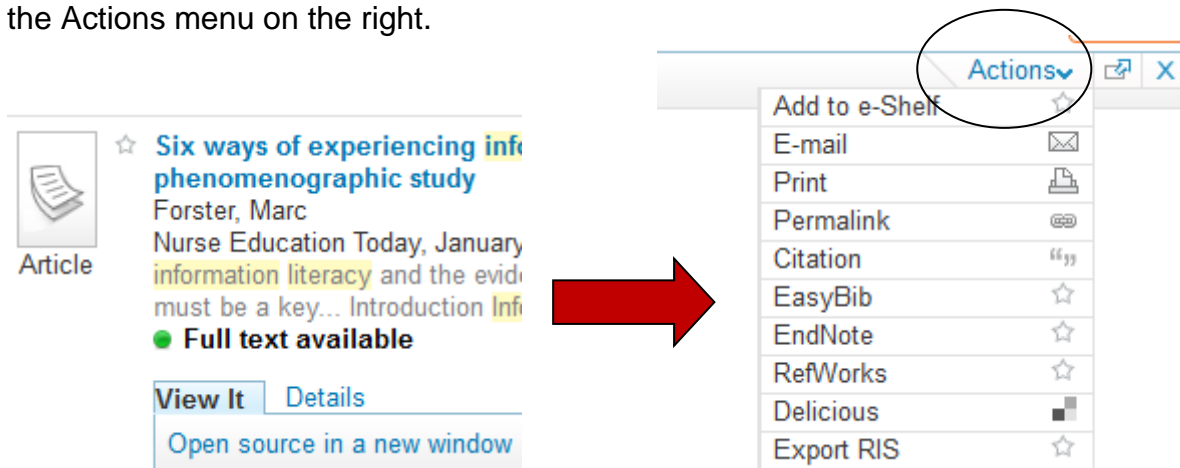- Complete the registration details.

Collecting References

The next step is to start collecting your references.
There are 2 ways to import references into RefWorks – Manual and Direct

Direct import from OneSearch

1. Run your search. In the record you want to add click on **View it** or **Details** to access the Actions menu on the right.


2. In the **Action** menu select **Refworks**

3. If you have a New Refworks account as well you will be asked which one you want to use. Select Legacy
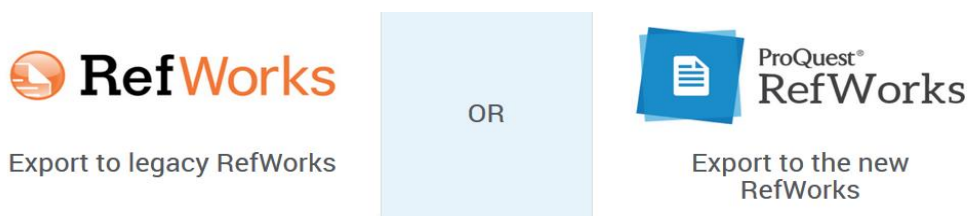

4. Refworks will open in another Tab (You may have to log in off campus – remember to use the Institutional/Shibboleth link, not the obvious login box)

5. Refworks always imports your references into a "Last imported folder" with an option to Check for duplicates and View the folder.

6. If you want to import several items at once you can create a list in OneSearch and import the list.

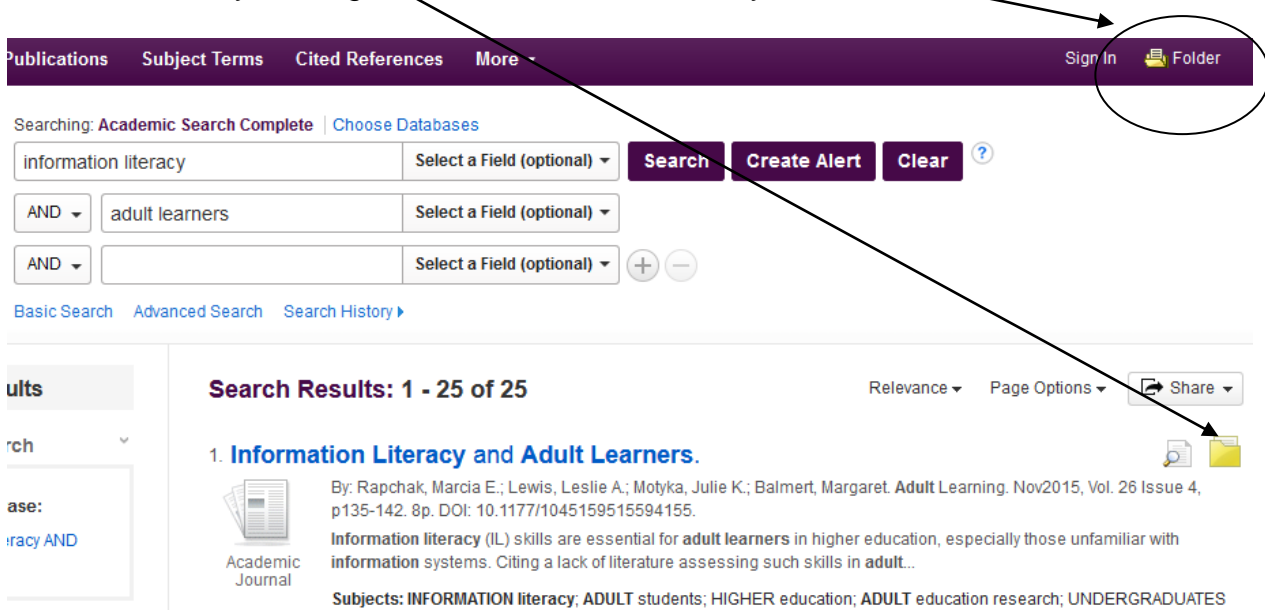7. First use the star to add your item to your "*eshelf".*
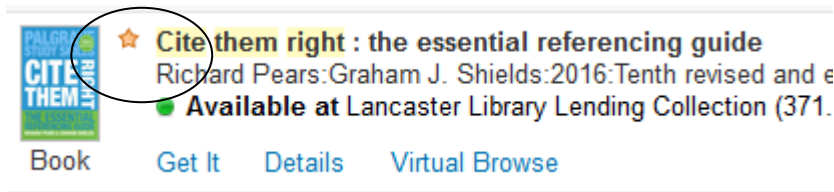
8. Access the eshelf, select the books and "Push to Refworks".
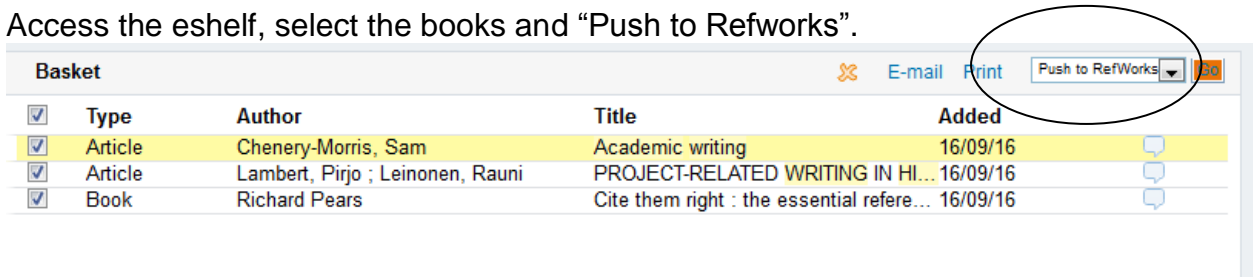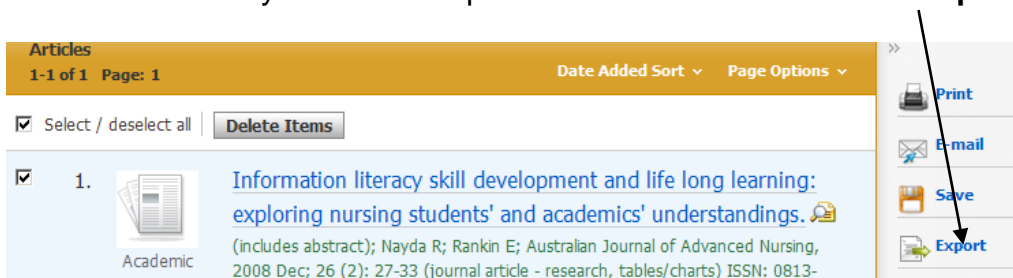

## Direct import from Ebsco databases such as CINAHL, Education Source and Academic Source Complete.

1. Carry out a search on your research topic. Select a few articles that might be useful by clicking on the Folder icons. View your Folder to see the list

2. Tick the items you want to export to Refworks and select the **Export icon**

3. Select the "*Direct Export to Refworks"* option and **Save**.
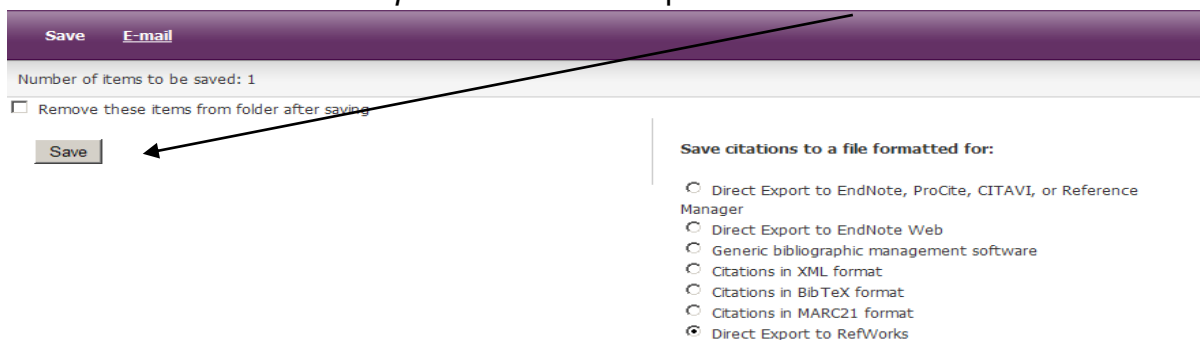
6. Go back to your RefWorks window and you will find that your selected references have been imported. Click on "*View last imported folder*" to see them. Results are always imported into the "*Last imported folder*".

Creating folders and moving records

You can create new folders and then use the "*Organize & share folders"* tab to move your records around.
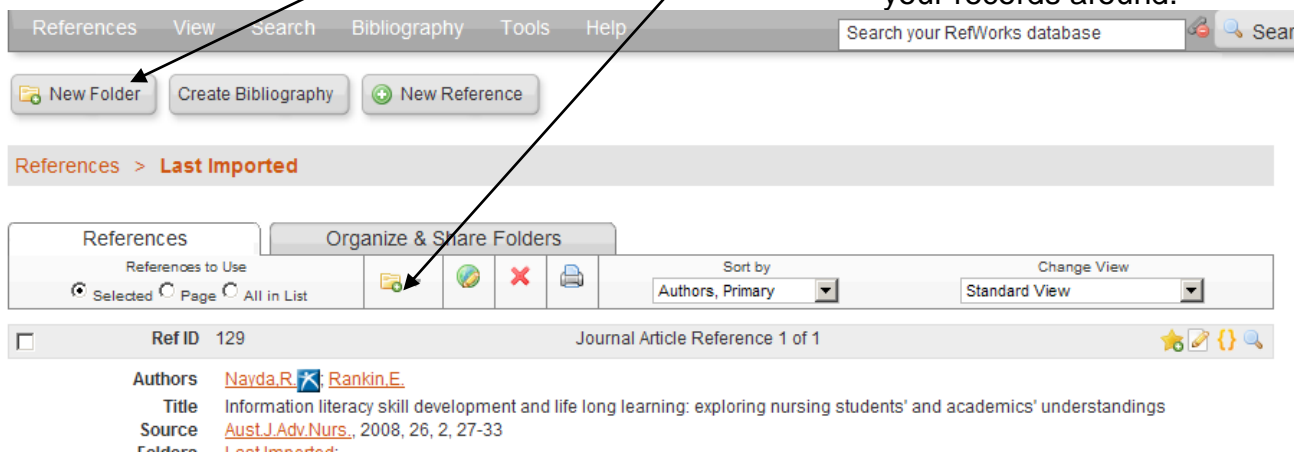
No system is fool proof and you should check that it has imported the correct details as you go along. Also if you want the record to display as an electronic source instead of a print source you will need to select this option in the edit screen and add the details that you would need to reference it correctly – eg. The URL and date accessed.
See *Cite Them Right* for more details.

Editing records

Make sure you are in the "*standard view*" to access the "*edit*" option (the pencil)
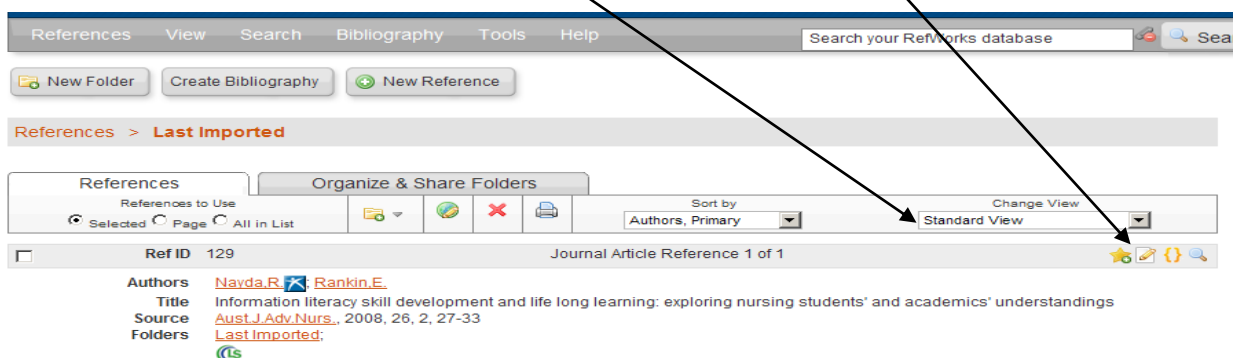
Edit Reference

Ref ID: 40

Fields used by   Cite them right ▾   ⓘ About this style

and Reference Type   Journal Article ▾

This will then display and populate the fields used by Cite them right.

nb. In the most recent (10ᵗʰ edn.) of *Cite them Right* all ebooks and ejournal articles are referenced in the same way as print books and journal articles.

Edit Reference

Pub Year:	2009
Periodical, Full:	Journal of clinical nursing
Volume:	18
Issue:	8
Start Page:	1085
Other Pages:	1095
Links:	http://search.ebscohost.com/login.aspx?direct=true&db=a9h&AN=36816773&site=ehost-live;
DOI:	
Database:	Academic Search Complete
Retrieved Date:	11th January 2010

Add to folder   Select a folder... ▾
ejournals test 📝

Attachments   [   ] Browse...

▾ Additional Fields

Source Type: ○ Print ⦿ Electronic
Output Language: Unknown ▾
Periodical, Abbrev: J.Clin.Nurs.
Pub Date Free Form: 04/15

⬅ Prev   ➡ Next   📋 Duplicate   💾 Save Reference   ➕ Save & Add New

To Specify whether a source is electronic or Print scroll down and open the **Additional fields** option.
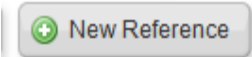
In here further down you will also be able to add your own notes.

Refworks editing tips (these are all to ensure your Reference List is produced in Cite them Right format):

- The author field should be Surname, First Name. If these appear in the wrong order, change them around.

- If you have a source with multiple authors, these need to be separated with semi-colons.

- If the book has an edition, you just need the number e.g. 2 (Refworks puts in the rest)

- 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.

- Journal articles do not need a DOI, Link, Database, or Retrieved Date and should be print.

5. **SAVE** the reference.

To manually imput a record

Choose [New Reference] This will take you to a blank version of the record above so you can input all the details.
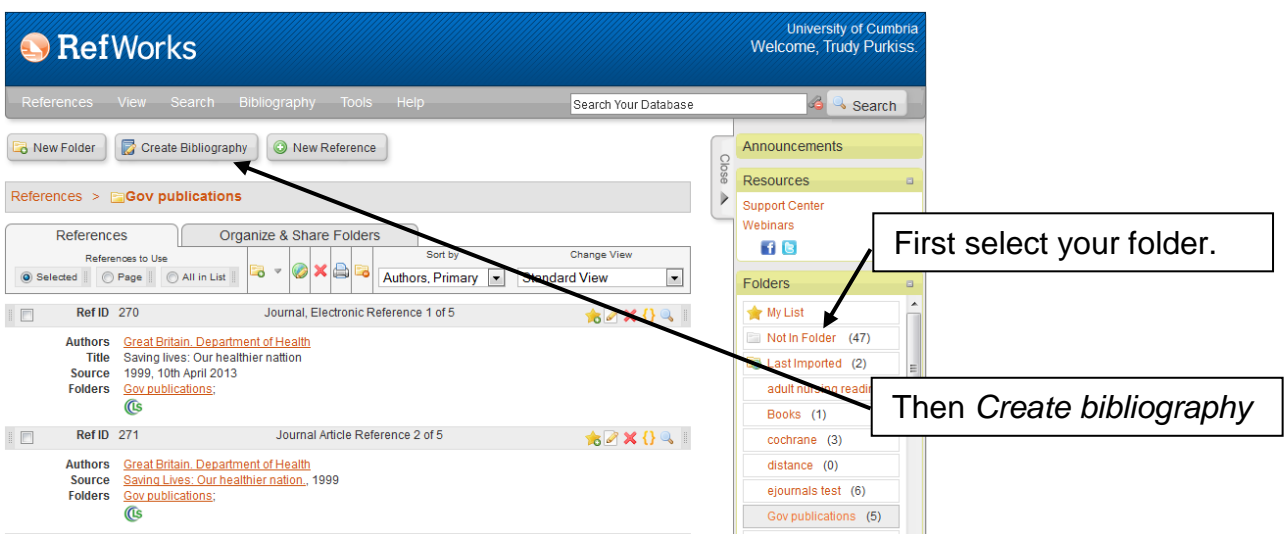
There are currently problems adding text to manual records in **Internet Explorer 9**.
To resolve this select the compatibility button on your browser bar.
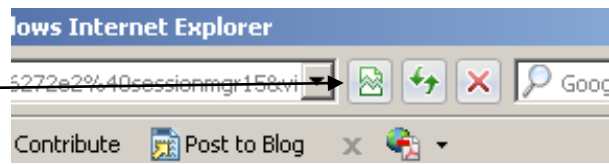
Creating a bibliography.

If you have created assignment specific folders Refworks can turn a folder into a bibliography.

First select your folder.

Then *Create bibliography*

You will get this pop up menu.

Select "Cite Them Right" as the output style.

Select the File type you want. Word will allow you to copy and paste the list onto the end of your assignment.

Create your bibliography.

Refworks will create your bibliography, which you can then copy and paste onto the end of your assignment.

Using Refworks to create a reference list
(for articles that you have cited in your essay)

Another way to do this is to use Refworks to put the citations into your assignment as you go along. It will then create a reference list from your citations. It is only possible to do this on your own computer as it requires a free Plugin (*Write-N-Cite4*) which you need to download from the Tools menu within Refworks.
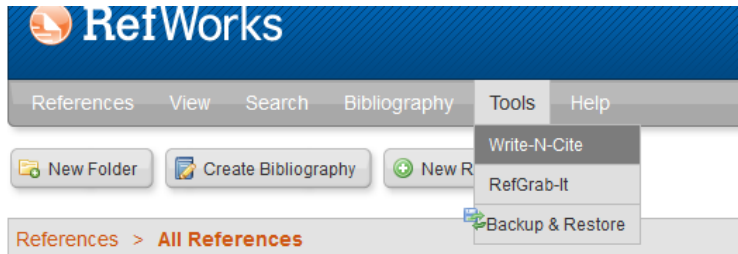
1.

2. You will get an option to download a 32 bit or 64 bit version. This depends on your own computer, you can check which at this site
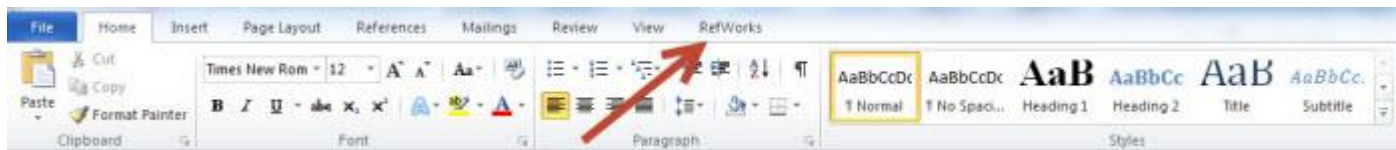
   http://www.howtogeek.com/howto/24259/beginner-discover-if-youre-running-the-32-or-64-bit-version-of-office-2010/

3. Open up a word document - Once downloaded Refworks should appear in the Microsoft Word ribbon.

4. Open up the Refworks menu in word and **Log In**.

   YOUR USUAL LOG ON WILL NOT WORK.

   You will need to copy and paste the code from the Write-n-cite tool option within Refworks (where you found the download)
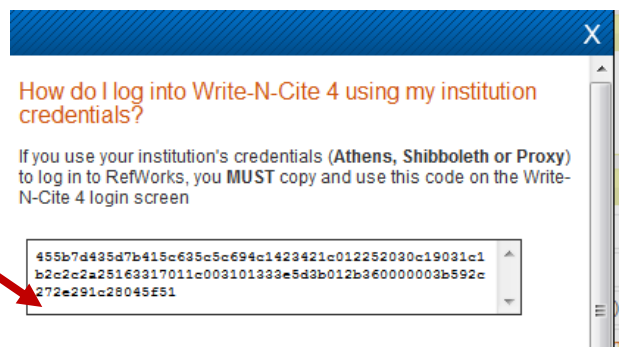
5. This will then sync Write-n-Cite with your Refworks account. You can leave the Write-n-cite plug-in running on your own computer, you don't need to log out each time but if you do, just go back to the Refworks page to pick up a new code.

   As you add new references to Refworks you should get into the habit of Syncing your accounts so that the Write-n-cite has access to all your references.

6. Select *Cite them right* from the **Style** drop down in the Refworks menu.

7. In your word document, create some text (or use an existing word document if you'd prefer to practice). Place the cursor where you want the reference inserted.
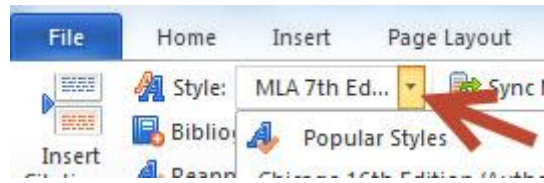
8. Click the **Insert Citation** and **Insert New** option to launch the insert/edit citation box.

9. Use the folders or search option to locate your reference. Click on the reference.

You can use the edit options to hide the author if you have referred to them within the text or override page numbers for quotations.

In-text citation preview

Click the plus button to add another reference to the in-text citation

You will see a preview of the formatted citation in your chosen Output Style (Cite them right)

10. Click **OK** to insert your formatted citation into your paper.

NB. Always check the references to make sure the entries have been formatted in the correct style, (no system is perfect!). You may need to add some details, it all depends on how you set up the records in the first place – see page 5. Look at *Cite them right* for information on citing and referencing correctly

11. You can insert your bibliography anywhere in your paper while you are writing. Click **Bibliography Options, Insert Bibliography**. *Note:* the bibliography will be inserted wherever the cursor is in your paper. You can click **Remove Bibliography** and re-insert if it you need to change the location.

For more information and detail see the help pages within Refworks.

<u>Other features in Refworks</u>
- Use the "*Organize & share folders" tab* to organise your references into different folders
- The Search menu allows you to search your references by Author, journal or descriptor.
- There is a **RefGrab-It** function in the *Tools* menu that imports website details for you. (**N.B.** Only the website details <u>not</u> the reference of documents held on the site – those you will have to manually input)
- It is possible to set up a direct import from Google Scholar – use the *Scholar Preferences* to select this function.   (**N.B**. this will not import any links, just the bibliographic details.)
- Use the help menu for more detailed information and on-line tutorials.
- It is possible to back up your reference collection. Use the *Tools* menu to find *Backup/Restore*.
- You can keep your account after you leave as a member of the University Alumni Association for as long as the University subscribes to Refworks for further details see http://www.cumbria.ac.uk/Public/LISS/Documents/Publications/RefWorksAlumniHandout.pdf