

# RefWorks 2.0 / Training Guide

## Overview

RefWorks 2.0 is a web-based application designed to manage bibliographic references. This detailed guide will demonstrate how to: import references from a variety of sources; manage them within RefWorks; create bibliographies and insert formatted citations into documents.

Please note that RefWorks is **only** available to staff and students of St George's, University of London and the Faculty of Health, Social Care and Education.

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## Introduction

RefWorks 2.0 enables you to:

- Collect and store bibliographic references (i.e. details such as author and title about books, journal articles etc.) by downloading from web-based data services, or by entering manually.
- Organise your references by storing them in online folders.
- Insert formatted citations and bibliographies in your documents.

As RefWorks 2.0 is web-based, you can use it from any PC with internet access and it is compatible with most browsers. However, **it is recommended that you use RefWorks 2.0 in the Firefox browser.** You can check compatibility information here:

<https://www.refworks.com/refworks2/help/Compatibility.htm>

The versions of RefWorks and Write-N-Cite in this training guide are based on those available in the SGUL computer rooms.

## Accessing RefWorks

To access RefWorks:

- Go to <http://www.refworks.com/refworks>
- Click “My Institution’s Credentials (Shibboleth)”
- Scroll down the alphabetical list to find St. George’s, University of London
- Enter your St George’s username & password at the SGUL Shibboleth page

## First time use - registration

The first time you use RefWorks you will need to create an account. Log in as instructed above and you will be prompted to fill in the registration form.

After registering you will see your new RefWorks account. You will also receive a confirmation email. Next time you login it will take you directly to your references.

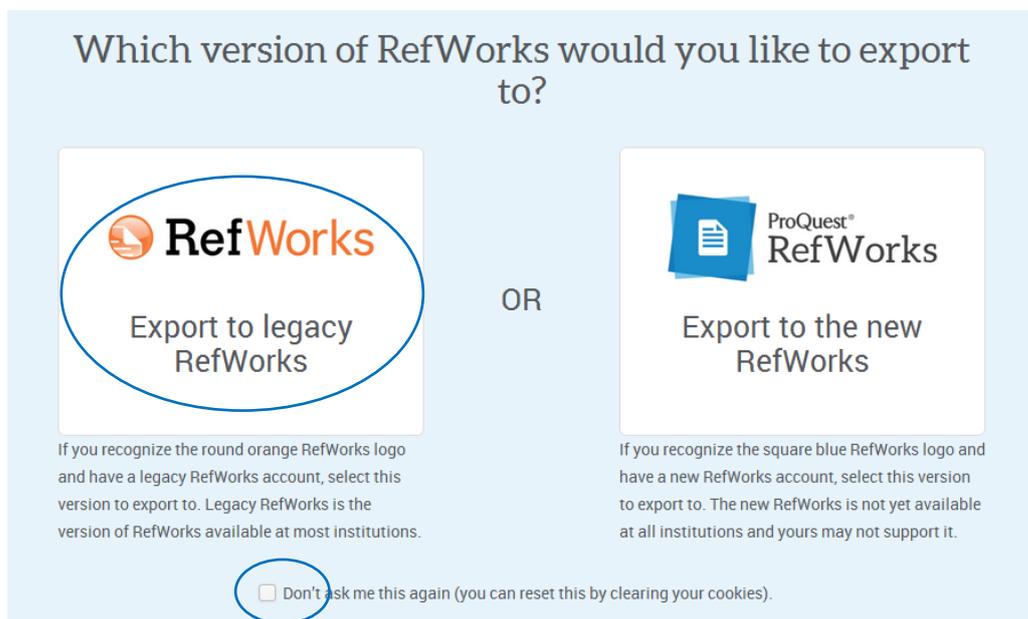
## Importing references of online sources

A powerful and quick way to build your collection of references without having to re-type is to import them, after having performed a search using a database.

There are several ways to do this including:

- Use a specialised search interface such as Hunter to find references and perform a direct export to RefWorks in one step. Other interfaces that provide direct export are Ovid, EBSCOhost, BioMed Central and ScienceDirect.
- Not all searchable databases allow you to perform a direct export. In this instance, you must save the references to an intermediary file, usually a .txt file, and then import the .txt file into RefWorks. PubMed (page 9), Web of Science (page 10) and the Cochrane Library (page 11) work in this way.
- Use the RefWorks search feature to search a Library catalogue and perform a direct import (page 11).
- Google Scholar will perform a direct export to RefWorks one reference at a time (page 12).
- As a default you only see the Harvard- FHSCE & SGUL & Vancouver output styles listed under 'St George's Specific'. Some of the more common output styles are also listed. Hundreds are available and to add styles to this list, select Tools menu, Output Style Manager.

When importing references to RefWorks, you may be prompted to choose a version of the software:



RefWorks 2.0 is also known as Legacy RefWorks. Make sure you select the correct version before proceeding. You can remember your selection by ticking the box at the bottom of the screen.

## Import references using Hunter

You can export your article references directly into RefWorks in one step.

**Note:** These instructions assume that you are familiar with performing a search using Hunter. If not, please refer to the guides on the Library help pages: <http://library.sgul.ac.uk/help>

- Go to the Library Homepage <http://library.sgul.ac.uk>
- Click **Hunter** on the left-hand side or use the Hunter toolbar in the middle of the page.
- Perform a search and save some articles to your e-Shelf.
- Click on the link to e-Shelf to see your saved citations. Make sure you login using your **SGUL user name and password** if you wish to save these for later.
- Tick the box beside the citations you wish to export.
- Click on the three horizontal dots above your saved items and select **Push to RefWorks**

The screenshot shows the library interface. At the top, there is a navigation bar with 'My Favorites', 'ADD LABELS', and a menu icon (three dots) highlighted with a red box. Below this is a section for 'SAVED RECORDS', 'SAVED SEARCHES', and 'SEARCH HISTORY'. Under 'SAVED RECORDS', there is a list of 3 items. The first item is an article titled 'Music, music therapy and dementia: A review of literature and the recommendations of the Italian Psychogeriatric Association'. The article details authors (Raglio, A.; Bellelli, G.; Mazzola, P.; Bellandi, D.; Giovagnoli, A.R.; Farina, E.; Stramba-Badiale, M.; Gentile, S.; Gianelli, M.V.; Ubezio, M.C.; Zanetti, O.; Trabucchi, M.) and the journal (Maturitas, August 2012, Vol.72(4), pp.305-310). A 'PEER REVIEWED' badge is visible. To the right of the article title are icons for quote, email, and a menu (three dots). Below the article list, there is a toolbar with 'My Favorites', 'ADD LABELS', and a menu icon (three dots). Below the menu icon is a row of export options: 'EXPORT BIBTEX', 'EXPORT RIS', 'REFWORKS' (highlighted with a red box), 'ENDNOTE WEB', 'EASYBIB', 'PRINT', and 'E-MAIL'. A 'CLOSE' button is located below the export options.

A second browser window should open with RefWorks and an Imported References box.

Click on **View Last Imported Folder** to see the citations in RefWorks.

### **\*IMPORTANT\***

Book citations can also be imported into RefWorks, however if there is **more than one author** their names may have to be entered into citations and bibliographies **manually**. This will not be necessary if there is just one author.

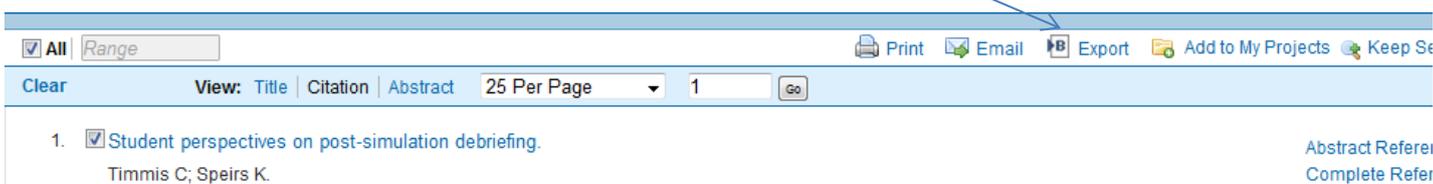
Remember: Each time you import to the Last Imported folder, its previous content is cleared and moved into the 'Not in folder' list.

## Import references using Ovid and Export feature

Some search interfaces have direct export buttons, so that you can export your references directly and import into RefWorks in one step.

**Note:** These instructions assume that you are familiar with performing a search using Ovid. If not look at the Library Homepage for help: <http://library.sgul.ac.uk/help>

- Go to the Library Homepage <http://library.sgul.ac.uk>
- Click on the link to **Databases**.
- Select the **Medline** database (via **Ovid**).
- Perform a search and select some citations.
- Click the **Export** option just above the results list.



### Export Citation List:

Export To: RefWorks

Selected Results: 1

#### Select Fields to Display

- Citation (Title, Author, Source)
- Citation + Abstract
- Citation + Abstract + Subject Headings
- Complete Reference
- Custom Fields

#### Include

- Link to External Resolver
- Include URL

- From the Export to drop down list select RefWorks.
- Click on Export Citation(s).
- A second browser window should open with RefWorks and an Imported References box.
- Click on View Last Imported Folder to see the citations in RefWorks.

### Remember:

- You may be prompted to select a version of RefWorks to import your references to. Make sure you select 'Legacy RefWorks'.
- Each time you import to the Last Imported folder, its previous content is cleared and moved into the 'Not in folder' list.

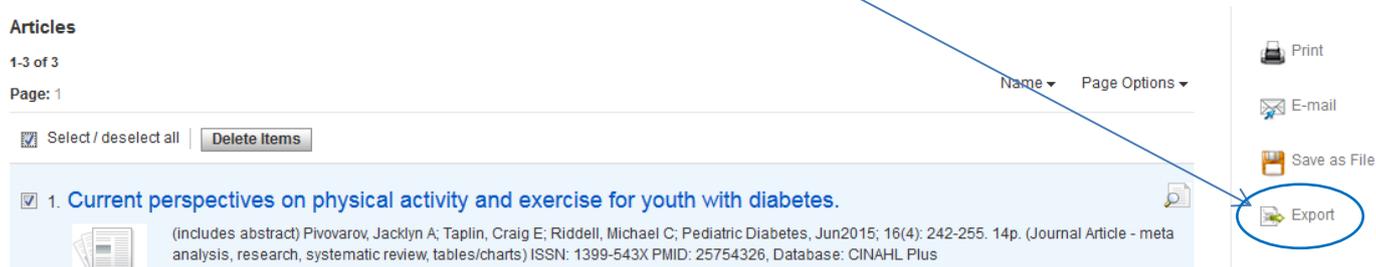
## Import references using EBSCOhost and Direct Export feature

### Import references using EBSCOhost and Direct Export feature

As with Ovid, you can export your references and directly import into RefWorks in one step.

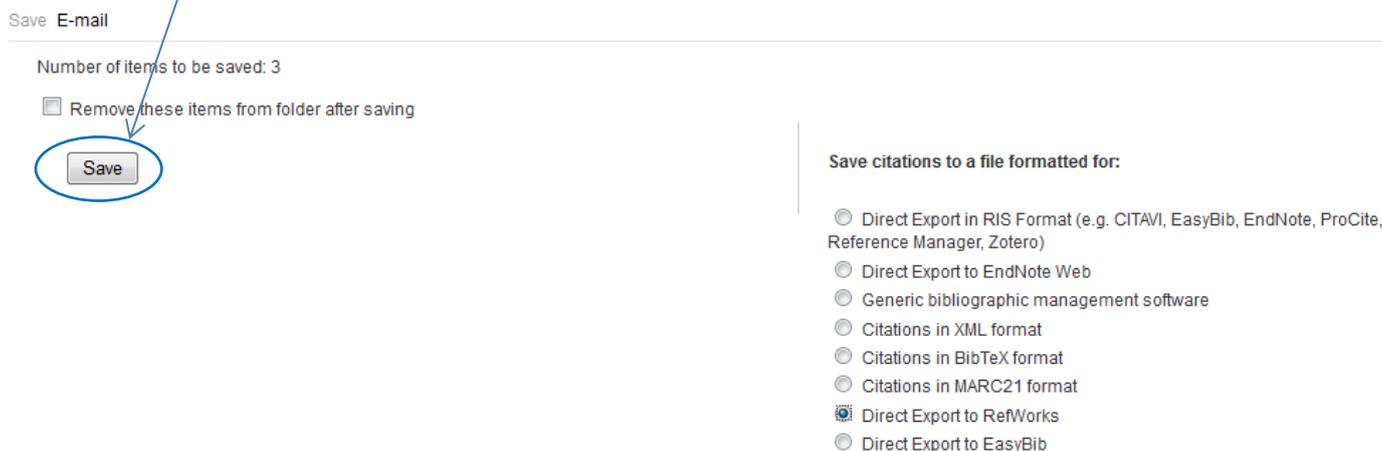
**Note:** These instructions assume that you are familiar with performing a search using EBSCOhost. If not look at the Library Homepage for help: <http://library.sgul.ac.uk/help>

- Go to the Library Homepage <http://library.sgul.ac.uk>
- Click on the link to **Databases**.
- Select the **CINAHL Plus** database.
- Perform a search and click on the 'add to folder' icon  to add some references:
- Click on the **Folder** tab at the top of the screen
- Select some references, and click the **Export** icon.



The screenshot shows the EBSCOhost interface. On the left, under 'Articles', it says '1-3 of 3' and 'Page: 1'. There are buttons for 'Select / deselect all' and 'Delete Items'. A list of articles is shown, with the first one selected: '1. Current perspectives on physical activity and exercise for youth with diabetes.' To the right of the article list, there are icons for 'Print', 'E-mail', 'Save as File', and 'Export'. The 'Export' icon is circled in red. A blue arrow points from the 'Export' icon in the screenshot to the 'Export' option in the 'Save citations to a file formatted for:' section below.

- In **Export Manager**, select **Direct Export to RefWorks**.
- Click **Save**.



The screenshot shows the 'Save E-mail' section of the Export Manager. It says 'Number of items to be saved: 3' and has a checkbox for 'Remove these items from folder after saving'. The 'Save' button is circled in red. To the right, under 'Save citations to a file formatted for:', there are several radio button options. The 'Direct Export to RefWorks' option is selected.

- Your records should appear in the **Last Imported Folder** in RefWorks.

### Remember:

- You may be prompted to select a version of RefWorks to import your references to. Make sure you select 'Legacy RefWorks'.
- Each time you import to the Last Imported folder, its previous content is cleared and moved into the 'Not in folder' list.

## Import references from Internurse and Intermid

- Go to the Library Homepage <http://library.sgul.ac.uk>
- Click on the link to **Databases**.
- Select the **Internurse** or **Intermid** database and perform a search.
- Select a result you wish to export and once in the article view, select the Tools button.

### The effects of music therapy for older people with dementia

Michelle Wall, Anita Duffy

Published Online: 27 Sep 2013 | <https://doi.org/10.12968/bjon.2010.19.2.46295>

 View Article

 Tools  Share

- From the drop-down menu select **download citations**. Then select Ref

**Format**  RIS (ProCite, Reference Manager)

EndNote

BibTex

Medlars

RefWorks

Direct  
import

#### Tips for downloading citations

**Download article citation data**

Download article citation data for:

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The effects of music therapy for older people with dementia

Michelle Wall and Anita Duffy

British Journal of Nursing 2010 19:2, 108-113

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- You will be taken to another page, click on the link to **Submit data to RefWorks**.

#### Remember:

- You may be prompted to select a version of RefWorks to import your references to. Make sure you select 'Legacy RefWorks'.
- Each time you import to the Last Imported folder, its previous content is cleared and moved into the 'Not in folder' list.

## Import references from PubMed by downloading a text file and importing

**Note:** These instructions assume that you are familiar with performing a search using PubMed. If not look at the Library Homepage for help: <http://library.sgul.ac.uk/help>

- Go to **PubMed** ([www.pubmed.gov](http://www.pubmed.gov))
- Perform a search and select the references you want to export.
- Click **Send to** and select **File**. Under Format change **Summary (text)** to **MEDLINE**. Click Create File. If prompted, choose to save the file to a location, on site it may automatically be saved in your H: drive.

Format: Summary ▾ Sort by: Best Match ▾

Send to ▾

### Search results

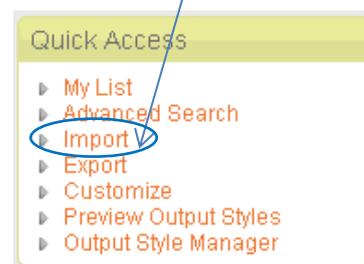
Items: 1 to 20 of 123 Selected: 3

<< First < Prev Page 1 of 7 Next > Last >>

- [Acetaminophen versus Ibuprofen in Young Children with Mild Persistent Asthma.](#)
1. Sheehan WJ, Mauger DT, Paul IM, Moy JN, Boehmer SJ, Szeffler SJ, Fitzpatrick AM, Jackson DJ, Bacharier LB, Cabana MD, Covar R, Holguin F, Lemanske RF Jr, Martinez FD, Pongracic JA, Beigelman A, Baxi SN, Benson M, Blake K, Chmiel JF, Daines CL, Daines MO, Gaffin JM, Gentile DA, Gower WA, Israel E, Kumar HV, Lang JE, Lazarus SC, Lima JJ, Ly N, Marbin J, Morgan WJ, Myers RE, Olin JT, Peters SP, Raissy HH, Robison RG, Ross K, Sorkness CA, Thyne SM, Wechsler ME, Phipatanakul W; NIH/NHLBI AsthmaNet..

To import the PubMed text file into RefWorks

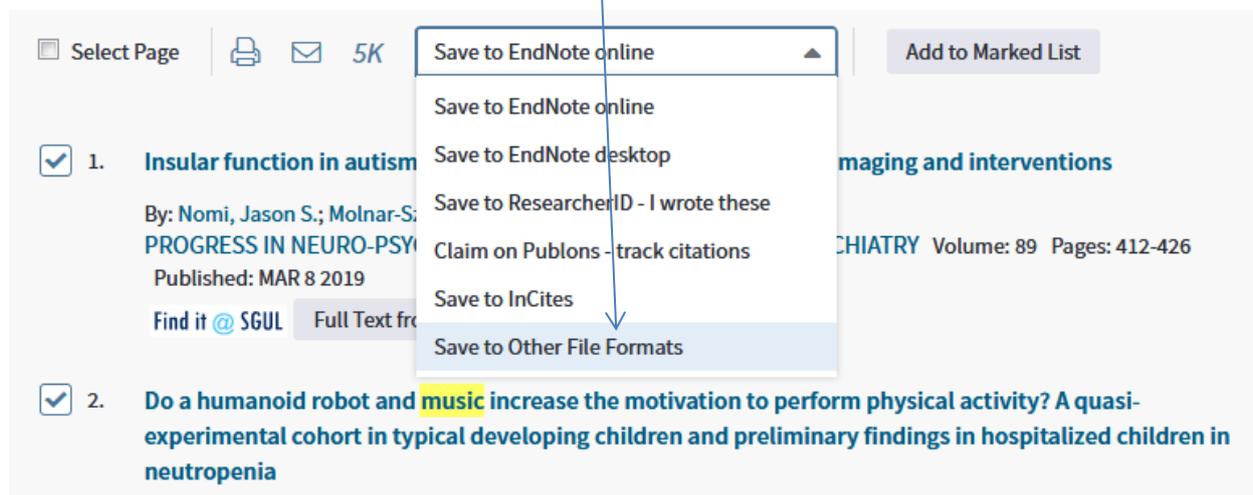
- From the **References** menu in RefWorks click on **Import**. Or use the quick link on the right-hand side.



- Use the **From Text File** option.
- Select **NLM PubMed** as the **Import filter/data source**.
- Click **Browse** button to locate your saved .txt file.
- Leave **Encoding** as the default setting.
- Click the **Import** button.
- Choose a folder to import your references into; they will also go into the **Last Imported Folder** until you import your next set of references.

## Import references from Web of Science by downloading a text file and importing

- Go to the Library Homepage <http://library.sgul.ac.uk>
- Click on the link to databases.
- Select **Web of Science** database and perform a search.
- Select some citations, click on the **Save to...** pull down menu and select **Save to Other File Formats**.



**Send to File** ✕

3 records selected

Record Content:

File Format:

- In the pop-up box select the File Format Other Reference Software and click send.
- Click Save.
- This will open a 'File Download' dialog box. It will prompt "Do you want to open or save this file?" Select Save.
- Select a location, enter a file name if you wish, and save the file.

To import the text file into RefWorks:

- Select the **References** menu in RefWorks, and then Import.
- Use the **From Text File** option.
- Select **Thomson Reuters** as the import filter / data source.
- Select **Web of Science** as the database.
- Click **Browse** button to locate your saved .txt file, click **Open**.
- Click the **Import** button to import your references.
- Your records should appear in the Last Imported Folder.

## Import references from The Cochrane Library by downloading a text file and importing into RefWorks

- Go to <http://www.cochranelibrary.com>
- Perform a search.
- Select some citations.
- Click **Export Selected Citations**
- Select Save to **RefWorks** then **Download**

Save citation to:  CiteULike  Mendeley  RefWorks

- This will open a 'File Download' dialog box. It will prompt "Do you want to open or save this file?" Select **Save**.
- Select a location, enter a file name, and save the file. (Make sure file type is text).

To import the Cochrane text file into RefWorks

- Select **References** menu, then Import.
- Use the **From Text File** option.
- Select **RIS Format** as the import filter / data source.
- Select **RIS Format** as the databases source.
- Click **Browse** button to locate your saved .txt file, click **Open**.
- Click the **Import** button to import your references.
- Your records should appear in the Last Imported Folder.

## Import references from a Library catalogue

- In RefWorks, select the **Search** menu, and then **Online Catalogue or Database**.
- Select a catalogue.
- Enter some search terms in the **Quick Search** box.
- Alternatively, click on **Advanced Search** to search by author, title etc.
- Use the + icon to search additional fields.
- Click **Search**. Search results will be displayed as below.



- Select your references, click **Import** and **OK** to confirm.
- Close the Search Results window
- Your records should appear in the Last Imported Folder.

**Note:** Not all databases and catalogues listed will import effectively using this option.

## Import references from Google Scholar

- Go to <http://scholar.google.com>
- Click on the link to **Settings** (in the toolbar above the Google Scholar logo)
- At the bottom of the page where it says **Show links to import citations into**, select RefWorks from the drop down menu.
- Click on **Save**.
- Search results will now display an **Import into RefWorks** link.
- Perform a search.
- For one of the search results, click the **Import into RefWorks** link.
- This will import your chosen result into RefWorks (you may need to login to RefWorks).
- Click on **Last Imported Folder** to view your record from Google Scholar

### Note:

- You can only **import one reference at a time** from Google Scholar
- Consistent data such as title, author, year, etc. may not always exist in your results, but if information is present, it will be imported into RefWorks

### Remember:

- You may be prompted to select a version of RefWorks to import your references to. Make sure you select 'Legacy RefWorks'.

## Import references from PEDro using "Import data from the following text" in RefWorks

- Go to <http://www.pedro.org.au>
- Perform a search and select some references.  
(Be aware that it does not give a clear indication that a record has been selected.)
- Choose the references you wish to import by clicking on Select.
- Click on **Display Selected Records**.
- Highlight and copy the records (right-click and copy or Ctrl+C).
- In RefWorks under the **References** menu click on Import.

Import References

Import From [Request a Filter](#) [List of Filters & Databases](#) [Help](#)

- From Text File
- ▼ From Text

Import Filter/Data Source: PEDro - Physiotherapy Evidence

Database: PEDro - Physiotherapy Evidence

```
resting hypoxemia (PaO2 <= 55 mmHg or SpO2 <= 88%) (grade:
strong recommendation, moderate-quality evidence).
Full text (sometimes free) may be available at these
link(s):
http://dx.doi.org/10.1059
//0003-4819-155-3-201108020-00008
http://www.ncbi.nlm.nih.gov/pubmed/21810710
http://www.annals.org/content/by/year
```

▸ From EndNote Database

Import To

(Note that references are also put in the Last Imported folder)

Import Into Folder: None

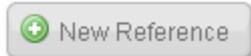
Import

- Click on **From Text**.
- Select **PEDro** as the **Import Filter/Data Source**.
- Paste text into the box.
- Select a folder or leave as **Last Imported**.
- Click **Import**.

## Adding a reference manually

Most of the time, your references can be downloaded into your database from online resources. However, there will also be references that require keyboard entry such as theses and dissertations.

### Add a new reference



Click the **New Reference** button.

- In **Fields used by** select an output style, such as Harvard-FHSCE & SGUL or Vancouver. (Note that this is just an aid for data entry, you can still choose to use other referencing styles when generating a bibliography).
- If you do not specify where to save the reference, it will be saved in the **'Not in Folder'** folder.
- Select the **Reference Type**, for example journal, book, thesis, dissertation etc.

### Add New Reference

[Help](#)

Fields used by  [About this style](#)  
and Reference Type

The following fields are used by your selected output style. You can access additional fields below.

Authors:

Title: **B** *I* U  $x_2$   $x^2$  | ↶ ↷

Periodical, Full:

- Enter the information as required by your chosen style.
- The format for the Author field must be last name first followed by a comma, first name (or first initial followed by a period), and middle initial followed by a period. Each entry must be separated by a semi-colon. For example: Smith, R.; Jones, Robert K.; Adams, Mary
- You may enter additional information, by clicking on **Additional Fields**.
- To save the reference click **Save Reference** then close the Add New Reference window.

## Managing your references

When you log in to RefWorks all your references will be displayed.

Use the **Sort by** drop-down list to change the order in which your references are displayed.



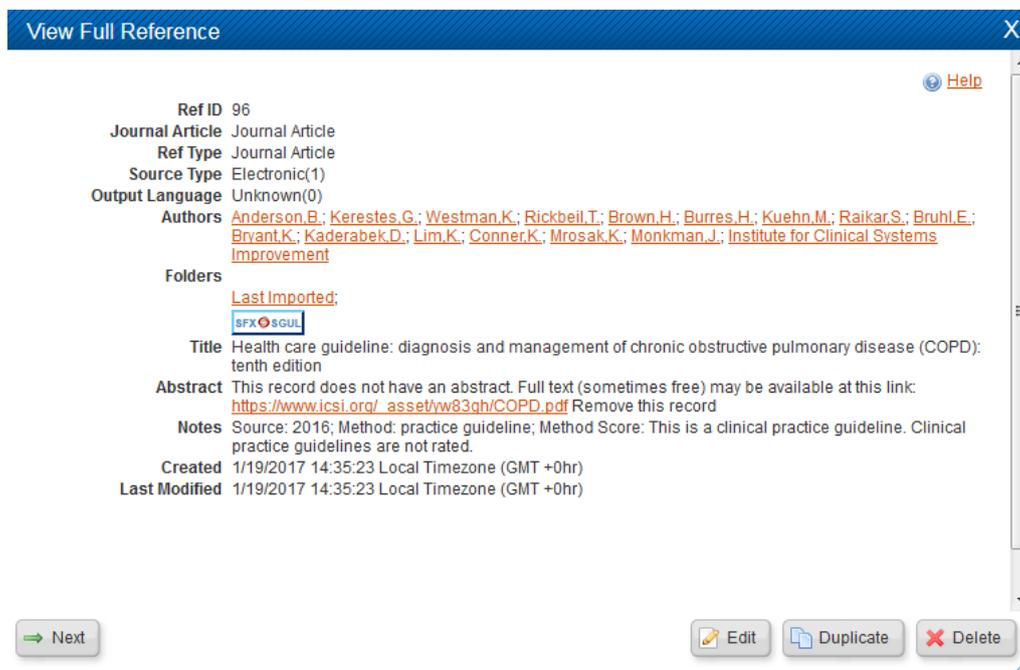
The screenshot shows the RefWorks interface. At the top, there are two tabs: 'References' and 'Organize & Share Folders'. Below the tabs, there are three radio buttons for 'References to Use': 'Selected', 'Page', and 'All in List'. To the right of these are several icons: a folder, a globe, a red 'X', a printer, and a document. Further right is the 'Sort by' dropdown menu, which is currently set to 'Authors, Primary'. To its right is the 'Change View' dropdown menu, set to 'Full View'. Below these controls, a reference card is displayed for 'Ref ID 96', 'Journal Article Reference 1 of 3'. The card shows the following details: 'Ref Type: Journal Article', 'Source Type: Electronic(1)', 'Output Language: Unknown(0)', 'Authors: Anderson, B.; Kerestes, G.; Westman, K.; Rickbeil, T.; Brown, H.; Burres, H.; Kuehn, M.; Raikar, S.; Bruhl, E.; Bryant, K.; Kaderabek, D.; Lim, K.; Conner, K.; Mrosak, K.; Monkman, J.; Institute for Clinical Systems Improvement', and 'Folders: Last Imported; SFX @ SGUL'.

You can display different levels of detail using the **Change View** options:

- Standard view
- One line/Cite view
- Full view

## Viewing a reference

To view the complete record for a reference, click on the magnifying glass icon  above the reference.



The screenshot shows a window titled 'View Full Reference'. The window contains the following information: 'Ref ID 96', 'Journal Article Journal Article', 'Ref Type Journal Article', 'Source Type Electronic(1)', 'Output Language Unknown(0)', 'Authors Anderson, B.; Kerestes, G.; Westman, K.; Rickbeil, T.; Brown, H.; Burres, H.; Kuehn, M.; Raikar, S.; Bruhl, E.; Bryant, K.; Kaderabek, D.; Lim, K.; Conner, K.; Mrosak, K.; Monkman, J.; Institute for Clinical Systems Improvement', 'Folders Last Imported; SFX @ SGUL', 'Title Health care guideline: diagnosis and management of chronic obstructive pulmonary disease (COPD): tenth edition', 'Abstract This record does not have an abstract. Full text (sometimes free) may be available at this link: <https://www.icsi.org/asset/vw83qh/COPD.pdf> Remove this record', 'Notes Source: 2016; Method: practice guideline; Method Score: This is a clinical practice guideline. Clinical practice guidelines are not rated.', 'Created 1/19/2017 14:35:23 Local Timezone (GMT +0hr)', and 'Last Modified 1/19/2017 14:35:23 Local Timezone (GMT +0hr)'. At the bottom of the window, there are three buttons: 'Next', 'Edit', and 'Delete'.

## Editing a reference

You may need to make changes to a reference, for example, to add or remove information or to correct an error.

Make sure you are either in **Standard View** or **Full View**. Click on the edit icon  above the reference you want to edit. After you have made the changes, remember to save the reference.

## Create a new folder

In RefWorks, you can use folders to organise your references.

To create a new folder:

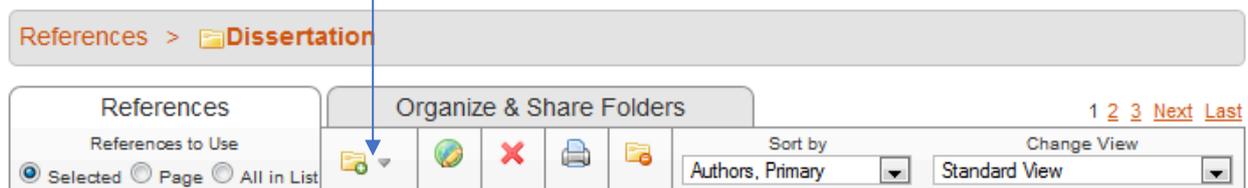


- Click on the **New Folder** button:
- Enter the folder name and click **Create**.

## Move references to a folder

 At first, your references will not be in a folder. To move references into a folder, or from one folder to another:

- Select the references you want to move.
- Move mouse pointer to the folder icon and select the folder you want to move the reference to. When you move references between folders it is a copy process; i.e. the reference remains in the original folder and the new folder.



## Remove from folder

 Use this option to clear selected references from a folder. This will remove a reference from just this folder. If the reference is in any other folder it will remain. If you use '**Remove from folder**' and the references are only in one folder, RefWorks will move them to a system folder called **Not in Folder**.

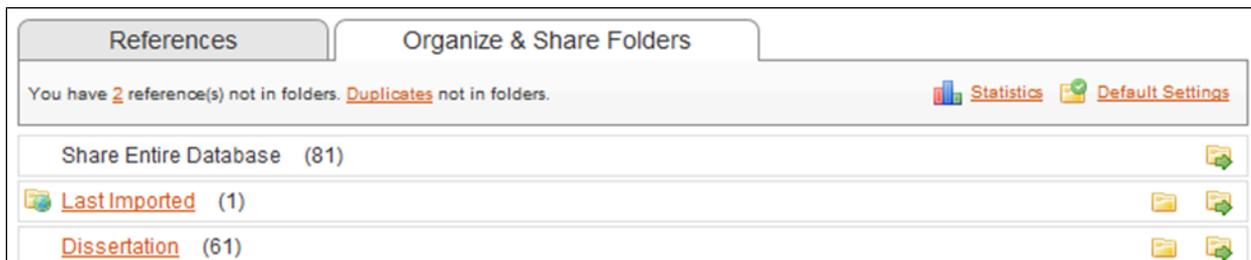
## Delete – to permanently remove references from all folders

 This option will permanently delete a reference from your database – i.e. from all folders. Any references you delete are automatically moved to a system folder called Deleted References (in the View menu). The green restore icon shown in the tool bar there allows you to reinstate a reference but after 30 days they are permanently deleted.

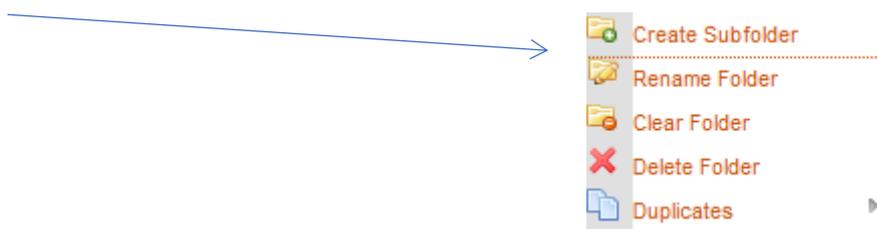
## View and organise folders

To view your folders, rename a folder or delete a folder:

- Click on the **Organize & Share Folders** tab.



- Then click on the folder icon and select an option from the drop-down menu.



## Using Global Edit

The **Global Edit** feature allows you make changes to multiple records at the same time, such as adding the same information to a particular field in selected references.

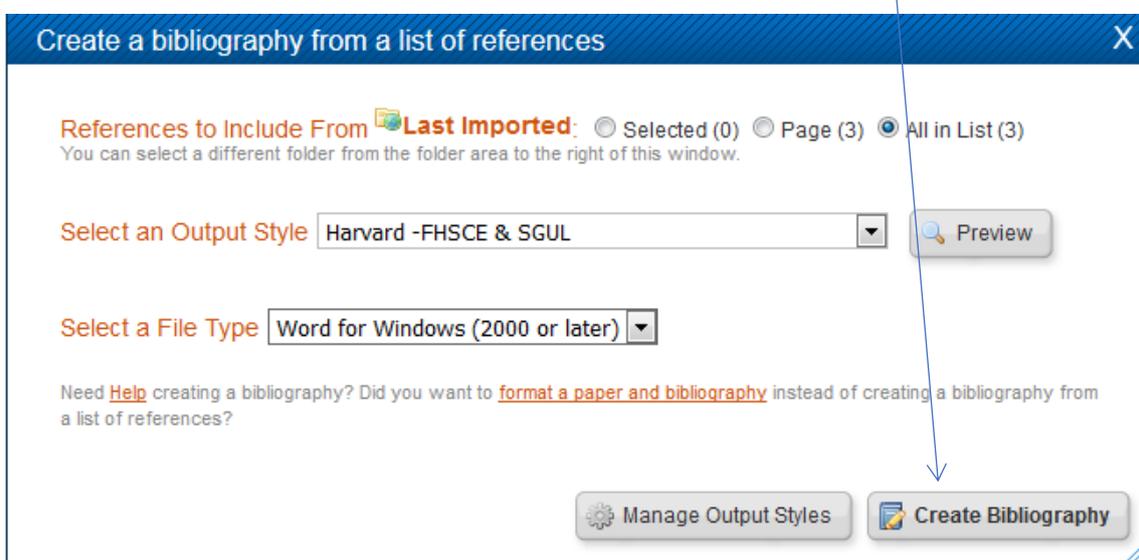
To perform a Global Edit:

- Select the references you wish to edit (you can skip this if you want to make changes to all references in a list or folder).
- Click **Global Edit** 
- Choose what you want to do: Add, Move, Delete or Replace.
- Specify a field and make the appropriate changes.

## Generating a bibliography in RefWorks

You can create a bibliography (an ordered list of books, articles etc.) from references in RefWorks. To generate a bibliography for selected references, first add the references you want to include to **My List** (a temporary folder). Click on the star icon ★ next to an individual reference in standard view, or select references and use the move to folder option.

- Choose the set of references to include; you can select all in the database, those in My List or specify a folder.
- Click on **Create Bibliography**.
- Select the output style required, such as Harvard- FHSCE & SGUL.
- Choose a file type (for example, Word or Rich Text Format (RTF)).
- Click on **Create Bibliography** button in the bottom right of the window.
- A list of formatted references will be created in a file for you to save, print, email as required (you may need to allow the pop-ups).



**Note:** If you want to create a reference list for articles cited in a document, use the method described in the next section: Inserting citations into Word.

## Inserting citations into Word documents

RefWorks allows you to insert citations and create bibliographies within a Word document. There are two ways to do this:

- Using the Write-N-Cite 4 add-in.
- By copying and pasting the citation using One Line/Cite View feature in RefWorks.

Write-N-Cite is a small separate program which must be installed on the PC you are using. It is freely available and can be downloaded from within RefWorks. It is easier to use the Write-N-Cite utility, but the other option is useful if Write-N-Cite is not available.

**Note:** Write-N-Cite 4 is installed in St George's Library Computer rooms and at Kingston University.

- Log in to RefWorks.
- Select **Tools** menu, select **Write-N-Cite**.

### Write-N-Cite

**What could be easier than clicking a button to cite references while you write your paper?**

Write-N-Cite allows you to cite references from your RefWorks account with just a few clicks. With Write-N-Cite you can choose from thousands of bibliography styles and watch as it instantly formats your in-text citations, footnotes and bibliography.

Do you have questions about the latest version of Write-N-Cite, Write-N-Cite 4? See our [frequently asked questions](#).

**New Write-N-Cite for Windows (version 4.4.1376)**  
Nov 17, 2015

We are pleased to release a new version of Write-N-Cite for Windows (version 4.4.1376). This version includes:

- Support for Windows 10 and Word 2016
- InstallShield error resolved
- New login screen - works with current RefWorks and new version of RefWorks coming in 2016.
- New login screen - log in to Write-N-Cite with institutional credentials (Shibboleth/OpenAthens)
- Support of Custom Output Styles

**How do I log into Write-N-Cite 4 using my institution credentials?**

If you use your institution's credentials (Athens, Shibboleth or Proxy) to log in to RefWorks, you MUST copy and use this code on the Write-N-Cite 4 login screen:

```
455c7d4553704a5c6d52506c46142e323d30262b612a3d323d50
392a0d02113d1b5d0f0a373c3129201042296c321d154c382039
2e271031160f110a4c2e71
```

**Downloads**

 [Write-N-Cite 4 for 32 bit Word](#) 50.1 Mb  
Version: 4.4.1376 (2015-11-17)   
For Windows XP, Windows Vista, Windows 7 and Windows 8  
Supports Word 2007, Word 2010 and Word 2013

 [Write-N-Cite 4 for 64 bit Word](#) 45.7 Mb  
Version: 4.4.1376 (2015-11-17)   
For Windows XP, Windows Vista, Windows 7 and Windows 8  
Supports Word 2007, Word 2010 and Word 2013

Having trouble installing Write-N-Cite 4? Our [installation guide](#) might help, or you may need to check the [Mac](#) or [Windows](#) software requirements.

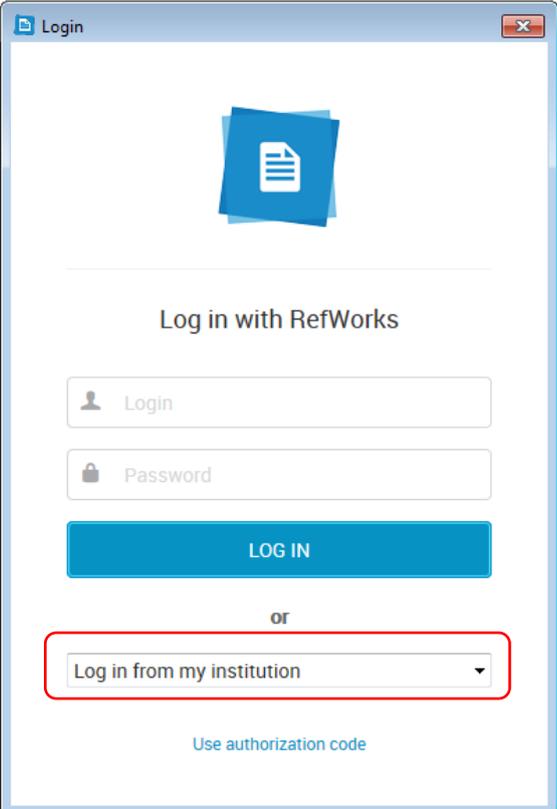
[Other Versions](#)

- Various options are available. Check the compatibility with your operating system and version of Word. Click **Other Versions** for Mac installations.
- If you have installed a previous version of Write-N-Cite you will have to uninstall it first before installing Write-N-Cite 4.
- Download and install on your computer following the on-screen instructions.

**Please note:** Currently, Write-N-Cite for Mac does not work with Word 2016, only Word 2008 and Word 2011 for Mac

## Inserting Citations and bibliography with Write-N-Cite 4

- Keep RefWorks open.
- Try it yourself: Open a Word document and type the following text:  
  
“This document will show you how to insert single and multiple citations and how to create a bibliography.”
- Click on the RefWorks tab at the top of your word document.
- Click on the Log in option from the RefWorks menu and select ‘**Log in from my institution**’. Search for St. George’s, University of London and enter your **SGUL username and password**.
- In your Word document, place your cursor in the text where you want to insert the citation.
- Click on the link to **Insert Citation**, select **New**. A box will appear showing you your folders and references. **Select the reference** you want to cite then click on **OK**.



- To generate a **bibliography** first select a style. The style drop-down menu is on the top left-hand side of the menu. Use the drop down box to select Other Styles. This will give you the option to choose **Harvard FHSCE & SGUL** or any other referencing style you require.
- Place your cursor in the text where you want to inset the bibliography. Click on the **Bibliography Options** then select **Insert Bibliography**.
- Repeat the previous step using a different output style. The citations and bibliography will be re-formatted in the new style.

**Note:** There are hundreds of output styles available; as a default you only see the Harvard-FHSCE & SGUL and Vancouver output styles listed for St George’s. To add styles to this list, log into RefWorks, and select the Bibliography menu, then Output Style Manager.

## Edit citations

Inserted and formatted citations do not always appear exactly as you want them to. You may want to add a prefix or suffix such as: (Also see Baker 2009) or (March 2003 p.13)

You may also want to exclude the author name if you mention it in the sentence, you can do this manually.

**Note:** If you notice incorrect details such as a spelling error in the author’s name or the wrong year, you need to go back to your RefWorks database, make the change there and re-insert the citation.

## Preparing the document to send to another recipient such as publisher

In order to provide this Write-N-Cite feature, field codes are inserted in your document where a citation or bibliography is generated. Generally, it is preferable to provide a copy of your document without these codes. To do this, use the **Remove Field Codes** option.

### Remember:

- Save a copy of the document with the field codes. Without these codes you will not be able to use the Write-N-Cite feature to edit your work if there is a problem or you need to generate a new document with a different referencing system.
- Make a copy of this document, remove the field codes and send this document to the recipient.
- If you need to make changes, always edit this original document with the codes.

To remove the field codes:

- In Word, select the **RefWorks** tab at the top of the screen.
- Click **Remove Field Codes**. This will remove all the coding from the document.

Remember before starting this process, it is strongly recommended that you save a copy of the document with a different name. Once removed, the citations and bibliography can no longer be updated or reformatted with RefWorks.

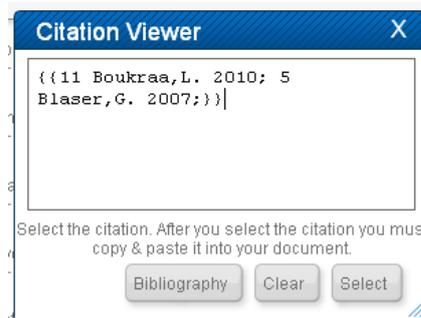
## Insert citations without Write-N-Cite

- Try it yourself: Open a new Word document and type the following text:

“This document will show you how to create a bibliography when Write-N-Cite plug in is not available.”

- Login to RefWorks.
- Display a reference in RefWorks to insert in your document.
- Click the **Cite** icon above the reference you want to insert 

- The **Citation Viewer** window will open with the citation number. Select everything in the window and copy to the clipboard (Ctrl + C).



- In your Word document, place the cursor where you want the citation to appear in your text and paste (Ctrl + V) this citation into your Word document.
- In the Citation Window click **Clear**.
- Repeat the previous steps with another citation, or multiple citations, placing them elsewhere in the text.
- **Save** your document as RWtraining and close it.

- In RefWorks, click **Create Bibliography**.
- Choose Harvard – FHSCE & SGUL
- Click on **Format Paper and Bibliography**.
- Browse to your Word file (RWtraining) as the **Document to Format**.
- If your document does not download automatically, click the **Download it** link and then **Save**.

**Note:** Remember to **always work and edit in the original document with field codes**. You can save as many final documents, at various stages and in as many styles as you wish.

As a default you only see the Harvard- FHSCE & SGUL & Vancouver output styles listed under St George's Specific. Some of the more common output styles are also listed. Hundreds are available and to add styles to this list, select Tools menu, Output Style Manager.

## Using the Harvard – FHSCE & SGUL output style

The Harvard - FHSCE & SGUL output style has been put together to help you reference your books, journals and websites correctly.

**You should always check your references to make sure they correspond to the correct style before submitting your work.**

Some of the main points to look out for are:

- If your citation includes a page number this will have to be added manually.
- Most references that are imported electronically will be referenced correctly. However, if you are referencing a chapter, section or part of a book, you will need to enter the information manually into RefWorks.
- Check corporate authors are referenced properly, especially if the item has been imported electronically.

## How to backup and restore your RefWorks database

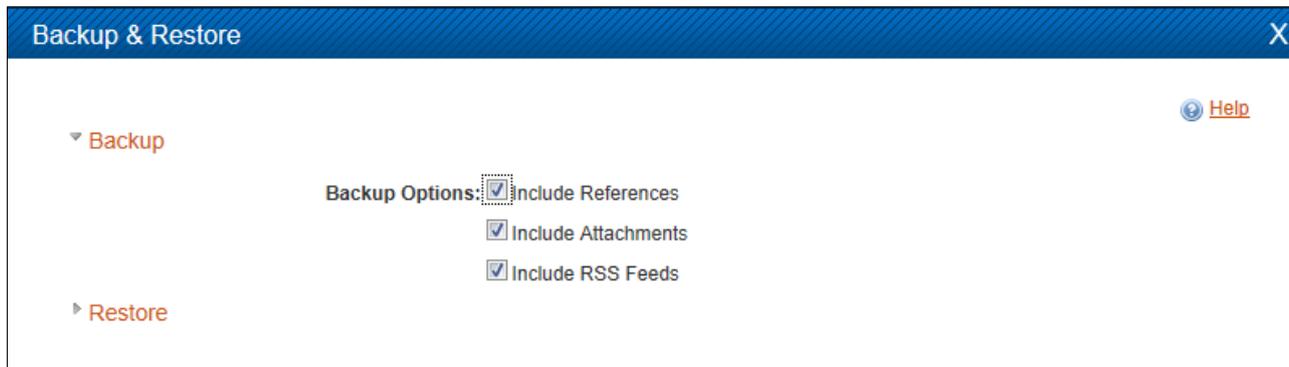
As you would make a backup of any important files, it is a good idea to make a regular backup of your RefWorks database. In the event of any problem with your database, you can restore from the backup.

If you need to move your RefWorks database to a different Shibboleth account, you should use the Backup & Restore feature.

Go to the **Tools** menu and select **Backup & Restore**.

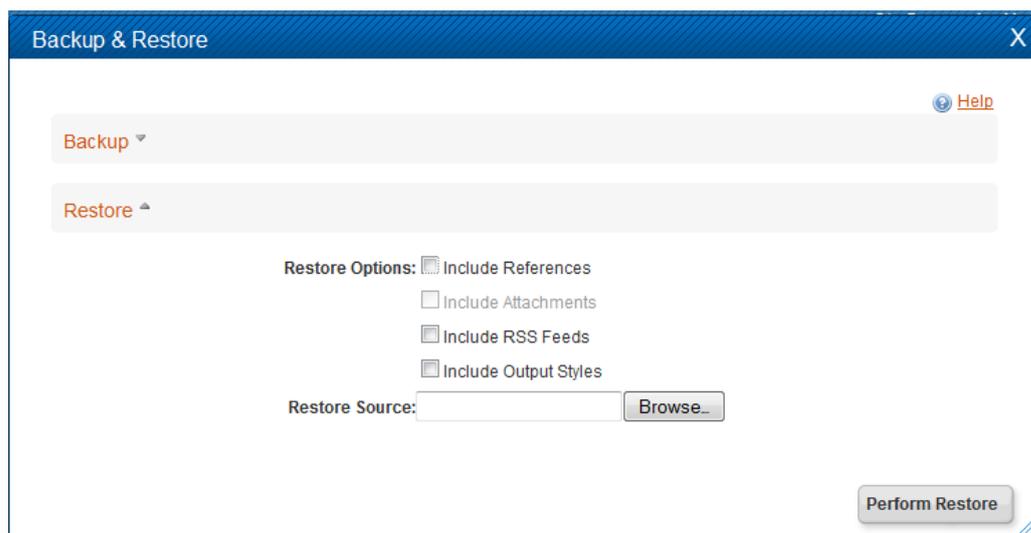
## Backing up your existing RefWorks account

- Select the information you want to backup and then click on **Perform Backup**.
- An RWB format file will be automatically saved for you, you will not be able to open, read or amend it. This file can be restored into your RefWorks account.



## Restoring your RefWorks account

- Select the information you want to restore, use **Browse...** to locate the backup file and then click on **Perform Restore**.



**NOTE:** If a box opens informing you that you need to choose a program to open your backed up or restored document, browse your computer to choose one. Internet Explorer is effective.

## Using Export and Import References

### Export from RefWorks

You can export a copy of all or part of your database to a different application, such as Reference Manager or EndNote, or you may want to share references with someone else using RefWorks.

- Select the references you wish to export.
- Select **References** menu, **Export**, or use the quick access link on the right.
- Select the **Export format** you want, then click **Export References**.
- Save the resulting file in whichever format you prefer (Word, Notepad)

**Export Format** allows you to select the format you want to create. The options are:

- **Bibliographic Software** (such as EndNote, Reference Manager, ProCite) - saves the database in a tagged format that can be imported into another bibliographic management program.
- **BibTex – RefWorks ID** Saves the database in the file format for use with the LaTeX document preparation system
- **Citation List** - creates a list to use when writing your paper offline. The format includes the RefID, Authors Primary, Title Primary, and Publication Year only.
- **RefWorks Tagged Format** - use this format for sharing data with other RefWorks users. Please note that any folder structure is not maintained.
- **Tab Delimited** - saves all your data in an organized manner with each field separated by a tab. It may then be loaded into other programs that are designed to read this type of format.
- **RefWorks XML Format** is used to create your export file in an XML format.

### Import into RefWorks

You can also bring in references from other sources outside RefWorks (such as EndNote, Reference Manager), provided they are in one of the supported formats described above.

- Select **References** menu and then **Import**, or use the quick access link on the right.
- Select the appropriate **Import Filter/Data Source** and **Database**.
- **Select a Text File** using the **Browse...** to where your text file is saved. Click **Import**.
- The references will be imported into the **Last Imported Folder** as well as any folder you have selected.

## Further help and support

### Support from RefWorks:

- Within RefWorks go to **Help > Launch Help File** to view the Online Help manual.
- Support pages including Tutorials and links to the RefWorks Community:  
<http://refworkscommunity.ning.com/page/main-1>
- RefWorks YouTube Channel: <http://www.youtube.com/proquestrefworks>

### Library Contacts:

- Email your Liaison Librarian: [liaison@sgul.ac.uk](mailto:liaison@sgul.ac.uk)
- Visit the Research Enquiries Desk for drop-in help. (Mon-Fri, 11am-4pm subject to change)
- Try our RefWorks and Reference Management guide: <http://libguides.sgul.ac.uk/refworks>