RefWorks
Training Guide

What is Refworks?

RefWorks is a web-based application designed to help you manage your references. It allows you to:

- Import references from different sources (including databases) and enter references manually.
- Organise and manage your references (e.g. using folders, deduplicating references).
- Create a bibliography.
- Insert formatted citations into documents (e.g. using Cite-N-Write in Microsoft Word).

Please note

This training guide shows you how to use the **new RefWorks**, not the Legacy RefWorks (referred to as RefWorks 2.0).

RefWorks is **only** available to staff and students of St George's, University of London.

As RefWorks is **web-based**, you can use it from any PC with internet access and it is compatible with most browsers.

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

How do I log in?

To access RefWorks:

- Go to **http://refworks.proquest.com**
- Click "**Use log in from my institution**".
- Under **Shibboleth** scroll down the alphabetical list to find "St George's, University of London" or find St George's by typing "St George's" into the search box.
- Enter your St George's username & password at the SGUL Shibboleth page.

When you log in for the first time, you need to **create an account** by filling in the registration form. Some users will be asked to authenticate access using their SGUL email address first before setting up an account. Thereafter, every user can log in via Shibboleth.

Adding references to RefWorks

To build your collection of references you can import them from different sources. There are several ways to do this including:

- Use a 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 (Medline, PsycInfo, Embase)
  - EBSCO (CINAHL, Medline, AMED)
  - Internurse/Intermid/Allied Health Professionals
  - Google Scholar
- PubMed, Web of Science and the Cochrane Library do not allow direct export, so you have to save the references to an intermediary file (a .ris file), and then import those into RefWorks.
- Use the RefWorks search feature to search a Library catalogue and perform a direct import.
- Add references manually. This is the recommended option for Proquest databases (i.e. Assia, BNI, etc.). Do not use the cite function within Proquest as the correct Harvard – FHSCE & SGUL style is not available.

You can also add references manually, import PDF documents to create references and use the Save to RefWorks tool in your browser which allows you to download references from different sources.

Check our **RefWorks and Reference Management Libguide** for detailed information on how to export references into RefWorks, including screenshots http://libguides.sgul.ac.uk/refworks/adding

A few tips and tricks on exporting references

- When importing references to RefWorks, you will be prompted to choose a version of the software, make sure you choose the "newest version of RefWorks":
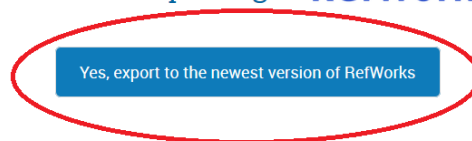
- Sometimes exporting a reference is also called "send to RefWorks"
- Some databases allow you to export multiple references at a time, others only support exporting references individually.
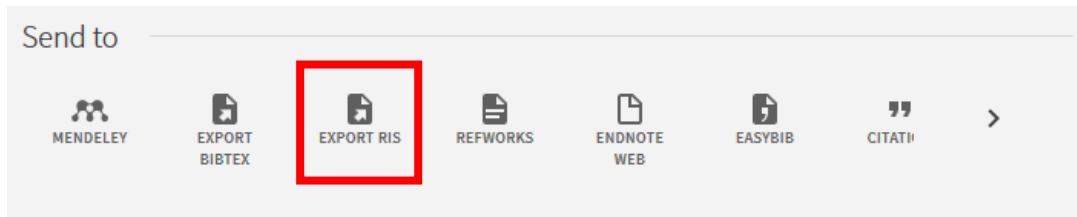
Example: Import references using Hunter

You can export your article references directly into RefWorks in one step. Once you have found a resource on Hunter that you want to export you:

- Click on the 🙶 (**citation**) icon if you are looking at your search results.

- Click on the **RefWorks** icon if you are looking at the full record.

A second browser window should open with RefWorks and an Imported References box. If you okay it, the reference is moved into the **Last Imported** folder, which lists your imported references in reverse chronological order.

Book citations with **more than one author** may have to be entered into citations and bibliographies **manually**. This will not be necessary if there is just one author.

Once your reference is imported, **always double check** it to make sure all the necessary information is included and correct (e.g. page numbers, authors, etc.)

Example: Import references using EBSCO and direct export feature

Many databases like EBSCO allow you to export your references directly into RefWorks.

There are two ways of doing this:

- Perform a search in a database, e.g. **CINAHL Plus** and click on the '**add to folder**' 🔲 icon to add some references.
- Click on the **Folder** tab at the very top of the screen.
- Select some references, and click the **Export** icon.
- In **Export Manager**, select **Direct Export to RefWorks**.
- Click Save.

OR

- Perform a search in a database, e.g. **CINAHL Plus** and click on an article you want to add to RefWorks.
- Click on the **Export** 📤 Export icon.

Dance for People With Parkinson Disease: What Is the Evidence Telling Us?

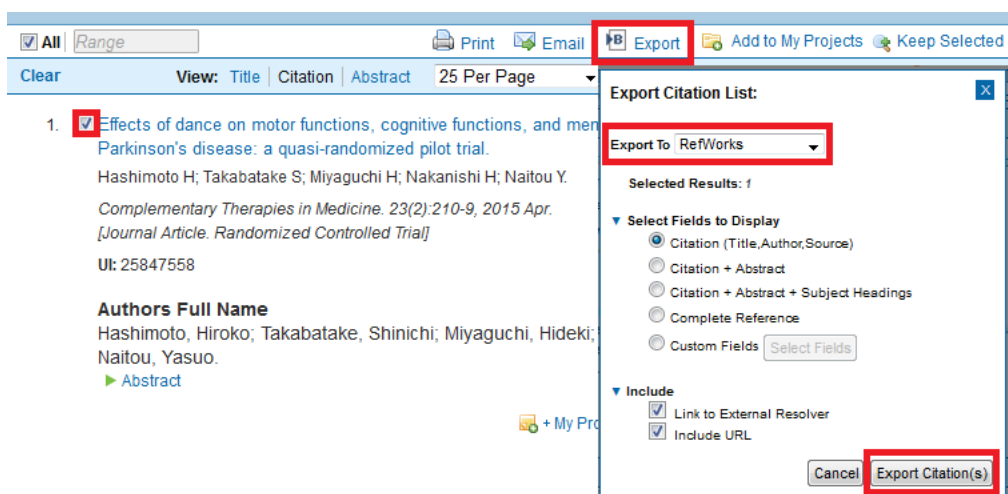- Your records appear in the **Last Imported Folder** in RefWorks.

Remember:

- Always select **export to newest version of RefWorks when prompted.**
- The Last Imported folder lists all your imported references in reverse chronological order.

Example: Import references using Ovid and direct export feature

Many databases like Ovid allow you to export your references directly into RefWorks.

- Perform a search in a database, e.g. **Embase** and tick the box to the left of the article you want to add. You can export multiple references in this way.
- Click on the **Export** icon.
- A new window will open, under Format select **RefWorks**.
- Click **Export**.

- Go to **PubMed** (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.
- To add the reference to RefWorks, click on **Add** (the **+** icon) at the very top of the page.
- Under **Import References**, you can import a file either by dragging and dropping or you can select the file you saved previously.
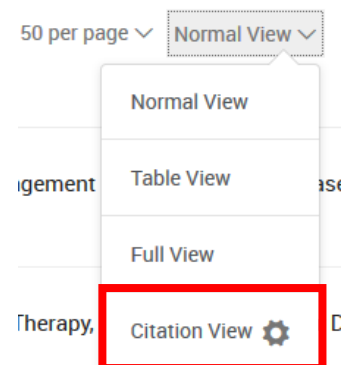

Manage your references

When you log in to RefWorks all your references will be displayed, automatically sorted by date added, so in reverse chronological order. **Normal view** is the default option, but you can also change to Full View, Table View and **Citation View**.

If you click on a reference, a window on the right-hand side will open which allows you to see more details (i.e. abstract, authors, etc.). You can **edit** the reference by clicking on the **pen icon**. To delete a reference, just tick the box next to it and select the **bin (delete) icon**.

Remember

- **Citation View** shows you your references in the appropriate style for SGUL (Harvard – FHSCE & SGUL). The first time you use this function, you need to **save Harvard – FHSCE & SGUL as the default style** by clicking on the cog icon beside citation view.

- Citation View is helpful to make sure your references include all the necessary information to be correct. If details are missing RefWorks will alert you by highlighting missing elements in yellow.

Create and use folders

In RefWorks, you can use folders to organise your references. Visit http://libguides.sgul.ac.uk/refworks/organising for more information.

To create a new folder:

- Click on **My folders** (tab in the left-hand menu).
- Click on **Add folder**.
- Enter a folder name and click Create.

You can then:
- Drag and drop files here or add references by using the **+ (plus) icon**.
- Move files into the folder by checking the box next to the reference(s) and click **Assign to folder**. Choose the folder(s) you want to add the reference to. You can assign references to multiple folders.

What else can you do?

- There are different ways for you to **share folders** with others. On the left-hand side menu, there is a Sharing tab. If you are looking at a specific folder, at the top of the page you can find a sharing icon. **Sharing Settings** allow you to control who can do what with your references. For more information, have a look at http://libguides.sgul.ac.uk/refworks/organising and find the Sharing Folders tab.

Remember

- Under **All References** you can find all your references in reverse chronological order.
- Until you have assigned your references to a folder, they will be in the **Not in folder** "folder".
- You can add subfolders to your folder, which can be useful if you are working on an extended research project i.e. a dissertation.

Tools

Under the **Tools** Tools tab, you can **Find Duplicates**, **Bulk Edit** your references and download **Cite-N-Write**.
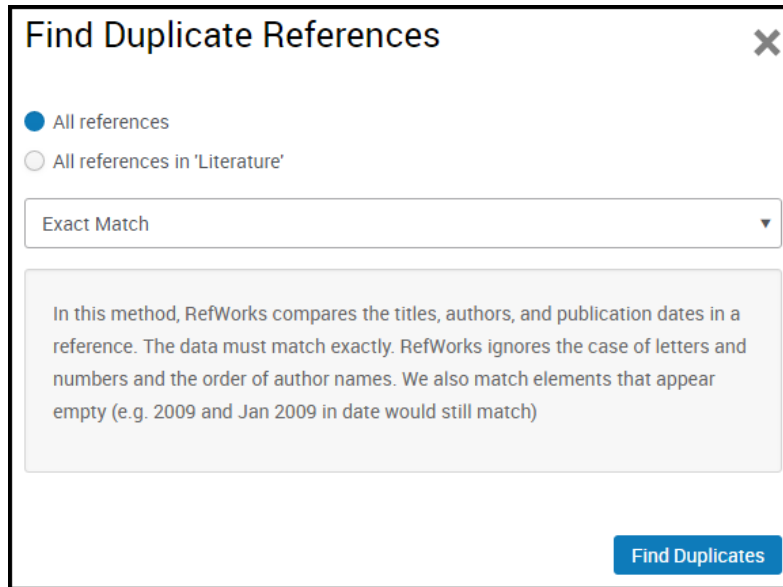
Deduplicate references

You can deduplicate your references, which is useful for example if you have a large amount or if you added references in bulk. RefWorks can compare and find duplicates for up to 2,000 references.

To remove duplicate references:

- Select **Tools**.

- Click on **Find Duplicates**. The Find Duplicate References dialog box appears.

- If you selected the action while viewing a folder, or search results (including a tag), you can select whether to search for duplicates across all of your references or only the ones in the current list.
- Select the criteria for matching **by following the on-screen instructions** beneath each of the options.
- **Select Find Duplicates**. If any duplicates are found, they are highlighted and pre-selected to make them easy to delete.
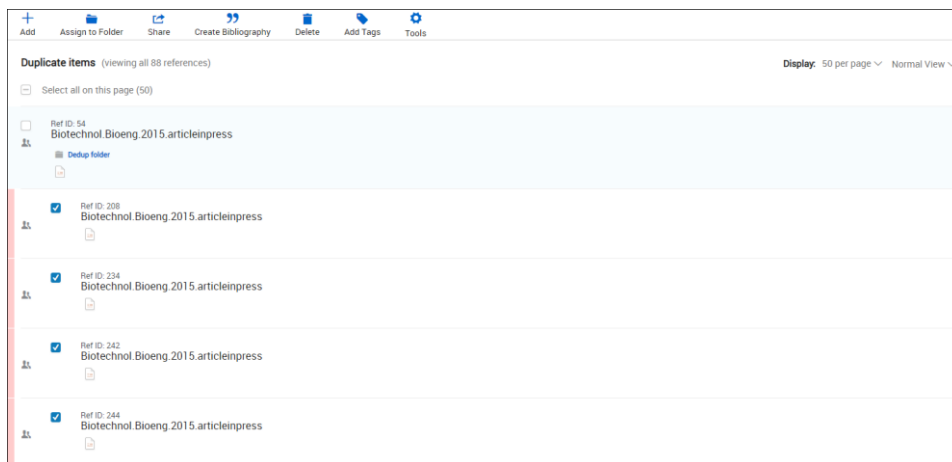
Bulk Edit

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.

Use RefWorks in Word

Under **Tools** you can download **Write-N-Cite for Word**, which is a small separate programme.

On SGUL computers, Write-N-Cite is automatically part of Word, but if you use your own device you need to download this add-in. For more information, please visit https://libguides.sgul.ac.uk/refworks/word.

- When you click on Tools you are prompted to create an alternate password. Please **do not create another password** and click cancel. You might be prompted again to do so as you navigate these pages, please ignore those messages.
- Under **Cite in Microsoft Word** you can download and install the correct version depending on the device that you have. Please note that this **only works in Word 2016**.
- Under **Other Windows and Mac Versions** you can find Write-N-Cite for older versions of Word.

Please Note – Mac Users

Write-N-Cite does not work for the Mac version of Word 2016. You must use **RefWorks Citation Manager** instead. You can download this and find further instructions under **Tools>Tools>Cite in Microsoft Word>Other Windows and Mac Versions.**

Insert citations without Write-N-Cite

You can also add references to Word by ticking the box next to the reference you want to add, then click on Create Bibliography>Quick Cite. A new window opens up, where you have to choose the correct citation style Harvard – FHSCE & SGUL, then click continue and you can copy/paste the citation from there.

If you can we recommend you use **Write-N-Cite** instead.

Generate 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:

- Tick the boxes on the left-hand side of all the references you want to include. You can do this from the All References list or a specific folder.
- Click on **Create Bibliography** Create Bibliography at the top of the page.
- When you click on Create Bibliography, RefWorks lists all the selected references in a citation style of your choice. Make sure to **select Harvard – FHSCE & SGUL** at the top of the page.
- You can then copy and paste the bibliography into your document.

Insert citations and bibliography with Write-N-Cite

Once you have downloaded Write-N-Cite and on SGUL PCs by default, you can open Word and click on the RefWorks tab at the top to start adding citations and a bibliography.

- Click on the RefWorks tab at the top.
- Click **Log in**.
- Select **Log in from my institution**.
- Find St. George's, University of London under Shibboleth.
- Make sure to select **New RefWorks**, when you are prompted to choose a version.
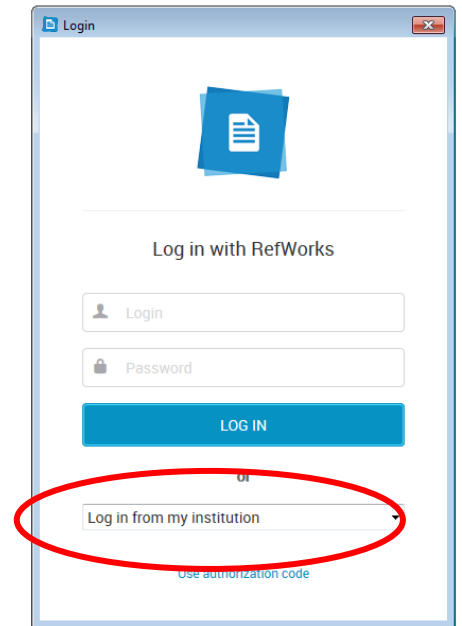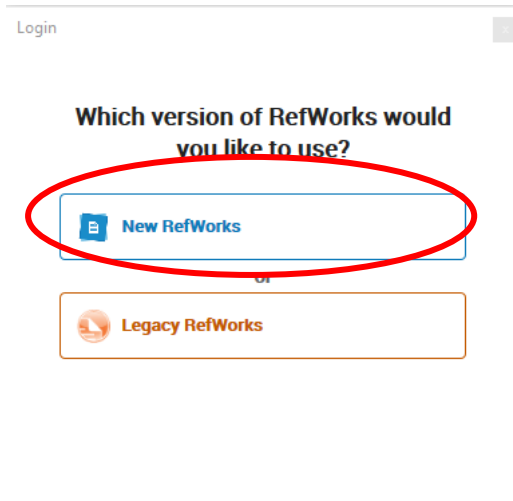
Once you are logged in:

- Make sure to **select the correct referencing style**!
- RefWorks selects MLA by default, but at **SGUL we use Harvard – FHSCE & SGUL**, so make sure to select the appropriate option.
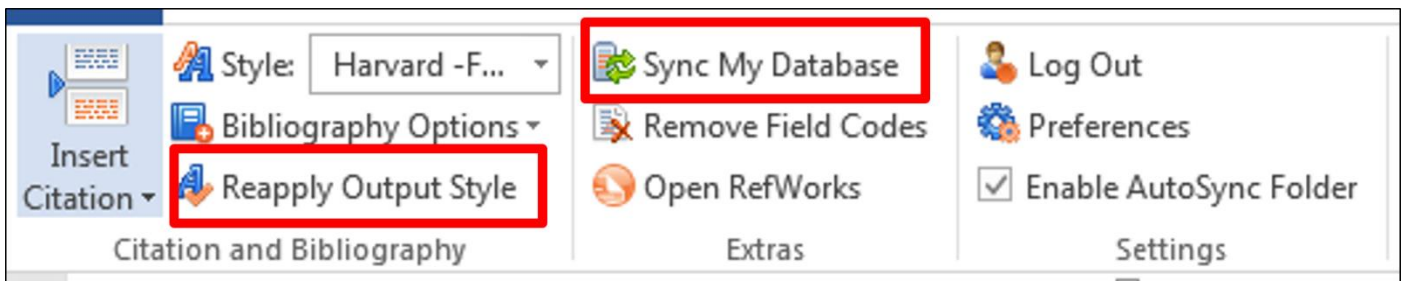
- Once you have done that you can:
  - Insert Citations. Click on **Citation>Insert New**. A new window will open which allows you to search your list of references from RefWorks. Select the right one and click okay.
  - **Sync My Database** if you have added new references to RefWorks since opening the document, to make sure your list of references is updated.
  - Once you have added a citation to your document you can **Create a bibliography** by clicking on **Bibliography Options,** then select **Insert Bibliography**. **Note:** Refworks will add the bibliography where your cursor is in the document.

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.

Tips & Tricks

Common referencing mistakes to look out for:

- If your citation includes page numbers these 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.

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

Further help and support

Support from RefWorks

- Within RefWorks go to the **?** icon in the top right-hand corner.
- RefWorks YouTube Channel:
  https://youtu.be/9mTYGIOBvag
- RefWorks have their own Libguide
  https://proquest.libguides.com/newrefworks
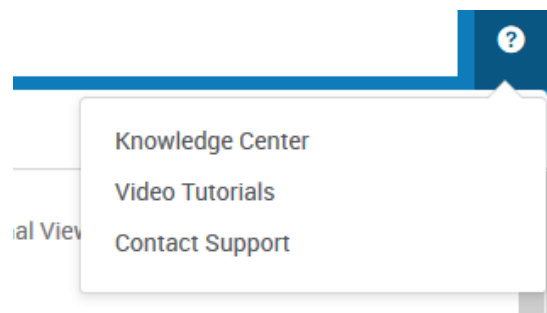
Library Contacts

- Email your Liaison Librarians: liaison@sgul.ac.uk
- Visit the Research Enquiries Desk for drop-in help. (Mon-Fri, 11am-2pm subject to change)
- Try our RefWorks and Reference Management guide:
  http://libguides.sgul.ac.uk/refworks/overview