USING REFWORKS [LEGACY] 2.0
Reference Management System

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CONTENTS

Using Refworks 2.0

RefWorks is an online reference manager program that provides a link between your RefWorks database of references that you have found during your searches, regardless of the library tool used, and the document you are creating (essay, report, paper, etc.). It offers tools to search for references both locally and globally, manage your references, create bibliographies, cite references in your document and create a reference list of the cited references.

1 STARTING TO USE REFWORKS

To begin using RefWorks you will need to:

a. Create an account – go to section: "Create an account in RefWorks ", page 4
   b. Import references – go to section: "Import references into RefWorks", page 5
   c. Create folders – go to section: "Create folders to group your references", page 10
   d. Cite references in your document (essay, project, etc) and create reference lists – go to section: "Citing references and creating reference lists", page 15

2 ACCESS REFWORKS

RefWorks can be accessed, either on- or off-site, through the University of Nicosia library's website:

<http://www.library.unic.ac.cy/>

Click on RefWorks, in the Quick Links section.
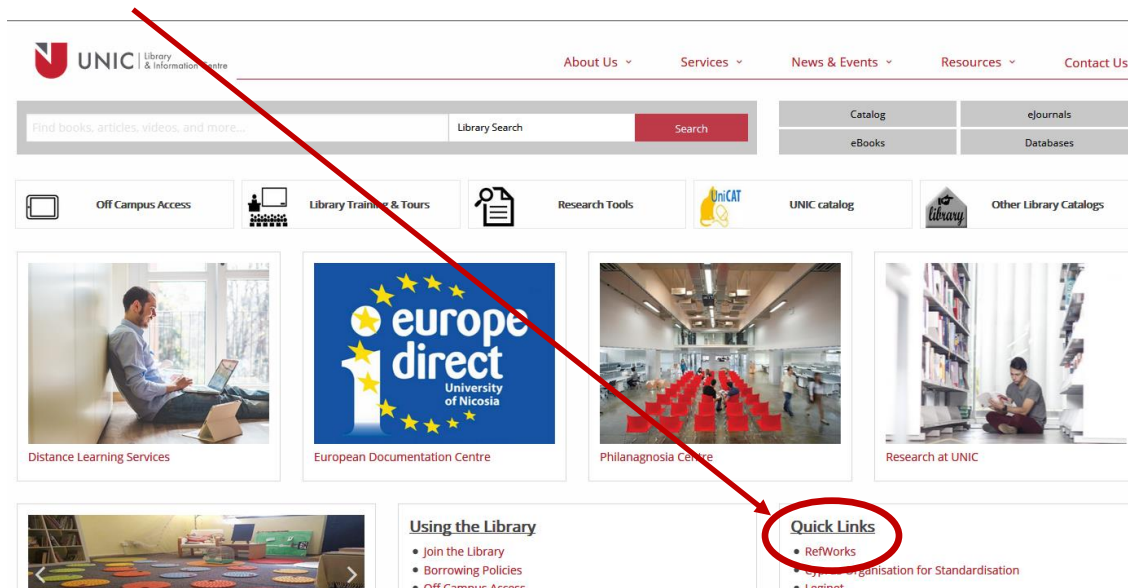
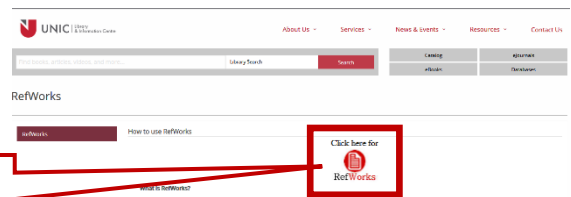Once the RefWorks link has be clicked on, you will be taken to the RefWorks instruction page which offers a brief guide on how to use RefWorks. Read through the instructions and click on the logo at the top of the screen.

Click to enter RefWorks

RefWorks login page is opened, here you can login or create an account.

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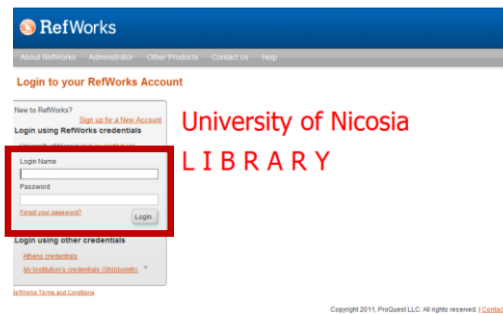
2.1   CREATE AN ACCOUNT IN REFWORKS

Go to the Login page and click on "Sign up for a new account". A new window is opened. Fill in the appropriate information and then click on "Create Account". A new window will open enabling you to start using RefWorks.

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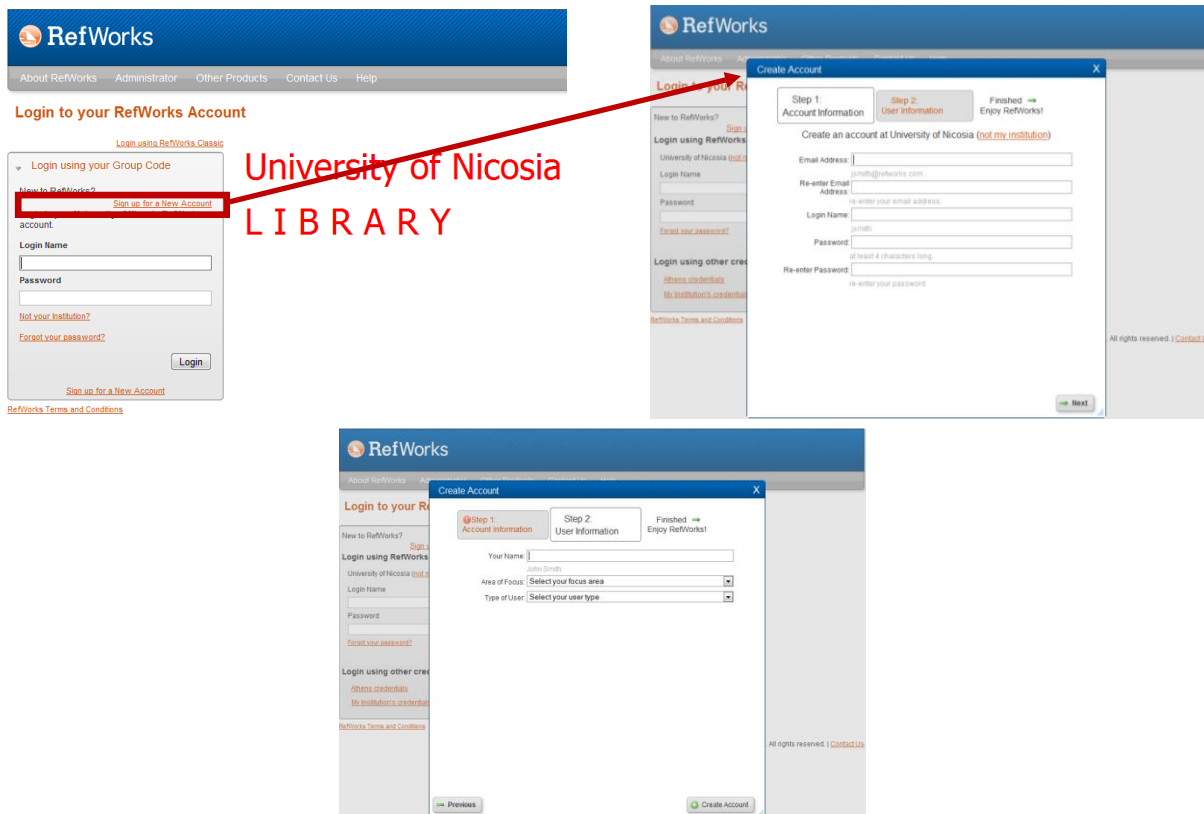
3 IMPORT REFERENCES INTO REFWORKS

There are a number of ways to add references to your RefWorks account: exporting from other databases, exporting from the library's discovery system "Library Search", using RefWorks tool "RefGrab it" to import details of webpages or manually adding references from other sources.

3.1 EXPORT REFERENCES FROM LIBRARY SEARCH AND EBSCO DATABASES TO REFWORKS

Library Search is a tool that enables you to simultaneously search the library catalogue and the majority of the databases (for both electronic books and articles) that the library has subscribed to.

References accessed through Library Search can directly exported to RefWorks:

- Perform your search in Library search, select the reference(s) you wish to export to RefWorks by clicking on the blue folder logo 🔲 to the right of the reference. This adds the references you have selected to a Folder.
- Click on Folder (top-right corner of the screen) or on "Folder View" (in the orange box on the right), a list of all the references you have selected is shown.
- Review and select the references to be exported, then click on Export to the right of the screen.
- Select "Direct Export to RefWorks", then click Save this will open RefWorks (a screen may appear asking you to select a RefWorks program – select RefWorks Legacy). If you are already logged-in to RefWorks it will directly import the reference, otherwise you are taken to the login page. Once you have logged in it will automatically import the reference. Click on the button "View last imported folder" to view your imported references.
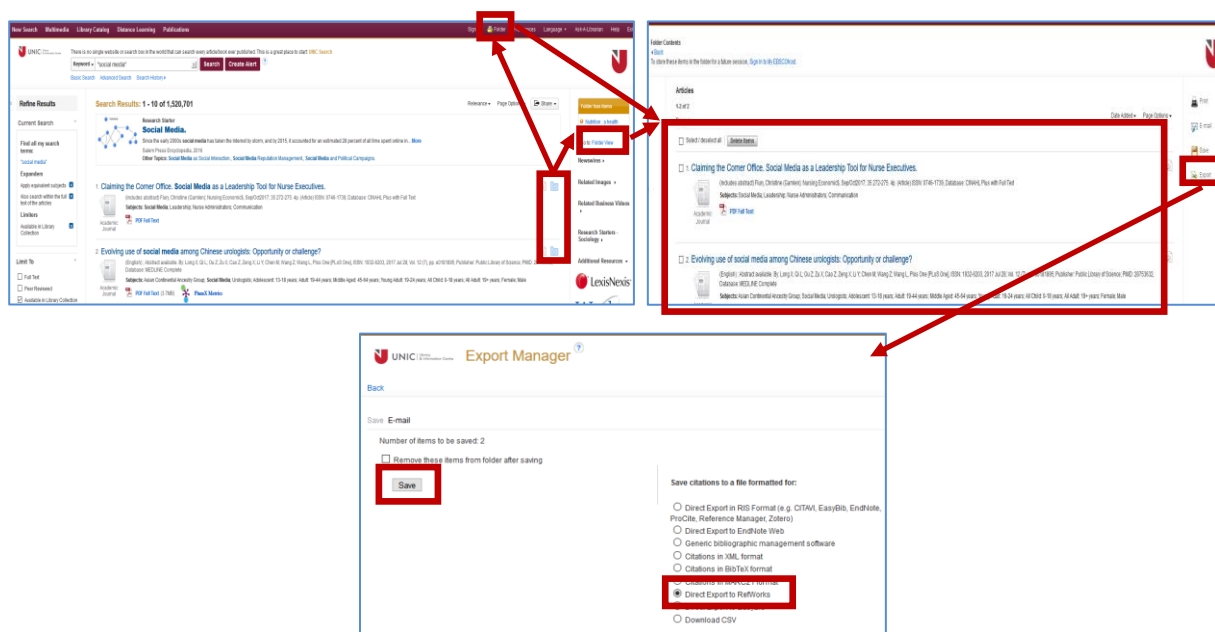
3.2 EXPORT REFERENCES FROM OTHER DATABASES

The most common way to add references to RefWorks is by exporting them directly from the databases (accessed through the library website) you searched. These databases offer an "Export", "Save" or "Citation" function with a direct link to RefWorks. Database vendors have different methods of exporting references. Below are examples of vendor export procedures from ProQuest, ProQuest eBook Central, Emerald, Taylor and Francis and PMC PubMed.

3.2.1 Export references from ProQuest (articles)

Perform your search and then tick-mark the references you wish to export and then click on "Save". A window will open select "RefWorks" in the "Export to" box and then click "Continue".
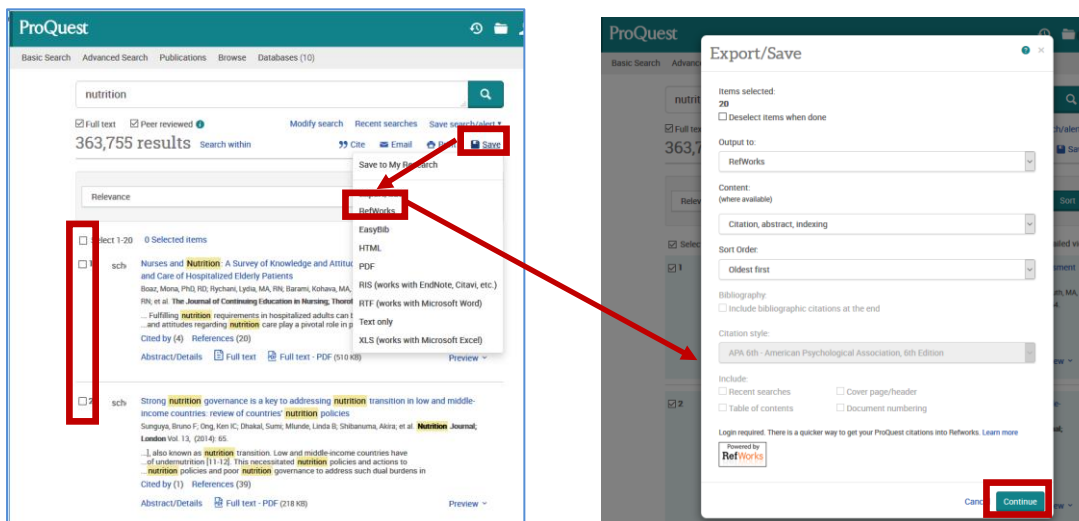
This will open RefWorks (a screen may appear asking you to select a RefWorks program – select RefWorks Legacy). If you are already logged in to RefWorks it will directly import the reference, otherwise you are taken to the login page. Once you have logged in it will automatically import the reference. Click on the button "View last imported folder" to view your imported references.
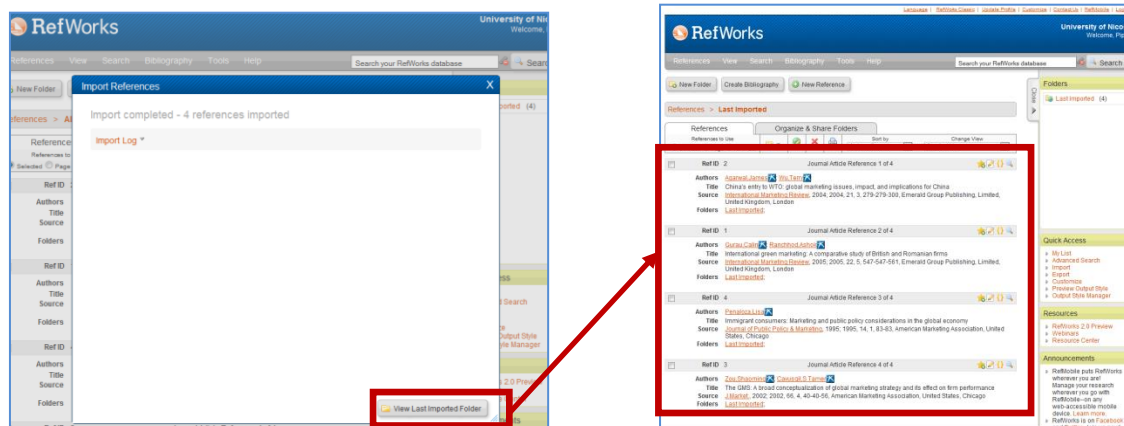
3.2.2 Export references from ProQuest eBook Central

Perform your search and click on the title of the book you wish to export. This will open a window with the details of the book. Click on "Cite Book". A window will open, click on "RefWorks".

3.2.3 Export references from Emerald

Perform your search in Emerald. Select the references you wish to export by tick-marking the tick box. In the "For Selected Items" box, select "Download citation". A window will open, select RefWorks and tick-mark the Direct Import tick box. Click on "Download article citation data". Another window will open click on "Submit data to RefWorks".
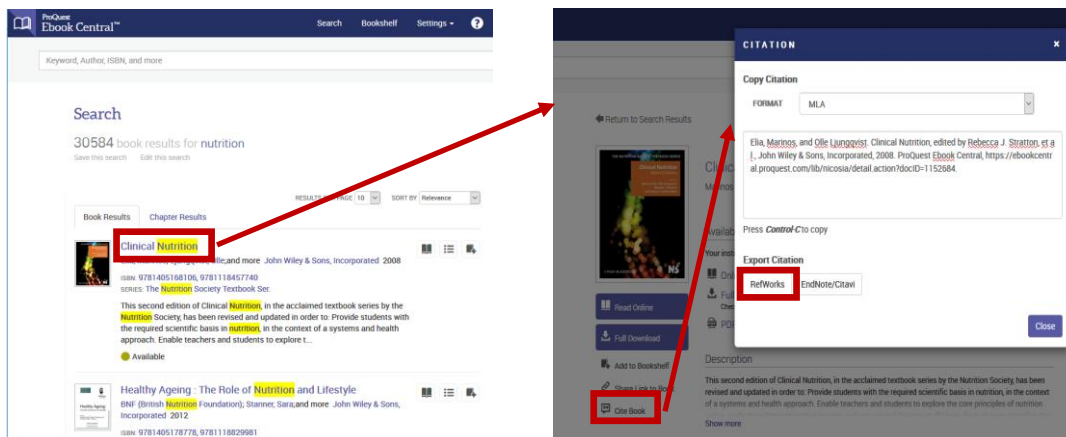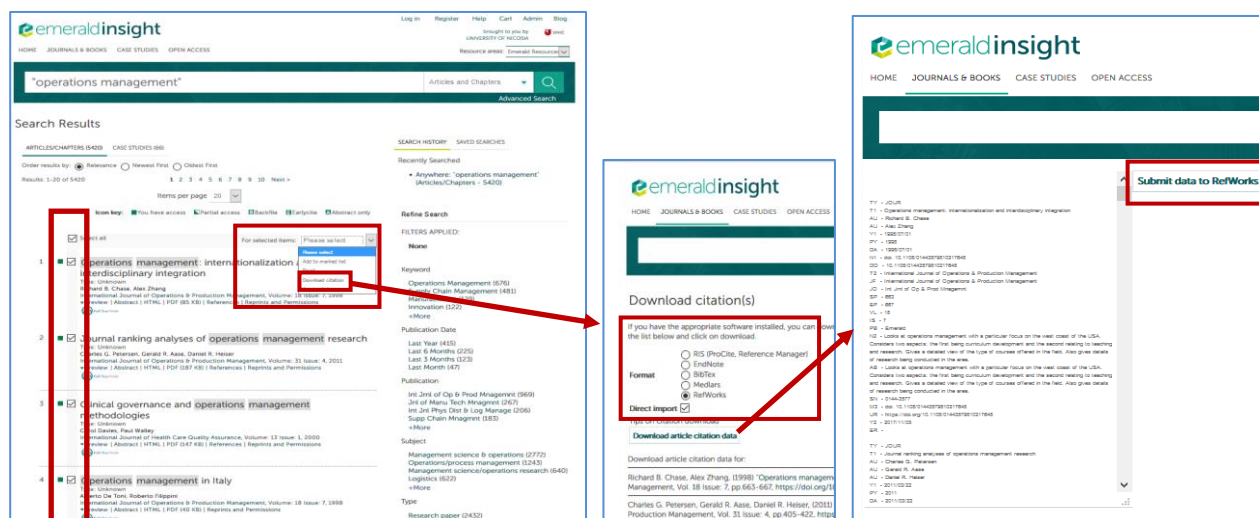

This will open RefWorks (a screen may appear asking you to select a RefWorks program – select RefWorks Legacy). If you are already logged in to RefWorks it will directly import the reference, otherwise you are taken to the login page. Once you have logged in it will automatically import the reference. Click on the button "View last imported folder" to view your imported references.

3.2.4   Export references from Taylor and Francis

Perform your search in Taylor and Francis database. Click on the title of the article to be exported to RefWorks. A window opens, click on "Download citation". In the new window, select "RefWorks Direct Export" and then "Download citations".
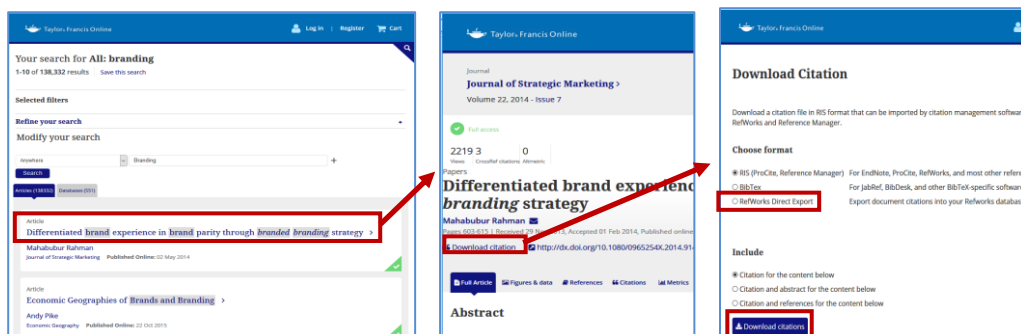

This will open RefWorks (a screen may appear asking you to select a RefWorks program – select RefWorks Legacy). If you are already logged in to RefWorks it will directly import the reference, otherwise you are taken to the login page. Once you have logged in it will automatically import the reference. Click on the button "View last imported folder" to view your imported references.

3.2.5   Export references from PubMed Central (PMC)

Perform your search in PMC and select the references you wish to export to RefWorks. Then…

- Click on "Send To" (upper right), then "File", then in the "FORMAT" box select "MEDLINE".
- Click on "Create File". The file will be saved in the Downloads folder [DO NOT OPEN THE FILE].
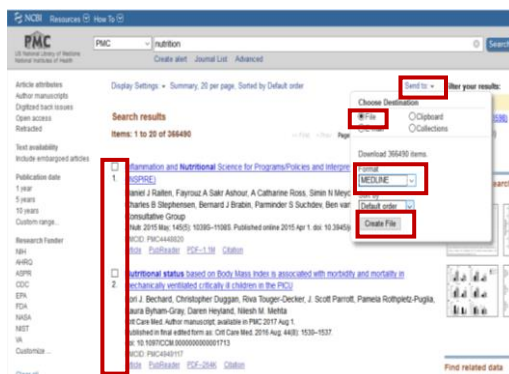
In RefWorks
- To import the references into RefWorks, select "References", "Import" from the top menu bar.
- Select "NLM PubMed" as the Import Filter and "PubMed" as the database and select the text file you created
- Click "Import" and the references will be imported into RefWorks.

3.3 Enter References Manually

To manually add references to your RefWorks database, click on the main menu option "References" in the top left-hand side of the screen. Then click on "ADD NEW" from the sub-menu. A new screen will open where you can enter the bibliographic details of your reference (see "Field instructions", below for instructions on how to fill in relevant fields).
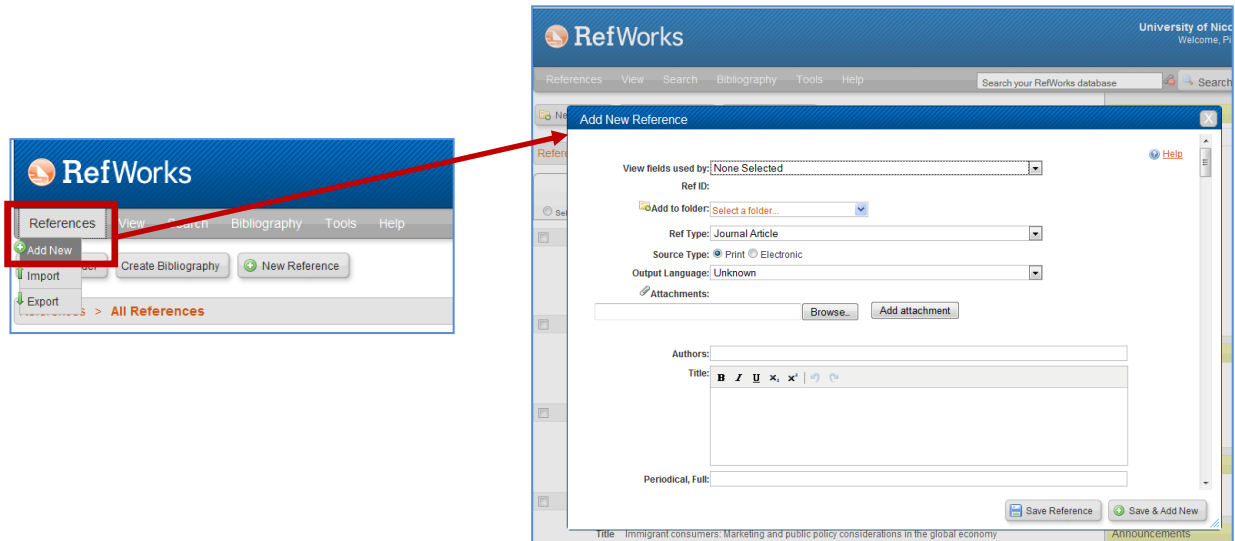
Field instructions:

- **"View fields used by"** – This field lists different output styles to choose from. Each output style will specify the fields that need to be completed. You can complete additional fields by clicking on the at the bottom of the screen.

- **"Ref ID"** – gives a reference identification number, which is generated automatically.

- **"Ref Type"** – Here you define the resource 'type', from the drop-down list, e.g. book, journal article, webpage, etc.

- **"Output language"** – Specifies the language that the resource was written in.

- **"Attachments"** – Allows you to attach any computer files that are associated with the reference.

- **"Authors"** – Author names should be entered 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, J.R.; Jones,Robert K.; Adams,Mary; etc.

  If the Author has a title, place a comma after the middle initial and add the title followed by a period. For example:

 Green,Adam J.,Dr.; Berg,James,II; etc.

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- **"Title"** – Type in the main title of the resource.

- **"Periodical, Full"** – If the resource you are generating the reference for is a journal article you need to write the full name **not** the abbreviation (this is put in the following field) of the journal in this field.

- **"Pub year"** – This is the year that the resource, e.g. article, was published.

- **"Volume"** – The journal volume that the article was published in.

- **"Issue"** – The journal issue number that the article was published in.

- **"Descriptors"** – Most references have descriptors assigned to assist you in locating the reference in the future. They are similar to keywords, e.g. if the resource is about nursing you can have a descriptor "Nursing". Use a semi-colon to separate each descriptor.

- **"Abstract"** – The author's abstract may be typed in manually or copied and pasted from another source.

Once all the relevant fields have been completed either click on "SAVE & ADD NEW" (which will save the reference and keep the "Add new reference" window open allowing you to manually add another reference) or "SAVE REFERENCE" (to complete your entry).

# 4 CREATE FOLDERS TO GROUP YOUR REFERENCES

Folders can be created either before or after you have imported references into RefWorks. It is preferable to create your folders when the references are imported into "Last Imported Folder" as you can group the references right away instead of trying to remember at a later stage, thereby avoiding the problem of remembering the subject area that reference covers or losing the reference when your database becomes large.

To create a folder click on the "New folder" button and in the window that opens type in the folder name. This should be something that enables you to recognise the references within the folder and click "Create". The folder name appears on the right-hand side of the screen.
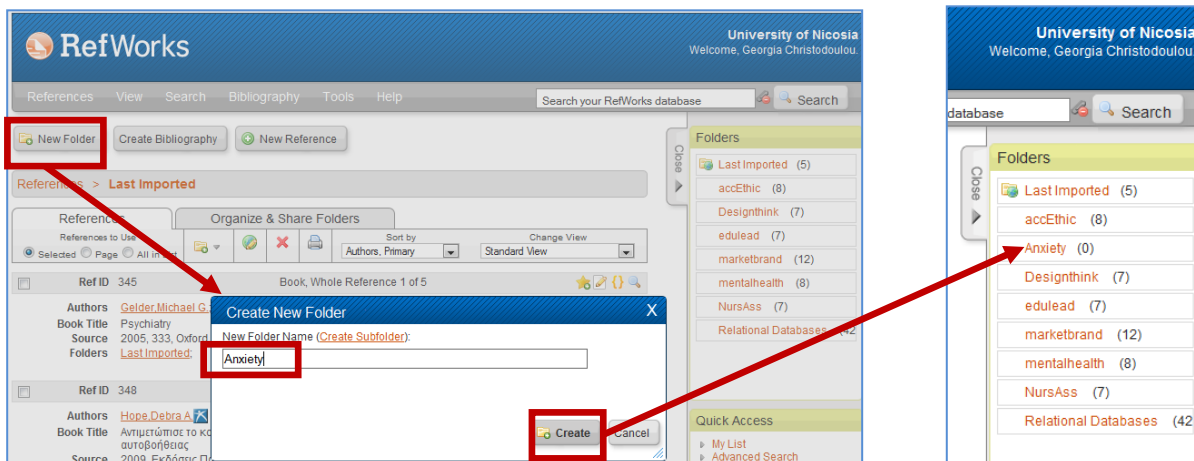
5 ADD REFERENCES TO FOLDERS

You can add references to folders by either tick-marking each reference individually or selecting "All in List" in the box above the results table. Click on and then on the name of the folder you created. The references are then linked to that folder.
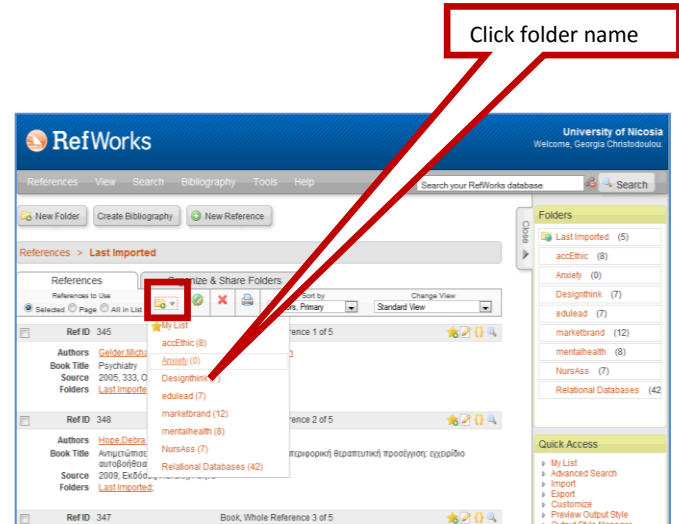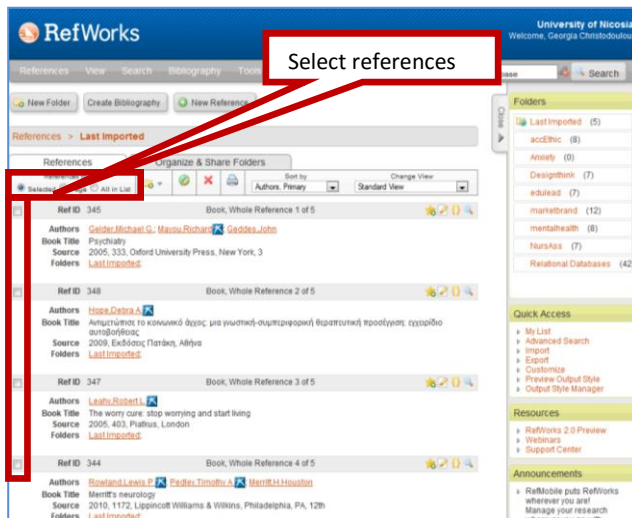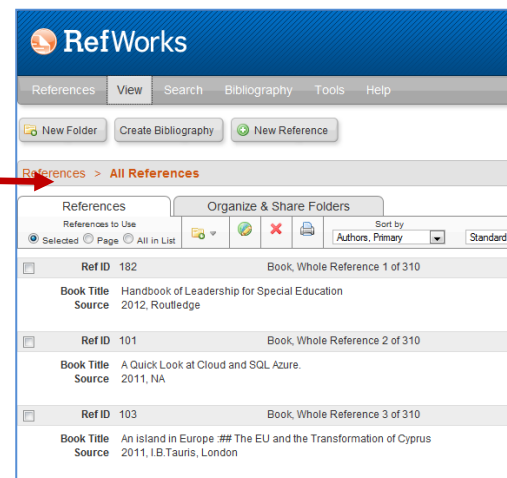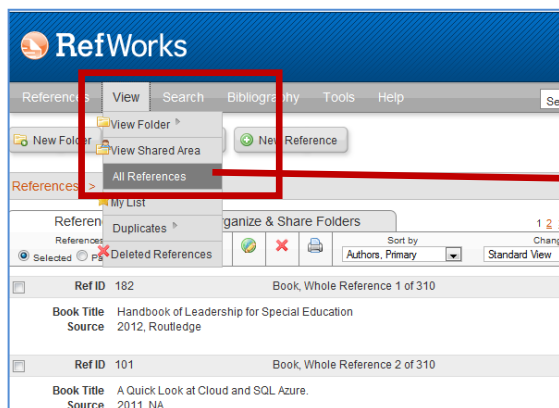

6 VIEW YOUR REFERENCES

If you need to view the references in your database or in a particular folder follow the next two sections.

6.1 VIEW ALL REFERENCES

To view all the references in your database click on "View" in your main menu and then "All references". The path above the reference list shows you which folder you are looking at.

6.2 TO VIEW REFERENCES IN A SPECIFIC FOLDER

To view the references in a specific folder, click on the folder name in the "Folder" frame to the right of the screen and a list of the references in the folder will appear in the main body of the window:
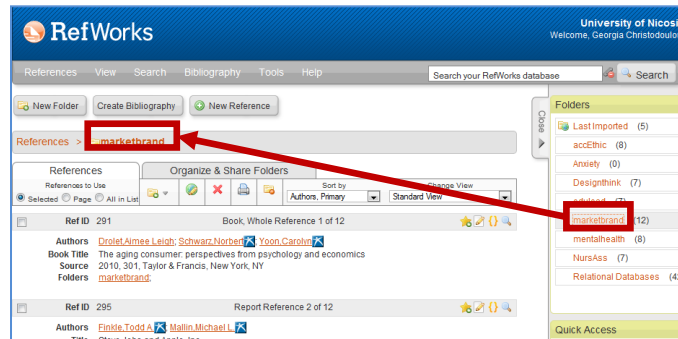
7 SEARCH FOR REFERENCES WITHIN YOUR DATABASE

There are three ways to search your RefWorks database: Search RefWorks box (also known as Quick Search); Lookup and; Advanced Search.
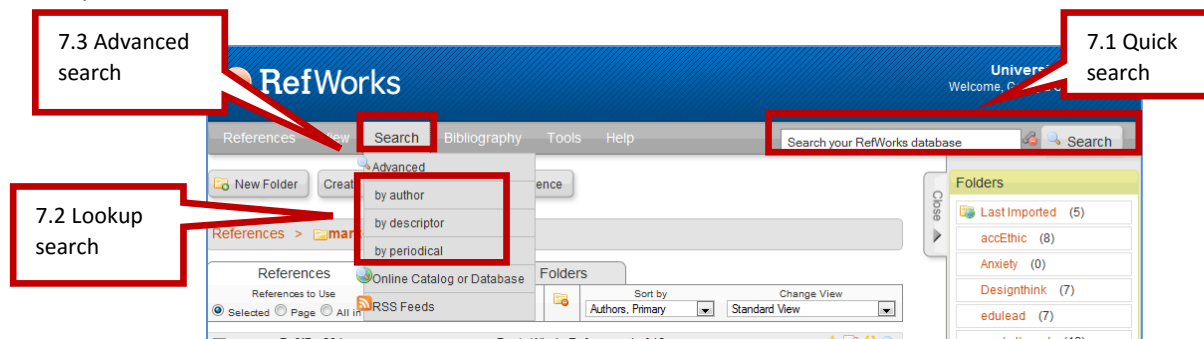

7.1 QUICK SEARCH BOX

This search box allows you to search your database but you should be careful as it might retrieve searches that are not useful to you. For better retrieval we recommend using either "Lookup search" or "Advanced search".

To use "Quick search" type your search term in the box and then click "Search". Results are ranked by relevance. A document earns a relevance rating based on the number of words in the search query that it contains, and the weight value of each of those words.

7.2 LOOKUP SEARCH

Here your search is done using indices: by Author, Descriptor and Periodical, which provide another method for locating groups of references. Searches can be performed alphabetically or by putting a keyword in the "Lookup" search box.
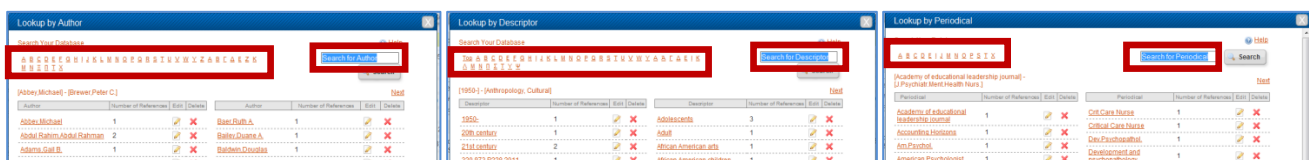
7.3 ADVANCED SEARCH

"Advanced" search makes it easy to perform field-specific searches (i.e. Author, Title, etc). It allows you to construct Boolean searches (using AND, OR and NOT), limit searches to specific folders; search file attachments stored with your RefWorks references and save your search strategies.

To perform an advanced search:

- Click on "Search" from the main menu and then "Advanced", a window will open
- The first boxes allow you to retrieve previous searches that you have saved.
- The following boxes enable you to generate a new search:
  - First select the field in which RefWorks should search for the keyword/phrase you type in the adjacent box. If you leave this blank and tick-mark the adjoining box RefWorks will search for empty fields.
  - Clicking on the green circle with a white cross in it will enable you to perform a Boolean Search. Once clicked the Boolean Box will appear where you define the relationship between the search terms and another row of boxes will appear for you to state the next search terms. You can have upto four search criteria.

Boolean Operators	Description
AND	Results must include both search terms
OR	Results can include either or both of the search terms
NOT	Results must include the first but EXCLUDE the second search term

  - The last box lets you specify whether you wish for your whole database or a specific folder to be searched.
  - Then click either "Save" to save your search or "Search" to perform the search.
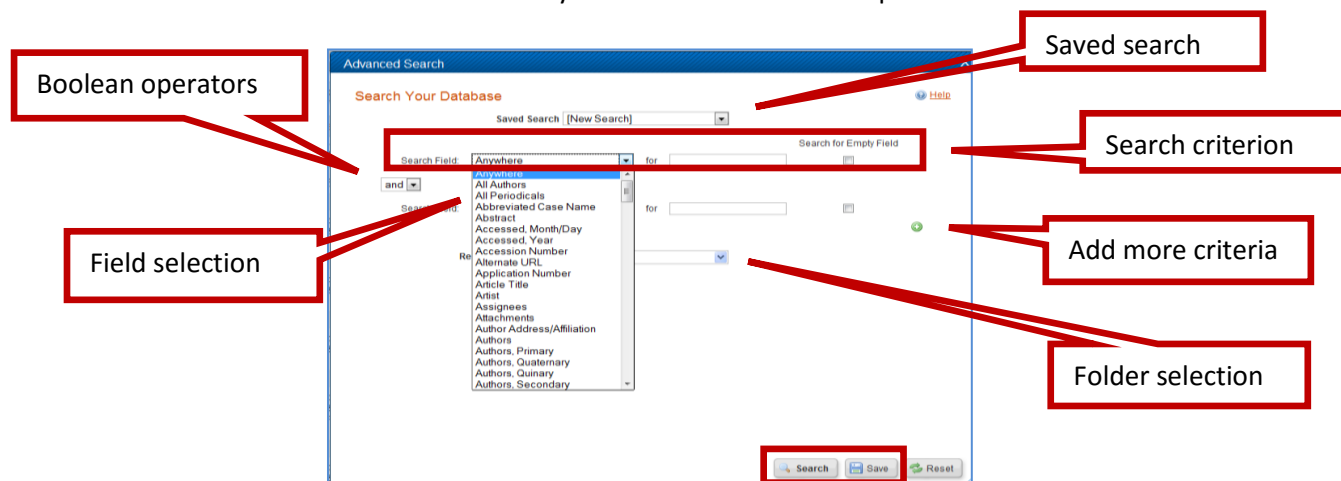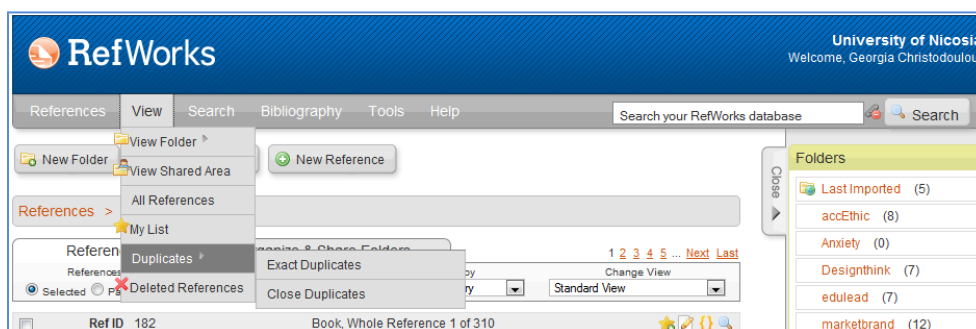
8 FIND AND DELETE DUPLICATE REFERENCES

Over time it is very easy to import a reference more than once. As you have limited space on the server to store your database and to reduce confusion when citing references it is necessary to regularly perform checks for duplicates.

To check for duplicates:

- Click on "View" in the main menu and then click on "Duplicates". You are then offered two options:
  - o Exact Duplicates – checks for exact matches based upon the Author Names, Title and Year of Publication fields.
  - o Close Duplicates – checking is done by comparing a combination of Author Names, Title, and Year of Publication. It is a loose comparison so may result in a display of references that are not actual matches. This allows duplicates to be found even if there are minor errors in the data.

Once you have chosen the type of duplicate search you want to execute, RefWorks will produce a list of references (if any) with the duplicate tick-marked. Once you have checked that the ticked-marked references are duplicates you can delete them by clicking on the red "x" above the reference list.
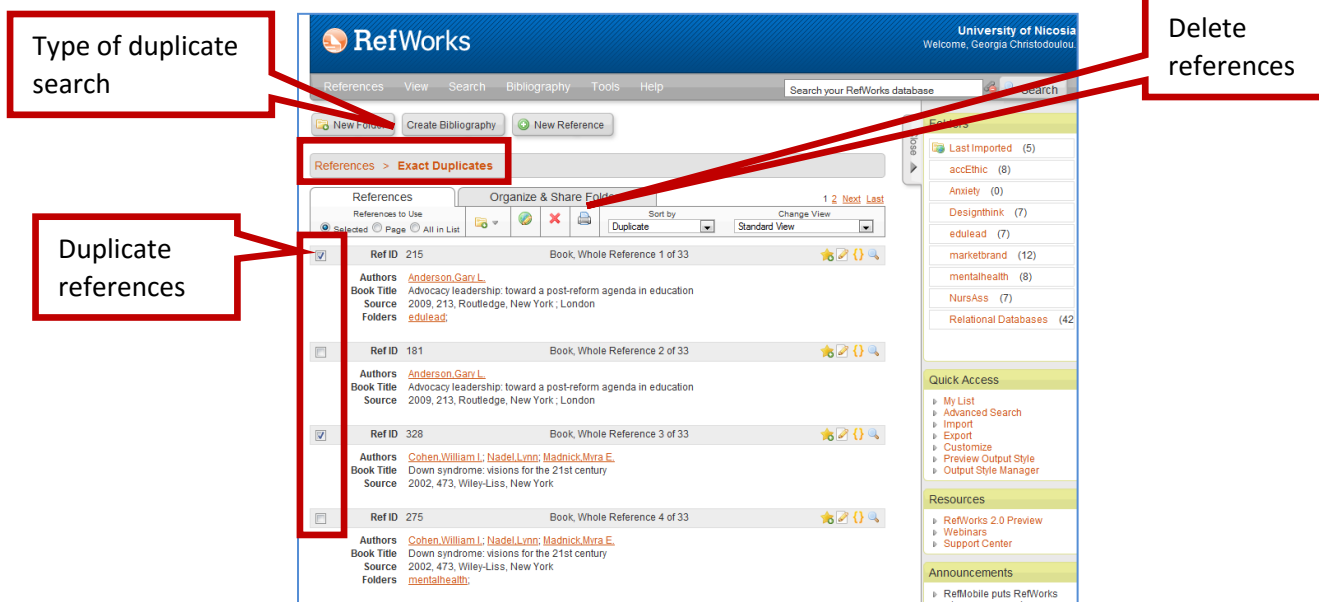
9 CREATE A BIBLIOGRAPHY

Bibliographies are used when you wish to create documents, such as, reading lists or to produce a list of references on a specific topic. It is **NOT** what you use to cite references in your document.

To create a bibliography:

- Select the folder, on the right hand side, from which the references will be extracted
- Click on either the "Create Bibliography" button or "Bibliography" in the main menu and then on "Create", this will open a new window.
- Select the appropriate Output Style (this is the format in which your bibliography will be produced)
- In "Select a file type" select the type of document that you wish the bibliography to be exported into, e.g. MS Word document, text document, etc.
- Then click on the "Create Bibliography" button. A small box will appear in the bottom left-hand corner of the screen with two links; 1) to open or save the file and 2) to email the bibliography you created.
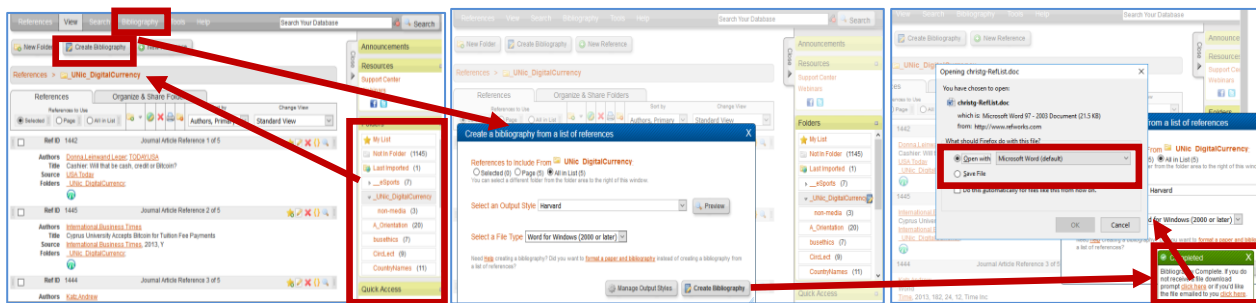
10 CITING REFERENCES AND CREATING REFERENCE LISTS

When you refer to a reference in your document it is necessary to "cite" that reference next to the relevant sentence; this is known as "in-text citation", e.g.

> *...It has been found that conventional approaches to risk management based on decision tree methods are ineffective (Massingham, 2010).*

In-text citation

RefWorks provides a sub-program called "Write-n-Cite", which is a link between your RefWorks database and your MS Word document. It enables you to cite references in your text and then create a reference list of the cited references at the end of your document.

10.1 INSTALL "WRITE-N-CITE"

To use "Write-n-Cite" it is necessary to download the program onto your computer (this is only done ONCE!):

Please make sure MS Word is closed and it is good practice to run "Windows Update"

- Click on "Tools" on your main menu and then on "Write-n-Cite". This will open window giving download instructions and a link to the download file.
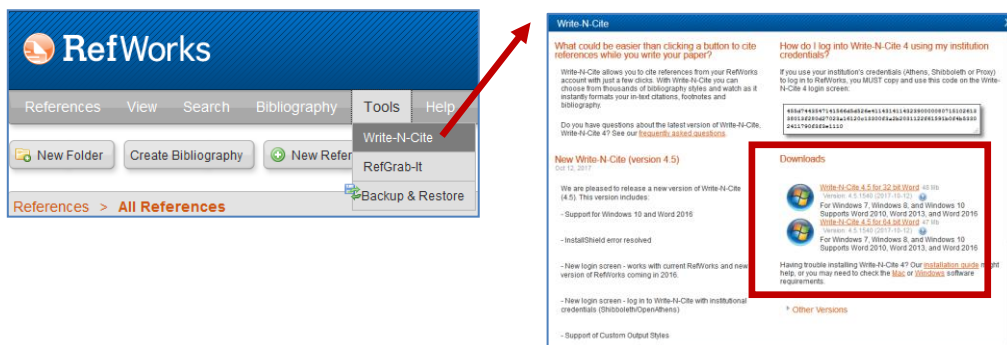

- Click on the "Download" and follow the installation instructions.
- Once installation has been completed, a tab "RefWorks" or "ProQuest" will appear in MS Word.

10.2 CITING REFERENCES

Having installed "Write-n-Cite" onto your computer you are now ready to cite references in your document. In MS Word, you need to login so that you are connected to your personal database:
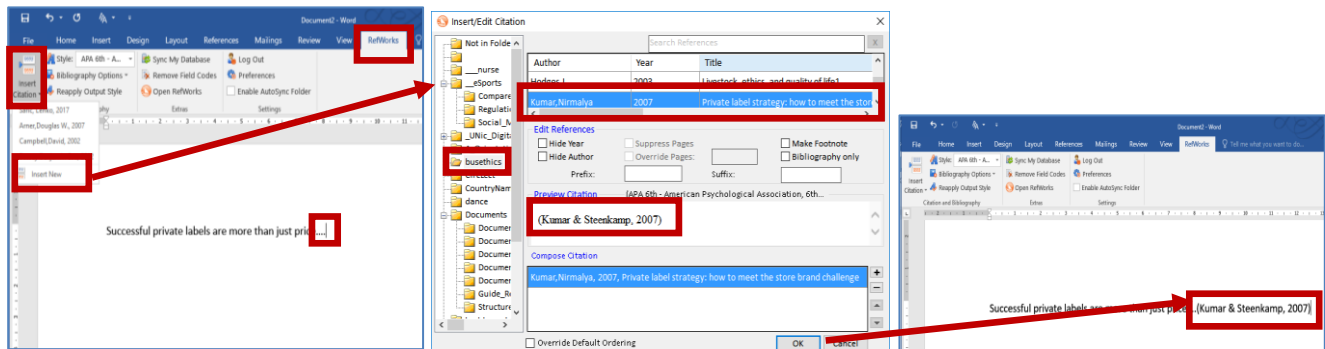
- Click on the tab RefWorks and then login. A box will appear asking for an authorization code, this is obtained from where you downloaded the Write-N-Cite program in RefWorks: Tools, Write-n-Cite.
- Copy the code in the box. Go back to the login box in MS Word and paste it in the appropriate box, then "Log In". All options under the RefWorks
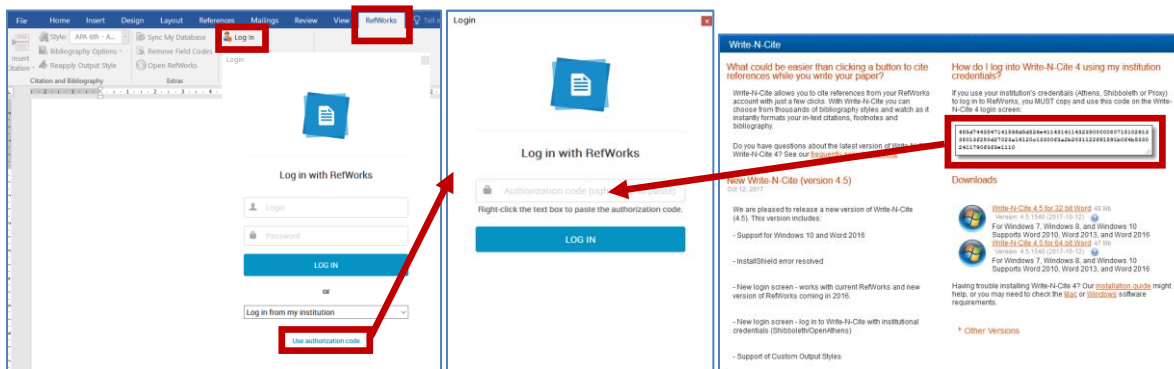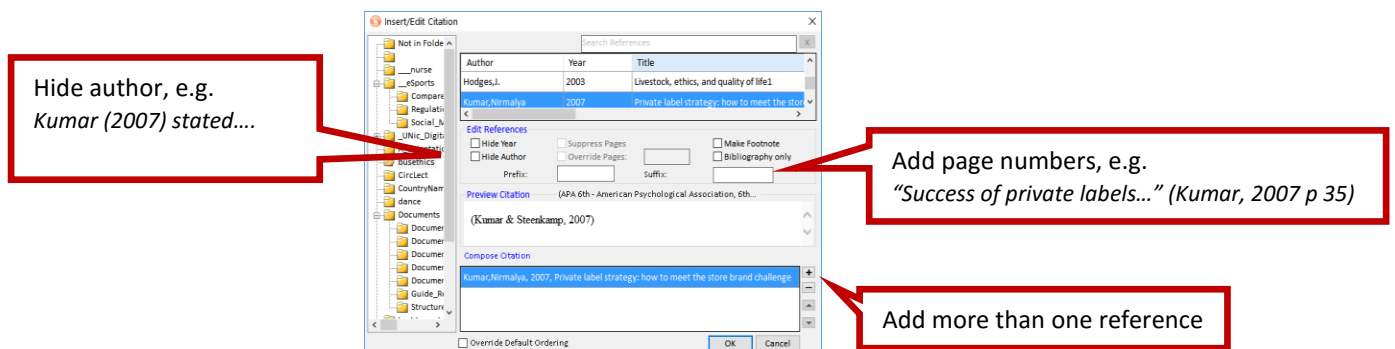

If you haven't logout in a while click on "Sync my database" this will update the links between MS Word and your RefWorks database.

To begin citing:

- Open a blank document in MS Word and begin writing. Place the cursor where you wish to insert the citation.
- Click on the RefWorks tab, then on "Insert Citation", and then on "Insert New". A window opens listing the folders you created with the references.
- Select the folder containing the reference and click on the reference you wish to insert, then OK.

Additional features for in-text citations:

Hide author, e.g.
Kumar (2007) stated….

Add page numbers, e.g.
"Success of private labels…" (Kumar, 2007 p 35)

Add more than one reference

10.3 CREATE A REFERENCE LIST

Once you have finished writing and citing the relevant references the next step is to create a reference list of all the references that you have cited.

- Go to a new line.
- In the RefWorks tab, select the appropriate output style (this specifies the format of the reference list and the in-text citations) in the box labelled "Style"
- Click in "Bibliography Options" and then "Insert Bibliography" and the reference list is automatically generated.