Contents

Introduction 2
Setting up an account 2-3
Customising your account 4
Setting up folders 5
Importing Citations 6
Exporting from Summon 6
E-book citations 7
Dawson 7
Ebrary 7

Exporting from databases 8-15

Ebsco 8-9
JSTOR 10-11
Proquest 11
ScienceDirect 12
PubMed 13
Bibliography of British and Irish History (no direct export) 14-15

Ref-Grabit 15
Managing folders and moving items 16
Editing references 17
Adding records manually 17
Appending full-text records to citations 19
Sharing records in folders 20
Deleting references 20
Creating reference lists and bibliographies 21
Write-N-Cite 22
Help 22
RefWorks is the recommended reference management tool at UCS. You can use RefWorks to do one or more of the following:

- Import references directly from bibliographic databases and the Summon search tool.
- Edit references to include PDF documents and your own notes.
- Manage your references in multiple folders for different subjects, assignments or projects.
- Share your references with fellows in your work groups.
- Generate full reference lists and bibliographies in various referencing styles e.g. UCS Harvard or APA.

You may find it useful to import to RefWorks all potentially useful references and then organise them into separate folders for items you actually cite in each piece of work. This saves having to backtrack and search for things again.

TIP! Be aware that RefWorks is NOT designed to do all the work for you! You are still required to check all references that are imported to ensure that they are complete and include all the necessary elements (e.g. the web address and date accessed for all e-resources). To help you with this, use the Referencing Support link in the Libraries and Learning Services box on MyUCS.

NOTE! Some problems have been reported with using RefWorks with Chrome and Safari. If you experience any problems please change your web browser to Internet Explorer.

Setting up an Account

- To access RefWorks click go to the Libraries and Learning Services box on your MyUCS page.
- Select Referencing Support from the menu
- Select the green RefWorks and Reference Management tab. Follow the instructions in the Get a RefWorks account box, select Go to Refworks.

Select Login
• Complete the **Create an account at University Campus Suffolk** form, choosing your username and password.

![Create Account Form](image)

**TIP!** You can use your UCS login as your RefWorks login. You can also use either your UCS or personal email address as your login or set up an account for each email address - you can have more than one RefWorks account if you have more than one email address.

**Off-Campus access**

Logging in from home or outside the Campus

Go to RefWorks. The URL for RefWorks is [http://www.refworks.com](http://www.refworks.com)

• Select the Remote access tab
• Enter the subscriber code available from the UCS Learning Services website
• Enter your username and password

**My Refworks details**

<table>
<thead>
<tr>
<th>Username</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
Customising Your Account

1. Reference List Options

- To ensure that the citations in your RefWorks general reference list and folders display in the UCS Harvard style, click on the on the red **Customise** link at the top of the screen.

- Click in the drop-down and change the first output style box to **UCS Harvard V3**
- Type “UCS” into the drop-down box over the top of **Select an Output Style for Reference View** and navigate to UCS Harvard.
- Click **Save customised settings** at the bottom of the page.

2. Output Style Manager

- To ensure that your bibliography (reference list) displays in the UCS Harvard style, click on **Bibliography** to see the drop-down menu to display the **Output Style Manager**.

- Type **UCS** in the Search box and click on the **Search** button. UCS Harvard will now appear in the List of Output Styles box.
- Highlight **UCS Harvard V3** and click on the green arrow button to move across into the **Favourites** box.
Setting up folders

Refworks imports references into a folder called Last Imported Folder and then moves references into a long list of References. This list can be searched, but to help keep track of your references it is advisable to set up folders – these can be related to the work that you are undertaking, or maybe a folder of your initial search results.

Folders can also have subfolders

To create a folder

- Click on the New Folder tab
- Enter a name for the folder
- The folder will appear in the list on the right hand side of the screen.

To set up a subfolder

Right click on the folder that you want as the parent folder, the option create subfolder is displayed

Click on Create Subfolder

Give the folder a name

A small arrow will appear beside the folder indicating that there is a subfolder attached.
Importing Citations into RefWorks

If you see the following error message when you are trying to import a citation click on “Go to web site – not recommended.

Exporting from Summon

- Do a search in the normal way and display your results.
- Mark any items that you wish to export by clicking on the + symbol to the right of the citation.
- Click the folder icon (top right of screen).

TIP! When exporting any book citations from Summon, you will may need to edit the citation in RefWorks in order to remove the URL (web address).
Exporting e-Books

e-Books (Dawson)

- Display the e-book record and click on the Export to drop-down option to select RefWorks.
- Remember to edit the record to remove the web address if it comes across in the citation.

E-books (Ebrary)

In Proquest ebrary select Get Citation
Export to Refworks/flow

Exporting from Databases offering direct export to RefWorks

For help exporting from individual databases, see the links on the UCS Library web site under http://www.refworks.com/refworks2/help/Overview_Building.htm

Ebsco

Exporting from Ebsco databases:

- Art Full-text
- Cinahl
- Communication and Mass Media Complete
- SportDiscus with Full-text

- **TIP!** You do not have to be signed into EBSCO to do this.
- Search for articles in the usual way.
- At your results list click on the **Add to Folder** link.
Now click on Folder or see the folder displayed to the right in the orange box.

In your folder contents area you will see the new items you have just added. If you already had items in the folder from previous searches you will need to scroll to the bottom of the list to see your new references. There is a sort option which you can change to Date Added.

Select the items you wish to export by clicking the check box to the left of each item (alternatively, click Select All) and click Export.

Click on the Direct Export to RefWorks button. If you wish to remove the citations from your EBSCO folder, click on Remove these items from folder after saving.

Click Save
You can also export individual articles from the detailed citation page using the **Export** link.

**Exporting from JSTOR**

- Undertake your search in the usual way
- From your list of results tick the records that you would like to export

Select Export Citation

Export Citations

Export citation information for the 2 items below.

Select a format:
- **Citation** (default): Create a citation in a new window. Select “Save As” on the file menu, and save as text file
- **Print-friendly**: A print-friendly citation
- **RefWorks**: Add citation to RefWorks

**1. After the Match Girls’ Strike: Bryant and May in the 1890s**
Lowell J. Satre
Victorian Studies, Vol. 26, No. 1 (Autumn, 1982), pp. 7-31
Page Scan  PDF  Summary

**2. Review 38**
The Bryant and May Museum of Fire-Making Appliances: Catalogue of the Exhibits, by Miller Christy
Review by: H. S. H.
Man, Vol. 27, (Mar., 1927), pp. 57-58
Page Scan  PDF  Summary

**3. Art, Technology, and Science: Notes on Their Historical Interaction**
Cyril Stanley Smith
Page Scan  PDF  Summary
• Select RefWorks from the list.
• You will be asked to login to RefWorks.
• Your references will be imported.

Exporting from Proquest Databases

Tip! If you create a My Research account in Proquest to store articles and searches, any folders you create will also appear in RefWorks (and vice versa). If you add items into your Proquest folders these will sync with your RefWorks folders. Likewise, if you delete items from your Proquest folders they will also be deleted from your RefWorks folders.

• Search as usual and mark the references to export.
• Click on the More option
• Click on RefWorks in the pop up box.

• The Export/Save box will appear. Click Continue to open RefWorks.
Exporting from Science Direct

From the results display screen, mark the records you wish to export and select the Export Citations option.

At the next screen, click on Citation and Abstracts (if you would like to export the abstract too) and click on Refworks Direct Export.

Exporting from Medline

- Display the record you wish to export and click on RefWorks button.

- Click on the Return button to open RefWorks and import records.
Exporting from PubMed

- Conduct your search and mark the records you wish to export
- Click on Display Settings and then select Medline and click the Apply button

Your results will be displayed in a tagged format. Using your browser’s Save As function, navigate to the local drive and save the file in the text (.txt) format.

Now login to RefWorks
- Select Import from the side bar (under Quick Access)
- In the Import Filter/Data Source select NLN PubMed as the data source and PubMed as the database.
- Browse to find the text file you saved to your computer
- Click Import and your records should appear in the Last Imported Folder
Exporting where there is no direct export option (eg. Bibliography of British and Irish History)

For help exporting from individual databases, see the links on the UCS Library web site under http://www.refworks.com/refworks2/help/Overview_Building.htm

Text file entry

Example from Bibliography of British and Irish History

- Tick the references to export
- Click on the Export link – a box will open.
- Tick the txt – Refworks Tagged Format

Click on Export and a second box will display with the option to save

Save the file.
In RefWorks select **Import reference** from the right hand side of the screen

- Select RefWorks Tagged Format from the options supplied.
- Find the File and click on import
- Your references will be imported. Move them to a file.

**Ref Grab-It**

- This tool allows you to capture data from web pages and import it into RefWorks
- To install RefGrab-It click on **Tools>RefGrab-It**
- Then right click **RefGrab-It** and select **Add to Favourites**
Capturing Data from Web Pages using RefGrab-It

- Add the RefGrab-It bookmarklet to your Favourites (see above).
- Navigate to a web page and click on RefGrab-It in your Favourites.
- RefGrab-It shows the results in a light box. The first reference shown will be for the webpage.
- There may also be other references that have been picked up and these can also be selected.
- Click on the Import to RefWorks button

Managing Folders and Moving Information

- Once you have searched for records in a database and successfully exported the references, RefWorks will open up in another window and you will be prompted to login.
- To view imported articles, click on the View Imported Article button. Alternatively, to view your updated references, close the Import Reference window. The new articles will be integrated (in alphabetic order) although you can sort by Last Modified to see the latest imported records.
- **Tip!** Once you have moved items into folders, do not try to delete citations from your reference list if you have moved them into folder s or they will be deleted from your folders too!
- **Tip!** To help you navigate your reference list you can use the Search option to look for references containing particular words or phrases.
Creating Folders

• It is a good idea to organise references into folders, perhaps one for each topic or piece of work. Click the New Folder button and give the folder a name e.g. Dissertation. Click Create.

• To create a sub-folder, click on New Folder, then on Create Subfolder. Select the name of the parent folder from the drop-down and enter a sub-holder name, e.g. Introduction, and click on Create.

• You can have references in more than one folder (but do not delete them from your main reference list).

• You move references to different folders by clicking on the grey bar and dragging. Alternatively, click on the Add to folder option (under the Organise & Share Folders tab) and add to a folder.

Editing References

• Once you have imported references you can edit them e.g. by deleting unwanted URLs for print books, adding notes etc.

• To edit a record, click on the edit (pencil) icon above the record.

Adding a Reference Manually

• Not all references have to be actually exported into RefWorks, you can also add these manually.

• Click on the New Reference button at the top of the page.

• Select UCS Harvard as the correct input style in the Fields Used by box.
• Select the correct Reference Type using the drop-down option.
• Enter information and click on Save Reference.

**TIP!** If you are using Internet Explorer and experience problems entering information in fields other than the author field, you will need to go into compatibility mode.

• Click on Tools and then on Compatibility View Settings
• Enter ucs.ac.uk into the text box and click add, or choose Display all websites in Compatibility View

**Appending Full-text Articles to a Citation**

Most records added to RefWorks will include a 360 Link that you can click on. This will take you to the full-text of an article where available.

**Adding PDFs**

If you have downloaded a PDF of an article from a database you can attach that to the reference on RefWorks. To do this:

• First download and save your article.
• Then select edit (the pen and paper icon)
• Scroll down the page to the Attachments box
• Click on the Browse button to search for the article that you want to attach
• Click on the Save Reference button
When you go back to your list of references you will see a paper clip along the grey bar to alert you that there is an article attached.

Adding notes to a reference

To add notes to a reference, select edit (the pen and paper icon)

The edit reference box will appear

Scroll down to additional fields and click on this. A field for personal notes will open that can be used for adding notes. Remember to Save any changes that you make.
Sharing Citations in Folders

- You can share your references with others using the social networking tools available.
- First make the file available to be shared. Select the Organise and Share tab.
- Click on a file and RefWorks will ask you if you want to share the information. Once you have agreed to this you can hover over the folder icon and a number of options will be displayed.

- Select the preferred method to share the file (email, social network or URL link)

Deleting Records

TIP! Do not delete records from your reference list if you have added them to a folder as they will be deleted from your folders too! It is safer to remove it from a folder as follows:

- Select the folder to remove
- Tick the item(s) to be removed
- Click on the Remove from Folder option

Your references will be removed from the folder but will still remain in your list of references.

You can permanently delete items from the main list of references using the red delete (cross symbol)
Creating Your Reference List or Bibliography

- Select the folder you wish to create the bibliography from and click on **Create Bibliography** button (top of page).
- Accept **Harvard – UCS Standard** as the output style. If UCS Harvard does not appear as an option in the drop-down you need to adjust your settings in Output Style Manager (see under Customising your Account).
- Under **References to Include** decide whether you want the references in your general folder or in one of the folders you have created (or even your last import folder).
- In the **File Type** drop-down, select **Word for Windows** as the file type, or the file type that you want to use.
- Click **Create Bibliography** (bottom right)
- Click on an option under the green **Completed** button (bottom right corner)
- Your file can then be cut and pasted into your work.
- If you need to do further editing, this can be done in your Word document – e.g. RefWorks incorrectly puts references with no authors at the top of the list rather than alphabetical by title.
Write-N-Cite

This facility allows you to cite references from your RefWorks account with just a few clicks. It helps you to format your in-text citation by synching it with your reference list in RefWorks.

To use Write-N-Cite with RefWorks you must download a small utility program to your computer. There are versions of Write-N-Cite for Windows users and a single version for Mac Users.

- To install onto a UCS machine click on the Enable RefWorks icon on your desktop.
- If you are off-campus you should login to RefWorks and click on Tools.

Once this has been installed you are ready to use Cite-N-Write in Word as follows:

- Open your document in Word. You should see the RefWorks (maybe called Proquest) tab on the toolbar. Click Login and enter your RefWorks login. If prompted, enter the group login code rwucuffolk.
- Click on Sync my database.
- Click on Style: popular styles drop-down, click on Other styles and select UCSHarvard2 and save.
- When you wish to insert and in-text citation click Insert citation>Insert new.
- RefWorks then opens up to show your folders from which you can select a citation.

Examples of correct in-text citations

1 author      (McDonald, 1996)
2 authors     (Brown and Avery, 2012)
3 authors     (Tovar, Must and Bermudez, 2009)
4 or more authors (Tovar et al., 2009) - Note that et al. should be italicised

RefWorks Help

For help or more information about using RefWorks:

- Click on the link to Referencing Support in the Libraries and Learning Services box on MyUCS.