

# Advanced Guide to



ProQuest  
RefWorks

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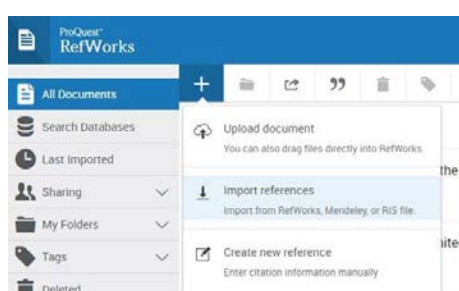
*This is an advanced guide to the features and tools available in New RefWorks. If you're new to New RefWorks, please take a look at our "Getting Started with..." guide.*

## Migrating From Legacy to New RefWorks

If you have an existing Legacy RefWorks account and you want to use the references from that in *New RefWorks* then you can migrate the references across. Both accounts exist separately, so migrating **won't lose** the references in Legacy or close the account.

**Important!** Due to compatibility issues, finish all papers you start using Write N Cite if they're connected to your Legacy account.

Log-in to your *New RefWorks* account and click on the *plus* symbol and then click on *Import References*. Choose *RefWorks*

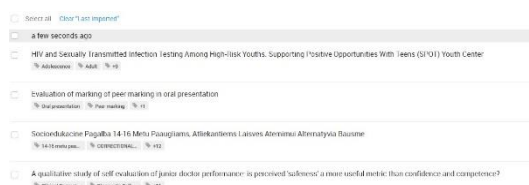


Import from another reference manager



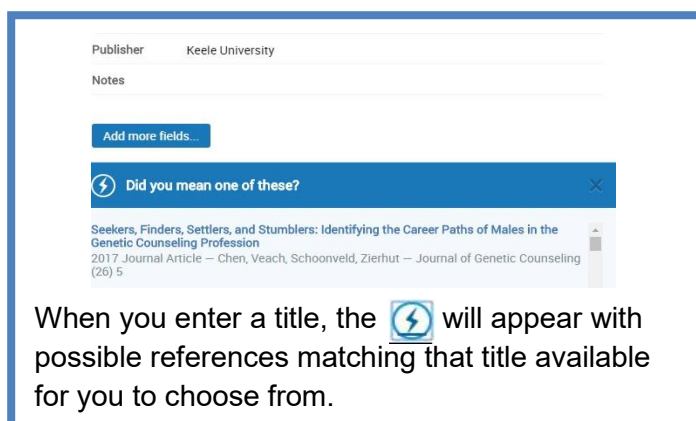
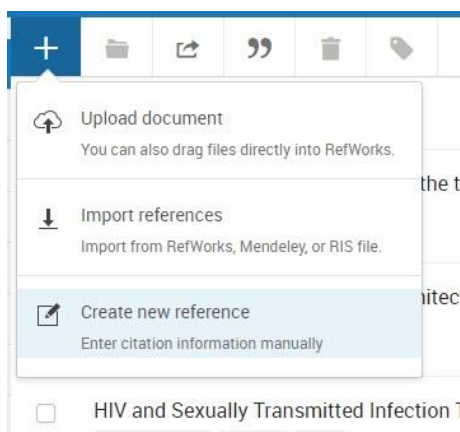
If we don't support importing from your reference manager yet, try exporting to a supported format.

Follow the instructions to authorise the transfer. You may have to log-in to your Legacy account. Your references will appear in the *Last Imported* tab.



## Creating References Manually

There may be times when you can't import a reference into *New RefWorks* because the source isn't available or searchable electronically. To create references manually, click on the *plus* symbol and click *Create new reference*.



Forum/Blog Discussion

Title Finders Seekers

Tags keelelibrary x blog x searchstrategies x

Add tag

Attachments Add an attachment...

Authors Chesworth, Scott Last name, First name

Website http://www.keele.ac.uk/library

Date of Post 23rd February 2018

Abstract

URL http://www.keele.ac.uk/library

Publisher Keele University

Notes

Add more fields...

Choose the source and then complete all the fields you need for that source. Click *Add more fields* if you want to add anything extra.

## Adding Tags

You can add tags to your references to create searchable terms/keywords that will let you find all references using that tag or allow you to group references by keyword. There are several ways to add tags to references.

1. When you're creating or editing a reference, you can add tags to the record and save the changes. You can also delete any unwanted tags by clicking the x symbol.
2. You can select any number of references you want to add a tag to from a folder, *All Documents* or the *Last Imported* tab. Just check the box next to the references you want to tag or click *Select all*.

Select all (10)

Cyberbullying: Its nature and impact in secondary school pupils

Family poly-victimization and cyberbullying among adolescents in a Chinese school sample

Stakeholder Perceptions of Cyberbullying Cases: Application of the Uniform Definition of Bullying

Moral Disengagement About Cyberbullying and Parental Monitoring: Effects on Traditional Bullying and Victimization via Cyberbullying Involvement

Cyberbullying: What Counselors Need to Know

Cyberbullying among Finnish adolescents - a population-based study

A Case Study of the Perceptions of Secondary School Counselors Regarding Cyberbullying

Reducing cyberbullying: A theory of reasoned action-based video prevention program for college students

Where does cyberbullying fit? A comparison of competing models of adolescent aggression

Using IT Design to Prevent Cyberbullying

Select all (10)

Cyberbullying: Its nature and impact in secondary school pupils

Family poly-victimization and cyberbullying among adolescents in a Chinese school sample

Search existing tags or type to add new

cyberbullying

CYBERBULLYING

cyberbullying

Cyberbullying

Cyberbullying -- Nursing -- In Infancy and Childhood

Cyberbullying -- Prevention and Control -- In Infancy and Childhood

Save

Click on the *tag symbol* and enter the keyword you want to use for tagging. Select from the list of tags it suggests you could use and that are already in use and click *Save*.

The tag is added to the record and can be seen under the reference title.

## Using Tags to Search for References

You can search for references using tags in two ways:

Tags

Canada

Cancer

cancer care

Cancer Care Delivery Mod...

Cancer Care Facilities

Cancer Patients

1. Click on the *Tag symbol* in the left hand menu. Tags are listed alphabetically so just type your search term and select the tag you want to search for.

ProQuest RefWorks

All Documents

Search Databases

Last Imported

Sharing

My Folders

Tags

cyberbullying

CYBERBULLYING

tags:"cyberbullying"

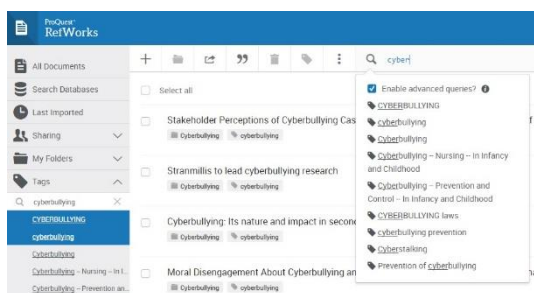
Select all

Stakeholder Perceptions of Cyberbullying Cases: Application of the Uniform Definition of Bullying

Stranmillis to lead cyberbullying research

Cyberbullying: Its nature and impact in secondary school pupils

You will see the tag you've used for your search at the top and all the references containing the tag will be displayed.

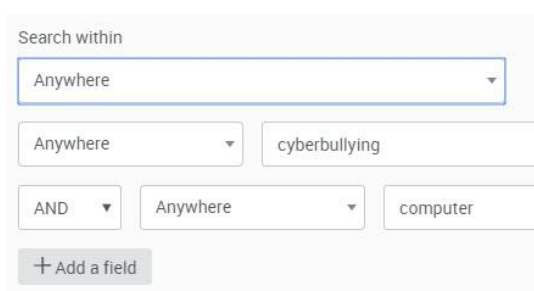


2. Type your search term into the search box at the top of the page and select the term you want to use. All the references containing the tag will be displayed.

You can also use this to search for documents containing that search term by pressing *Return* instead of clicking a tag entry. This will search the full text of any uploaded documents as well.

## Using Advanced Search Features

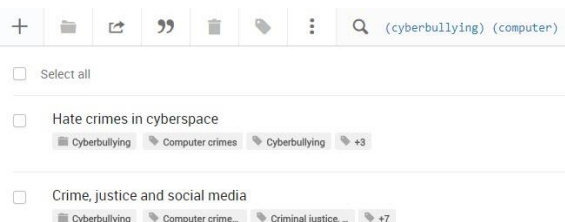
You can use advanced search strategy techniques, such as Boolean logic (AND, OR and NOT) to find references you've imported into *New RefWorks*. Just click on the *magnifying glass symbol* (🔍) and the *Advanced* option will appear.



When you're ready, click *Search* and you should see all the references that contain your search parameters.

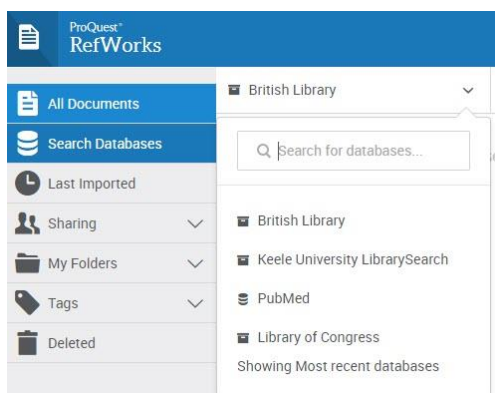
You can choose to search the whole of *New RefWorks* (*Anywhere*) or select from folders you've created, the *Last Imported* tab or the *Not in Folder* tab.

You can also select the field you want to search within for your search term and add any number of additional fields using the Boolean operators.

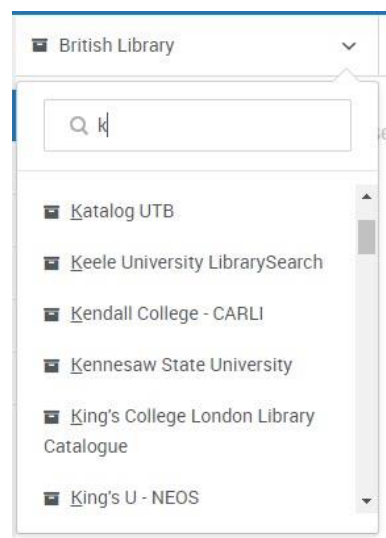


## Importing References Directly from Library Catalogues

You can import references from any catalogue in the world as long as the institution has made them accessible and searchable via *New RefWorks*. You can also use the Advanced Search features to develop a more complex search.



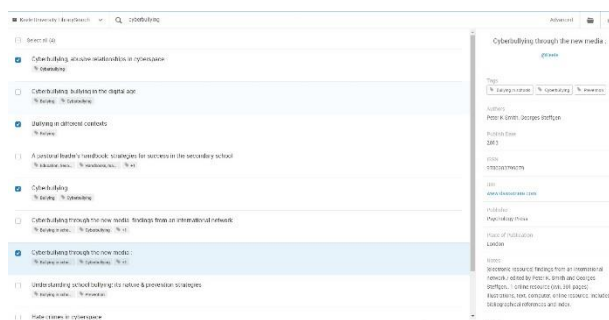
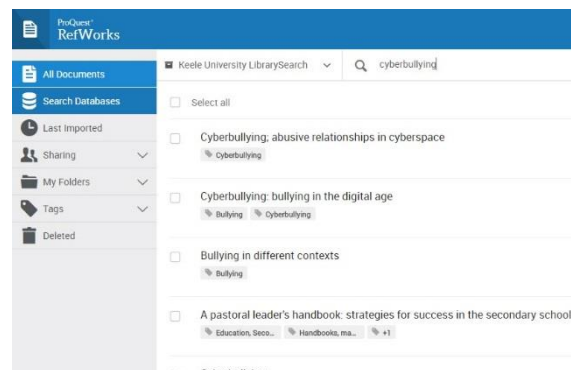
To begin, click *Search Databases* from the left menu. You will see a search box and also the most recent databases you've used – like a favourites menu.



Enter the name of the institution or just type a letter to begin browsing the results under that letter.

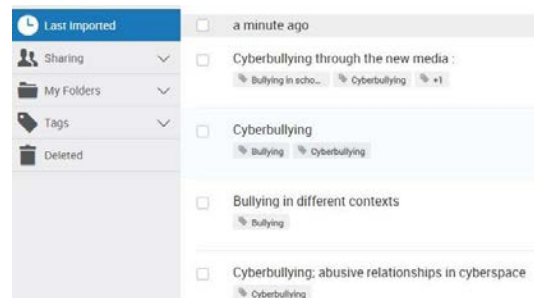
Select the catalogue you want to search and enter your search term. You can use the Advanced Search features to search within different fields of the records (Authors, Titles, Keywords, Publication Dates) and add additional fields using Boolean logic.

**Please note:** when searching catalogues in this way, results will only show book records.



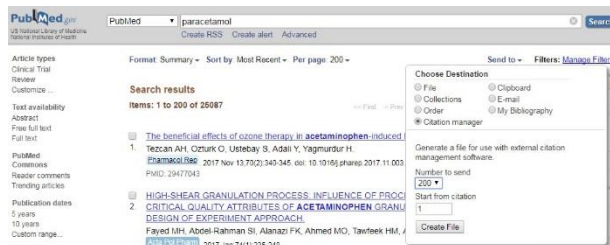
The references will appear in the *Last Imported* tab where you can then move them into folders in the usual way.

You'll see a list of titles with tags underneath each record. You can click on an item to see the details pane and then check the box to the items you want and click *Import* in the top right to import those references into *New RefWorks*.



## Importing References from Files

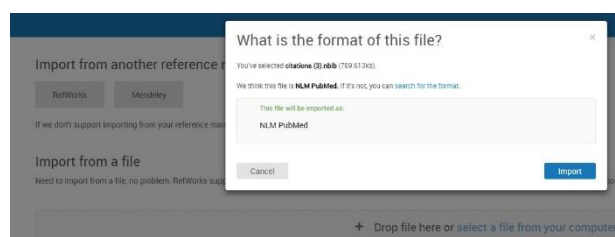
Whilst *New RefWorks* makes importing references from individual catalogues and databases easy, there are still some databases where you'll need to save references as files before you import them. We're going to look at PubMed where you'll need to create a file for export.



*RefWorks* can recognise.

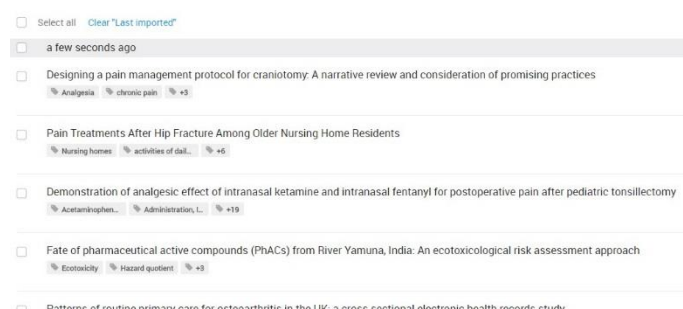
Within *New RefWorks*, click on the *plus symbol* and choose *Import references*. Then under *Import from a file*, click to begin searching for the file created from PubMed.

Enter your search terms and from your list of results, click *Send to* and then choose *Citation Manager*. Select the number of citations you want in the file and click *Create File*. This will create a file in an *.nbib* format – a PubMed file that *New*





New RefWorks will recognise the format, so click *Import* and the upload will begin.



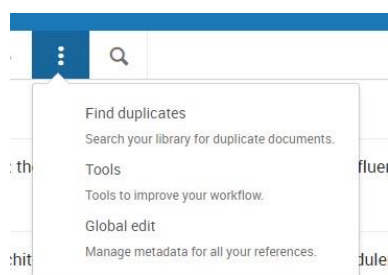
Sometimes, New RefWorks won't recognise the file format, but if you search for the database you are getting the file from (and sometimes the sub database as well) then it should be able to convert the files.

It may take several minutes depending on how many records are in the file. Once complete, the references will appear in the *Last Imported* tab ready for moving into folders.

This should work with most databases where there isn't a direct way to export to New RefWorks and is a good way to import several hundred records at a time.

## Finding and Removing Duplicate References

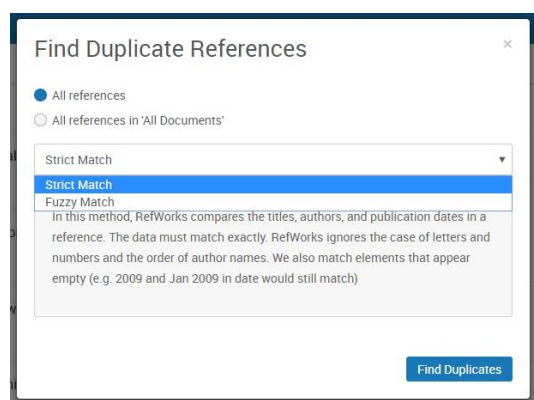
When bulk exporting references from a number of databases, you may find that some of the same references crop up. These references can sometimes look different as the metadata may display differently across databases, but it is the same reference. In these cases, you may want to remove the duplicate from New RefWorks. Fortunately, there's a tool for that!



You can remove duplicates from specific folders, the *Last Imported* tab, *Not in Folder* tab, or *All Documents* tab. Click on the *menu icon* at the top of the page and click *Find duplicates*.

Click the radio button next to where you want to search. *All references* will search the whole of New RefWorks, whereas the second option will be limited to the folder or area you were in when you began the process.

Now choose from the two match options.

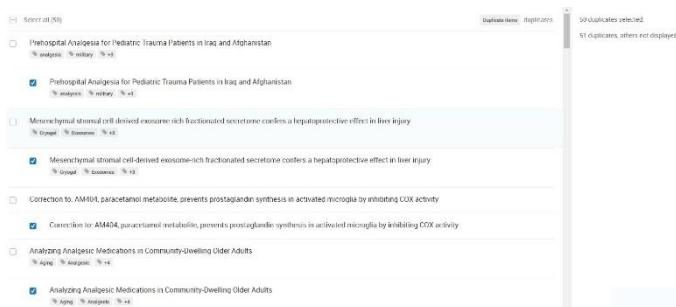


*Strict Match* will compare titles, authors and publication dates in the references and look for other references that have **exactly** the same details.

*Fuzzy Match* will compare titles, authors and publication dates as before, but will match

anything that is **similar** to that information taking into account that databases may format their references differently.

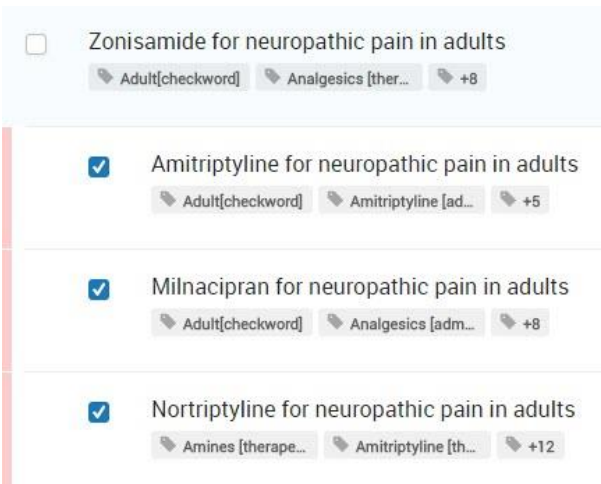
Once selected, click *Find Duplicates* to begin the process.



When using a *Fuzzy Match*, it may pick up references that have similar keywords within the title as it is looking for close matches. You will need to check these before you decide to delete them. Just uncheck any references you don't want to remove.

Once you're happy that the references you've selected are all duplicates, click on the *bin* icon to remove them.

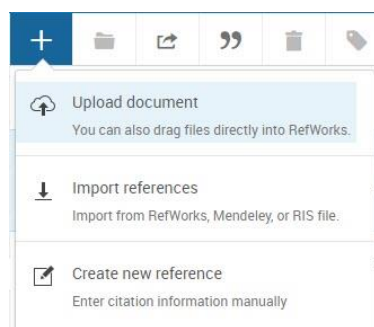
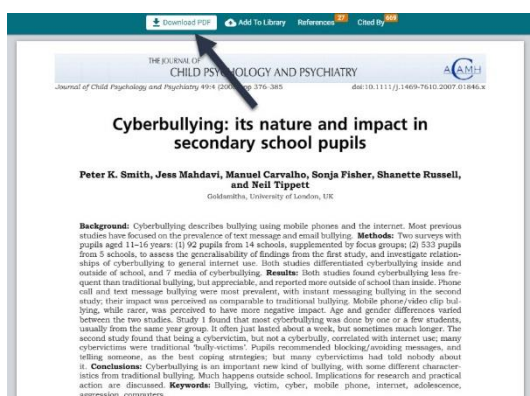
It will list the references that match the search with the duplicate underneath highlighted and checked. When using a *Strict Match*, it should identify genuine duplicate references. Check them before you delete them.



**Remember!** Items stay in the bin for up to 30 days, so if you've accidentally deleted something you can restore it to where it came from.

## Uploading Documents

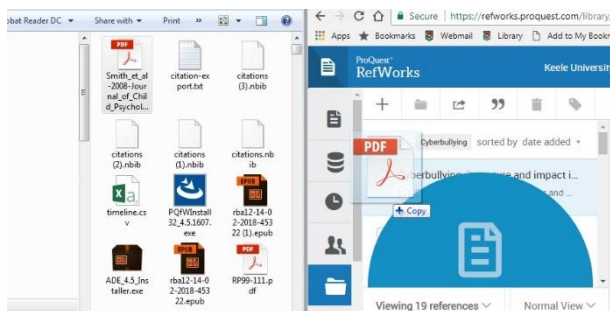
*New RefWorks* has unlimited storage for references and documents and it is possible to upload documents and attach them to your references, so you can access them directly. When you use the "Save to RefWorks" bookmarking tool to save article references, it will often capture the article along with the reference, but if it doesn't there is a way to upload articles yourself.



Find the article you want to upload and download the PDF to your device. Then go into *New RefWorks* and click on the reference you want to upload the document to.

You can EITHER: click on the *plus symbol*, choose *Upload document* and then find the PDF from your files.





OR you can drag and drop the file onto the reference.

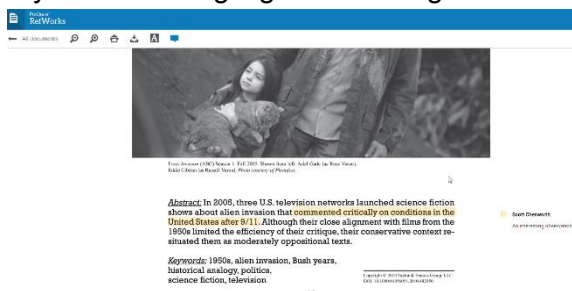
The document will appear as a preview in the details pane. You can then click **Read** to view it through *New RefWorks*.


You can also drag and drop articles that you haven't imported references for. Just drag the document into the folder you want to store it and *New RefWorks* will analyse the metadata and complete the reference details for you. You can edit anything that isn't right in the usual way.

## Annotating Documents

Once you've uploaded a document into *New RefWorks*, click **Read** to view it through the reading pane. You can also make annotations to any documents saved in this way.

If you want to highlight something from the document, just highlight the area using the



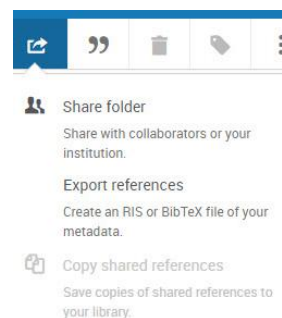
mouse and click on the **text symbol** (  ) where you have the option to choose which colour to highlight it in. If you want to add a comment to the document, just click on an area of the document and a comment box will appear for you to add a comment.

## Sharing Your References

If you're working within a group or collaborating on a project, you can share a folder of references from *New RefWorks*.

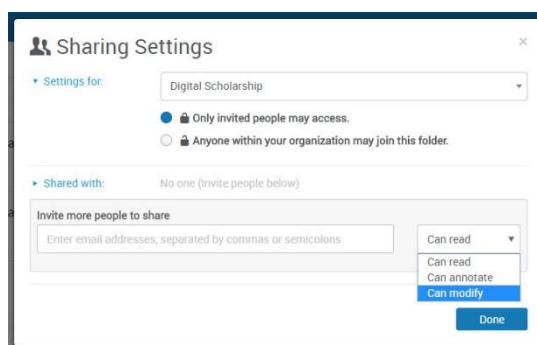
There are two ways to share a folder:


1. Under the Sharing tab, click **Share a folder**.
2. On the toolbar, click the **Share and Export** icon and then **Share folder**.



The Sharing Settings window will appear. Choose a folder and then select whether it is accessible only to people you invite or to anyone at Keele.

If you're inviting people, enter their email addresses and then use the drop-down to choose whether or not they can edit your references. Click **Share folder** once you're ready.



A **people symbol** (  ) will show next to any folders you're sharing.

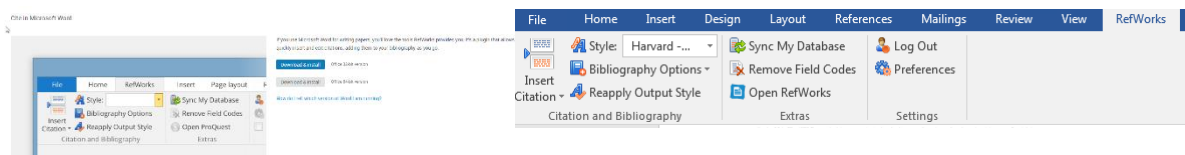
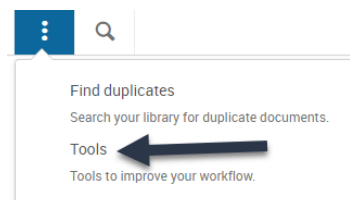
You can also view any folders shared across Keele by clicking on *Folders at Keele University* under the *Sharing* tab. This will show you a list of folder names and owners and give you the option to *Join* if you want to access those folders.

## Using Cite in Microsoft Word

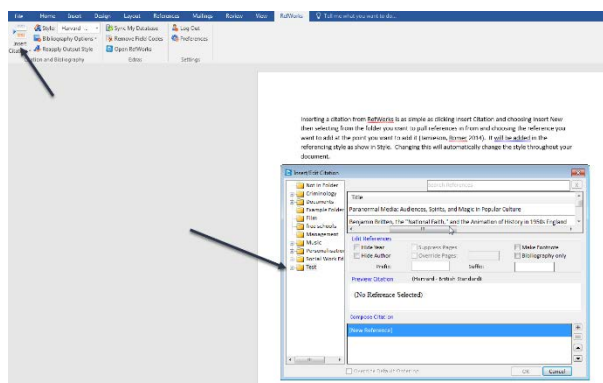
By setting-up *Cite*, you can link citations from *New RefWorks* directly into your documents.

To download *Cite*, click on the *menu icon* (☰) from the toolbar and select *Tools*. Scroll down to *Cite in Microsoft Word*.

Choose the correct download depending on whether you're running Word in 32 or 64 bit (there's a link to help you), and *Cite* will install a RefWorks tab on the ribbon within Word.



Click on *Log-in* from the *Settings* option on the ribbon and Word will sync with your *New RefWorks* account. Then to add an in-text citation into your paper, just type away and click *Insert Citation* from the RefWorks tab when you want to add one in.



Select *Insert New* and then choose from your list of folders and select the reference that you want to add.

This will add a citation (author's surname and year of publication) to wherever your cursor currently sits.

If you need to change the referencing style just select it from the *Style* drop-down menu.

The full reference will appear at the end of the paper in your bibliography or list of references, but don't add that in until you've completed the paper. When you're ready, click on *Bibliography Options* and select *Insert Bibliography*. This will then add each citation in its full referencing format alphabetically by surname. It will add it at the point your cursor is sat, so make sure you're at the end of the paper or at the start of a new page.

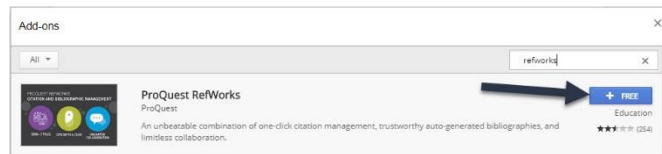
If you delete a reference from your RefWorks account, it will also disappear from your paper, so be careful about deleting references unless you really don't need them. If you accidentally delete one then you can still access them from the bin for up to 30 days after and restore them to the folder they came from.

## Using Cite in Google Docs

If you don't have access to Word or prefer to work online using Google's document suite then you can set-up *Cite* through Google's word processing program, Docs.

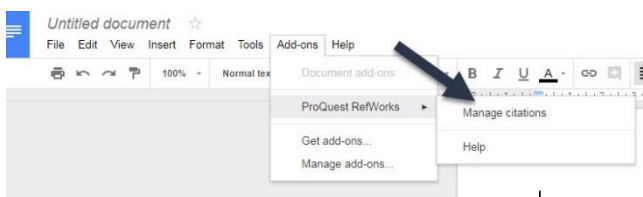
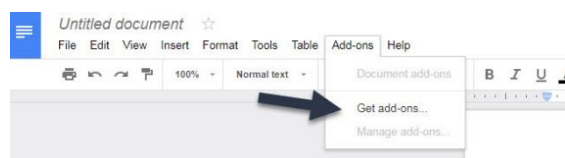
There are two ways to install *Cite*:

1. Within *New RefWorks*, click on the *menu* icon from the toolbar and select *Tools*. Scroll down to *Cite in Google Docs* and click *Get the Add-on*.

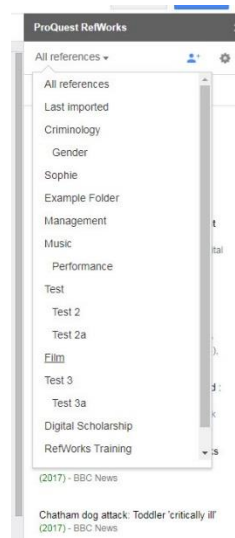


This will take you to the *ProQuest RefWorks* add-on within the Google app store. Click on *Free* to begin installing it.

2. Open up a Google Doc and start a new document. Click on *Add-ons* and then click *Get add-ons...*. Search for *RefWorks* and then install the add-on as above. Under *Add-ons*, you'll see *ProQuest RefWorks*. Hover over the arrow and click *Manage citations*.



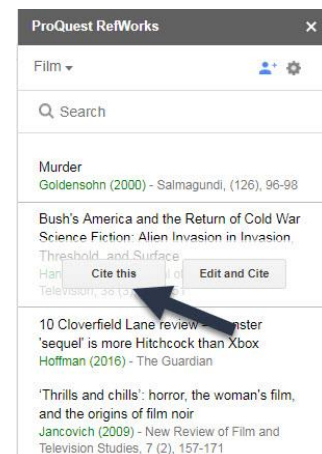
You'll see a list of all your references from *New RefWorks*.



To select a folder, hover over *All references* and you'll see your folder list. Click on a folder name to see the references.

To add in-text citations to your document, just type away and then select the folder you want to reference from as above. Hover over the reference and click *Cite this*. This will add an in-text citation wherever your cursor is on the page. It will also add the full reference, but you can cut and paste that onto another page or document.

If you need to change the referencing style then just click on the settings wheel (⚙️), click *Change citation style* and then set the preferred citation style before clicking *Update*. You can see a preview of the style in the window.



## Customising Citation Styles

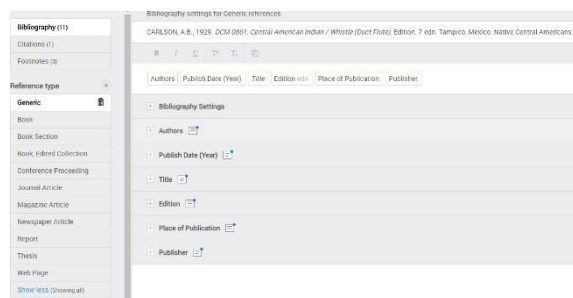
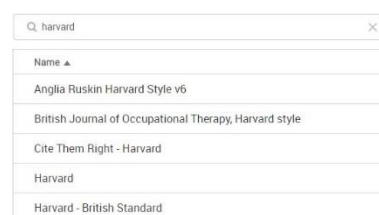
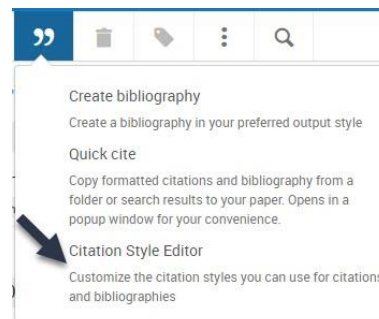
Although there are hundreds of referencing styles to choose from in *New RefWorks*, it is important to follow the style suggested in your module guide or the preferred house style of the publisher you are writing for, so you may need to refine elements of the style you use.

To begin customising a style, click on the ” symbol from the top menu and click on *Citation Style Editor*.

Search for the style you want to modify by typing in keywords and selecting the style that best matches the one you want to use. You will need to duplicate the style to create a custom one as changes cannot affect global styles.

Once you've created a duplicate (click *Options*, select *Duplicate* and rename the style), you'll see *Me* next to the title to indicate it's a custom style (these will also appear under *My Styles*).

You can modify the settings for the bibliography, citations and footnotes to determine parameters like: line spacing; indentation; and order of appearance in the document.



When you copy a reference style, it should copy all the associated reference types with it, so all you need to do is tweak them to match the style you need to follow.

You can modify the order of the reference parts by dragging and dropping the text blocks and you can do this for every reference type listed.

You can modify every part of the reference and set rules for how they display including rules for how many authors to show and whether to separate them with commas or 'and' (if separating with 'and', you need to put spaces either side of 'and'.) When you've finished modifying, click *Save*.

You will need to make changes to all the reference types (Generic; Book; Journal Article, etc.) when you are modifying.

To begin using the custom style using *Cite in Microsoft Word*, you will need to *Sync* your database in the RefWorks tab. This will then show your custom style in the list of *Recent Styles*. Select this, and any references in your bibliography or in-text will utilise your style.

