



ProQuest RefWorks

REFWORKS BASICS

Introduction to using ProQuest RefWorks

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Introduction to RefWorks

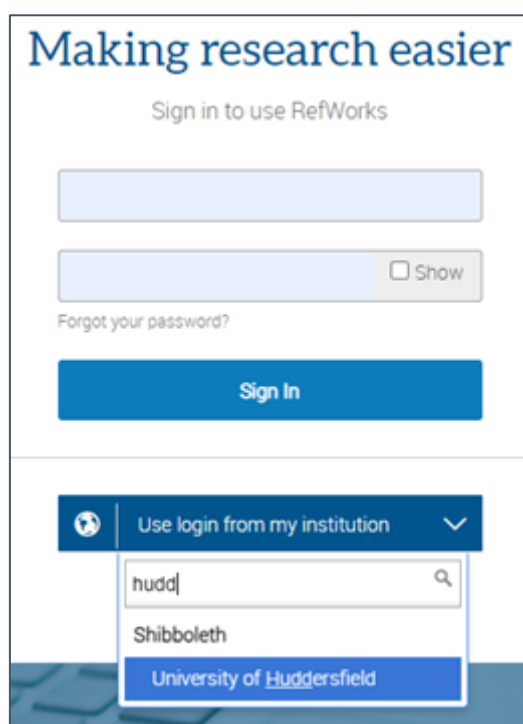
This is an introduction to the key elements of RefWorks. Further support can be found on our [online guide](#) and from your subject librarian at library@hud.ac.uk.

The library also runs occasional training sessions on various topics including RefWorks. You can sign up for future training or access recordings on the [Library Live website](#).

Setting up a RefWorks account

The University of Huddersfield has a subscription to RefWorks. You do not automatically get an account; you must register first before you are able to use it. Please make sure you are using the latest version of RefWorks and NOT the 'legacy', or older version.

- Go to [RefWorks ProQuest](#).
- Select 'Use login from my institution' and start typing 'Huddersfield'. Select 'University of Huddersfield' from the list.



The screenshot shows the RefWorks login interface. At the top, it says "Making research easier" and "Sign in to use RefWorks". There are two input fields: one for the email address and one for the password, with a "Show" button next to the password field. Below the password field is a link for "Forgot your password?". A blue "Sign In" button is positioned below the input fields. Below the "Sign In" button is a dropdown menu titled "Use login from my institution" with a downward arrow. The dropdown menu is open, showing a search bar with "hudd|" entered and a magnifying glass icon. Below the search bar, two options are listed: "Shibboleth" and "University of Huddersfield", with the latter highlighted in blue.

- On the next screen, enter your institutional email address (@unimail.hud.ac.uk for undergraduates and @hud.ac.uk for staff and researchers) and click "Check". On the next screen, click "Sign up".

Start using RefWorks

Please enter your institutional email address:

- **New Users** - Check if your institution has a subscription
- **Existing Users** - Perform a one-time reassociation of your login credentials

Institutional email address

u1234567@unimail.hud.ac.uk

Used to manage your account (e.g. log into the website and reset forgotten passwords) and receive system emails. We will not publicly display your email.

Check

Forgot your email address?

[Contact Support](#)

- Confirm the activation link in the email sent to your email account.
- The link will take you to RefWorks, where you can accept some cookies and fill in some profile information about your role at the University.
- You're now all signed up and ready to start adding things to your RefWorks library!

Adding references

Once you're registered you can start adding references to your library. You can export from most library databases. Make sure you're signed into your RefWorks account **before** you start importing references, it makes it much simpler.

When adding references from anywhere, you will reach the screen below. Click on yes; this will save your reference into the correct version of RefWorks.

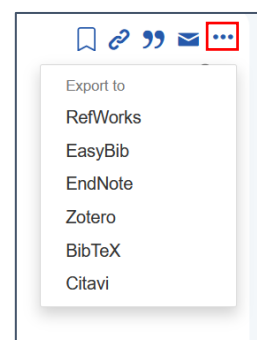


Adding references from Summon

You can save your results from Summon either individually, or in a group.

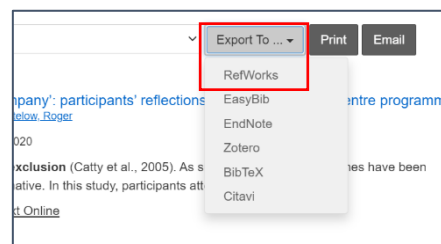
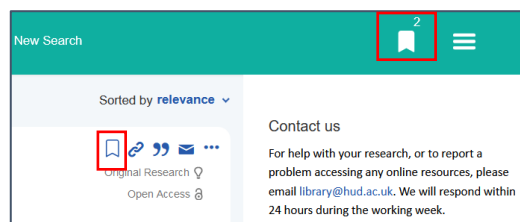
Individually

- Next to the result, click on the three small dots, which is labelled 'More Actions'
- Select RefWorks from the dropdown, and confirm you want to import to the newest version.
- Follow the steps to import. You can either import it to your library, or sort it straight into a folder.



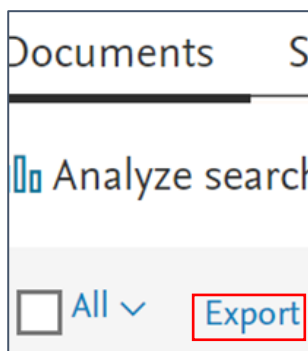
Group save

- Click the bookmark ribbon icon next to the result(s). It is labelled 'Save this item'. This will save it into a temporary folder, visible at the top of Summon.
- Click as many items as you wish to save at the same time.
- Once you have selected all the items you wish to export, click the bookmark folder at the top right of the page.
- Click on 'Export to...' and select RefWorks, then go through the process as before.



Adding references from other databases

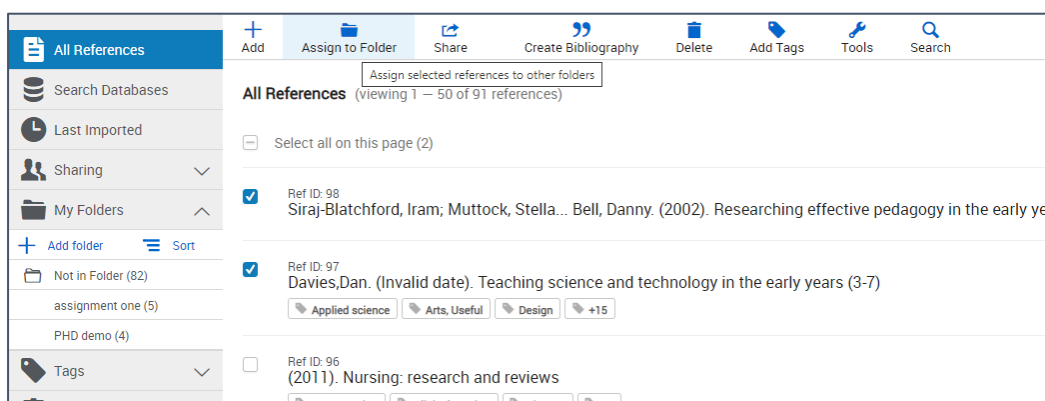
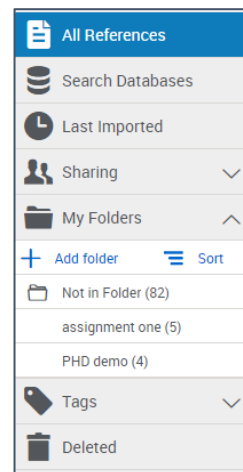
You can export to RefWorks from most academic databases. You are looking for an option to 'Reference', or 'cite' or 'export', or similar, or the speech mark symbol. You can select this, then RefWorks, and follow the usual steps laid out above. We've given a selection of examples below showing what you should be looking for.



Sorting references into folders

You may wish to sort your references into folders for different assignments, topics or themes. For further guidance on managing folders see this video: [Organising references with folders in RefWorks](#).

- Click on 'My Folder' from the options on the left, then 'Add a folder', choose a name, and save.
- Choose the reference you want from your library, then drag and drop into the folder.
- To sort more than one reference at a time, click the check box next to the ones you want, click the "Assign to Folder" button from the top bar, select the folder you want, and apply.



Creating citations and bibliography

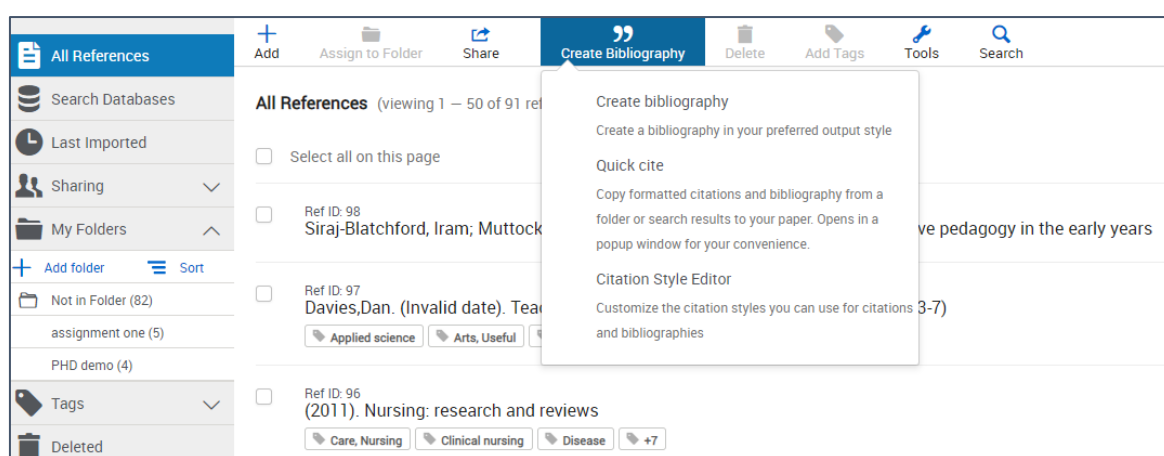
Choosing a referencing style

The University of Huddersfield's referencing style is APA 7th. RefWorks has a few slightly different versions of the style available. We recommend you choose the following:

APA 7th - Sentence Casing, DOI: <https://doi.org/>

This style will automatically turn any titles into "sentence case" (only the first word starts with a capital letter). This will mean if there are proper nouns in the title then you will need to correct these back to having capital letters.

Quick cite and Create bibliography



Quick cite

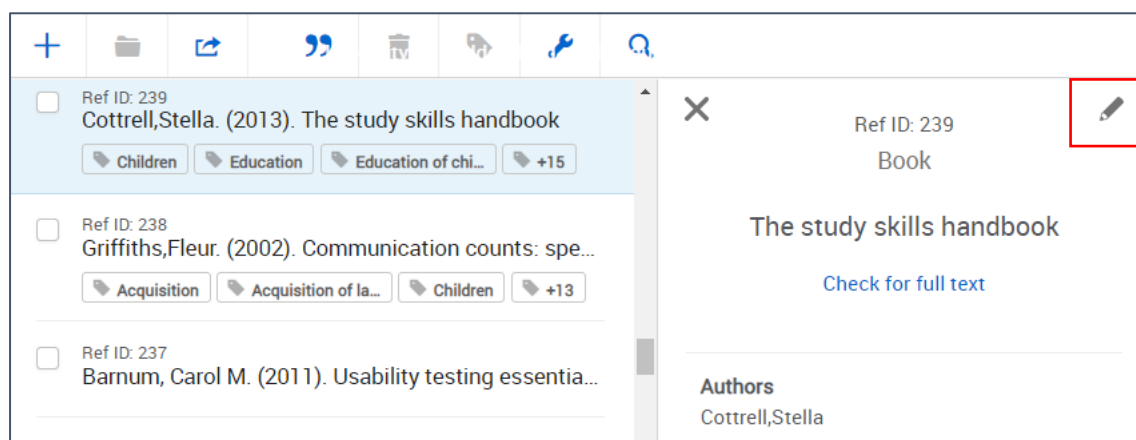
- To create a citation, click on the 'Create Bibliography' button and select 'Quick cite.'
- Choose your APA 7th style (see above) and click 'Continue'.
- Select the source you want to cite, and you can copy and paste it into your work.

Create bibliography

- Click the check box of each resource you want in your bibliography, or choose 'Select All'. You can do this in your main library or in folders.
- Click on 'Create Bibliography', then choose your APA 7th style (see above).
- It will generate your full bibliography in alphabetical order. You can then copy and paste it into your work.

Editing a reference

- Click on one of the references in your RefWorks library to open a right-hand column, then click on the pencil icon to edit the record.



Click on the reference that you want to edit, which will pull up the right hand column. Select the pencil icon to edit your reference.

- You can then add any missing information or correct any typos by clicking into the relevant field.
- Remember to click on 'Save' on the top right of the screen once you are done.

Importing a PDF into RefWorks

If you have downloaded a PDF of a journal article, you can attach it to the reference in your RefWorks library.

- Click the reference you want, which will open the right-hand column again as above.
- You can drag your saved PDF over; this will open a blue bubble saying 'drop here'. Drop it in to attach it to the reference.

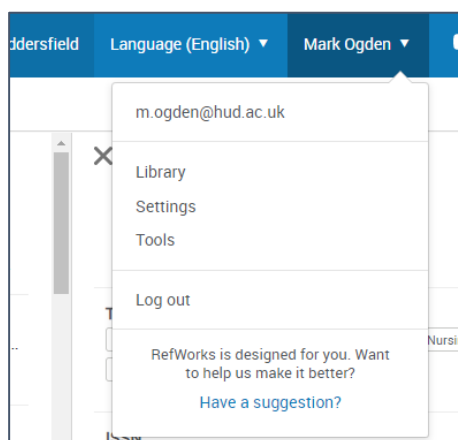
Finding duplicates

If you add the same reference to your RefWorks library more than once, you can easily locate and remove duplicates.

- Click on 'Tools' from the top menu bar and select the 'Find duplicates' button.
- Delete any unwanted references by clicking on the 'Delete' (bin) icon on the top menu bar.

Tools and plugins

RefWorks has a number of tools and plugins that you can use. These can be accessed by clicking on your name in the top right, and selecting 'Tools' from the dropdown menu.

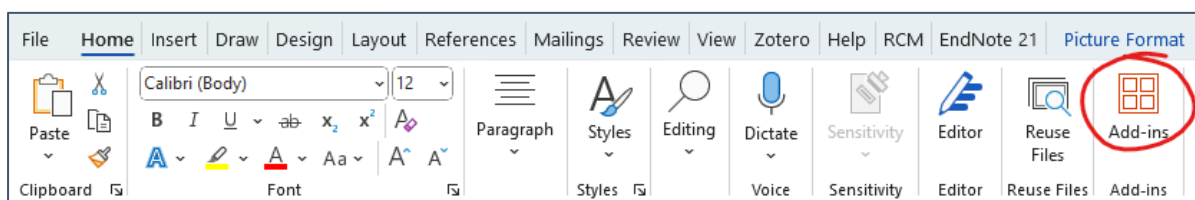


RefWorks Citation Manager

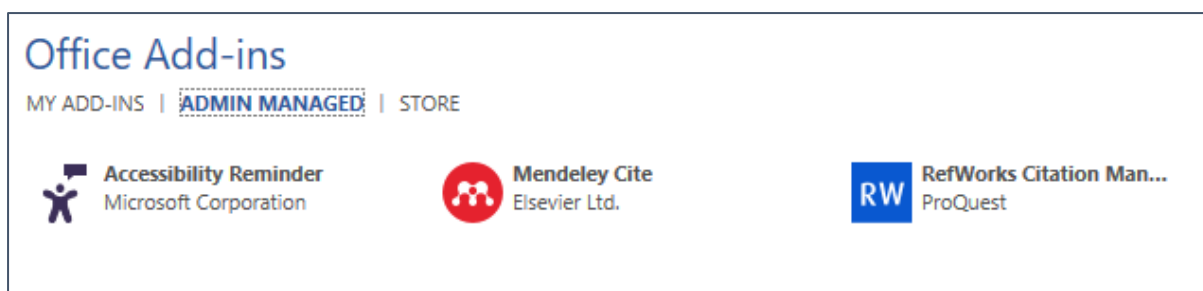
RefWorks Citation Manager (RCM) is a plugin for Microsoft Word. It allows you to quickly insert and edit citations and is available for Word 2016 and above. It is already installed on University computers and laptops. If you are using the University of Huddersfield version of Office365, downloaded from your UniMail, RCM may also be pre-installed.

Please note: if you are using an older version of Word, you will need to use the Write N Cite plugin instead. Please see the [Write N Cite user guide](#) if so.

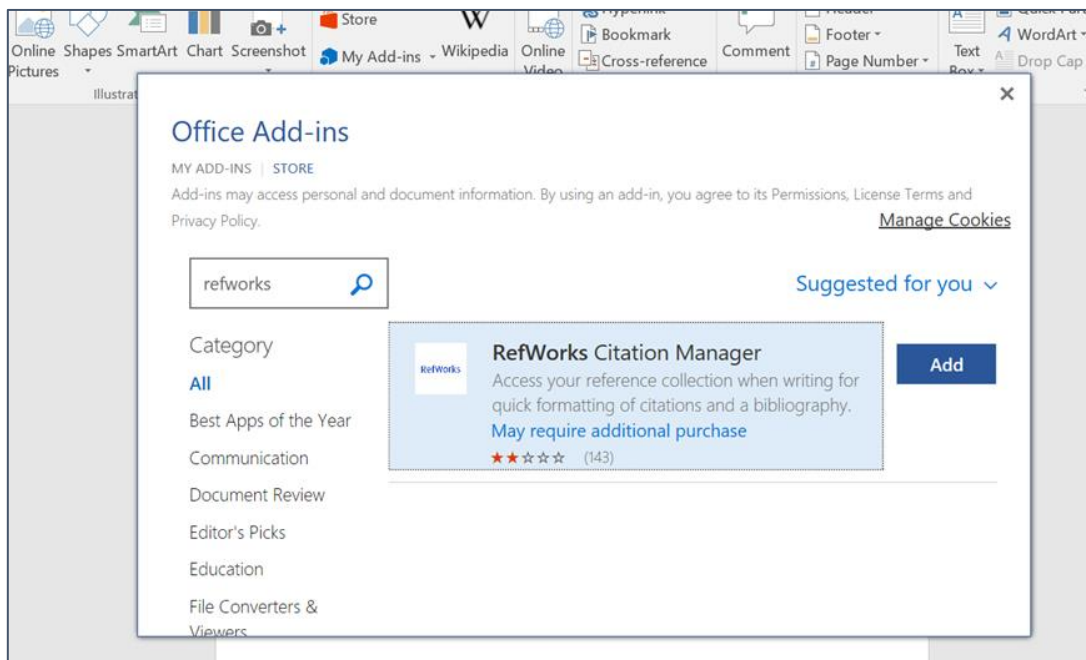
- In Microsoft Word, on the Home tab click Add-Ins.



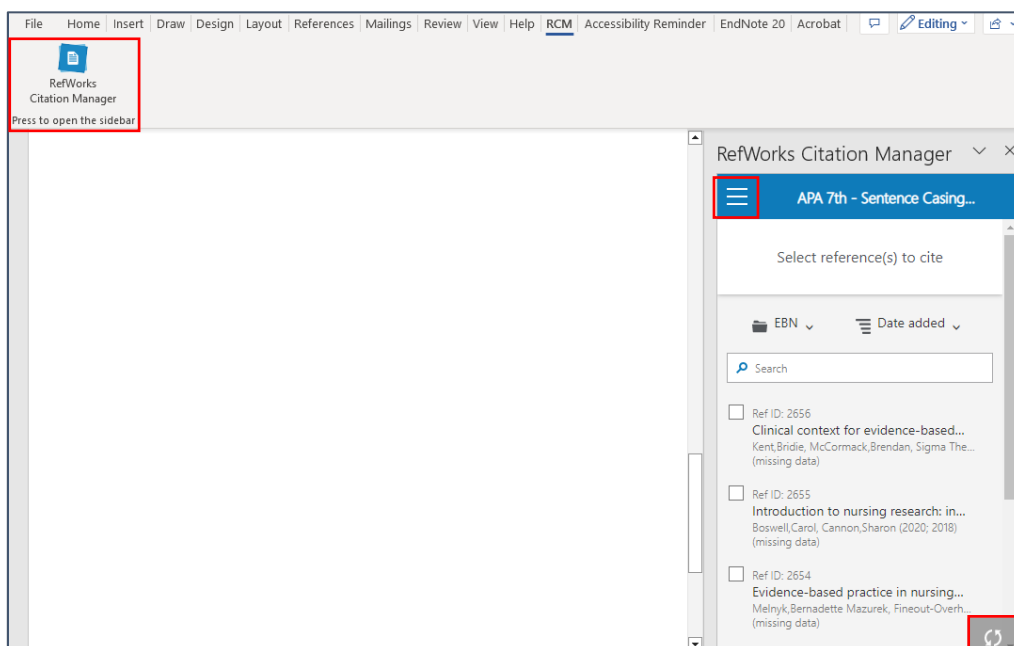
- If you are using the University's Office365 licence, click "Admin Managed" and then click "RefWorks Citation Manager".



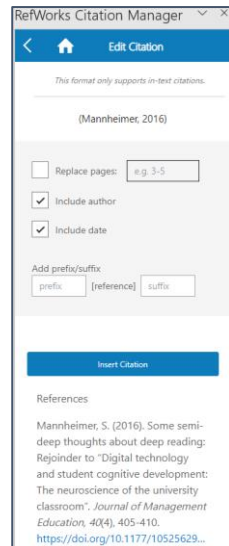
- If using your own version of Office365, click “Store” and search for RefWorks. Select RefWorks Citation Manager, and click 'Add' to Install.



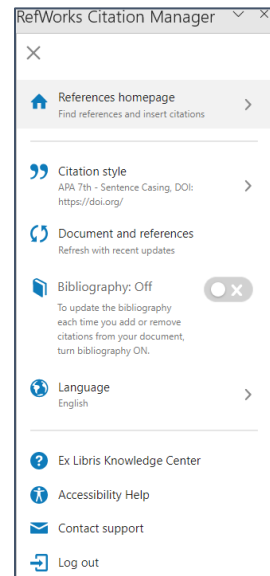
- RCM will now be installed in your tool bar on Microsoft Word. Click the RCM tab on the ribbon, and it will open a pane on the right side of the document. It will prompt you to sign in with your RefWorks account, which syncs your library, and your references will appear (if you use the institutional login, please see the [Alternate password](#) section below). The three lines highlighted take you to the main menu.



- You can now start to insert citations. Choose 'Quick Cite' to add a quick citation, or click the checkbox(s) to generate a preview before you add the citation. Make sure you have selected APA 7th as the style. To edit a citation, select it, then click 'Edit'.



- Accessing the main menu gives you extra options, such as choosing referencing style, language options, and whether you want to add your bibliography as you go.

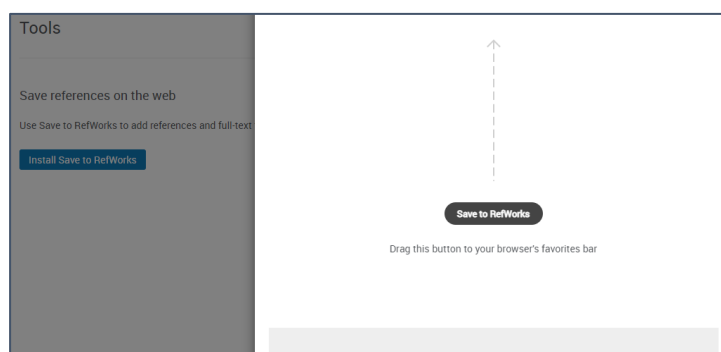


- Tip: if you have a lot of references in your document, updating the bibliography as you go can make Word run slowly. Set 'Bibliography: Off' to prevent this, and add your bibliography at the end once you have finished editing your document.

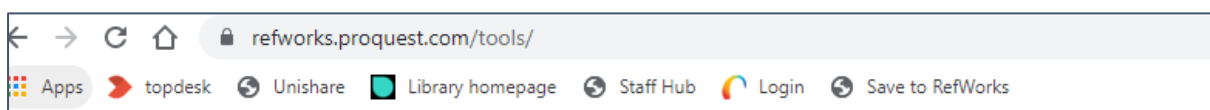
Save references on the web

RefWorks also has a browser plugin to save webpages, for example online news articles, or reports that don't have an export option.

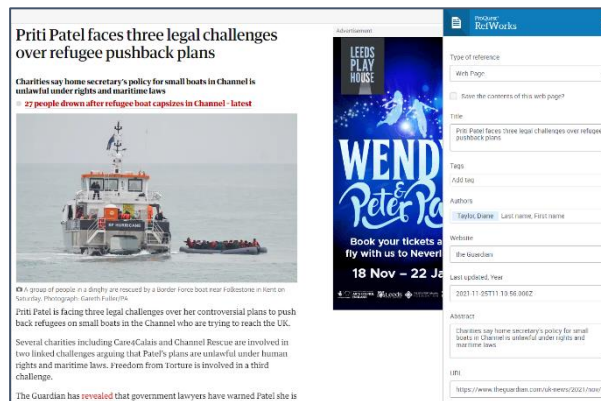
- Select 'Tools' from the drop-down menu under your name, in the top-right corner of RefWorks.
- Click 'Install Save to RefWorks', which will provide you with the Save to RefWorks button in your browser.



- Drag and drop the 'Save to RefWorks' button into your favourites bar. Make sure your favourites bar is visible (this changes depending on which browser you use).



- When you want to save a webpage into RefWorks, click on the button, and it will pull up a sidebar. You can check and edit the reference, and then import it straight into your RefWorks account.



Help

For further advice and support, see the ProQuest videos on their [YouTube channel](#), or ask a Subject Librarian via email at library@hud.ac.uk.