Converting from RefWork to EndNote

These slides will provide information on the following questions:

• How long will RefWorks remain available at QUB?
• What should I consider before converting from RefWorks to EndNote?
• How can I transfer references from Legacy RefWorks to EndNote?
• How can I transfer references from ProQuest RefWorks to Endnote?
• Can I use documents which already contain citations from RefWorks with EndNote?
The future of RefWorks at QUB

• EndNote will replace RefWorks as the university’s supported bibliographic management service.

• The university’s RefWorks subscription runs until December 2020, so current users can migrate to another bibliographic management service at a convenient time, e.g. EndNote, Mendeley, Zotero etc.

• At the moment RefWorks remains available in two versions: old Legacy RefWorks and new ProQuest RefWorks. We will update RefWorks users, if there is any change.
Things to consider prior to migration (1)

Folder structure

When migrating from RefWorks to EndNote, the existing RefWorks folder structure will not be replicated in EndNote.

If you would like to preserve your existing folder structure, prepare your EndNote account prior to migration, by setting up appropriate “Groups”.

Then export your RefWorks references folder by folder and assign them to the appropriate groups in EndNote.
Attachments

Attachments (such as article PDFs) will not automatically migrate from RefWorks to EndNote.

If you would like to transfer attachments, you will need to download them from RefWorks and then import (or drag and drop) them into EndNote.
Things to consider prior to migration (3)

Converting Word documents

If you are using Legacy RefWorks and you have added citations to a document using the RefWorks Write-N-Cite tool, you can convert the document to use with EndNote.

You need to reformat the document with a special Convert to EndNote custom output style.

Please note: This option is not available for documents where citations have been added using the RefWorks Citation Manager tool.
Exporting references from Legacy RefWorks

Sign in to Legacy RefWorks and display the references you would like to migrate, e.g. all or by folder

Click References > Export
Exporting references from Legacy RefWorks

Select the references you wish to export (e.g. All in list) and check that the option Bibliographic Software (EndNote, Reference Manager, ProCite) is selected.

Click Export References
Exporting references from Legacy RefWorks

An “Export Complete” message will be displayed:

A new browser window or tab should open automatically, showing your exported references in a structured format.

If the references do not appear automatically, click the Click Here link in the “Export Complete” message box.
Exporting references from Legacy RefWorks

Save your exported references to a text file (.txt)

Remember the file location for importing into EndNote
Exporting references from Proquest RefWorks

- Sign in to ProQuest RefWorks.
- Choose the references you would like to migrate, e.g. All or by folder.

Click Share
Exporting references from Proquest RefWorks

Check your selected references for export

Select *RIS Format*; then click *Export*
Exporting references from Proquest RefWorks

Save the .ris file to your computer
Remember the file location for importing into EndNote
You can now import your references to EndNote. Create a new EndNote library, or open an existing one to import the file with your references from RefWorks.

In Endnote, click File > Import > File
Importing references to EndNote Desktop

Click Choose … to locate your file of exported RefWorks references

From the Import Option drop-down list, choose Reference Manager (RIS)
Importing references to EndNote Desktop

Duplicates – you can choose whether EndNote should discard identical citations or Import All.

Text Translation – doesn’t need to be changed unless your operating system is using a language setting other than English.

Click Import.
Importing references to EndNote Desktop

Select the imported references and drag and drop them into an appropriate group.
Importing references to **EndNote Online**

You can choose to import your references to EndNote Online instead.

Click **Collect > Import References**

Then click the **Browse** button to locate your file of exported RefWorks references.
Importing references to EndNote Online

Select **Import Option** *RefMan RIS*

You can select a group to import your references into

Click **Import**
Importing references to EndNote Online

EndNote online will confirm the number of references imported and the destination group (if selected).
### Importing references to EndNote Online

#### Planning Law

<table>
<thead>
<tr>
<th>Author</th>
<th>Year</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>McEldowney, J.</td>
<td>2003</td>
<td>Public management reform and administrative law in local public service in the UK International Review of Administrative Sciences Added to Library: 25 Jun 2019 Last Updated: 25 Jun 2019 Online Link: Go to URL QConnect</td>
</tr>
<tr>
<td>O'Hagan, A. M.</td>
<td>2011</td>
<td>The existing law and policy framework for ocean energy development in Ireland Marine Policy</td>
</tr>
</tbody>
</table>
Converting a Word document using Write-N-Cite

This works with **Legacy RefWorks**. We are currently checking, if a similar option is also available for **ProQuest RefWorks**

- To convert a document created using the RefWorks **Write-N-Cite** tool, it needs to be reformatted in the **Convert to EndNote** custom output style, which is available from Clarivate:


Please follow the instruction on the page to obtain the **Convert to EndNote** custom output style
Converting a Word document using Write-N-Cite

In Style apply Convert to EndNote custom style

I like referencing (1). It is a very useful skill to learn (2,3). Bibliographies are particularly invaluable (2).
Converting a Word document using Write-N-Cite

I like referencing (McEldowney, 2003, Public management reform and administrative law in local public service in the UK). It is a very useful skill to learn (McKay & Murray, 2017, Planning law and practice in Northern Ireland; Purdue & Bowes, 2014, A Practical approach to planning law). Bibliographies are particularly invaluable (McKay & Murray, 2017, Planning law and practice in Northern Ireland).
Converting a Word document using Write-N-Cite

Open the appropriate EndNote library and the document you have formatted in the Convert to EndNote custom style.

Save the modified document with a new name.

I like referencing (McEldowney, 2003, Public management reform and administrative law in local public service in the UK). It is a very useful skill to learn (McKay & Murray, 2017, Planning law and practice in Northern Ireland; Purdue & Bowes, 2014, A Practical approach to planning law). Bibliographies are particularly invaluable (McKay & Murray, 2017, Planning law and practice in Northern Ireland).
Converting a Word document using Write-N-Cite

Select all text in the document

Then remove any field codes:

**Windows**: Press `[Ctrl]+6` (above the "T" and "Y" key)

**Mac**: Press `[Command]+6` (above the "T" and "Y" key)
Converting a Word document using Write-N-Cite

Select the required style

Click Update Citations and Bibliography

I like referencing (McElkdowney, 2003, Public management reform and administrative law in local public service in the UK). It is a very useful skill to learn (McKay & Murray, 2017, Planning law and practice in Northern Ireland; Purdue & Bowes, 2014, A Practical approach to planning law). Bibliographies are particularly invaluable (McKay & Murray, 2017, Planning law and practice in Northern Ireland).
Converting a Word document using Write-N-Cite

EndNote will match the details in the document to the references in your Endnote Library.

If there are ambiguities (e.g. duplicate references), you will be asked to select the matching reference.
Converting a Word document using Write-N-Cite

Some citations may not be converted automatically.

Unconverted citations can be added manually.

I like referencing (1). It is a very useful skill to learn. (McKay, 2017, Planning law and practice in Northern Ireland: Purdue & Bowes, 2014, A Practical approach to planning law). Bibliographies are particularly invaluable (2)

Converting a Word document using Write-N-Cite

Not all information from edited citations is successfully converted.

I like referencing (McEldowney, 2003, p 33). It is a very useful skill to learn (Mckay and Murray, 2017; Purdue and Bowes, 2014). Bibliographies are particularly invaluable (2017).
Converting a Word document using Write-N-Cite

Page numbers are retained.

Author name suppression is lost.

Lost edits can be re-applied manually using the Edit & Manage Citation(s) option.
Any questions?