

## Welcome to RefWorks!

This guide will provide you with helpful tips needed to navigate RefWorks. For a comprehensive guide refer to the [RefWorks User Guide](#).

### CREATING YOUR ACCOUNT

To get started with your new RefWorks account, go to <https://refworks.proquest.com>. Enter your institutional email address and create a password.

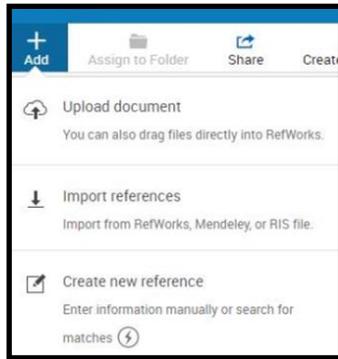
**NOTE:** RefWorks supports [Shibboleth and Open Athens](#), which allows you to use your institutional credentials to sign into RefWorks.

Remote users accessing RefWorks from off-site or from a non-registered IP address, must either enter the unique URL provided by the institutional admin, log in via the organization's proxy server, or log in using other institutional credentials (Athens, Shibboleth).

### NAVIGATING REFWORKS

The screenshot shows the RefWorks web interface for a user named 'ProQuest University' with the role of 'Undergraduate Student'. The interface is divided into several sections, each labeled with a blue box and an arrow:

- Top Navigation:** Located at the top of the page, containing the user's name, institutional affiliation, and language settings.
- Left Sidebar:** A vertical menu on the left side with options like 'All References', 'Search Databases', 'Last Imported', 'Sharing', 'My Folders', 'Tags', and 'Deleted'. It also includes links for 'Privacy Policy', 'Terms and Conditions', and 'Cookie Policy'.
- Main Navigation:** The central area containing a list of references. The top of this area has a toolbar with icons for 'Add', 'Assign to Folder', 'Share', 'Create Bibliography', 'Delete', 'Add Tags', 'Tools', and 'Search'. Below the toolbar, there are options for 'Display: 25 per page' and 'Normal View'. The reference list includes entries such as 'Findings from McGill University Reveals New Findings on Climate Change' and 'Climate change 1995'.
- Right Sidebar:** A vertical panel on the right side showing details for the selected reference, including 'Ref ID: 59', 'New/Open Article', a 'Read' button, 'Tags', 'Attachments' (with a PDF file), 'Publish Date' (August 14, 2017), 'ISSN' (1940-6432), and 'Language'.
- Bottom Actions:** A horizontal bar at the bottom of the interface.



There are several ways to add references into Refworks.

Begin in the Main Navigation and click on **+Add**:

**Upload a Document** – these are documents from your own computer files. Example: PDF, PPT, Word Doc. They can also be uploaded with drag and drop anywhere on the All Documents page or Import a Reference page.

**Import a Reference** – allows you to import reference files from other

**Create New Reference** – Search for a title or DOI, review the results and save the ones you choose, or manually add all reference meta data. When selecting **Create new reference** a new pane will appear on the right.

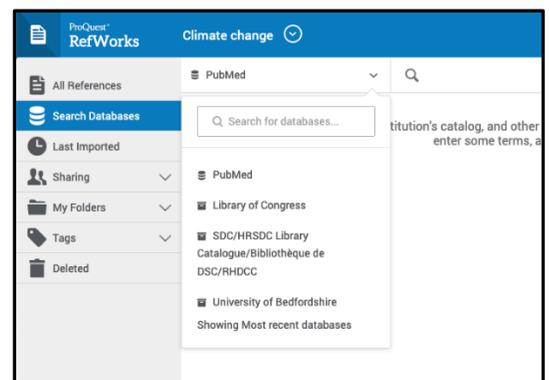
You can search for a reference or create it yourself.

1. Enter a title, or as much of the title as you can.
2. When available, click on the lightning icon button ⚡ in the Title field to have RefWorks match the title with an item in the library. This button is also available after you enter a value in the DOI field, which appears for most reference types.
3. RefWorks displays possible suggestions at the bottom of the pane. If you select one, RefWorks completes the title and fills the fields with information from the library. You can later review or edit fields.
4. To keep the reference, click on **Save**. The reference will be added to your **Last Imported** Folder.
5. If no match is found, you can create the reference by typing in the metadata yourself and clicking on **Save**.

You can save references or articles, including full text (if available) from any website into RefWorks using the Save

You can also add references by searching in linked library catalogs and publicly available databases. Search results can be imported into your account with the click of a button.

1. Select the **Search Databases** tab from the left sidebar.
2. Open the dropdown and enter the name of the database you wish to search or select it from the list of recently used databases.
3. Enter the search term in the search box and click on the **Search** icon
4. Select the relevant items and use one of the following options to save the references:
  - a. Click on the **Folder** icon to import into a specific folder. Choose an existing folder or create a new folder.
  - b. Click on Import. The newly imported references are placed in the **Last Imported** folder and can be assigned to folders by dragging and dropping or by using the **Assign to Folder** action in the Main Navigation.

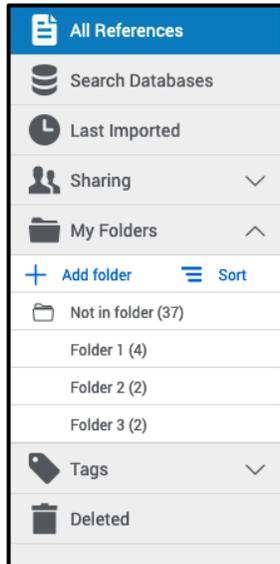


A successful import will generate a message similar to the following:



To export references, navigate to the page or folder of the references you would like to export. Click on **Share** in the Main Navigation, then **Export references**. Select the relevant options and click on **Export**.

## ORGANIZING REFERENCES



RefWorks supports the full research process and provides a variety of options to help you better organize references.

### Left Sidebar:

**All References** – Contains all references in the project.

**Search Databases** – Used to search for items in external linked databases.

**Last Imported** – Displays references imported in the last 30 days.

**Sharing** – Enables you to view folders that were shared with you.

**My Folders** – Allows you to organize references into folders and subfolders. A single reference can be in multiple folders.

**Not in Folder** – Displays references that have not yet been moved into a folder.

**Tags** – includes tags assigned to references that are imported and presented

## ORGANIZING REFERENCES IN FOLDERS

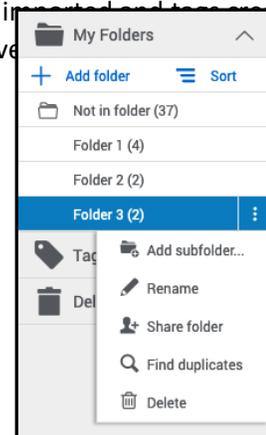
To add a folder:

1. Click on **+Add folder**
2. Name your folder
3. Click on **Save**

To add a subfolder:

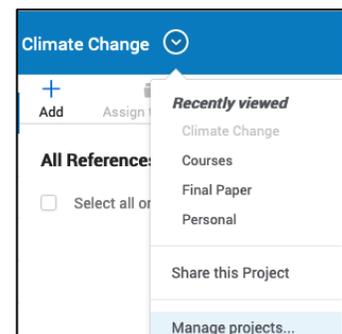
1. Click on the selected folder's kabob icon  (on the right)
2. Click on **Add subfolder...**
3. Follow prompts to name and save the subfolder.

You can sort folders alphabetically or drag and drop in your preferred order. You can toggle between the two sorting options using the **Sort** option under **My Folders**. When choosing the custom option, your latest custom sorting is restored.



## ORGANIZING REFERENCES IN PROJECTS

References can also be organized into projects, which are separate reference collections with unique folders, references, tags, etc. Most users will find they can organize their references sufficiently by using folders. For some users, especially those working on multiple research projects with different groups of people, the ability to isolate references and folders within a Project is needed. Your RefWorks account has a default project called Untitled Project. You can change the name and create new projects in the Manage projects page.



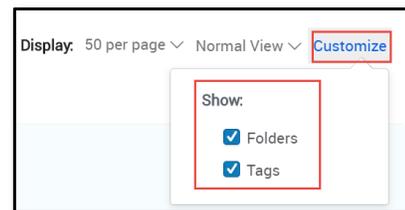
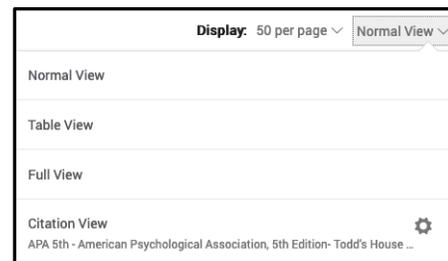
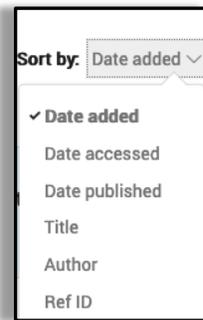
## VIEWING REFERENECES

**Sort by:** Select how you want to display references: by date, title, author or Ref ID. RefWorks will remember your selected sorting the next time you open RefWorks.

**Number of references per page:** Select how many references you would like to appear on the page (from 25 to 2000 references).

**View type:** Select which view you prefer: Normal View (default), Table View, Full View or Citation View. RefWorks will remember your selected view the next time you open RefWorks.

Using the Customize tab allows users to display Folders and Tags checkboxes when selected. Clearing the checkboxes hides the folders and tags from the list of references. This option is available in Normal View and in Full View.



Use the Advanced Search capability to find information in specific folders or reference metadata fields.

Access the **Advanced Search** by clicking on the **Search** icon in the Main Navigation.



Click on **Advanced** and an options panel will open.



Advanced searches can be created by selecting a variety of fields (including custom fields), search terms and Boolean operators.

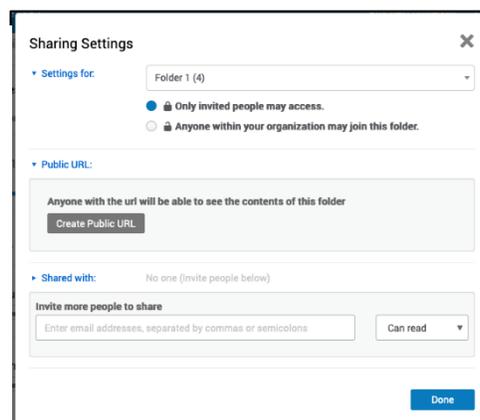
## SHARING & COLLABORATING

RefWorks sharing capabilities allow you to share folders and projects with others within or outside your institution. In addition to individual sharing, users can share folders with all users at their institution.

### FOLDER SHARING

Select the folder you choose to share in your **My Folders** tab.

1. Click on the  icon and select **Share Folder** or click on the **Share** icon in the Main Navigation.
2. In the Sharing Settings screen use the dropdown options to configure:
  - o Settings for: Which references to share
  - o Public URL: Create a URL to provide access to people who do not have a RefWorks account. They will be able to view, sort, export references and create a bibliography.
  - o Shared with: Type the email addresses, designate if the recipients can read, annotate or modify and optionally add a message.
3. Click on **Done**.



The screenshot shows the 'Sharing Settings' dialog box for 'Folder 1 (4)'. It has a close button (X) in the top right. Under 'Settings for:', there are two radio button options: 'Only invited people may access.' (selected) and 'Anyone within your organization may join this folder.'. Under 'Public URL:', there is a text box with the placeholder 'Anyone with the url will be able to see the contents of this folder' and a 'Create Public URL' button. Under 'Shared with:', it says 'No one (invite people below)'. There is a section 'Invite more people to share' with a text input field 'Enter email addresses, separated by commas or semicolons' and a dropdown menu set to 'Can read'. A 'Done' button is at the bottom right.

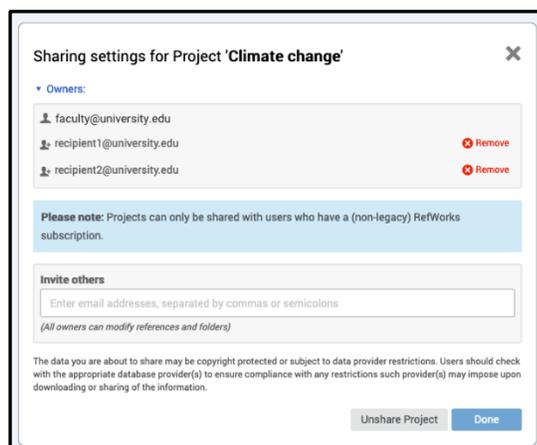
### PROJECT SHARING

You can share a project with other RefWorks users.

- Doing so makes them a project owner and gives them full permissions within the project, including adding, deleting, and modifying folders and references.
- Any project owner can delete the project, as long as it is not the current project of any owner.

Select “Share this Project” from the Project dropdown menu or from a project’s “Actions” button on the My Projects page (Project Menu > Manage Projects):

The Project Sharing Settings page appears, allowing to invite users to the project, and displaying users with whom the project was already shared.

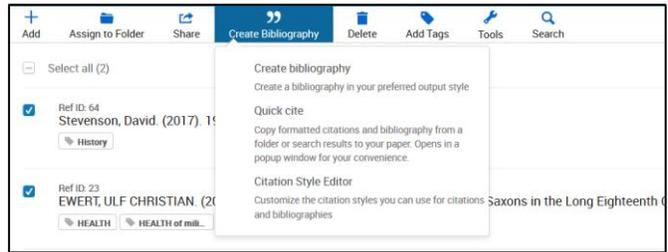


The screenshot shows the 'Sharing settings for Project 'Climate change'' dialog box with a close button (X) in the top right. Under 'Owners:', there is a list of three users: 'faculty@university.edu', 'recipient1@university.edu', and 'recipient2@university.edu', each with a red 'Remove' button. A blue 'Please note:' box states: 'Projects can only be shared with users who have a (non-legacy) RefWorks subscription.'. Under 'Invite others', there is a text input field 'Enter email addresses, separated by commas or semicolons' and a note '(All owners can modify references and folders)'. A disclaimer at the bottom reads: 'The data you are about to share may be copyright protected or subject to data provider restrictions. Users should check with the appropriate database provider(s) to ensure compliance with any restrictions such provider(s) may impose upon downloading or sharing of the information.'. 'Unshare Project' and 'Done' buttons are at the bottom right.

## CREATING CITATIONS OR A BIBLIOGRAPHY

You can create citations and a bibliography from selected references or folders.

4. Navigate to the page or folder of references you want to use.
5. Click on **Create bibliography** in the Main Navigation.
6. Click on **Quick Cite**.



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1. Navigate to the page or folder of references you want to use.
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3. Click on **Quick Cite**.

Choose your preferences:

1. **Citation Style:** RefWorks will remember the last citation style you used. You can change styles by clicking on the style name and either searching for a new style or selecting from the displayed list.
2. **Insert Citations:** Select the references for which you would like to create citations. As you select references, their corresponding citations will be displayed in the text box.
3. Click on the clipboard icon, navigate to your document and paste the formatted citations. Don't forget to save your paper when you're done!
4. Click on **Continue to bibliography** to generate a bibliography which you can copy and paste into your document. You can also click on **Create bibliography** in the main Navigation and then again on **Create bibliography** to skip creating citations.

## TOOLS

RefWorks offers add-on and plug-in tools to help with your research. To access these, click on **Tools** in the Main Navigation.

### Save to RefWorks

By installing the Save to RefWorks plug-in in your browser, you will be able to save a reference or article, including full text (if available) from any website into your RefWorks account.

### Plug-ins for Microsoft Word and for Google Docs

These plug-ins allow you to quickly insert citations and a bibliography to your document using references from your RefWorks folders. Follow the details in the Tools section to identify the plug-in relevant for you and follow the installation instructions.

## RESOURCES/SUPPORT

- [Ex Libris RefWorks Knowledge Center](#) offers various resources for Admins and users.
- [RefWorks YouTube Channel](#)
- The RefWorks Technical Support team is available to assist you with any issues that come up while using RefWorks. Please [submit a case](#), case contact us by email: [support@refworks.com](mailto:support@refworks.com)