

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](#).

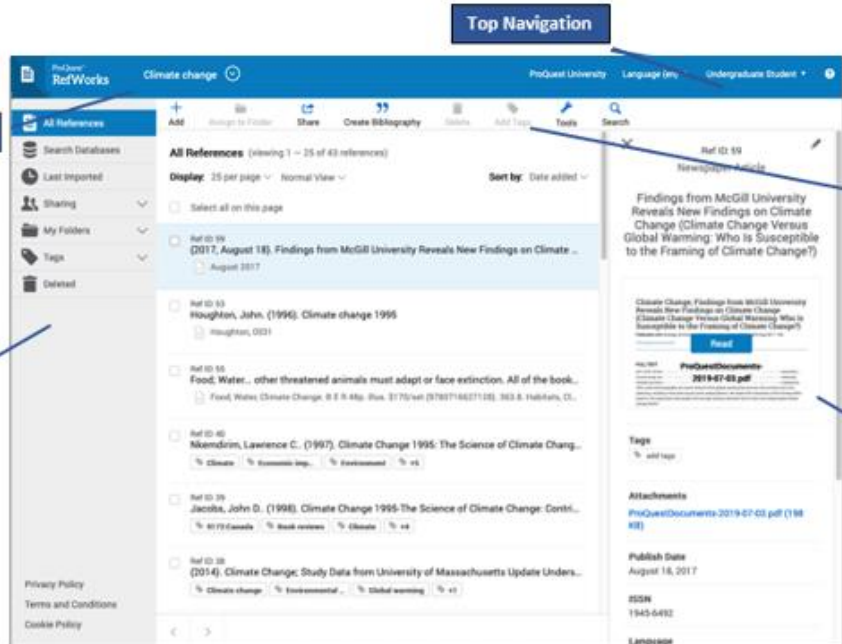
CREATING YOUR ACCOUNT

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 Open Athens, which allows you to use your institutional credentials to sign into RefWorks.

Remote users accessing RefWorks from off-campus or from a non-registered IP address, can click [here](#) to log in using their UNIC email & password (OpenAthens credentials).

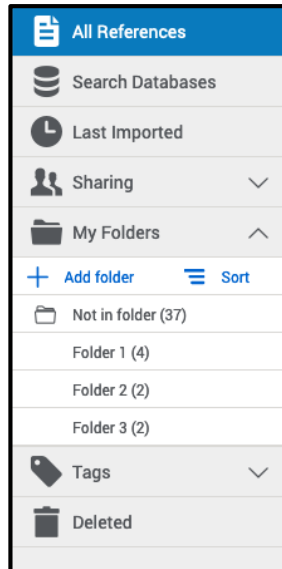
NAVIGATING REFWORKS



The screenshot shows the RefWorks interface with several callout boxes pointing to key navigation elements:

- Top Navigation:** Points to the top header area containing the user's name, language, and account type.
- Projects:** Points to the left sidebar menu.
- Left Sidebar:** Points to the left sidebar menu, which includes options like 'All References', 'Search Databases', 'Last Imported', 'Sharing', 'My Folders', 'Tags', and 'Deleted'.
- Main Navigation:** Points to the top navigation bar containing 'Add', 'Assign to Folder', 'Share', 'Create Bibliography', 'Sort', 'Add Tags', 'Tools', and 'Search'.
- Right Sidebar:** Points to the right sidebar area, which includes 'Tags', 'Attachments', 'Publish Date', 'ISSN', and 'Language'.
- Bottom Actions:** Points to the bottom navigation bar containing 'All References', 'Display: 25 per page', 'Normal View', and 'Sort by: Date added'.

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 tags created by you when adding references. A reference can have multiple tags.


Deleted – Contains all items that have been deleted.

ORGANIZING REFERENCES IN FOLDERS

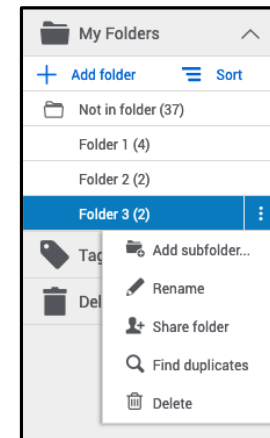
To add a folder:

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

To add a subfolder:

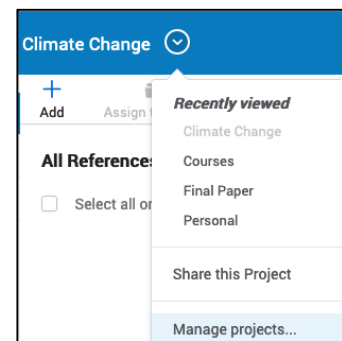
1. Click on the selected folder's kabob icon  (on the right)
2. Click on **Add subfolder...**
3. Follow prompts to name and save the subfolder.

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.

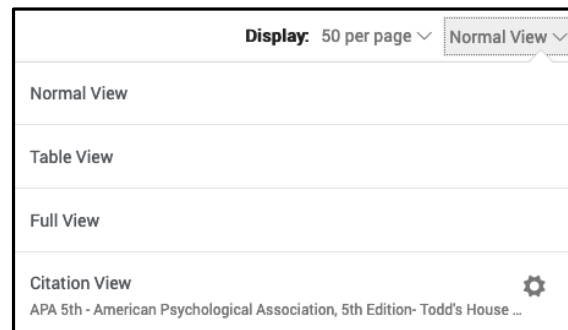
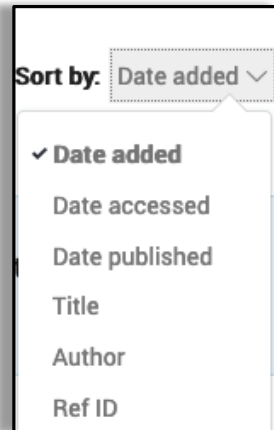


VIEWING REFERENCES

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.

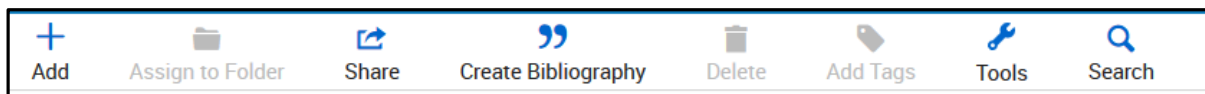
Number of references per page: Select how many references you would like to appear on the page (from 25 to 2000 references).

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.



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.

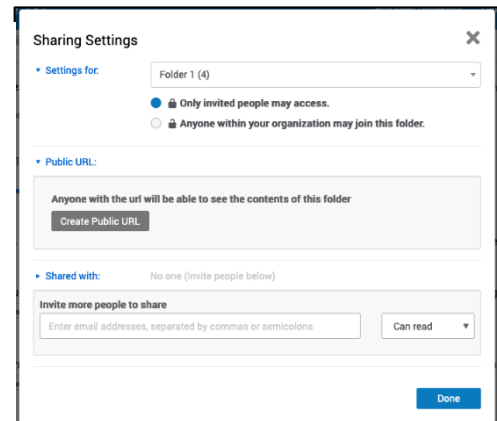
SHARING & COLLABORATING

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 an 'Invite more people to share' section with a text input field for email addresses and a dropdown menu currently set to 'Can read'. A 'Done' button is at the bottom right.

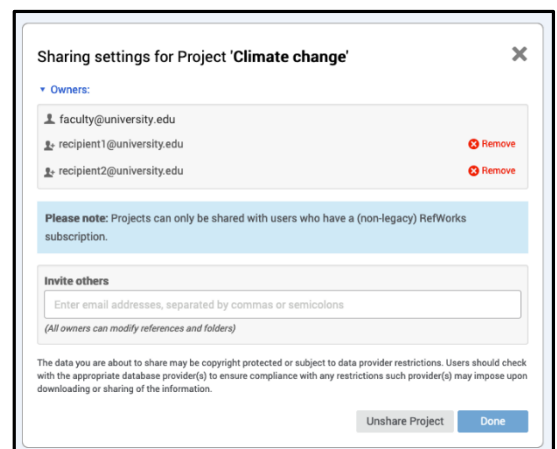
PROJECT SHARING

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.

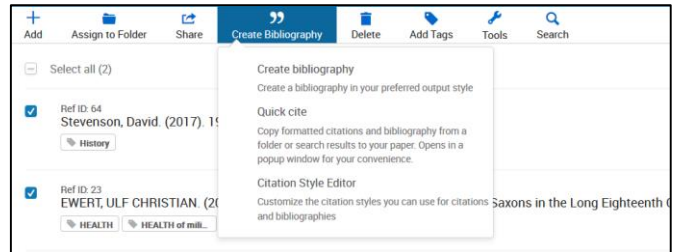


The screenshot shows the 'Sharing settings for Project 'Climate change'' dialog box. It has a close button (X) in the top right. Under 'Owners:', there is a list of three users: 'faculty@university.edu', 'recipient1@university.edu', and 'recipient2@university.edu', each with a red 'Remove' button. A 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 for email addresses and a note '(All owners can modify references and folders)'. At the bottom, there is a disclaimer about copyright and data restrictions, and two buttons: 'Unshare Project' and 'Done'.

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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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