

# Welcome to RefWorks!

This guide will provide you with helpful tips needed to navigate RefWorks. For a comprehensive guide refer to the <u>RefWorks User Guide</u>.

# **CREATING YOUR ACCOUNT**

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

**NOTE:** RefWorks supports <u>Shibboleth and Open Athens</u>, 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).

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		186	37	135
Making research easier Sign in to use RefWorks	7			
Ester your email address	-			
Enter your password Show				
Sign In				
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**Top Navigation** – Includes a drop-down for the language menu, user menu (your user name), and help resources (question mark icon).

**Projects** – Allows a user to work on separate projects with a single login account. Please refer to the Projects section below for more information.

**Main Navigation** – Allows you to easily and quickly: add, organize, share, cite, delete references, find tools and more.

**Left Sidebar** – Contains tabs that provide you with organization folders and quick access to your references.

**Right Sidebar** – Enables you to manually create a reference or to view a selected reference. This appears only if <u>Create new reference</u> or a specific reference is selected.

**Top Actions** – Provides settings for the number of references per page and reference view preferences. Reference View defaults to Normal View when you first open RefWorks and will remember your selected view the next time you open RefWorks.





#### **VIEWING REFERENECES**

**Sort by:** On the top right use the dropdown to 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:** On the top right, select how many references you would like to appear on the page (from 25 to 2000 references).

**View type**: On the top right, 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.





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Normal View		
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Citation View APA 5th - American Psychological Associat	ion, 5th Edition- To	dd's House



#### **CONTENT ORGANIZATION**



RefWorks supports the full research process and provides a variety of folder 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.

#### Creating new folders and subfolders and organizing references

To add a folder:

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

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To add a subfolder:

- 1. Click on the selected folder's kabob icon i (on the right)
- 2. Click on Add subfolder...
- 3. Follow prompts to name and save the subfolder.
- You can select a single or multiple reference(s) and drag and drop them into a folder or use the *Assign to Folder* action in the Main Navigation. More on folders in the My Folders section below.
- 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.





#### **SEARCH DATABASES**

RefWorks provides access to hundreds of 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.

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			Shibata, N; Kimura, S Urushihara, H. (Invalid date). Influenza vaccination	n effectiveness for people aged under 65	i years in Japan, 2013/2014 se

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. You may choose an existing folder or create a new folder.

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8	Search Databases		<ul> <li>Select all on this page (2)</li> </ul>			Assign to Folder :		
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4. Select the relevant items and use one of the following options to save the references:
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.

	ProQuest* RefWorks		Climate change 🕤 ProQuest University	Language (en) 🔻	Undergraduate St	udent 🔻 🕐
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A successful import will generate a message similar to the following:

Successfully imported 2 references





## ADVANCED SEARCH

The Advanced Search capability allows you to find information in specific folders or within specific 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.

ď	Search all documents	Advanced

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

By searching for specific terms, you can better evaluate if these references are truly useful to your work.

Search within Anywhere		•	
Anywhere	Enter search	n terms	
AND V	Title •	Enter search terms	
OR v	Anywhere -	Enter search terms	8
NOT 🔻	Abstract 🔺	Enter search terms	8
+ Add a field	date		
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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 reference managers, from legacy RefWorks and from other sources.



For more details, see Importing References.

**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.
- When available, click on the lightning icon button <sup>(f)</sup> 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.
- 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*.

		Save	Cancel
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## SHARE

RefWorks sharing capabilities allow you to share your folders with others within or outside your institution. In addition to individual sharing, users can share folders with all users at their institution. For project sharing refer to the **Projects** section below.

- 1. Select the folder you choose to share in your **My Folders** tab.
- 2. Click on the <sup>‡</sup> icon and select **Share Folder** or click on the **Share** icon in the Main Navigation.



- 3. In the Sharing Settings screen use the dropdown options to configure:
  - $\circ~$  Settings for: Which references to share
  - 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.
  - Shared with: Type the email addresses, designate if the recipients can read, annotate or modify and optionally add a message.
- 4. Click on *Done*.

○  Anyone within your organization may join this folder. Public URL:	
Public URL:	
A summer with the and will be able to see the sector to aftile folder	
Anyone with the url will be able to see the contents of this folder	
Greate Public UNL	
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To export references:

1. Navigate to the page or folder of the references you would like to export. Click on **Share** in the Main Navigation, then **Export references**. The Export references dialog box appears.



2. Select whether to export all references in the current view or only selected references (you will have to select specific references for this option to be available).

Export references		×
From		
O All references in 'All Documents' (90)		
Selected references (2)		
Format		
BibTeX		
O RIS Format		
◯ Tab Delimited (.tsv)		
XML format		
	Cancel	Export

- 3. Select the output format: BibTeX, RIS, tab delimited, or XML.
- 4. Click on *Export*.

For more details, see Exporting References to a File.



## PROJECTS

Projects 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:

ProQuest* RefWorks		Climate Change	$\odot$	
All References		+ Add Assign	Recently viewed	(current)
Search Databases		All Reference	Courses	(/
Last Imported		Select all or	Final Paper	
Sharing	$\sim$		Personal	
My Folders	$\sim$		Share this Project	
Tags	$\sim$		Manage projects	
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## **Sharing a Project**

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.



#### **Two Ways to Share:**

1. Select "Share this Project" from the Project dropdown menu:

Untitled Project	$\odot$					
Add Assign	Recently viewed	(current)	) Delete	Add Tags	المج Tools	Q Search
Select all	Share this Project					
	Manage projects					

2. From a project's "Actions" button on the My Projects page (Project Menu > Manage Projects):

Wy Projects Create a new Project		
When working in a document, references from only one project are available to cite. Use Projects when you want Projects in the Knowledge Center.	o keep collections of references sealed off from each other, like in sys	tematic reviews. Read more about working with
Name +	Created #	
Unsitied Project (Current) 0	Apr 23, 2019, 5:51:40 PM	Actions +
		Rename     It, Share Project     Delete

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

	,	
• recipient1@un	iversity.edu	8 Remove
+ recipient2@un	iversity.edu	😢 Remove
Enter email add	resses, separated by commas or semicolons	
	·····	
All owners can mod	ity references and folders)	

The following actions are available from this page:

- Share the project: enter an email address in the Invite Members to Join field and click on **Done**.
- Stop sharing with a specific owner: click Remove next to the owner's email address and click on **Done**.
- Stop sharing with all owners: click on Unshare Project



## **CREATE CITATIONS OR A BIBLIOGRAPHY**

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

- 1. Navigate to the page or folder of references you want to use.
- 2. Click on **Create bibliography** in the Main Navigation.
- 3. Click on Quick Cite.

A new window will open, allowing you to 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.
- 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.



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Citation Style	Insert Citations	Bibliography	
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You can create a bibliography (without citations) from selected references or folders.

- 1. Navigate to the page or folder of references you want to use, select references you want to include (or select none, to include all references).
- 2. Click on Create bibliography in the Main Navigation.
- 3. Click on **Create bibliography**.



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.

+	All Documents	MLA 8th Edition	~	All references in 'All Documents' (90)     Selected References (2)
				Bibliography from Selected references (2)
				Works Cited EWERT, ULF C. "A Population Falling III: The Poor Health of Saxons in the Long Eighteenth Century" Cana http://search.ebscohost.com/login.aspx?direct=true&db=a9h&AN=119836128&site=ehost-live, doi: Stevenson, David. 1917: War, Peace, and Revolution. Oxford University Press, Oxford, 2017, http://ebook /detail.action?docID=5061676.

4. Click on **Copy to Clipboard**, navigate to your document and paste the formatted bibliography. Don't forget to save your paper when you're done!

All Documents MLA 8th Edition V	All references in 'All Documents' (90)     Selected References (2)
	Bibliography from Selected references (2)
	Works Cited
	EWERT, ULF C 'A Population Falling III. The Poor Health of Saxons in the Long Eighteenth Century' <i>Canadian Journal of History</i> , vol. 51, no. 3, 2016, pp. 534-562, http://search.ebscohost.com/login.aspir/direct-true8dbr-a9hbAN=1198361288.site=ebost-live, doi:10.3138/C.H.ACH.51.3.004.
	Stevenson, David. 1917. War, Peace, and Revolution. Oxford University Press, Oxford, 2017, http://ebookcentral.proquest.com/lib/demo-myproquest /detail.action?docID-5061676.



## TOOLS

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

Tools	Q Search
Fin	d duplicates
Sea This	rch your library for duplicate documents. s feature is not available for shared folders.
Тос	bls
Exp wor	lore additional tools to improve your kflow.
Bul	k edit
Mar	nage metadata for all your references.

## 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.

Save references on the web			Use Save to RefWorks to add references and full-text to RefWorks from any website Install Save to RefWorks
★ Bookmarks	Save to RefWorks	Proquest	

## 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

			If you use Microsoft that allows you to qu	ord for writing papers, you'll love the tools RefWorks provides you. It's a plugin kly insert and edit citations, adding them to your bibliography as you go.		
File Home RefWorks	Insert Page layou Sync My Database Renove Field Codes	4	Download & install Download & install How do I tell which w	office 64-bit version Office 64-bit version sion of Word Lam numming?		
Citation and Bibliography	Extras			Cite in Google Docs		Use Google Docs to write? Our add-on allows you to insert and edit citations from your f library while you're working in Docs. It even adds your bibliography for you!
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				ProQuest RefWorks	johnsmith@gmail.com 👻	
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## **RESOURCES/SUPPORT**

The <u>RefWorks Knowledge Center</u> offers resources for both Admins and users such as: user guides, support materials, training, technical support and webinar recordings. The Knowledge Center can also be accessed by clicking on the ? symbol at the top right of the RefWorks screen.

#### **Key Resources**

- Follow us on Social Media <u>Facebook</u> or <u>Twitter</u>
- RefWorks<u>brochure</u>
- RefWorks overview
- Upgrade to RefWorks (from legacy RefWorks) guide
- RefWorks promotional video
- RefWorks LibGuides
- Stay up to date with the <u>release notes</u>

#### Tutorials

- YouTube videos
- <u>RefWorks training webinars</u>

#### Support

The RefWorks Technical Support team, part of the larger Exlibris Support organization, is also available to assist you with any issues that come up while using RefWorks. If the above information does not answer your questions please <u>submit a case</u>, or if unable to submit a case contact us by email: <u>support@refworks.com</u>.