

Getting Started with RefWorks

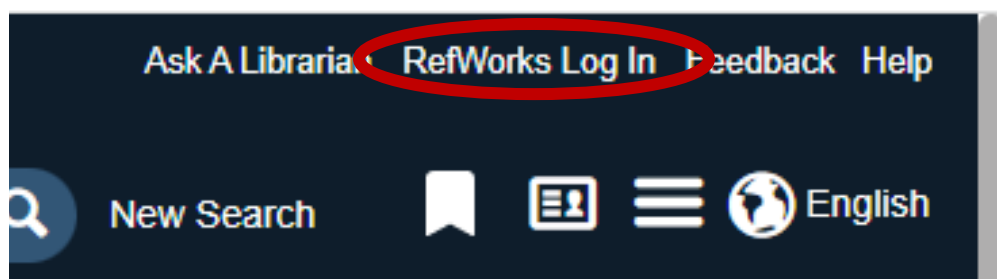
Creating an Account Using Email and Password

Creating an Account from the RefWorks Website

You can create an account from the RefWorks website using an email and password.

To create a RefWorks account from the Summon Search:

1. On the Marshall University Library website, complete a Summon search. Select **Refworks Log In** in the upper right.



Welcome back

Sign in to use RefWorks

[Forgot your password?](#)

Sign In



Use login from my institution



No account? - Sign Up here

2. Login using your Marshall ID if you have an account. If not, select **No account? – Sign Up here**.

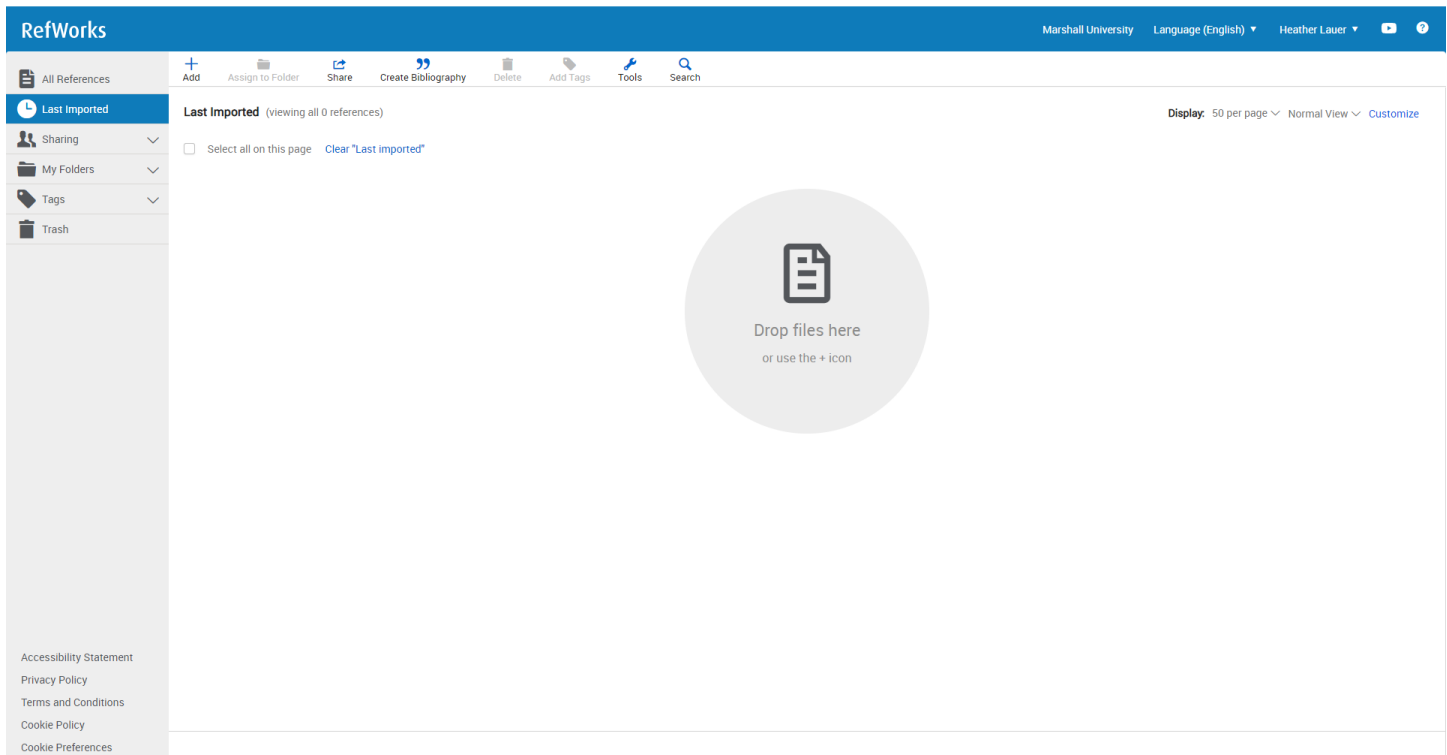
3. Enter your email address and select **Check**. Follow the instructions to complete your registration.
4. Otherwise, enter your login credentials. You are logged into your account and can start using RefWorks.



Enter the Refworks User Interface by selecting the Proquest Refworks folder.

The RefWorks User Interface

When you first log in to RefWorks, your home page displays with a focus on the Last Imported tab.



The RefWorks UI contains:

- **A: Reference Actions**
Includes the main menu with various actions, depending on the page you are currently working in (the tab you selected in the Reference Organization area):
 - **Add** – Opens a menu with the following actions:
 - **Upload document** – Browse your computer's files for a file to upload to RefWorks as a reference. See [Uploading Files as References](#).
 - **Import references** – Upload a reference file that you previously exported from legacy RefWorks or another reference management service. See [Importing References](#).

- **Create new reference** – Manually create a new reference. See [Manually Adding References](#).
- **Assign to Folder** – Add or remove the currently selected references to or from folders. This can also be used to add a local copy of a reference in a shared folder to your list of references. A single reference can be in multiple folders. See [Organizing References by Folders](#) and [Working with Shared Folders of References](#).
- **Share** – Opens a menu with the following actions:
 - **Share folder** – Share references in a folder with other users. See [Sharing Folders of References](#).
 - **Export references** – Export references to your computer's file system. See [Exporting References to a File](#).
- **Create Bibliography** – Opens a menu with the following actions:
 - **Create bibliography** – Create a bibliography of your references to add to your document or to a website. See [Copying References from RefWorks to Your Document](#).
 - **Quick cite** – See [Copying References from RefWorks to Your Document](#).
 - **Citation style editor** – Manage your reference citation styles. See [Managing Citation Styles](#).
- **Delete** – Opens a menu with options that depend on the tab you are currently viewing. The possible tabs are:
 - **My Folders > [folder name] – Remove from Folder:** Remove references from the folder, but do not delete them, **Delete:** delete the references and move them to the **Deleted** tab (trash).
 - **All Documents, Last Imported, or My Folders > Not in Folder – Delete:** delete the references and move them to the **Deleted** tab (trash).
 - **Deleted (trash) – Empty Trash, Delete Selected:** Purge (permanently remove) references from RefWorks, along with their associated uploaded files (if any).
- **Undo (Deleted tab only)** – Restore deleted references and remove them from the **Deleted** tab.
- **Add Tags** – Add or remove tags from references. See [Organizing References by Tags](#).
- **Tools** – Opens a menu with the following actions:
 - **Find duplicates** – Find and/or remove duplicate references. See [Removing Duplicate References](#).
 - **Tools** – Open the RefWorks Tools page to download and install RefWorks add-ons. See [Connecting Your Browser, Microsoft Word, and Google Docs to RefWorks](#).
 - **Global edit** – Perform bulk edit operations on references. See [Editing References](#).
- **Search** – Search your references. See [Viewing Your References](#) and [RefWorks Reference Fields and Types](#).

- **B: Reference Organization**

This sidebar contains tabs that provide quick access to your references. See [Viewing Your References](#). These tabs are:

- **All References** – All of your references
- **Last imported** – The references added in the last 30 days.
- **Sharing** – Share a folder or view shared reference folders. See [Sharing References and Working with Shared References](#).
- **My Folders** – Your references by folder, including those that are not in any folder. A single reference can be in multiple folders. Also enables you to manage your folders. See [Organizing References by Folders](#).

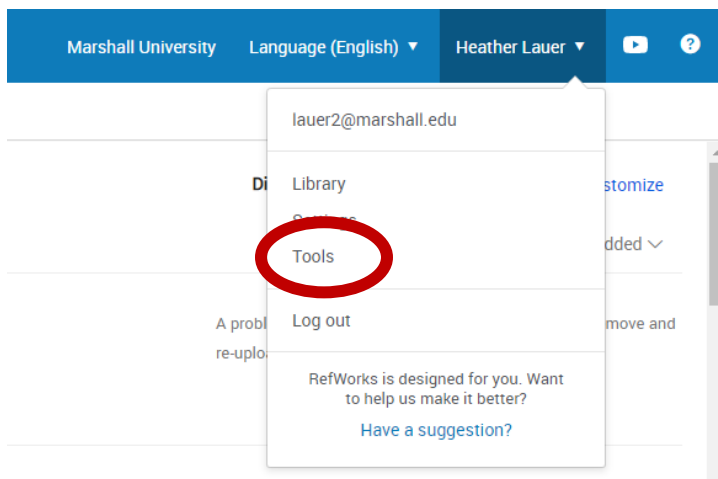
- **Tags** – Your references by tag. A single reference can have multiple tags. A tag is created when you add it for the first time to any reference, or if it is assigned to a reference in a folder shared with you. When [importing references](#), you can choose whether to import the tags or not. A tag is removed when it is no longer associated with any of your references (including in any shared folders). See [Organizing References by Tags](#).
- **Trash** – References you have deleted. References that you delete from this tab are permanently removed from RefWorks.

Including References



Next to each entry in **Summon**, there is a menu like above. The ellipse menu provides access to export a citation to Refworks (or Endnote). Select Refworks and export the citation to the newest version of Refworks when prompted. The material can be put in a pre-existing folder or into a new folder for organizational purposes.

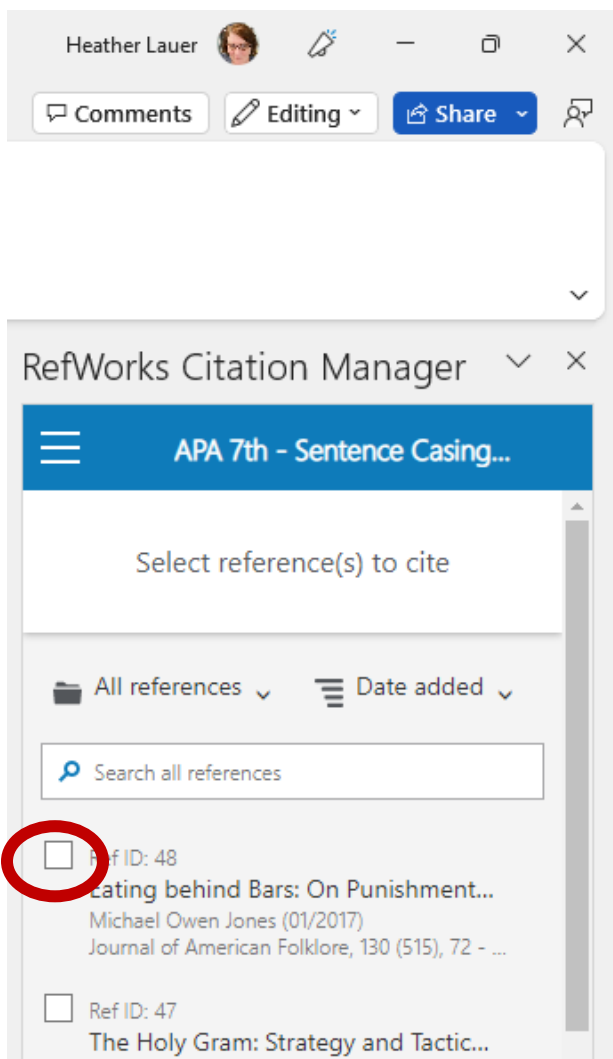
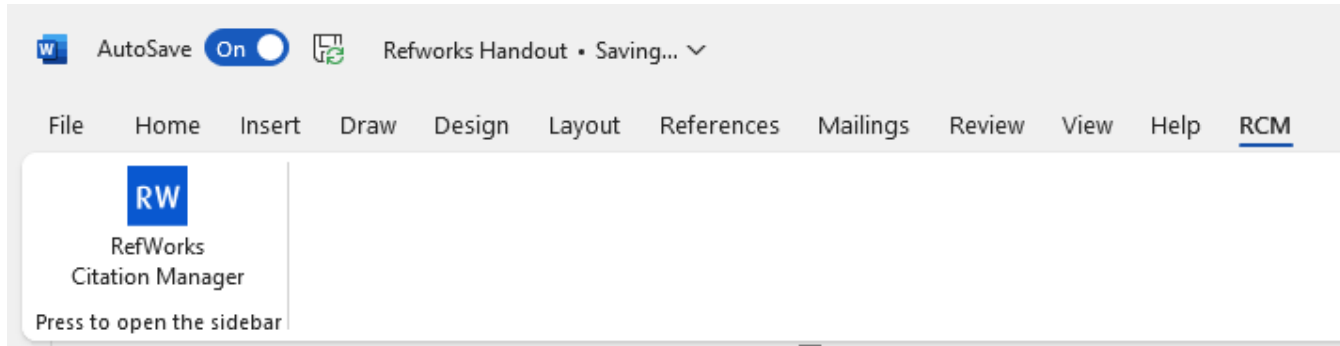
Adding Additional Tools



Select Tools. Then select Install Save to Refworks. This allows you to save webpages to your Refworks account. Click on **Install Save to Refworks** and drag the **Save to Refworks** link to your browser's bookmarks. When you find a website that you wish to save, click the **Save to Refworks** link. Modify the information that will pop up and select a separate button to **Save to Refworks** from the bottom right.

Refworks Citation Manager (RCM)

Below the **Install Save to Refworks** link, there are instructions for the **Refworks Citation Manager**. You will need to visit your Microsoft Store within Word to install it. It will allow you to sync your Refworks account to your Word program. Once it is installed, you can insert citations into your paper from your Refworks account. Once it is installed, select the Refworks Citation Manager under the RCM entry and log in with your credentials. The Refworks Citation Manager sidebar will open.



Select the entry you wish to cite in your document and then, on the next popup, select **Insert Citation** to insert the in-text citation.

Additional References

- [Managing References](#)
- [RefWorks Overview](#)

Modified by Heather Lauer (lauer2@marshall.edu) for Marshall University from:

https://knowledge.exlibrisgroup.com/RefWorks/Product_Documentation/RefWorks_User_Guide/0200_Getting_Started_with_RefWorks#Creating_an_Account