RefWorks

Tips on building the best institutional RefWorks webpage to support your users

To help you promote the use of RefWorks at your institution, we have provided you with a webpage template layout based on real life examples. The information in this page will make it easier for your users to find what they need to get started and will help your institution promote the best referencing solution for your users.

How to get started: Mix and match to find the layout that best works for you:

- ☐ Dedicate a page to RefWorks your institutional or library site
- ☐ Review the webpage template options below
- ☐ Utilize links provided in the template
- ☐ Items to consider including in your RefWorks webpage
  - What is RefWorks
    - o Add a statement explaining how RefWorks supports your community, include important features for your users
    - o Add articles and videos links
  - How to create an account
    - o Short How-tos
    - o Any instructions pertaining specifically to your institution
  - What a user needs to get started
    - o User guides
    - o Highlighted features
    - o Key resources
    - o Support

Layout options

The template below is based on a webpage with two tabs, which you can customize; alternatively you can set two pages. Text appearing in the template in square brackets and italics serves as instructions for creating the page

| **Getting Started with RefWorks** | **Using RefWorks** |

RefWorks [*find the logo here*]

[*Add an image or a video, for example https://www.youtube.com/watch?v=k_2ehCkZzkY*]

Welcome to RefWorks

[*For academic institutions:*]

A user-friendly reference management service that maximizes research productivity with easy-to-use tools for managing references and formatting citations and bibliographies.

[*For all institutions:*]

A user-friendly reference management service that simplifies research, collaboration, data organization, and paper writing.

Creating RefWorks account

[*If **not** using Single Sign On (Shibboleth / Open Athens):*]

- Go to the RefWorks signup page
- Enter your institutional email address
- Click on **Check**
- Enter a password and click **Sign Up**
- Check for an email from RefWorks and click on the link to activate your account
- Login and follow prompts to complete account creation

[*If **using** Single Sign On (Shibboleth / Open Athens):*]

- Log into your institution's network
- Go to the RefWorks login page
- Click on **Use login from my institution**
- Click on OpenAthens, or your institution name
- Fill in your user information to complete account creation

Become familiar with RefWorks

Watch short tutorials to help you get started:

- Getting Started with RefWorks Webinar – hosed by RefWorks
- RefWorks Basic Functionality
- Accessing RefWorks
-
Additional Videos and Guides
- RefWorks YouTube Channel
- RefWorks for Faculty
- RefWorks User Guide
- Knowledge Center

Can't find what you need? Reach out to the RefWorks Support Team

Join RefWorks training sessions

[*If offering training sessions in person or online:*]

The Library hosts RefWorks training sessions.

Current sessions:

Choose a date and time from the list below and click to go to the registration page.

- RefWorks – Introduction
  Date, Time

- RefWorks – Sharing
  Date, Time

Past recordings: Need further instructions? Contact your library support.

[RefWorks](#) offers many features, including advanced functionality. On this page we have highlighted the most common features you will use.

[*Select the most relevant features for your users and provide guidelines; always add a link to documentation and/or a video. Depending on your page layout, you can create expanded sections or new tabs for each feature.*]

Overview

- [RefWorks Overview](#) / [Video](#)
- [Getting Started](#)

Adding and Managing References

- [Adding References](#) / [Video](#) / [Video](#)
- [Organizing and Viewing References](#)
- [Editing References](#) / [Video](#)
- [Finding Duplicate References](#) / [Video](#)
- [Using Folders](#) / [Video](#)
- [Working with Projects](#) / [Video](#)

[Creating citations and bibliography](#)

Collaboration, Writing Tools, and add-ons

- [Sharing](#) / [Video](#)
- [Exporting](#)
- [Writing tools and add-ons](#)
  - [RefWorks Citation Manager (RCM) for Word](#)
  - [RefWorks Citation Manager (RCM) for Google Docs](#)
  - [Save to RefWorks](#)

**[Managing Citation Styles](#) / [Video](#)**

[*You may want to add an image*]

[*You can follow this example for creating feature sections*]
Creating citations and bibliography from within RefWorks

- Go to the folder with the references you want to cite and select **Create Bibliography** from the top toolbar. From the opened menu select **Create Bibliography** to create a bibliography only, or **Quick Cite** to create citations and bibliography.
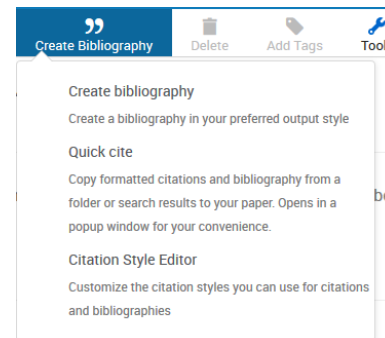
- RefWorks will remember the last citation style you used. You can change styles by selecting a style from one of the menus or by searching for the style.
- Choose the references you want to include (for **Create Bibliography** make sure you select them before accessing the menu) and proceed to create the citations and/or bibliography.