RefWorks Admin Getting Started Guide

Welcome to RefWorks.

This document was created to provide you with some suggestions on how you can customize your RefWorks subscription and promote usage for your Organization.

Below is a handy list of customization options, suggestions and ideas for you to consider and implement as you see fit.

Detailed explanations of each item are available in this document:

- Create a link to the RefWorks login screen from your website (Page 2)
- Determine off-site access procedure (Page 2)
- Customize the RefWorks Interface
  - Custom log-in screen (Page 3)
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- Schedule training sessions with our Customer Training and Education team (Page 16)

Everything in this document is optional – your users can be up and running with RefWorks without any customization, however, to help your users get the most out of RefWorks, we hope you will consider implementing some of the suggestions in this document.

As the Administrator of your RefWorks subscription, you have access to a variety of tools to assist you in understanding the features and options available to you in the Administrator Tool – where you can manage and customize your Organization's RefWorks subscription. From within the tool you can also monitor overall usage statistics for your Organization. Some of the tools available are:

- **Administrator Tool Tutorial** – this shows you how to use each area of the [Administrator Tool](#).
- **RefWorks Usage Reports** – Quarterly usage reports are available for download from within the Administrator tool and monthly reports (which provide different data than the quarterly reports) are available by subscription via email and sent on the 1st of each month automatically. You can sign up multiple administrators. To download the quarterly report and/or sign up for the monthly email navigate to Usage, Usage Summary Report.
- **RefWorks Community** – the RefWorks Community serves two purposes – we have a blog for ALL users that keeps you up-to-date on new features, as well as an Administrator only area, which has a discussion forum and admin-related materials or links to materials. In the Admin area on the Resources page, you’ll find customizable Quick Start Guides in a variety of languages. You can customize the first page to include local contact information. There’s also a marketing toolkit with customizable posters, flyers, banner ads and more. You’ll even find materials to help run local training sessions. The RefWorks Community can be accessed at [www.refworkscommunity.com](http://www.refworkscommunity.com). The Admin area is by invitation only. If you have not received an invitation and account information, please contact your Client Services.
Specialist.

- **Online Help** – detailed written information on the areas of the Administrator Tool. ([https://www.refworks.com/refworks/help/Refworks.htm#Administrator_Tool.htm](https://www.refworks.com/refworks/help/Refworks.htm#Administrator_Tool.htm))

You can access the Administrator Tool and all the resources above, by going to your RefWorks login screen ([www.refworks.com/refworks](http://www.refworks.com/refworks)) and clicking on the Administration link in the upper right-hand corner or you can go directly to this link: [http://www.refworks.com/userlog/detail.asp](http://www.refworks.com/userlog/detail.asp) to log in to the Administrator Tool. You’ll need your Organization’s group code and the administrator password that were sent to you with your subscription letter. If you do not have this information, please contact [refworks.support@proquest.com](mailto:refworks.support@proquest.com) and we will assist you.

Let’s get started!

### Linking to the RefWorks Login Screen

Your first course of action (before even logging into the RefWorks Administrator Tool) might be to create a link from your Organization’s website to the RefWorks login page.

Access to RefWorks is by unique username and password. For easy new account creation, we recommend taking advantage of the IP-authentication which enables new users to easily create an account affiliated with your subscription when within your IP-range. If you have users who would need to create a new account outside your IP-range, we provide a “group code” needed only for account creation. The “group code” identifies the new user as being part of your subscription.

Once an account is created, the group code is no longer needed to log in. You can also use a proxy server to provide off-site access for account creation. RefWorks also offers integration with Shibboleth. Contact RefWorks Technical Services at [refworks.support@proquest.com](mailto:refworks.support@proquest.com) for information on working with Shibboleth.

There are two ways to link to the RefWorks login from your website:

- **Create a direct link** to [www.refworks.com/refworks](http://www.refworks.com/refworks)
- **Link to the RefWorks login via your proxy server or VPN.** You can create a link that directs your users to log in to your network first, then redirects them automatically to the RefWorks login screen as if they were on-site.

### Off-Site Access to RefWorks

If you decide to use only a proxy server or VPN for off-site access, we recommend you provide instructions for your users on how to gain off-site access.

We also **HIGHLY** recommend you modify the automated email that is sent to all users when they register. You can eliminate the group code and add your proxy information.

EZProxy Users should take a look at the OCLC website for details on configuring the proxy server as well as configuring data vendors’ direct exports to work properly with RefWorks through your proxy. Information can be found at: [http://www.oclc.org/support/documentation/ezproxy/db/refworks.htm](http://www.oclc.org/support/documentation/ezproxy/db/refworks.htm)

### Customizing Your RefWorks Organization-wide Subscription

Once your subscription has been enabled, you and your users are ready to begin using RefWorks to import, store and manage references as well as generate bibliographies and reference lists. There are, however, several customization options available to you as the Administrator to further enhance your users experience with RefWorks. Below are a few ideas/suggestions for making RefWorks “your own”.

1. When your users arrive at the login page, they will automatically see the name of your Organization above the login box (see example below – your organization’s name will appear where it says “My Organization”).
You can customize this login screen, replacing the image and text about RefWorks by linking it to a webpage you create and host separately. Some Organizations include links to instructions on using RefWorks, others link to their library website. In the Administrator Central area of the Administrator Tool, you will find some real-life examples of custom login screens. Below is an example of the same RefWorks University login screen, linked to a webpage:

There are size restrictions of the space available on this screen. Detailed specification information is available in the online help – in the For Administrators section. Once you have your webpage to link to you can add it in the “Subscriber Information” section of the Admin Tool.

2. Other areas for customization are the focus area and user type drop-down menus used when a user first registers for their account. RefWorks provides some default information in these drop-downs, but the Administrator has the ability to add and delete the settings for these fields. The Administrator Tutorial section on Customizing RefWorks will illustrate how to do this.

3. When a user registers for their RefWorks account, he/she is automatically sent a confirmation email that includes such information as:
   - User login name
   - User Password
   - Group Code for off-site account registration This email can be customized to suit your Organization’s needs. For example, should you want all your users to login via a VPN or proxy server, you can remove the Group Code information and add a link to your VPN/proxy instead.

You can also include links to specific help information or instructions on using RefWorks or include contact information for local support on RefWorks.
4. You can link to anything you wish – our help instructions, custom information, your website – anything with a URL. This is another way to put customized information at your user’s fingertips.

Note

If your Organization uses Athens, Shibboleth or another authentication program, we strongly urge you to modify this email, as user login information may be automatically included that is not accurate and could cause confusion for your users. To see how to modify the automated email, go to the Administrator Tutorial section on Customizing RefWorks.

5. Did you know that you can create a section in the Import, Bibliography and Search Online Catalog or Database areas that lists the import filters, output styles and online catalogs and databases that your Organization uses most? Well, you can easily do this in the Preferences area of the Administrator Tool.

Here is an example of how a customized import filter list appears:

You can also select output styles to be displayed in an “Organization-specific area” of the output style drop-down:
You can even create custom output styles and post them for all your users to access (see the Administrator Tutorial section on Setting Preferences for detailed information on how to do this…).

6. If you have an online catalog that is Z39.50 compliant, you can add it to our Search, Online Catalog and Database area for your users to search and import directly from within their RefWorks account. You can even take this a step further and add subscription databases that are Z39.50 compliant. The Administrator Tutorial can show you how to do this, or you can even email RefWorks Technical Services and we can set this up for you!

7. Does your Organization use an OpenURL resolver? If so, you can easily link your RefWorks subscription to your resolver allowing your users to link out to your resources from records in their database. In the Administrator Tool, you’ll find an Open URL option in the Customize area. All you need is the URL to your resolver (and a logo if you want to include one). The Administrator Tutorial will show you how to do this! The screen shot below, show you how OpenURL links are displayed within RefWorks accounts.

**Configuring RefShare**

Before your users can begin using RefShare, as the RefWorks Administrator, you will need to make some decisions about how RefShare will be used at your Organization – as well as who can use RefShare.

Your Organization should first decide whether RefShare access should be available publicly or restricted by IP address (like your RefWorks subscription):

- Public access allows your users to share their databases and folders with anyone in the world. IP restricted access allows sharing only amongst your Organization.

If you have not yet determined which type of RefShare access your Organization desires or unsure which access you have, please contact refworks.support@proquest.com to specify your preference.
The Administrator Tutorial section on Managing your RefShare Subscription will illustrate all the points we mention in this section.

Here are a few things to think about – before you even log in to the Administrator Tool:

- Who should have “basic” RefShare access (the ability to share their RefWorks database or folders by URL)?
- Should users be able to share file attachments (if this feature is enabled for your subscription)?
- Does my Organization want to create a Shared Area Page for users to post their RefWorks folders and databases to?
- If we do create a Shared Area Page, who should have the ability to post to that page?

Once you’ve got the answers to those questions, you’re ready to begin setting RefShare up.

- Click on Subscriber from the tool bar and select RefShare Settings.
- Below is what you see when you first access the RefShare Settings section. You can navigate between the three areas of RefShare Settings by clicking on the appropriate buttons...

RefShare Settings opens up to the User Access Options page. This is where you establish “basic” RefShare access.

There are three types of “basic” RefShare access:

- **All Users** – just select that option and all registered RefWorks users will be able to share their databases and folders.
- **Selected Users** – only specific users will be able to share folders and databases. If you choose this option, the screen will refresh and you will have the ability to search for users (by login name or email address) which you can select to have access or you display all users and then select those you wish
- **No Users** – the default option (until you enable access using the options above).
The Shared Area Page

The Shared Area Page is an optional feature of RefShare that creates a webpage that users can post their folders or databases to. As the Administrator, you establish access for this feature as well.

1. Select the Shared Area Options button in the Go to: section. If you have decided not to have a Shared Area Page, then you need not do anything further.

2. To create the actual Shared Area Page, simply click on the checkbox that says Create Shared Area Page. A webpage will be created with some default text that you can customize.

3. You can also create specific categories for users to post their folders or databases to. See the Administrator Tutorial section on Managing your RefShare Subscription for details on how to do this.

4. Determine posting access to the Shared Area Page. In order for users to post to the Shared Area Page, they must first be given “basic” RefShare access in the User Access Options. You can select all users or a subset of users.
Tip: The Shared Area Page for your Organization has a static URL – which means you can link other web pages to it, should you want to make it available beyond the RefWorks interface. Below is a preview of a Shared Area Page:

Promoting RefShare

Here are some suggestions for promoting RefShare to your Organization:

• Send an email announcing RefShare to your users.
• Create a section on your website that announces RefShare and how it can be used/
• Create a link to the RefShare help from your webpage (detailed instructions on linking to specific help pages is available in the Administrator Central area of the Administrator tool).
• Create a direct link from your Organization website to the RefShareTutorial (which is also available on our You Tube channel: www.youtube.com/proquestrefworks or direct link http://www.youtube.com/playlist?list=...A9EB5855A07BD0). Feel free to send out direct links to the tutorial or help sections when promoting RefShare.

Note

All RefWorks users will have access to the Shared Area Page from within their RefWorks account, whether or not they have RefShare access. They will not be able to post to the Shared Area Page unless you have given them access in the Shared Area Options section.

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RefShare Examples

The uses of RefShare can be limitless – especially since you can use the shared folder or database URL to link from any web page or program. We’ve put together some real-life examples to help you get started thinking about how you can use RefShare within your Organization.

1. Course Reading Lists – RefShare is used frequently by faculty to share reading lists for their courses. Faculty either provide the URL to the folder with the materials listed in it, post the folder on the Shared Area Page, provide a link from their own course webpage, or if your Organization uses BlackBoard, places a link there. Here’s an example from Simon Fraser University in Canada where an Education Professor has used the Shared Area Page to post his course reading lists:

Clicking on one of the links brings you to the folder:

![RefShare Example](image)

If you’re interested in providing course reading lists via Blackboard, the University of Lincoln in the UK has posted instructions on how to do this (the Blackboard Building Block is available in the Administrator Tool – Admin Central area):


2. Creating an Author Database or Index – Several RefWorks customers maintain large databases of materials created by faculty or staff. The Cleveland Clinic Alumni Library in the US maintains a 45,000+ record database of all publications by their staff. You can view the shared folder from this web page: [http://my.clevelandclinic.libguides.com/cccauthors](http://my.clevelandclinic.libguides.com/cccauthors). Simply click on the link that says “Go to CCF Author Database”

3. Create a Reference Database – The Vera Institute for Justice publishes a database of a variety of documents relevant to their cost-benefit knowledge bank. They publish the entire RefWorks database, as well as individual folders with specific subject matter:

[http://cbkb.org/basics/references/](http://cbkb.org/basics/references/) They have also created a video published on You Tube which demonstrates how to access and export from the database:
4. **Create a Catalog of New Items Available in Your Library** – Using a combination of RefShare, Yahoo Pipes and FeedBurner, the University of Lincoln in the UK came up with this innovative use of RefShare as a way to highlight and promote new books purchased by the library. Check out this blog with detailed instructions on how to create this for your Organization:


5. **Publicize RefShare for Collaboration on Your Own Website** – Simon Fraser University in Canada has done a terrific job of creating a web page that informs users how they can use RefShare in their studies: http://www.lib.sfu.ca/my-library/refworks/refshare

### Establishing File Attachment Settings

RefWorks allows your Organization to store an unlimited amount of files attached to references, however, there are individual user storage limits that need to be established. By default, each user under your subscription can store up to 100 MB of files. As the administrator, you can modify the default storage space or modify storage for specific individuals – with a maximum of 5 GB storage per user.

In the Attachment Settings area you can:

- Establish a default amount of storage space for all users
- Modify an individual user’s amount of storage space
- Enable/disable file attachment storage for specific users
- View how much file attachment storage is used by your entire Organization - View how much storage an individual user is using

To modify attachment settings, select **Subscriber, Attachment Settings** from the toolbar in the Administrator Tool.

The **Administrator Tutorial** section on **Attachment Settings** provides details information on how to manage Attachment Settings.

### Promoting RefWorks to Your Users

In addition to customizing your RefWorks subscription, here are some other suggestions and materials to help promote RefWorks to your Users:

Create a "getting started" package for users (hard copy and/or electronic).

- **Distribute our Quick Start Guide** (pdf version available in RefWorks' online help or the ProQuest Support Center for you to download and distribute).
- Include instructions on how to set up an individual account
- Create a customized document of import instructions for the databases most frequently used (a complete list of instructions is available in Administrator Central as a Word document for you to use).
- Create a customized RefWorks FAQ (use the FAQs we provide and modify for your Organization).
- Link to our RefWorks LibGuide (or take pages for your own LibGuide!): http://refworks.libguides.com/home
- **Add a direct export** to your OPAC. Requires programming on your end, but makes importing easier. Admin Central has some examples from customers for SIRSI and Innovative.
- **Offer training courses.** We have provided Fundamentals and Advanced Features training course outlines in the Admin area of the RefWorks Community that you can modify to suit your needs and timeframe. We also have Fundamental and Advanced Feature Leader Guides to get you up and training quickly.
• **Promote RefWorks Free Webinars.** Offered weekly, these free training sessions are conducted by RefWorks training experts and are open to all users. Link to our website webinar page ([http://www.proquest.com/go/webinars-refworks](http://www.proquest.com/go/webinars-refworks)).

• **Link to recordings of our webinars.** We’ve recorded many sessions in English, Spanish, French and German and posted them on our website. Just go to [http://www.proquest.com/go/webinars-refworks](http://www.proquest.com/go/webinars-refworks) to see what’s available.

• **Link to our tutorials.** These too can be linked to from YOUR website! Make our tutorials easily accessible so your users can teach themselves at their convenience. [www.youtube.com/proquestrefworks](http://www.youtube.com/proquestrefworks)

• Be creative in promoting RefWorks to your users. Check Administrator Central for 10 suggestions for promoting RefWorks – created by one of our customers.

We hope that the information we’ve shared with you gives you some ideas on how to “Make RefWorks Your Own” for your Organization and on how to get your Users started with RefWorks. Other suggestions on customizing RefWorks are available in the Administrator Central section of the Administrator Tool.

Finally, take advantage of our Customer Training and Education team. Our professional trainers offer free webinars weekly and are also available to conduct web-conferenced or on-site training. They can show you all aspects of using and administering RefWorks. With your RefWorks subscription, you are entitled to the RefWorks Training Package which includes Administrator tool training, RefWorks Fundamentals, RefWorks Advanced Features and a Trainthe-Trainer session depending on your subscription, your free training may be webbased or on-site. Additional on-site training is available for a fee).

Please feel free to contact our Technical Services team ([refworks.support@proquest.com](mailto:refworks.support@proquest.com) or (+1. 800-521-0600 ext. 74440 or +1.734-997-4440) should you have any questions or need any assistance.

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**Note**

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