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# Using RefWorks: a quick guide

## What is RefWorks?

RefWorks is reference management software that enables you to:

- import references from databases or text files
- create references from saved PDF articles
- build up your own database of relevant references
- add correctly formatted citations to word documents
- build a bibliography

## How do I register?

Go to the Library website [www.imperial.ac.uk/library](http://www.imperial.ac.uk/library)

From the menu bar select **Learning and Teaching Support > Reference Management > RefWorks**

Click on the **Log in to RefWorks** button and click **Use login from my institution**.

Select **Imperial College London** from the list of options or type this into the search box.

Log in with your College username and password when asked to do so.

You will be taken to the **Create Account** screen.

You need to enter the following information:

Your name and College email address

Your department

Your status e.g. undergraduate

You are now ready to start using RefWorks!

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## How do I add references to my account?

There are various ways to do this:

1. Direct Export
2. Import saved PDFs of articles
3. Import a text or RIS file
4. Import using **Save to Refworks**
5. Import references from Imperial College Library Search
6. Add manually

### 1. Direct Export

Some databases and resources allow you to export references directly into RefWorks. Look for the **RefWorks** option when exporting references.

For this example, we will use **ScienceDirect**:

- Conduct your search and tick the boxes next to the references you wish to export
- Click on the **Export** button and select **Save to RefWorks**
- Log in to your RefWorks account when prompted to do so. The selected references will be downloaded into your library
- You can choose whether to assign the references to a folder in RefWorks, and whether to import any tags assigned to the reference by the database
- Click on the **Last Imported** folder to view the references

N.B. you may need to enable pop up blockers for Direct Export to work with some databases, such as Web of Science.

### 2. Import saved PDFs

You can import PDFs of journal article into RefWorks to create instant references. Either drag and drop individual PDFs into RefWorks, or click on the **+** button and **Upload Document**, then select the PDFs you want to import.

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### 3. Importing from a text or RIS file

With some databases you cannot export directly and instead you must save the references to a text or RIS file and then import it into RefWorks.

#### Importing using a text file:

For this example, we will use **PubMed**.

- Conduct your search and tick the boxes next to the references you wish to export
- Click on the Send to: link and select Citation Manager from the Choose Destination options, then click the Create File button and save the file if prompted to do so
- Log into your RefWorks account click on the **+ Add** and select **Import References**
- Drag and drop or select your saved file for upload
- RefWorks will attempt to identify the files origin e.g. NLM PubMed. If this is correct click Import, or click on Search for the Format and select an option from the drop down menu
- Your saved references will be imported into RefWorks

#### Importing using an RIS file:

For this example, we will use **Scopus**.


- Conduct your search and tick the boxes next to the references you wish to export
- Click the **Export** button and select **RIS** or **RefWorks** from the options (both options will produce an RIS file)
- Save the RIS file
- In RefWorks go to the **Add** menu and select **Import References**
- Click **select a file from your computer** or drag and drop the RIS file where directed
- Select **RIS format** as your import option in the drop down menu
- Your saved references will be imported into RefWorks

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## 4. Import using Save to RefWorks

Installing the **Save to RefWorks** bookmark in your browser allow you to download references from a variety of resources (Web of Science, EBSCO, PubMed, webpages) straight into your RefWorks library. Please note **Save to RefWorks** does not work with most databases.

To install **Save to RefWorks**:

- Click on the spanner icon  and select **Tools**
- Click on the **Install Save to Refworks** button
- Drag and drop the **Save to RefWorks** button into your browser bookmark/favorites bar
- Conduct your database search and when on the results page click the **Save to RefWorks** link in your bookmark bar
- The RefWorks sidebar will appear on the right of the screen, select the references you want and click the **Save to RefWorks** button
- The selected references will now be saved in your RefWorks library

## 5. Import references from Imperial College Library Search

You can search Imperial College Library Search via RefWorks and import references directly into your library.

- Click on **Search Databases**
- Search for **Imperial College London**
- Click the magnifying glass icon and enter your search terms
- Alternatively click the **Advanced Search** bar for additional options
- To add extra fields to the **Advanced Search**, click on **Add a field**
- Select the items to be imported, select a folder to import into if applicable, and click the Import button
- Click on **Last Imported** to see your references

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## 6. Manually adding references

- Click the **+** and select **Create New Reference**
- Select the appropriate **Reference Type**, e.g. Journal Article from the drop down menu
- As you type the title RefWorks will suggest options at the bottom of the screen or click the lightning icon
- Enter author names as Last name, First name or initial, e.g. Smith, J. or Smith, James
- To add additional authors hit **Enter**
- Corporate authors should be entered as they appear, e.g. Department of Health
- Click **Add More Fields** to add additional information, including fields used by online sources
- Once you've completed all the relevant fields click **Save**

## How do I organise and search my references?

### Creating Folders

You can create folders to keep references on the same subject, or for the same project grouped together. Note that all your references will remain in **All Documents** allowing you to view your entire library at any time.

References can be listed in more than one folder and you can create subfolders.

To create a folder:

- Click on **My Folders** to open the folders list, select **Add folder** and enter a folder name as required
- Add references to a folder by ticking the boxes to the left of the reference then click **My Folders** to open your folder list. Drag and drop the selected references onto the folder name to add them

### Using Projects

You can also organise your references using **Projects**. However, this is not necessary for most RefWorks users as it creates mini RefWorks libraries which are separate from one another and you cannot add references from different Projects into a document.

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## Adding attachments

To add attachments to references you must be in **Edit** mode.

- Click on the reference you wish to add an attachment to and in the Reference window click the pencil icon in the top corner to open Edit mode
- Click in the **Attachments** field and navigate to your file
- Click **Save** in the Reference window

## Search options

Click the magnifying glass to search your references. Click **Advanced** for more search options.

## How do I create a reference list/bibliography?

There are several ways to create a bibliography or list of references using RefWorks.

- **RefWorks Citation Manager** app in Word inserts citations and creates references in your chosen style
- **Write N Cite** plug in for Word inserts citations and creates references in your chosen style (For Windows users only)
- **Create bibliography** creates an alphabetical list of references in your chosen style
- **Quick cite** allows you to create citations in RefWorks which can be copied into Word to generate a reference list

This guide will provide information on using **RefWorks Citation Manager**.

## RefWorks Citation Manager

RefWorks Citation Manager (RCM) is an app available from the Microsoft Office Store which can be used in Word 2016 and above for Windows or Mac to insert citations and create reference lists.

### To install RefWorks Citation Manager in Word:

- Open a new Word document and select the **Insert** or **Add-ins** tab
- Click on **Get Add ins** and type **RefWorks** in the search box
- Select the **RefWorks Citation Manager** app and click **Add**
- The RCM app now be available in a new tab and under the **My Add-ins** menu
- Select the RCM tab and click the RCM icon to open it
- Log in using your College credentials

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**Note** if you cannot log in with your College credentials you can create a RefWorks password for use with RCM.

- Open your RefWorks account, click on your name at the top of screen and select **Settings**
- A log in box will appear select **Log in via my Institution**, select **Imperial** and log in with your College credentials
- Scroll down the page to the **Alternate Password** section and click on **Change Password**
- Enter a new password (N.B. this should not be the same as your College password)
- In Word, open RCM and log in using your College email address and the RefWorks password you created

### Creating a reference list in your word processing document using RCM

- Select your preferred output style from the hamburger (three lines) menu.
- Use the **Search** box to locate specific citations, or click on **All references** to view the citations in a folder
- Place your cursor where you want to cite a reference within the document and hover over the reference you want to cite in RCM. The **Cite This** button will appear, click the button to insert the citation into your document
- To insert additional references into a single citation, tick the box next to each citation. A preview of the citation will appear the top of the RCM window. Click on **Insert citation** to insert the citation. The order in which references appear in the citation is determined by your output style
- Click on the hamburger menu and toggle **Bibliography** to **On** to insert and automatically update your reference list

### Editing and deleting in-text citations using RCM

If you are using Harvard, or a similar author-date output style, you can edit your in-text citations and add or remove text. This is useful if you wish to add a page number or hide the author's name.

- Open your document and click on the citation you wish to edit. The **Edit** box will appear
- Use the options to hide the year or author. Or add a page number in the **Suffix** box
- Click **Update Citation** to update the citation in your Word document
- To remove the citation from your document click on **Delete Citation**

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## How do I get help with RefWorks?

If you have any questions or require assistance using RefWorks please contact the library by using the [ASK the Library](#) button on the homepage.

Visit the [RefWorks](#) pages on the Library website.

Attend a library training workshop on RefWorks. For a timetable visit the [Learning and Teaching Support – Workshops](#) web pages.

RefWorks also have a number of short 'how to' videos available on [YouTube](#) and an [online user guide](#).