

Information management software *RefWorks*

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Introduction

Using and citing research results of other authors in publications is an important part of scientific communication. To use information selected from various sources in academic or practical work, one needs to develop an effective strategy for managing and organizing information so that the found data can be reliably saved, quickly retrieved when needed, and appropriately used when writing various works.

In recent years, one of the most popular information managements softwires, which does not need to be installed on a computer, is *RefWorks*. It operates on the publisher's server and can be

accessed via the internet from any computer or mobile device. Every member of an institution subscribing to the software can register, create their own electronic library, and use it when writing papers, sharing information with colleagues, and so on. Individuals can also use this software by paying an annual subscription fee.

Advantages of the *RefWorks* software:

- It allows to import information from more than 800 databases;
- It has over 1,000 citation styles;
- The storage size depends on the subscription terms, typically providing 10 GB;
- It allows to save more than 10,000 records;
- It enables information searches in databases and library catalogs.

The module's goal is to provide knowledge about the *RefWorks* information management software.

After reviewing the learning materials and completing practical tasks, you will be able to work productively with the *RefWorks* information management software.

Login to *RefWorks*

Creating an account

When logging in for the first time, you need to create a personal account.

1. In your web browser, enter the address <<https://refworks.proquest.com/>> and click *Create account* at the bottom of the new window.
2. In the window that opens, enter your institutional email address and click *Check*.
3. Create a password, check the box to agree to the Terms and Conditions, and click *Sign up*.
4. Log in to your institutional email to confirm your *RefWorks* account. Click the link you received or copy it into your browser's address bar.
5. Enter your first and last name, indicate your institutional status (student, researcher, lecturer, librarian, etc.), and click *Next* until the main *RefWorks* window appears (see Figure 1).

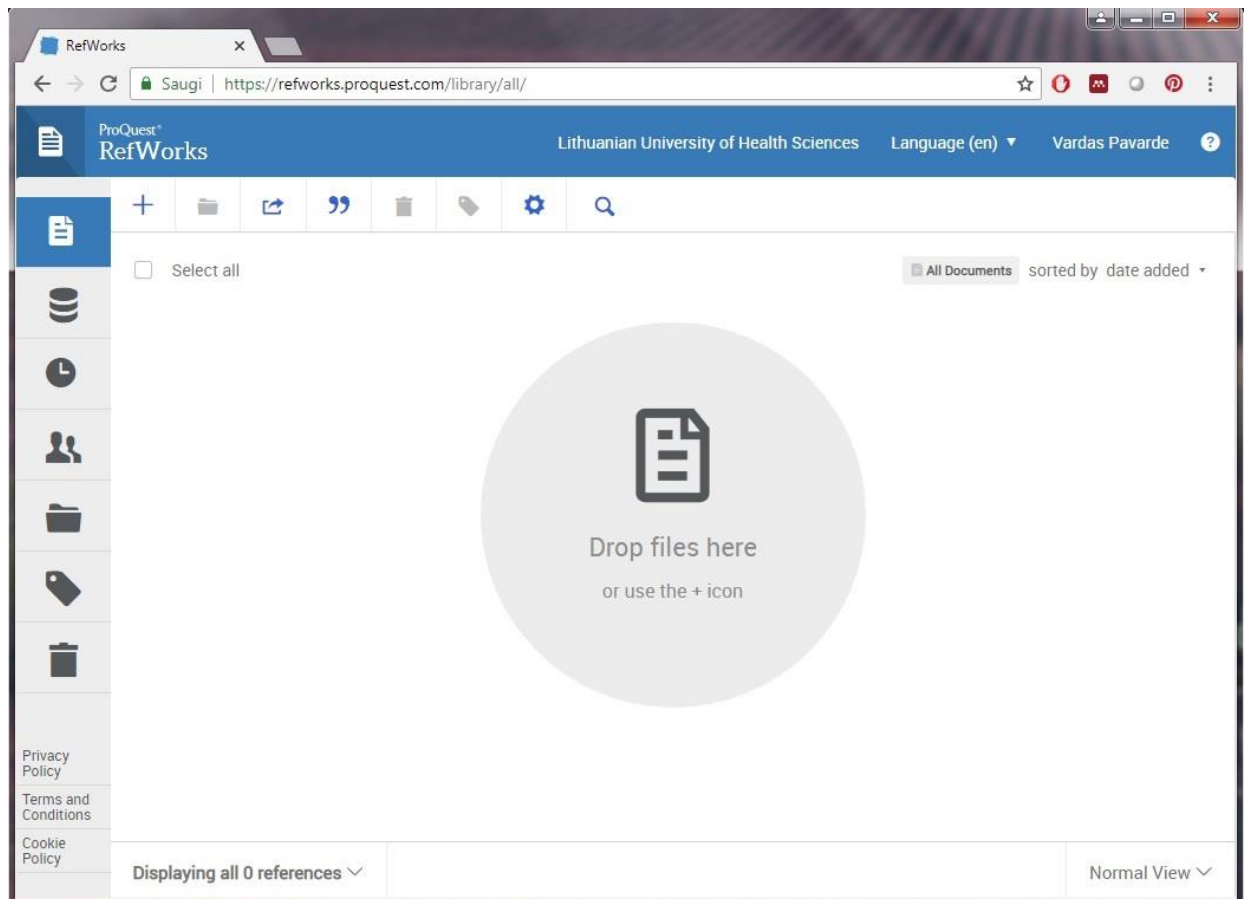


Fig. 1 RefWorks dashboard

Important! If you already have an account in the old *RefWorks* version, log in to your account and click on *Move to the newest version of RefWorks from ProQuest* at the top of the page. In the window that opens, click *Yes, copy my references to RefWorks*, and all your saved bibliographic records will be transferred from the old version to the new one.

Uploading records to *RefWorks*

There are several ways to save bibliographic information in the *RefWorks* software:

- uploading bibliographic records from a computer,
- uploading bibliographic records from databases,
- uploading bibliographic records from the internet,
- creating bibliographic records manually.

Uploading bibliographic records from a computer

If you have saved a PDF file of an article or book on your computer, you can simply drag it (by clicking with the left mouse button) into the *RefWorks* window. You can also drag an entire folder containing PDF files of articles or books – all PDF files in the folder will be visible in the *RefWorks* window, under the folders *Last Imported* and *All Documents*.

Uploading bibliographic records from databases

You can upload the desired bibliographic record directly from a database – the database must have an option to export to information management tools. Some databases, such as ScienceDirect, offer this option (see Figure 2).

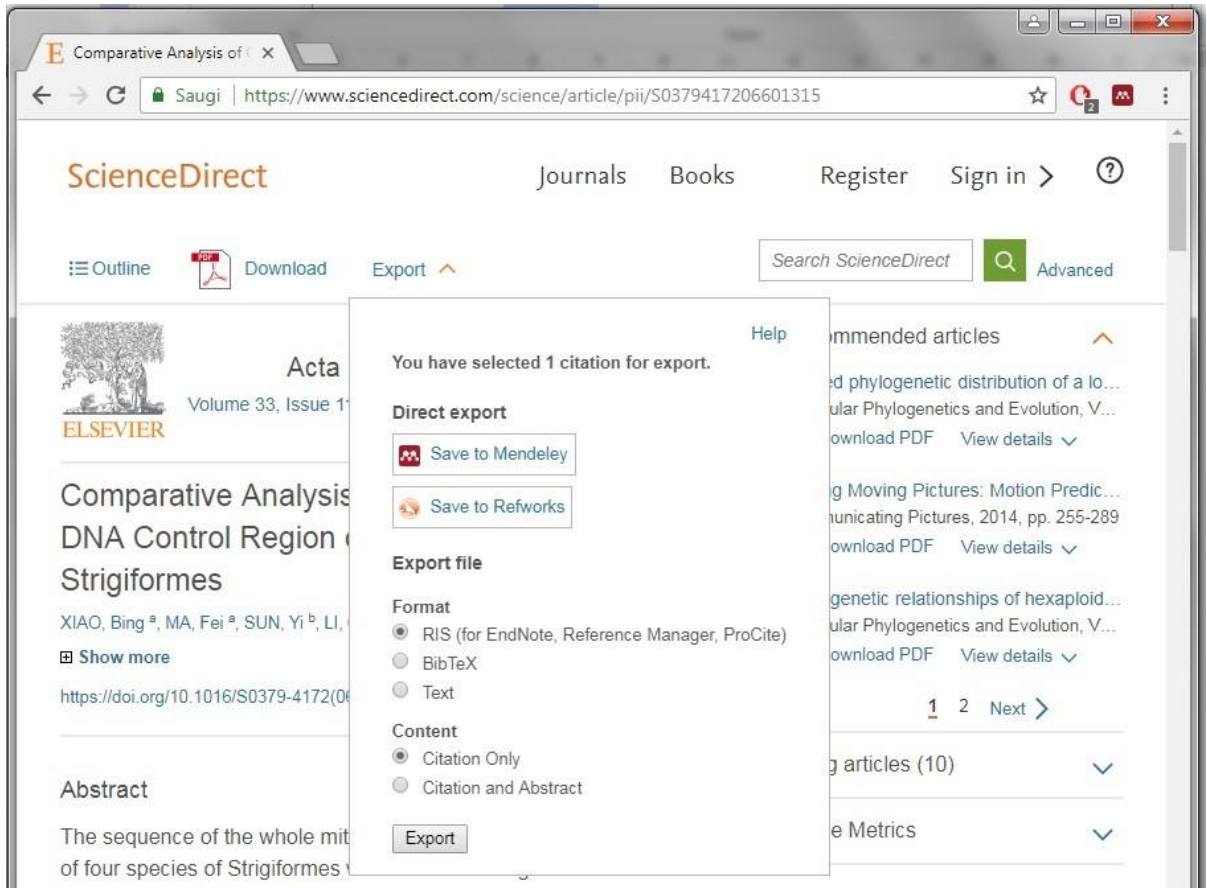


Fig. 2 Uploading a record from the ScienceDirect database

1. Click *Save to RefWorks*.
2. In an opened *RefWorks* window, select the newer *ProQuest RefWorks* version (the icon on the right side of the page) and, if needed, log in to your account.
3. The bibliographic record will be saved in the *Last Imported* and *All Documents* folders.

Uploading bibliographic records from the internet

In *RefWorks*, you can save information found online with a single click by installing the *Save to RefWorks* plugin.

1. Click the *Add* icon located on the toolbar in the *RefWorks* window (see Figure 3).

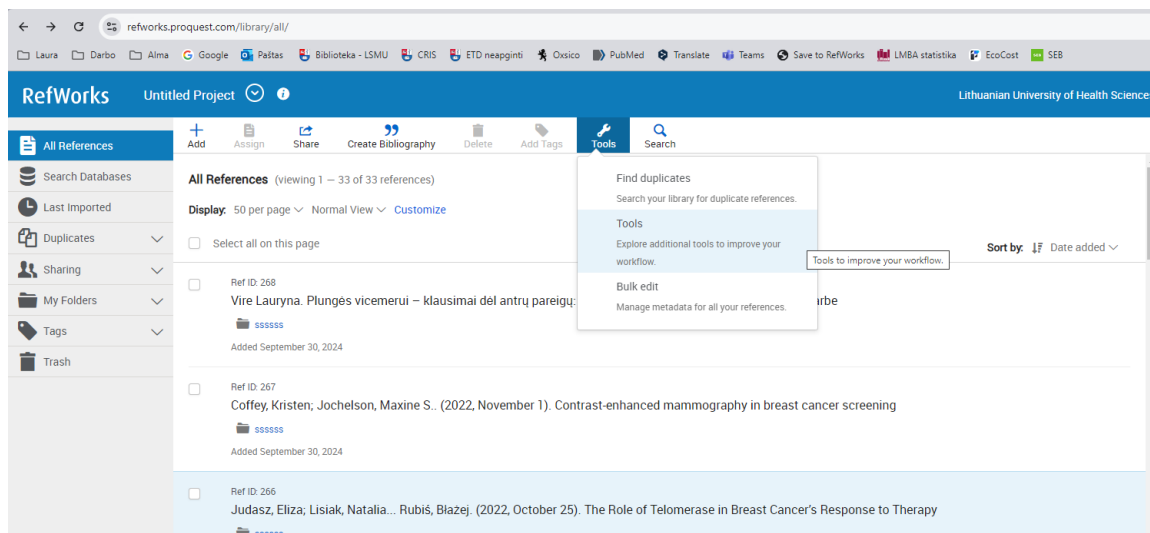


Fig. 3 The Tools icon

1. Select *Install Save to RefWorks*.
2. In the window that opens, click *Install Save to RefWorks* and drag the *Save to RefWorks* button to the bookmarks bar using your computer mouse. The plugin will appear in the bookmarks bar (see Figure 4).

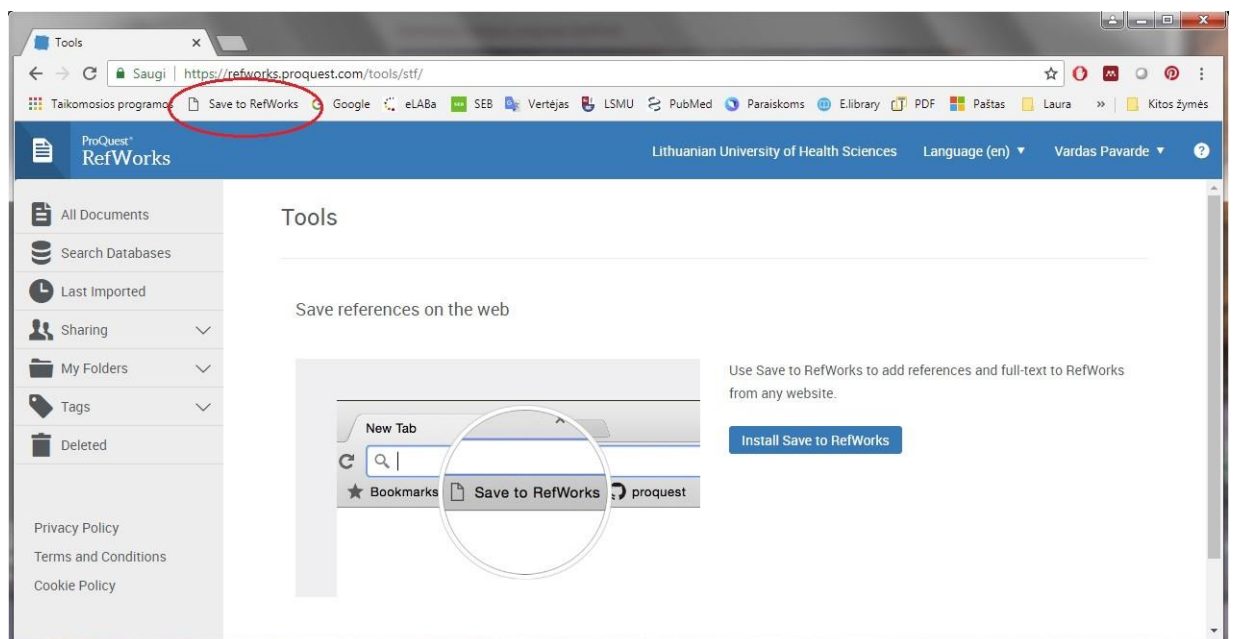


Fig. 4 Save to RefWorks plugin in the bookmarks bar

After installing the *Save to RefWorks* plugin, you will be able to save records directly from the internet, as well as save web links, articles, and more. When you find a record, you want to save in *RefWorks*, click the *Save to RefWorks* icon in the bookmarks bar. Click the *Save to RefWorks* button at the bottom of the window (see Figure 5), and the record will be saved in the *Last Imported* and *All Documents* folders.

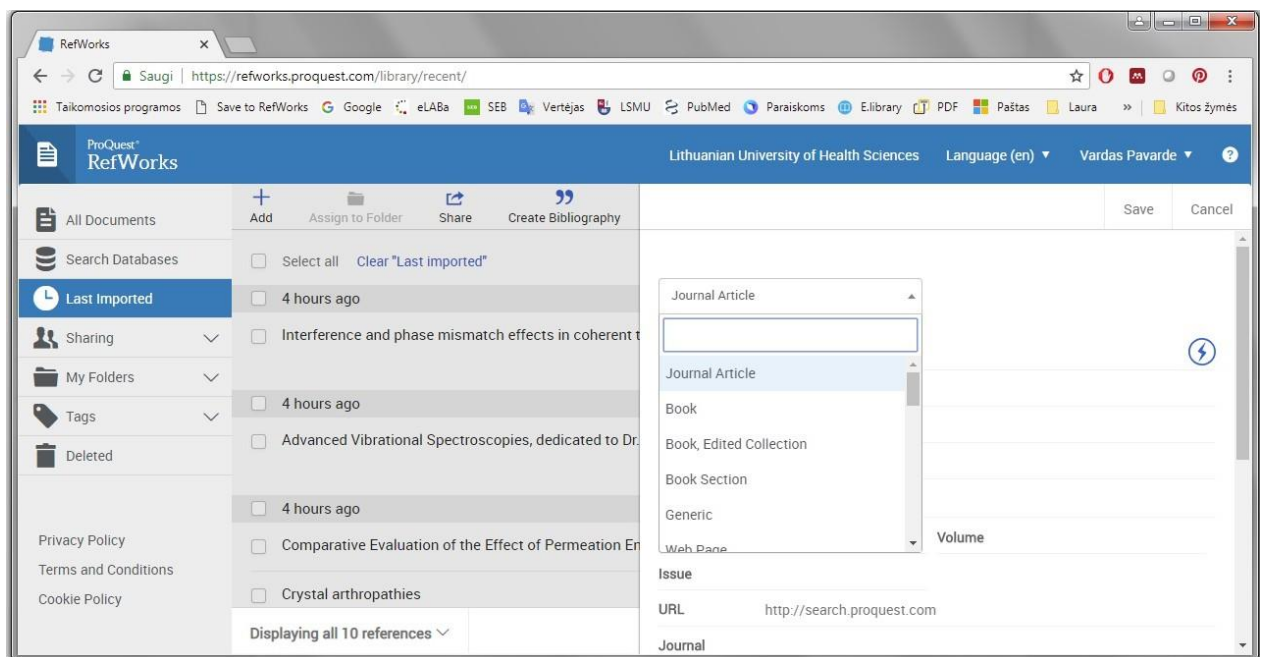


Fig. 5 Uploading records from the internet

Creating bibliographic records manually

You can also add records to *RefWorks* manually.

1. In the *RefWorks* window toolbar, click the *Add* icon (see Figure 3).
2. Select *Create new reference*.
3. In the table that opens, choose the record type, enter the record details, and click *Save* (see Figure 6).



6 Fig. Creating a new record manually

Organization of bibliographic records

Creating folders

To make record searching easier, you can create folders and organize relevant records into them.

To create a new folder, click *My Folder* and *Add a Folder* on the left side of the page, then enter the desired folder name.

You can move records from the *All Documents* folder to another folder. Select the records you want to move by checking the box, click *Assign to Folder*, and choose the folder where you want to move the records (see Figure 7).

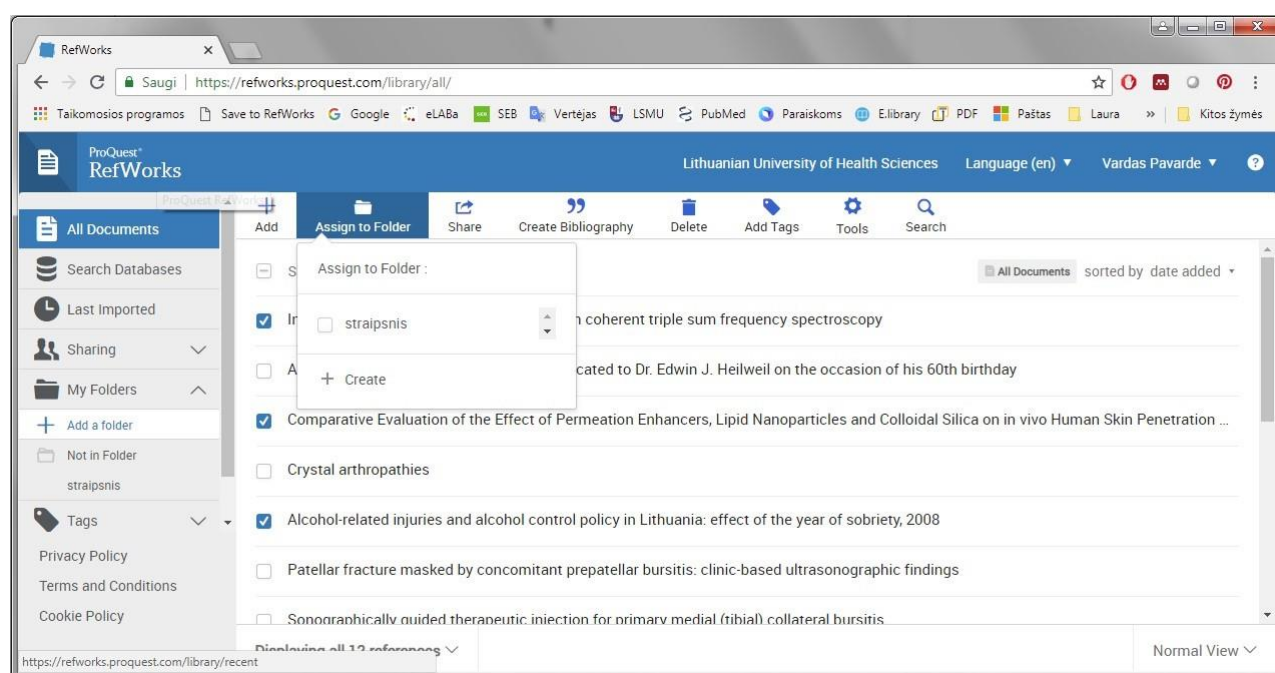


Fig. 7 Moving records to another folder

Editing, deleting, and sharing records, attaching full-text documents

Uploaded records can be edited, supplemented with new data, or attached with a full-text document.

In the *RefWorks* window, click on the record you want to edit – it will be highlighted in blue, and the record will appear on the right side, where it can be edited. Click the pencil icon at the top of the right section of the window (see Figure 8) and modify the bibliographic information of the record. **Important!** You can add a full-text document to the record in the *Attachments* section. **Important!** After editing the record, don't forget to click *Save* to save the new information.

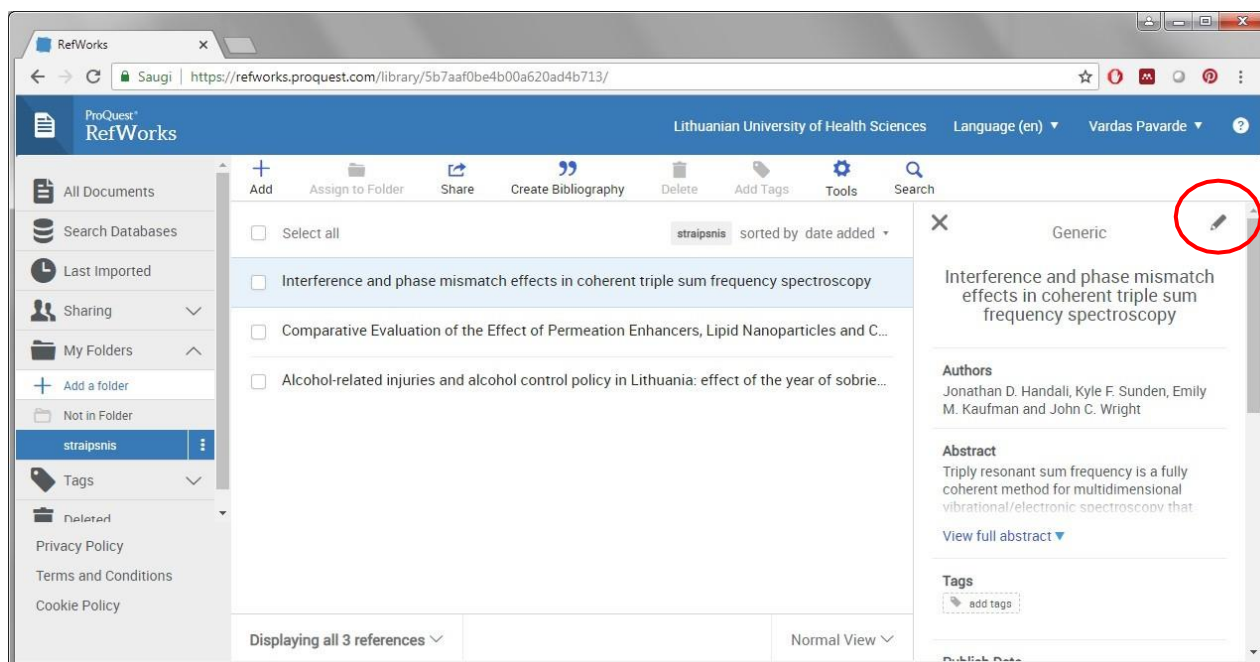


Fig. 8 Editing a record in RefWorks

To delete a record, select it and click *Delete Documents* in the toolbar, and the record will be removed from *RefWorks*.

Important! If you choose *Remove from Folder*, the record will only be removed from the specified folder but will remain in the *All Documents* folder.

To share your collected records with colleagues, select the folder you intend to share, click *Share* in the toolbar, and choose *Share folder*. In the window that opens, you can set the sharing preferences (see Figure 9).

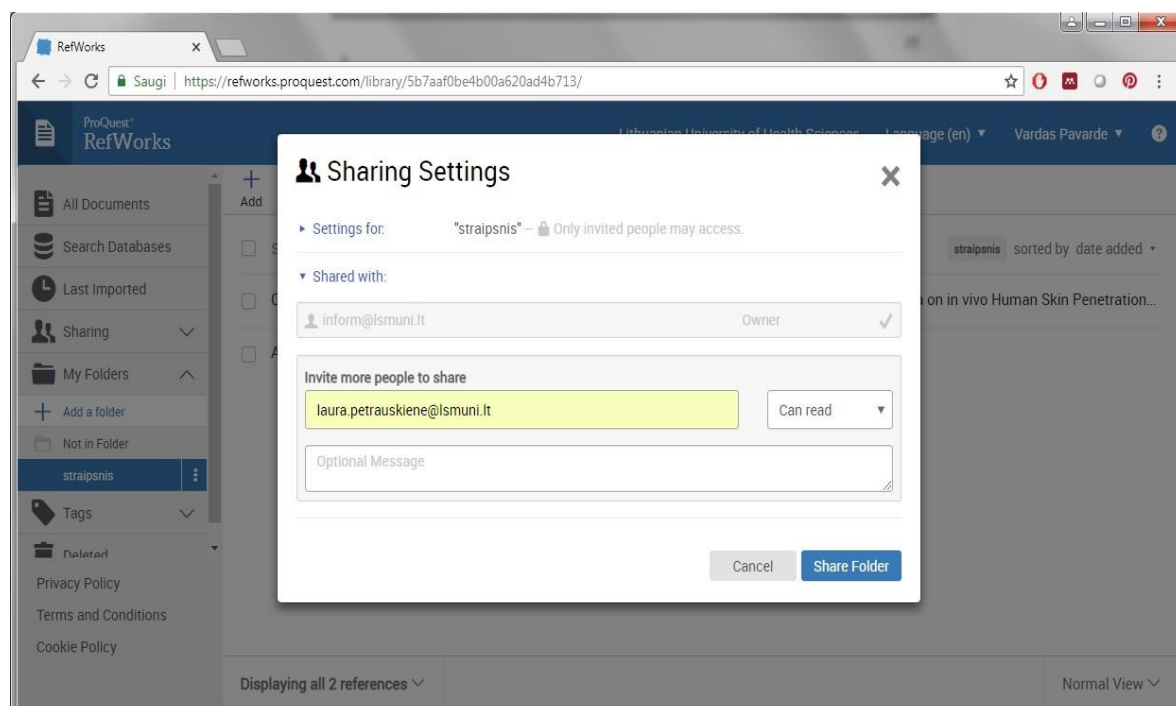


Fig. 9 Sharing preferences

Reading PDF files in *RefWorks*

The *RefWorks* software has a PDF reader that allows you to highlight selected text from an article in different colors and write notes.

To read a full-text document in the reader, select the desired record and click *Read* in the bibliographic metadata section on the right – the text will open in the PDF reader (see Figure 10).

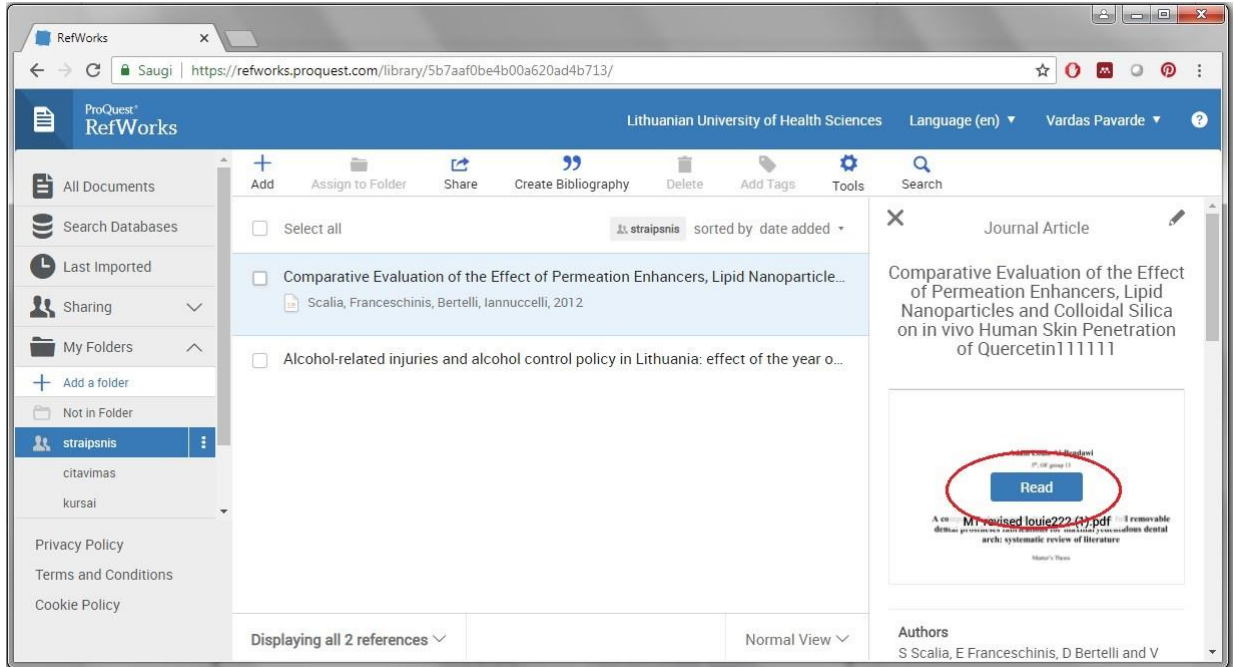


Fig. 10 Opening a full-text document in the reader

You can highlight text (click the *Highlight the selected text* icon in the toolbar) or write notes (click the *Comment on the selected text* icon in the toolbar) (see Figure 11).

To change the highlight color, click on the highlighted text and choose a different color from the menu that appears.

To delete notes or highlights, click on the highlighted text and select *Delete Conversation* from the menu that appears.

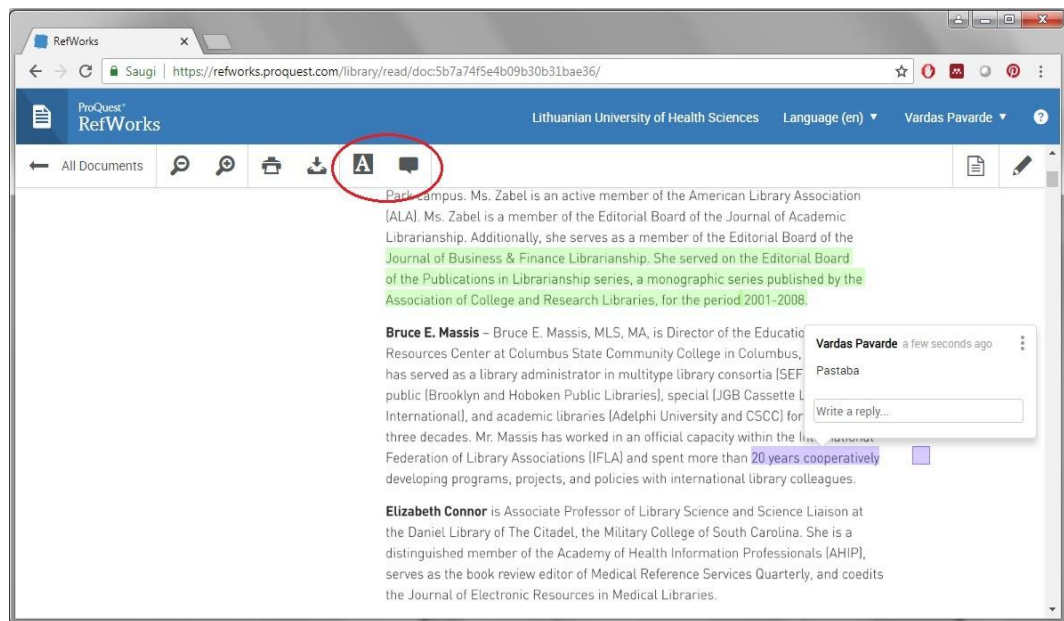


Fig. 11 RefWorks PDF file reader

RefWorks plugin for Microsoft Word

To cite academic papers, you need to install the *RCM* plugin in *Microsoft Word*.

1. In the *RefWorks* toolbar, select *Tools*, again *Tools* and then *Install RCM from the Microsoft AppSource*.
2. Download and install the *RCM* plugin (see Figure 12).

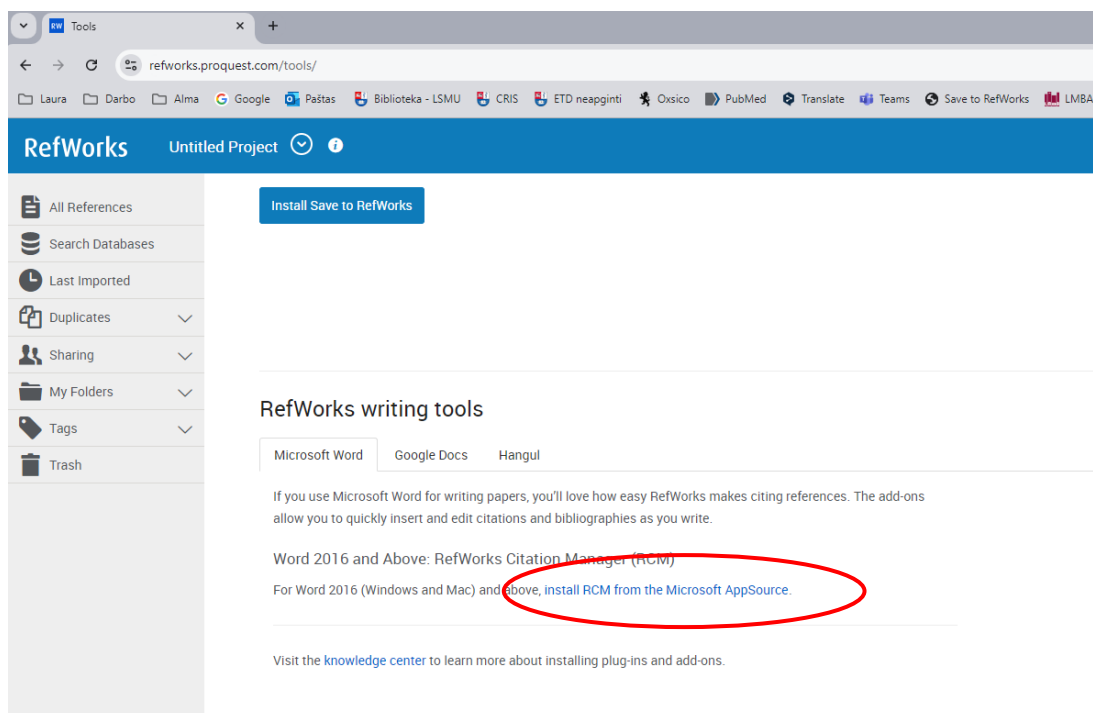


Fig. 12 Installing RefWorks plugin to Microsoft Word

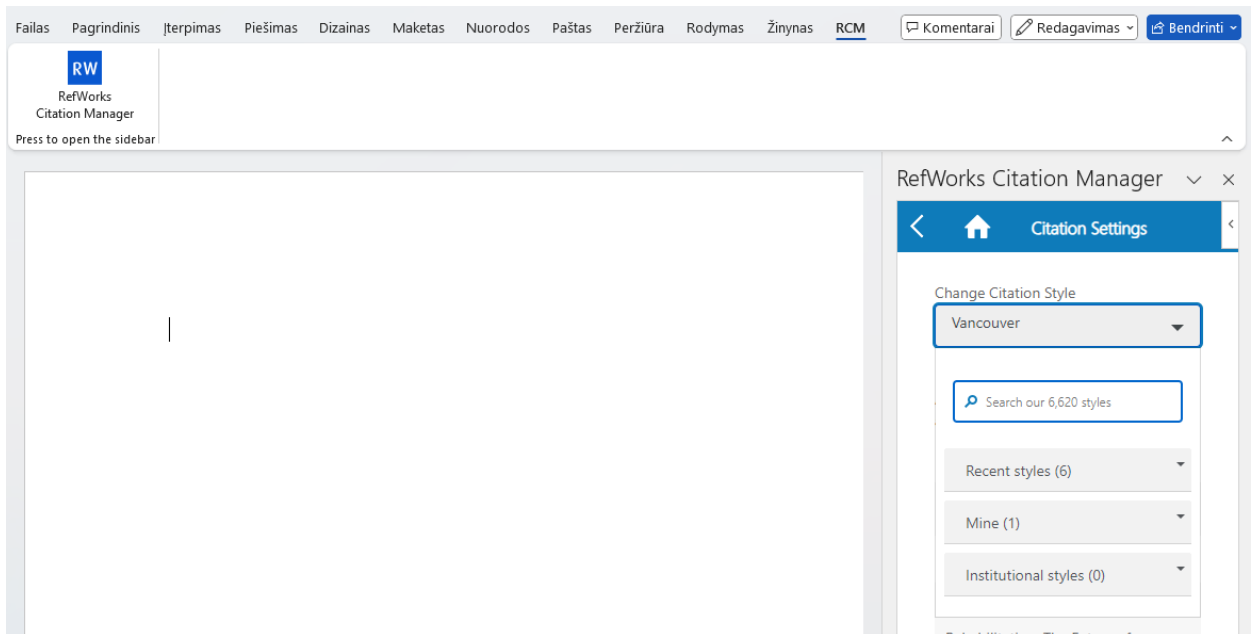


Fig. 15 Searching for a desired citing style

To insert a citation, place the cursor where the reference should appear and click *Cite This* in a RCM window (see Figure 16), If you want to add more, select as many references as you want. Click *Insert Citation*, and all the references will appear in the text.

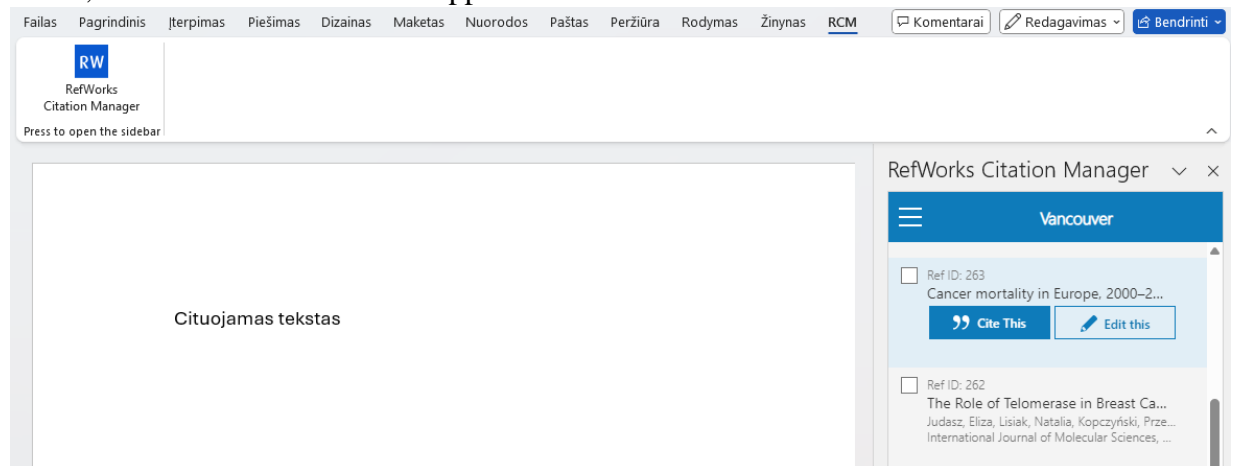


Fig. 16 Reference search window

Practical tasks

1. Create a personal *RefWorks* account.
2. Upload a reference from a source using the *Save To RefWorks* feature in the bookmarks bar.
3. In *Microsoft Word*, insert several references into the text and generate a bibliography in the IEEE style.

Links

RefWorks <https://refworks.proquest.com>

Conclusion

In this module, you have become familiar with the bibliographic management software—*RefWorks*.

Using this software, you will be able to save bibliographic references of information sources, organize them into folders, edit and share them, attach full-text documents, and prepare bibliographies in the desired citation style. You will also learn how to use the *RCM* plugin in *Microsoft Word*: insert references into the text and prepare a bibliography.

Used and recommended literature

1. PALMER, Sarah. *LibGuides: Introduction to RefWorks: Home* [interactive] [accessed 24 August 2018]. Access via the Internet: <https://proquest.libguides.com/newrefworks>.
2. PALMER, Sarah. *LibGuides: New RefWorks: Welcome to the New RefWorks!* [interactive] [accessed 24 August 2018]. Access via the Internet: <https://proquest.libguides.com/refworks/home>.
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4. REFWORKS. RefWorks in 20 Minutes. *YouTube* [interactive]. 2016 [accessed 20 August 2018]. Access via the Internet: <https://www.youtube.com/watch?v=qbuTev26cZw>.
5. REFWORKS. Using RefWorks Write-N-Cite for Microsoft Word. *YouTube* [interactive]. 2017 [accessed 21 August 2018]. Access via the Internet: <https://www.youtube.com/watch?v=deHYmuj1Ij8>.