

Getting started with RefWorks

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Signing up for RefWorks

RefWorks is only available for OUH Trust staff who have a specific need e.g. carrying out systematic reviews. For basic reference management and creating citations, you can use a free solution such as Zotero or Mendeley.

To request a RefWorks account, please email hcl-enquiries@bodleian.ox.ac.uk and library staff will request access for you.

Adding references to RefWorks


RefWorks is entirely web-based, so you will always access it via your browser.

There are a number of different ways to add references to your RefWorks library.

Exporting from Ovid databases (e.g. Medline, Embase, PsycInfo)

Run your search as usual in an Ovid database (you can get to databases quickly via the [NHS Knowledge and Library Hub](#)).

When you have results that you want to add to RefWorks, tick the boxes next to them. You can also use the **All** tickbox to add all results (up to a maximum of 2500), or enter a range in the **Range** box.



The screenshot shows a search results interface with several key elements circled in red:

- The **Export** button in the top right navigation bar.
- The **All** checkbox and the **Range** input field in the top left filtering area.
- The checkbox for the first result, which is checked.

The first result is:

1. Early surgery for perforated appendicitis: Are we moving the needle on postoperative abscess?.
Wu C, Fields AC, Zhao B, Castillo-Angeles M, Havens JM, Salim A, Askari R, Nitzschke SL
American Journal of Surgery. 226(2):256-260, 2023 08.
[Journal Article]
UI: 37210329
Digital Object Identifier
<https://dx.doi.org/10.1016/j.amj...>
Authors Full Name
Wu, Christine, Fields, Adam C, Zhao, Bixiao, Castillo-Angeles, Manuel, Havens, Joaquim M, Salim, Ali, Askari, Reza, Nitzschke, Stephanie L

On the right side of the result, there are options: Abstract Reference, Complete Reference, Find Similar, and Find Citing Articles. At the bottom of the result, there is a 'Find it Oxford' button and a row of action buttons: Abstract, Cite, My Projects, and Annotate.

Click **Export** in the top-right. From the **Format** dropdown menu, choose **RefWorks**.

You can use the **Fields** dropdown menu to choose the level of detail to export (we recommend **Complete Reference**).

When you are happy with your options, click **Export**.

A pop-up window will open. If it does not, click the link in the webpage that says “click this link to open the document.”

If you have created folders in RefWorks, you can choose to import directly into one of those at this stage. You can also choose not to import tags from the database (see [Organising your references](#) for more on tags) and to search for the full text of the article.

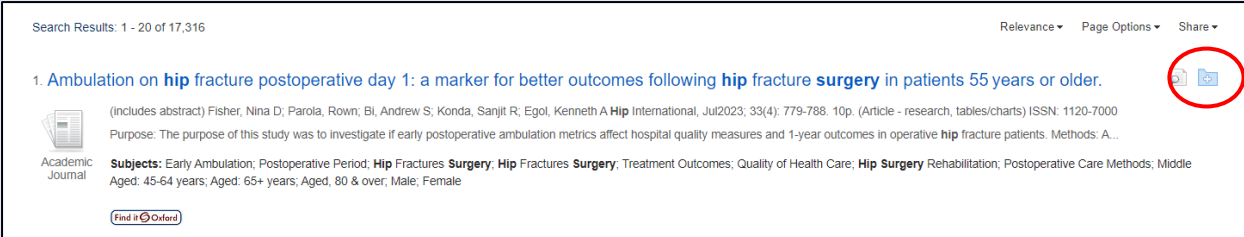
Click **Import**.

The references will be saved to your library and you will be taken to the **Last Imported** screen.

Exporting from EBSCO databases (e.g. CINAHL)

Run your search as usual in an EBSCO database (you can get to databases quickly via the [NHS Knowledge and Library Hub](#)).

To add individual results to RefWorks, click the **folder icon** to the right of each one.



Search Results: 1 - 20 of 17,316

Relevance ▾ Page Options ▾ Share ▾

1. Ambulation on hip fracture postoperative day 1: a marker for better outcomes following hip fracture surgery in patients 55 years or older.

(Includes abstract) Fisher, Nina D; Parola, Rowan; Bi, Andrew S; Konda, Sanjit R; Egol, Kenneth A *Hip International*, Jul2023; 33(4): 779-788. 10p. (Article - research, tables/charts) ISSN: 1120-7000

Purpose: The purpose of this study was to investigate if early postoperative ambulation metrics affect hospital quality measures and 1-year outcomes in operative hip fracture patients. Methods: A...

Academic Journal

Subjects: Early Ambulation; Postoperative Period; Hip Fractures **Surgery**; Hip Fractures **Surgery**; Treatment Outcomes; Quality of Health Care; Hip **Surgery** Rehabilitation; Postoperative Care Methods; Middle Aged: 45-64 years; Aged: 65+ years; Aged, 80 & over; Male; Female

Find it @ Oxford

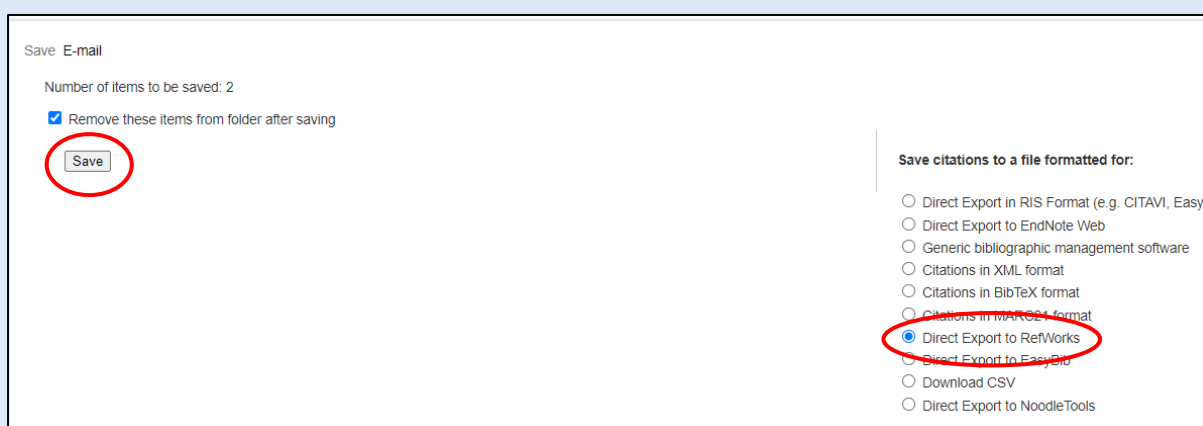
Go to your folder by clicking the **Folder** button in the top-right corner.



Tick the boxes next to the items you want to export, or use the **Select / deselect all** button to select all at once. Then click **Export** on the right-hand side.



Choose **Direct Export to RefWorks** and click **Save**. It is also a good idea to tick **Remove these items from folder after saving**, so you have an empty folder for next time.



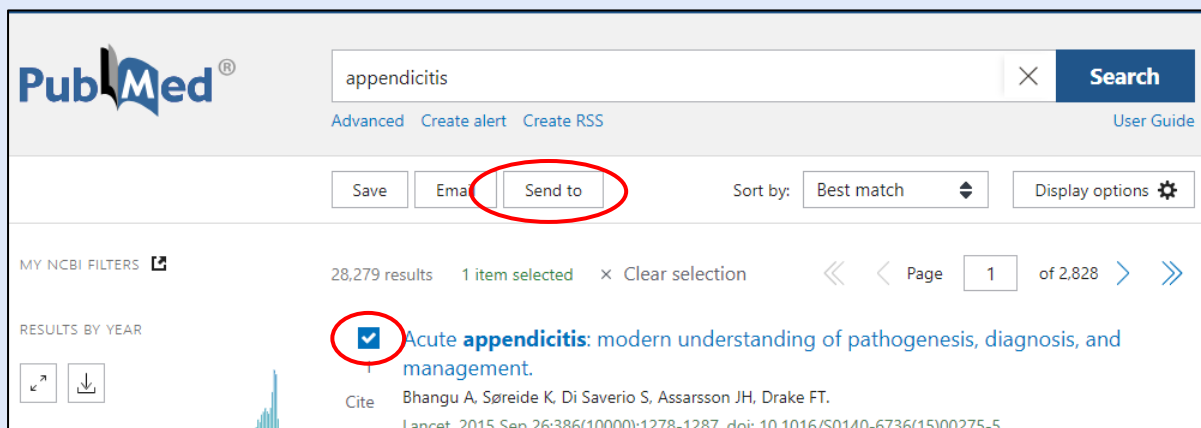
Choose a folder if you wish and click **Import**.

The references will be saved to your library and you will be taken to the **Last Imported** screen.

Importing references from a .ris, .nbib file (e.g. PubMed)

Some databases don't offer a direct export to RefWorks option, but will let you export references in a standard file format (usually .ris, .nbib, .xml or .bib). These can be read by RefWorks.

Run your search in [PubMed](https://pubmed.ncbi.nlm.nih.gov/). Tick the boxes next to the items you want to add to RefWorks and click **Send to**.



Choose **Citation manager** from the dropdown menu and click **Create file**. A file will be downloaded.

Go to <https://refworks.proquest.com/> and choose **+ Add and Import references**.

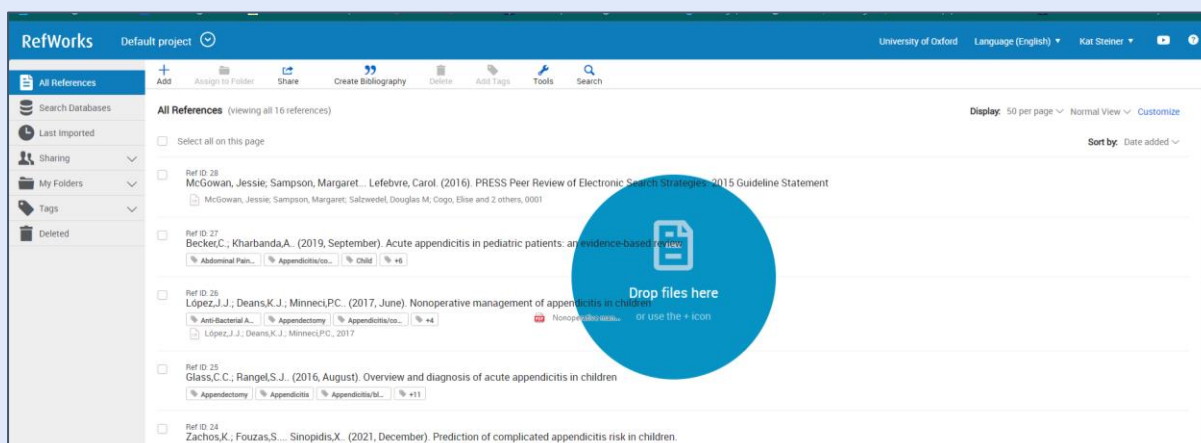
Drag and drop the downloaded file or click to select it from your file browser.

RefWorks will try to work out which database your file has come from automatically. If it can't, you can search for the format. Click **Import**.

Adding references using PDFs

If you have PDFs saved to your computer, you can drag and drop them into RefWorks.

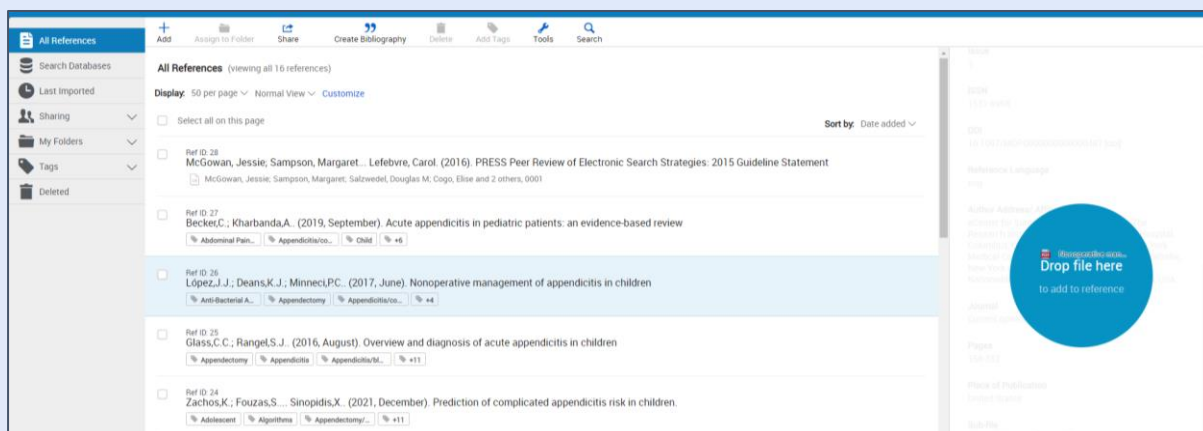
In your RefWorks library (<https://refworks.proquest.com/>), drag and drop the PDF into the middle of the screen.



RefWorks will try to add the details (title, author, date, journal etc) of the PDF, but you should check these carefully and add any missing information (see [Editing references](#)).

If you already have a reference in RefWorks and you want to add a PDF to it, click the reference to open the details page on the right.

Drag and drop the PDF into the right-hand pane.

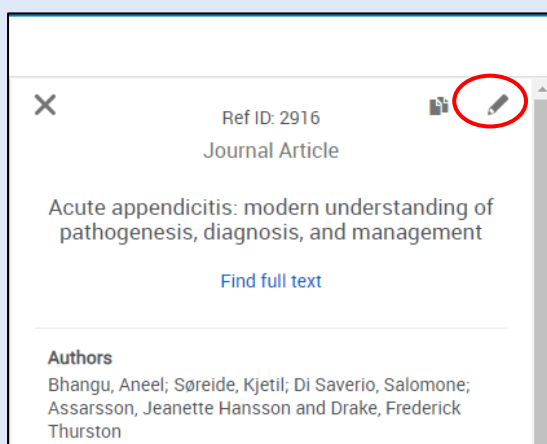


Adding PDFs to your references means you can access them from any computer, with a storage limit of 100GB.

You can click **Read** to open the PDF within RefWorks.

Editing references

To edit a reference, click it to open its details in the right-hand pane and then click the **pencil icon**.



It is a good idea to check the details of references when you add them. You can type in a field to correct it. You can change the **Ref Type** at the top to match what the reference is, e.g. Journal article, Conference proceeding.

Enter authors' names as Last name, First name, e.g. Smith, Jane. Press enter or tab between each person's name.

You can add tags here using the **Tags** field. Press enter or tab between each tag.

You can add private notes in the **Notes** field.

Click **Save** in the top-right to save your changes.

Organising your references

You can organise your references using **folders**. Click the **My Folders** button and then **+ Add Folder** to create a new folder.

Use the tickboxes beside references to select and then drag and drop them into folders, or use the **Assign to Folder** button at the top. References can be in more than one folder and you can always see all your references by clicking **All References**.

Deleting a reference from within a folder will give you the option to move it to the trash, or remove it from the folder.

You can also organise references using **tags**. References imported from databases will often come with their own tags (you can choose not to import tags when exporting from databases).

You can explore tags using the **Tags** button on the left and add tags by editing your references.

At the top of the screen, you will see you are working within a **Project**. Projects keep collections of references entirely separate from each other, which can be useful if you are working on a systematic review. You can create and rename projects by clicking the down arrow next to your project's name and then **Manage projects**. Each document can only cite from references in one project. More information on projects is available in the [RefWorks Knowledge Center](#).

Sharing your references

Click **Sharing** on the left to share a folder. Enter the email address of the person you want to share the folder with, and choose whether they can read, annotate (add comments) or modify (edit, add or remove references). You can also generate a public URL – anyone with that URL can view but not change the contents of the folder. This is useful if you are sharing with someone who does not have a RefWorks account.

You can also share entire projects – click the arrow beside your project and click **Share this Project**.

Citing sources in documents and creating bibliographies

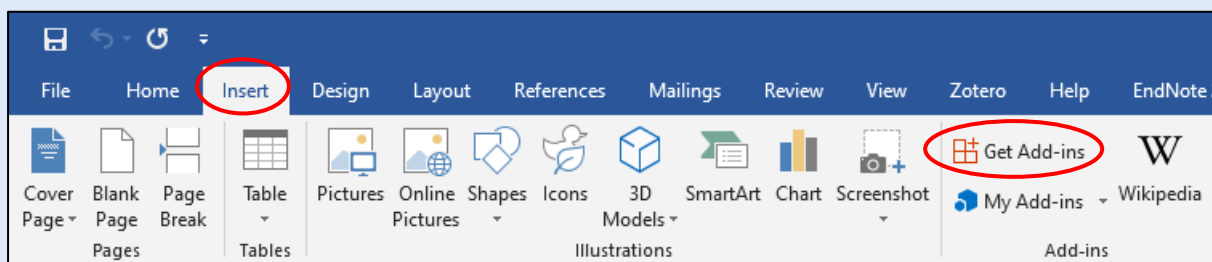
You can use RefWorks to insert citations and create automatic bibliographies in Word for PC or Macs.

For instructions for using RefWorks with pre-2016 Word or with Google Docs, see our other [RefWorks handouts](#).

RefWorks Citation Manager in Word

First, you will need to install the Word add-in RefWorks Citation Manager.

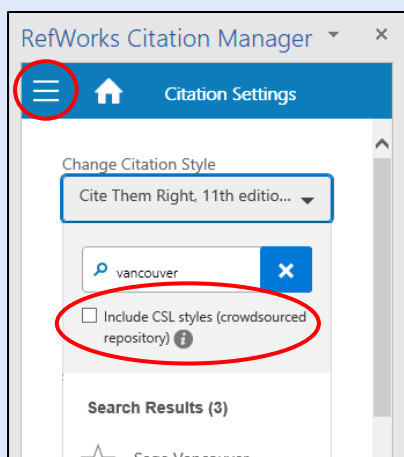
Open a Word document and click **Insert** and **Get Add-ins**.



Search for RefWorks, find **RefWorks Citation Manager** and click **Add** – you may also need to click **Admin Managed**.

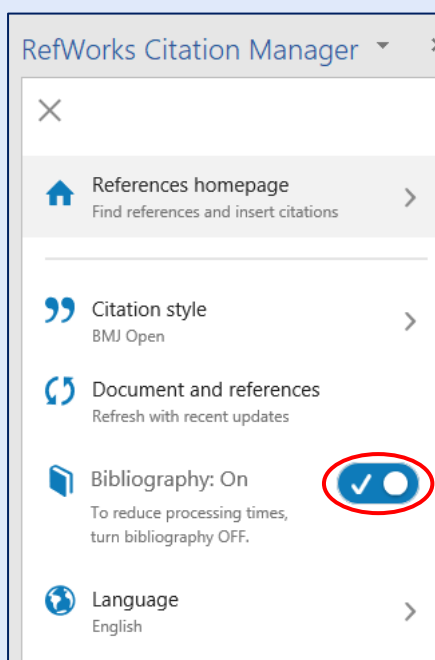
RCM will appear in the blue ribbon at the top of your Word document. Click it, and click **RefWorks Citation Manager**. Log in with your RefWorks account.

Click the **menu button** (three horizontal lines) to search for and choose a citation style – it is a good idea to untick **Include CSL styles** – these can be written by anyone and may not be accurate.



As you write, mouse over an article in the Citation Manager and click **Cite This**, or tick several articles and click **Insert Citation**.

You can toggle whether or not you see a bibliography at the end of your document by clicking the **menu button** and clicking the slider next to **Bibliography**.



If you want to delete a citation, click it in your document and click the red **Delete Citation** button – don't use backspace or the delete button on your keyboard.

If you notice errors in your citation, you should make your corrections in RefWorks in your browser, rather than in Word – this will change them in every occurrence of the citation, and save them for the future.

To update your citations in Word, click the menu button and click **Document and references** to refresh your bibliography.

Creating a bibliography to copy/paste

In RefWorks itself, you can quickly create a list of references in your chosen style, copy it, and paste it into a file or email.

In <https://refworks.proquest.com/>, choose references to cite using the tickboxes, or go to a folder.

Click **Create Bibliography** at the top.

Choose your referencing style and click **Copy to Clipboard** to copy your references.

More questions?

Email the library at hcl-enquiries@bodleian.ox.ac.uk

Handouts with more detail on how to use RefWorks:

<https://www.bodleian.ox.ac.uk/ask/workshops/reference-management-workshop-handouts>

RefWorks User Guide:

https://knowledge.exlibrisgroup.com/RefWorks/Product_Documentation/RefWorks_User_Guide