

# Referencing: RefWorks Handout

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Helen Bond (Information Skills Coordinator)

[helen.bond@bodleian.ox.ac.uk](mailto:helen.bond@bodleian.ox.ac.uk)

Kat Steiner (Library Manager and Outreach Librarian, Bodleian Health Care Libraries)

[kat.steiner@bodleian.ox.ac.uk](mailto:kat.steiner@bodleian.ox.ac.uk)

Sophie Lay (Senior Library Assistant, English Faculty Library and Philosophy and Theology  
Faculties Library)

[sophie.lay@bodleian.ox.ac.uk](mailto:sophie.lay@bodleian.ox.ac.uk)

## Contents

Introduction .....	3
Registering with RefWorks .....	3
Steps to sign up .....	4
Switch from signing into RefWorks with your Oxford Single Sign On to using an email address.....	4
Collecting references .....	5
Exporting references from SOLO to RefWorks .....	5
Exporting references from Google Scholar.....	8
Drag & Drop PDFs .....	10
Save to RefWorks browser plug-in .....	11
Adding a reference manually .....	13
Organising your references in RefWorks .....	15
Editing a reference and adding personal notes .....	15
Working with edited books and chapters.....	18
Using folders .....	22
Finding and deleting duplicate references .....	31
Inserting references into a word-processed document .....	34
Installing RefWorks Citation Manager in Microsoft Word and citing references .....	34
Creating a reference list in RefWorks .....	42
Installing RefWorks Citation Manager in Google Docs and citing references.....	43
Using Quick Cite to create in-text citations, footnotes and bibliographies .....	44
Further help with RefWorks.....	46

## Introduction

RefWorks is a web-based reference manager that University of Oxford members can use for free during their time at the University and as alumni. RefWorks can be used on Windows and Mac computers.

RefWorks has a range of features to help you collect, organise and cite your references. You can:

- Organise your library using folders and tags
- Search and delete duplicate references
- Share your references with colleagues
- Insert your references in Microsoft Word and Google Docs using software called a plugin

RefWorks has unlimited storage and is web-based, so you can access your library of references on any computer connected to the internet.

This document walks you through how to collect, organise and cite your references in a word-processed document.

## Registering with RefWorks

There are two ways of signing up and logging in to RefWorks:

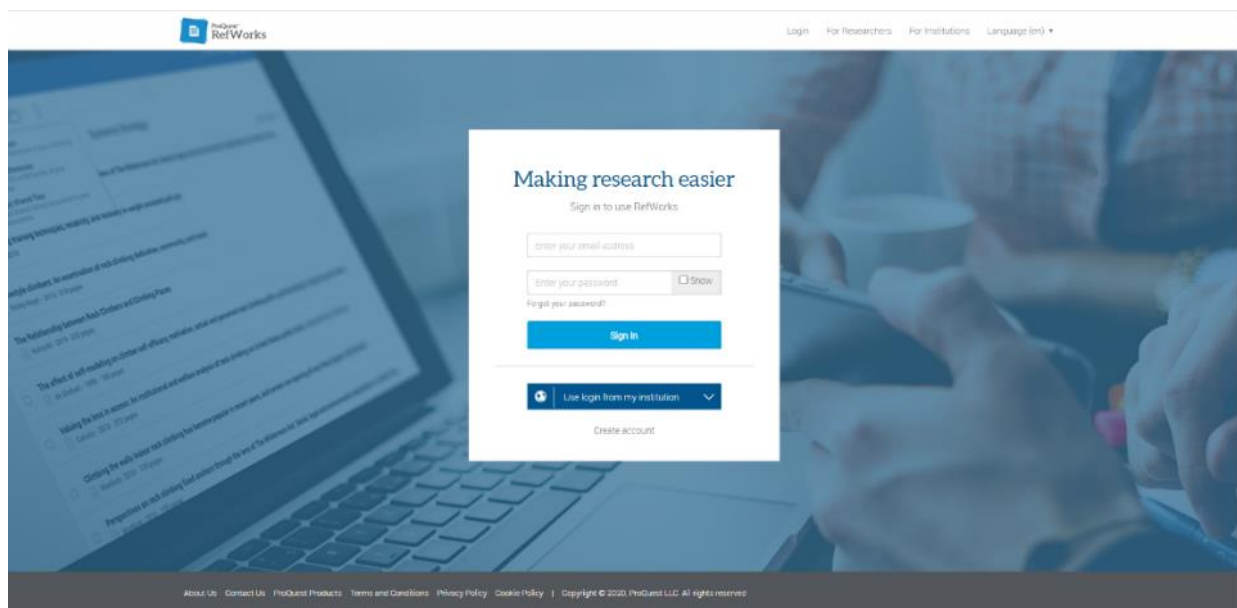
1. Sign up and log in using your Oxford email address
2. Sign up and log in using your Oxford Single Sign on (SSO)

You can use either, but we recommend signing up using your Oxford email address, as it is easier for alumni access after you leave Oxford. Once you have set up your RefWorks account with your University email address, you can change your email address to a personal one in the settings so that, once you leave the University, you will be able to log in to RefWorks even though your University address has expired.

If you do decide to sign up with your SSO, it is possible to change over to a personal email address before it expires.

## Steps to sign up

- Go to <https://refworks.proquest.com/>



- To sign up using your Oxford email address, choose **Create Account**.
- When prompted, enter your university email address and click 'check'.
- RefWorks should recognise the address as belonging to Oxford. Now pick a password and click 'sign up'.
- An activation email will be sent to your email account. In your email, either click on the link, or copy and paste the link into a browser.
- You will be prompted to fill in some details for your account (e.g. name, area of study).
- You then have the option of watching a small slideshow with a very brief introduction to RefWorks (you can skip this part if you wish by clicking 'Skip Tutorial'). On your first use of RefWorks, you will also get tip popups on the screen to help you. You can dismiss these by clicking on the X in the box, and check the 'Don't show these tips anymore' box if you want to get rid of them permanently.

Switch from signing into RefWorks with your Oxford Single Sign On to using an email address

- When you are logged into RefWorks, click your username in the top right-hand corner of the webpage.
- From the drop down select 'Settings'.

- Click the 'Remove Credentials' button towards the bottom of the page. If you never created a password for your RefWorks account, you will be prompted to now. You must provide a password so you can break the single sign on affiliation.
- Once the account is detached from your single sign on, you can update your email address in the 'Email' box.

### Collecting references

For instructions for exporting references from particular bibliographic databases, see our other handouts for humanities, social sciences and science databases on the [iSkills webpages](#).

### Exporting references from SOLO to RefWorks

SOLO is the resource discovery tool for the major collections of the libraries of the University of Oxford. It covers physical holdings in the majority of the libraries which includes the Bodleian Libraries and most Faculty/Department and College libraries. It also provides access to electronic material including e-books, e-journals and databases.

### Accessing SOLO

- To access SOLO go to <http://solo.bodleian.ox.ac.uk/>
- To access the full range of resources, Sign in using your Oxford Single Sign On (SSO). The sign in option is in the top right-hand corner

### Searching

- To submit a basic search query in SOLO, type your keywords into the search bar, for example Oxford history of Britain and click the search button.
- SOLO will return a list of search results matching your query including print and electronic resources. It is possible to export these records to RefWorks.

### Exporting from SOLO to RefWorks

There are two methods for exporting references to RefWorks.

#### **Method 1 – For exporting multiple references in one go**

1. Select the references you would like to export to RefWorks by ticking the boxes next to the title.

— You have selected 2 records [EXPORT ALL RESULTS](#) [X DISMISS](#)

☒ **MULTIPLE VERSIONS**  
**The Oxford history of Britain**  
Morgan, Kenneth O.  
  
 5 versions of this record exist. [See all versions >](#)

---

☒ **BOOK**  
**The young Oxford history of Britain & Ireland**  
Corbishley, Mike. | Morgan, Kenneth O.  
1996 | **Oxford** : **Oxford** University Press | 415 p. : ill. (some col.), facsim., geneal. tables, maps, ports. ; 27 cm.  
[Find & Request >](#)

2. Click the three-dot “Show actions options” button on the top right and select RefWorks.

— You have selected 2 records [EXPORT ALL RESULTS](#) [X DISMISS](#)

FAVOURITES/ ORLO EXCEL PRINT EMAIL BIBTEX EN ENDNOTE MENDELEY

RW REFWORKS RIS

CLOSE

3. RefWorks will open in your browser. If you’re not logged in, you’ll be prompted for your username and password.
4. Click on Import – you can choose to import into a Folder at this stage or do so at a later stage. Click on 'Go to Last Imported' to view the record in your 'last Imported' folder.

## Method 2 – For exporting one reference at a time

1. Once you have identified a record you would like to export, click the “Show actions options” button (the button with three horizontal dots) for that title.

2

BOOK

**The young Oxford history of Britain & Ireland**

Corbishley, Mike. | Morgan, Kenneth O.

1996 | Oxford : Oxford University Press | 415 p. : ill. (some col.), facsim., geneal. tables, maps, ports. ; 27 cm.

Altmetric 3

Show actions options

Find & Request >

2. Click 'RefWorks' in the window that pops up.

1

BOOK

**The Oxford history of Britain [electronic resource]**

Morgan, Kenneth O., editor

2010 | Revised edition. | Oxford ; New York : Oxford University Press | 1 online resource (838 pages) : maps

Online access >

EXCEL CITATION PRINT PERMALINK E-MAIL BIBTEX ENDNOTE MENDELEY **RW REFWORKS**

RIS

3. RefWorks will open in your browser. If you're not logged in, you'll be prompted for your username and password.
4. Click on Import – you can choose to import into a Folder at this stage or do so at a later stage. Click on 'Go to Last Imported' to view the record in your 'last Imported' folder.

## Notes

Sometimes there are errors in records exported from SOLO because the "fields" in SOLO records do not match up very well with the fields used by RefWorks. It is advisable to check the records that you have exported into RefWorks and edit them if necessary.

- Authors: for works with more than one author, SOLO sometimes only exports the first author to the author field in RefWorks. Other authors are exported to the Editor field, even if they are not editors. You should correct this by adding the other authors to the Authors field.
- Authors: sometimes additional information such as birth/death dates for authors are exported from SOLO to RefWorks. These are used in SOLO to differentiate between authors with the same name. However, they should not appear in your citations and bibliographies. If birth/death dates (or other additional information) are given alongside the author name you should delete them.

- **Edition:** SOLO exports the word 'ed' into the RefWorks Edition field. i.e. the field reads 3rd ed (rather than 3rd). When you use RefWorks to make citations or bibliographies in Word, it will automatically add the abbreviation 'ed' or 'edn' where appropriate. As a result, if the abbreviation is included in RefWorks, 'ed' will be repeated in your citations e.g. they will read 3rd ed ed. It's therefore best to delete 'ed' as soon as you export your records from SOLO to RefWorks.
- **Publisher:** SOLO gives the place of publication under both publisher and place of publication. You should remove it from the Publisher field, otherwise it will appear twice in your citations e.g. Philadelphia, Philadelphia.

#### *Exporting references from Google Scholar to RefWorks*

Google Scholar is a search engine which allows quick and simple searching of scholarly literature, including articles, books, theses and conference abstracts. It draws material from journal publishers, professional associations, universities and open access repositories.

#### *Google Scholar Subject Coverage*

Google Scholar is an interdisciplinary resource which covers all academic disciplines.

#### *Accessing Google Scholar*

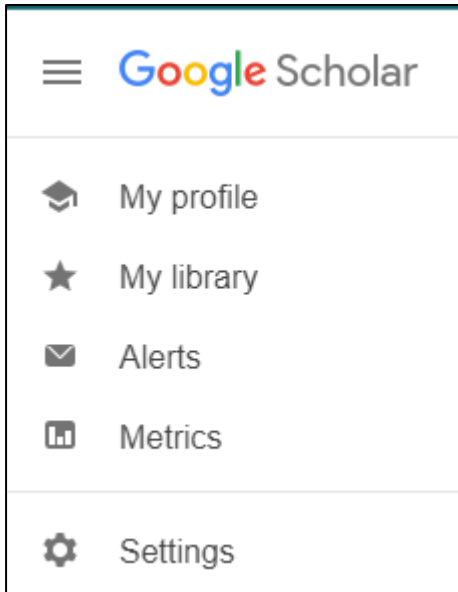
Google Scholar is freely available via <https://scholar.google.co.uk/>

#### *Configuring Google Scholar for RefWorks*

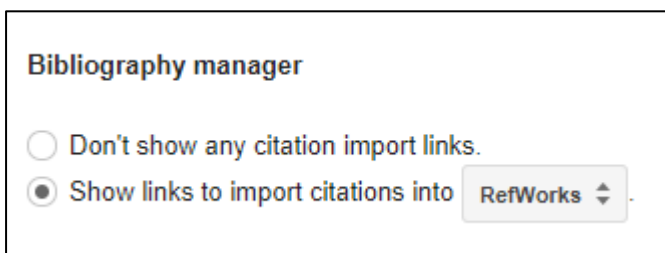
You can configure Google Scholar to link directly to RefWorks.



- At the top of the Google Scholar screen, click on the three-bar menu button then click **Settings**.



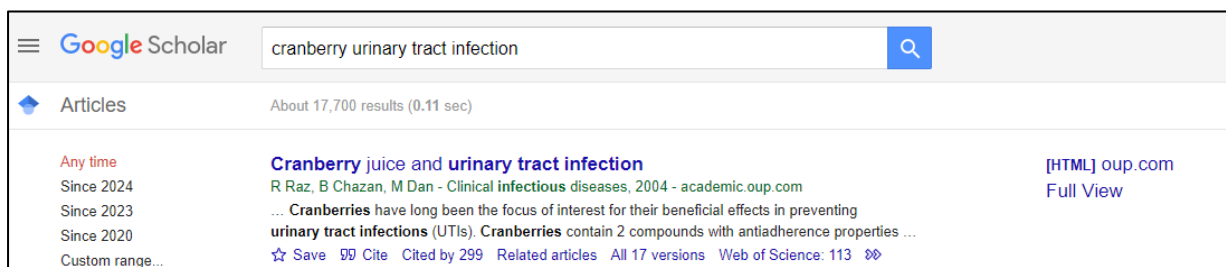
- Scroll down to **Bibliography manager** and click on the dropdown menu to choose **RefWorks** next to **Show links to import citations into**



- Click **Save**.

### *Running a Basic Search*

- Type your keywords into the search box and click on the blue magnifying glass icon.



### *Exporting to RefWorks*

Google Scholar allows you to export individual references into RefWorks.

- You will see a link to **Import into RefWorks** beneath each reference – click on the link. In some browsers, the **Import into RefWorks** isn't visible – click on the >> link to access this option.

#### **Cranberry juice and urinary tract infection**

R Raz, B Chazan, M Dan - *Clinical infectious diseases*, 2004 - [academic.oup.com](http://academic.oup.com)

... **Cranberries** have long been the focus of interest for their beneficial effects in preventing **urinary tract infections** (UTIs). **Cranberries** contain 2 compounds with antiadherence properties ...

☆ Save Cite Cited by 299 Related articles All 17 versions Web of Science: 113 Import into RefWorks >>

- RefWorks will open in your browser. If you're not logged in, you'll be prompted for your username and password.
- Click **Import** – you can choose to import into a folder at this stage or do it later. Click **OK** to view the record in your **Last Imported** folder.

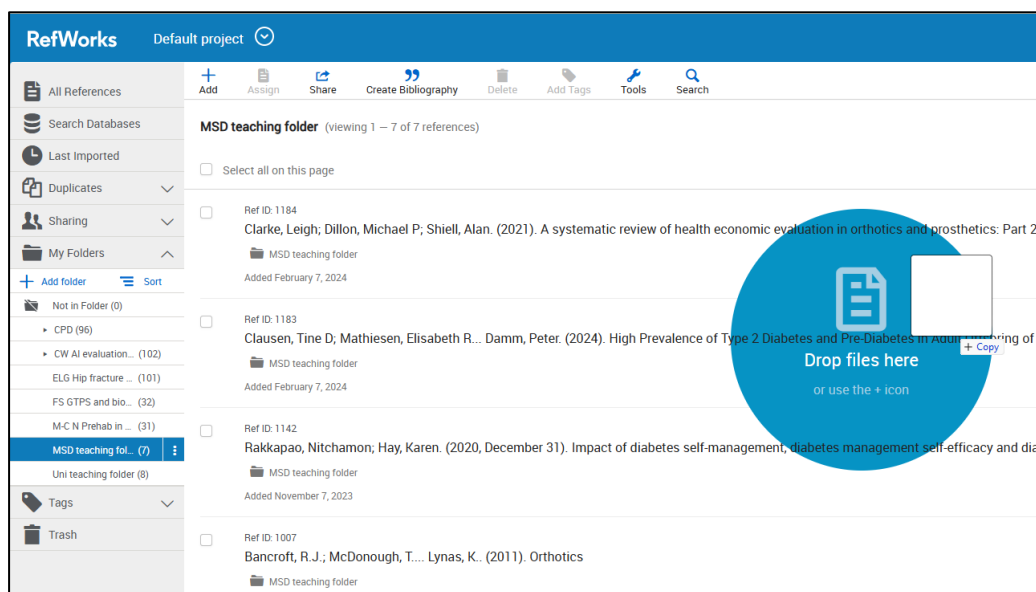
**Note:** You can only export one result at a time from Google Scholar to RefWorks, which can be time consuming.


#### Drag & Drop PDFs

If you have PDF files of journal articles saved on your computer, you can add them to RefWorks and RefWorks will automatically find matching citation information where available.

- Find the PDF that you want to add to RefWorks on your computer

- Click on the relevant PDF and drag into the middle of the RefWorks screen until you see the blue circle appear.



- Release the file.
- RefWorks will find matching citation information (e.g. bibliographic details such as author, title, publication details) where available.
- To verify that the citation is correct, click on the newly added reference.
- The reference details will appear in the right-hand preview pane.
- Click on the edit pencil icon  if you need to amend the information.

You can also add PDFs by clicking the **+Add** button at the top and clicking **Upload document**. You can then select the PDF you want to add to RefWorks.

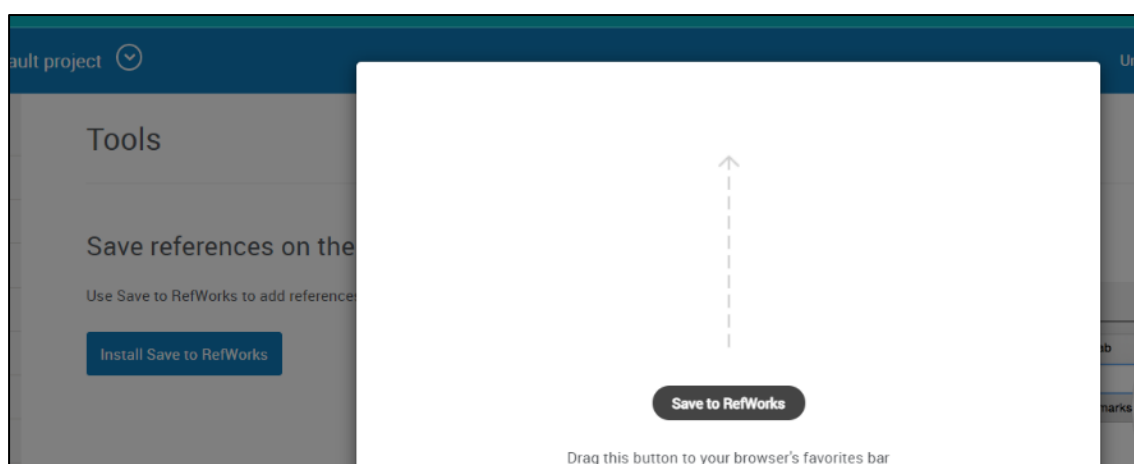
**Note:** RefWorks cannot find citation information for PDFs that you have made yourself (e.g. scanning a chapter from a book).

#### Save to RefWorks browser plug-in

You can install a RefWorks plug-in or extension within your web browser to add references and full-text from any website. You will need to display your favourites/bookmarks bar in order to do this – you can find instruction for how to do this in your chosen browser online.

### *Installing Save to RefWorks*

- First, you need to make sure that your favourites or bookmarks bars is showing in your browser. This can usually be done by clicking the settings button (three dots or lines) and finding options for bookmarks or favourites.
- From the main RefWorks page, click on the **Tools** (or spanner) icon from the menu bar at the top of the page.
- Select **Extensions & add-ons**.
- Click **Install Save to RefWorks** (blue button).

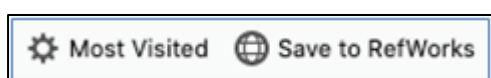


- Drag the Save to RefWorks button to your favourites/bookmarks bar as prompted.

Save to RefWorks will display differently depending on the browser that you're using – if you can't see where to drop the button, ensure your bookmarks or favourites bar is showing in your browser.

### *Using Save to RefWorks in Firefox, Google Chrome & Microsoft Edge*

- Open the website you want to add to RefWorks.
- Click on the Save to RefWorks link from your bookmarks/favourites menu below the URL box in your browser.



- A RefWorks preview pane will open on your screen – this may take a little time. You may be asked to log in with your RefWorks account.
- This is your opportunity to amend the information or add supplementary details.
- Once you're happy with the information, click on **Save to RefWorks**.
- You can decide to assign to a folder before clicking on **Import**.
- You will receive confirmation that the reference has been added to RefWorks.

**Note:** Save to RefWorks does not work on all web pages as it relies on being able to read the underlying structure of the webpage. You may find you need to [add references manually](#) or using an alternative method if Save to RefWorks cannot import the references.

### Adding a reference manually

You may need to add a reference manually to RefWorks, usually because the item you are referencing is non-standard e.g., a personal email or a nonpublished report. It's always easier to find the reference online so you should look hard before deciding to add manually.

- In RefWorks, click **+Add** on the top left of the toolbar.
- Click **Create reference manually**.
- A box will open on the right of the screen with fields for you to fill in. Some of them contain suggestions/hints for filling in (in grey), which can be overtyped.

Find full-text using link resolver

Ref Type: Journal Article

Title: [text input]

Authors: [text input]

Abstract: [dropdown menu: Audio, Bill/Resolution, Book, Book, Edited Collection, Books, Section]

Tags: [text input]

Attachments: [text input]

Date Published: [text input]

Issue: [text input]

ISSN: [text input]

DOI: [text input]

URL: http://search.proquest.com

Journal: [text input]

Pages: 11-21

Notes: [text input]

Is Electronic: ☒ This is an electronic source.

Add more fields

Save Cancel


- The **Electronic Source** box is automatically ticked. Untick the box if you have a print resource (e.g. a physical book). This will influence what is displayed in your bibliography. URLs will not be displayed if the **Electronic Source** box isn't ticked.
- The default **Ref Type** is **Journal Article** – click on the drop-down menu to change to the type of reference you have e.g. Book, Web Page, Report. Selecting the correct Ref Type at this stage will influence which fields need to be completed and which information will be displayed in your bibliography.

**Note!** There are several different types of 'Book' – make sure you select the appropriate one:

**Book** = authored work

**Book, Edited Collection** = edited work

**Books, Section** = chapter within a book

- Start filling in the title or paste in the DOI. Once you have started typing you can use the lightning symbol  to show automatic suggestions at the bottom of the screen.
- If you find a match, clicking on the title or clicking **Apply Changes** will populate the form automatically. Check all the fields in your reference to make sure the information is correct. If you don't want these suggestions, click on the X on the right of the blue suggestions bar at the bottom.
- Fill in the author(s) in the format Last name, First name. Press enter after each author name (even if there is only one) to separate the names out into author tags.
- Fill in the other fields with as much information as you have – even though not all citation styles use all of the available fields, you may find one day that you need to change to a style which does use them, so fill in as fully as possible. The automatically suggested fields are the minimum ones useful for a citation.
- If you need to add additional fields or create a custom field (to record additional information) click **Add more fields....**
- Click **Save** at the bottom of the screen to save your reference.

## Organising your references in RefWorks

### Editing a reference and adding personal notes

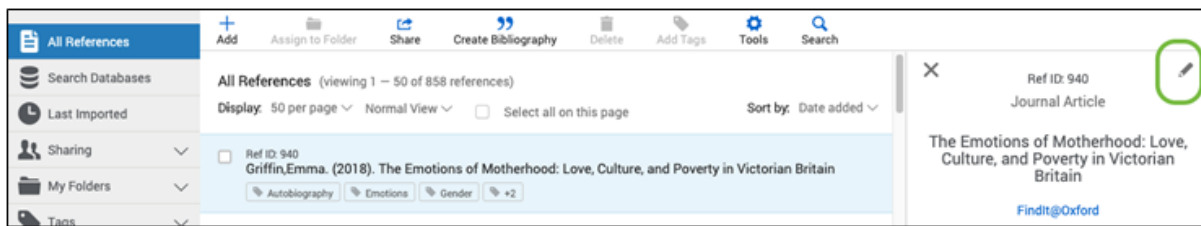
There are several reasons to edit your references in RefWorks.

- Sometimes items exported from databases do not have the correct 'reference type'. For example, a book may appear in RefWorks as a journal article. If the reference type is incorrect, the item will be cited incorrectly in your bibliographies. This is a particular problem with edited books exported from SOLO which appear in RefWorks with the reference type 'book' when they should have the reference type 'book, edited collection'. This may seem like an inconsequential detail but if the reference type is incorrect, the item will be cited incorrectly in your bibliography. Likewise, journal articles exported from databases are sometimes given the reference type 'generic'. If you want them to be cited correctly in your bibliography, you will need to change this to journal article.
- Some databases do not export well and basic details such as author name, title or publication details will be missing, incomplete or incorrect. It is essential that you correct these errors so that any citations and bibliographies you create are correct.
- The exported reference may not have as much detail as you would like.
- You may wish to attach a PDF of an article to the reference, to keep your resources and references together.

### *Finding a reference in your RefWorks account*

- Find the reference that you need to edit in RefWorks. If you have recently added it, it will be in the **Last Imported** folder. If it's not there, try searching for it in **All References**.
- When you have found the reference, click on it. The details of the reference will appear on the right of your screen.

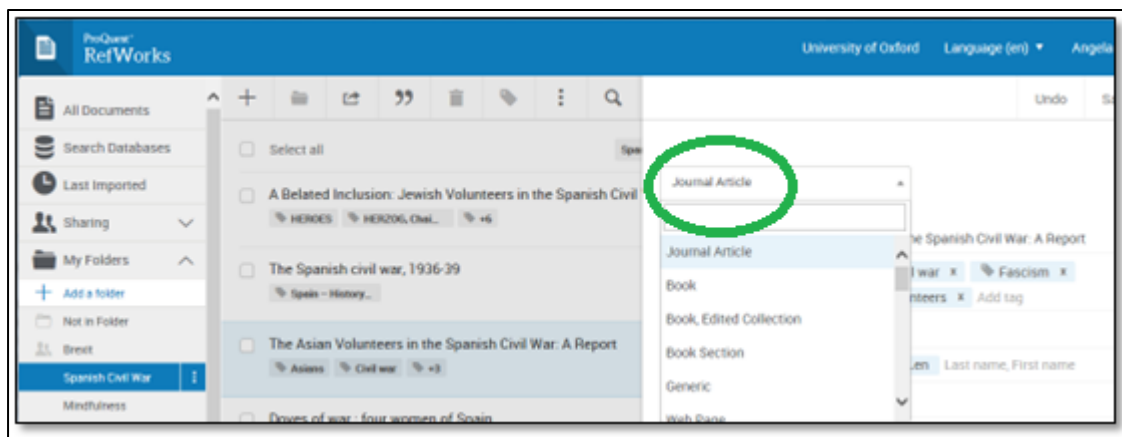
Click on the pencil icon on the top right corner of the reference to edit it.



### Editing basics

You will then be able to edit the various fields in the reference.

- First check the reference type is correct (e.g. if the item is an edited book, choose **Book, edited collection**. If it's an article, choose **Journal article** is selected). You can change reference type by choosing from the dropdown menu.



- Check the other fields in the record. You can edit any field by clicking in the field and typing. If you make any mistakes in your editing, click **Undo** before saving.
- Any tags which are not needed can be removed by clicking the **x** next to each tag.
- New fields can be added if required by scrolling to the bottom of the reference and clicking **Add more fields...**

### Adding notes, PDFs and other files

- To add notes to your reference, scroll down in the reference editing window and click on the **Notes** field. You may add any notes you wish in this field.

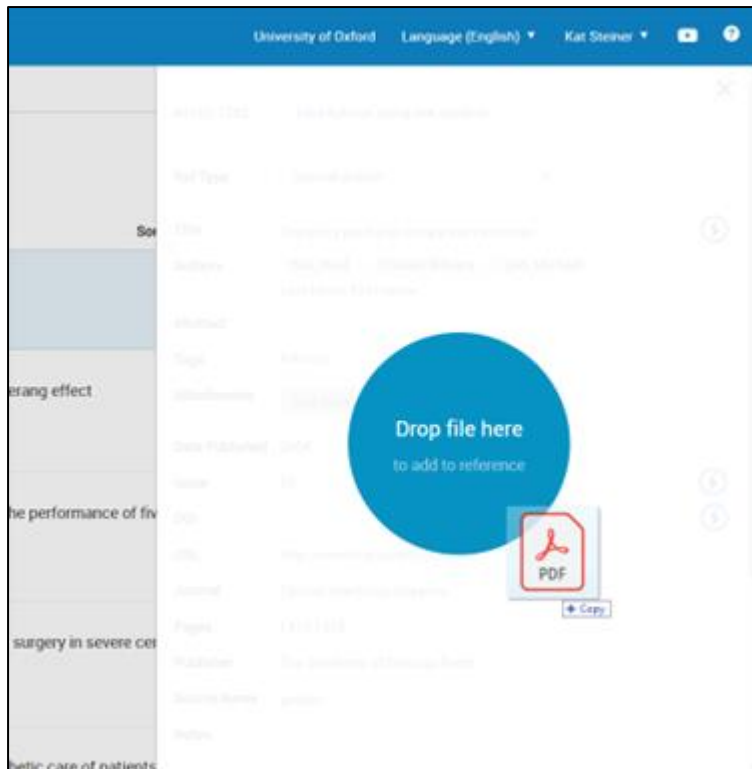


Retrieved From	<a href="https://www.youtube.com/watch?v=d0nERTFo-Sk">https://www.youtube.com/watch?v=d0nERTFo-Sk</a>
Studio / Distributor	econstories.tv
Studio Location	
Date Retrieved	Sep 27, 2016
Notes	Good video, covers pertinent points of each economists philosophy
Is Electronic	<input checked="" type="checkbox"/> This is an electronic source.

9. To add files to your reference, such as full text PDF articles/chapters or notes, click **Add file(s)** next to **Attachments** in the editing window. Search through the files on your computer and select the one you want to upload.

Abstract	
Tags	Add tag
Attachments	Add file(s)
Date Published	2004

10. You can also add a PDF to a reference by dragging and dropping the file onto the editing panel – you will see a blue circle that says **Drop files here**.



**Note:** As RefWorks is cloud-based, adding a lot of attachments can cause it to run more slowly, so it is preferable to be selective about which files you wish to attach, rather than doing this for all of your references.

### *Saving your changes*

When you are finished editing the reference, click on **Save** at the bottom of the reference editing window. If you make any mistakes in your editing, click **Undo** before saving.

### *Working with edited books and chapters*

Referencing styles treat books with authors (authored books), books with editors (edited books) and book chapters differently, so it is important to choose the correct reference type in RefWorks to ensure your formatted citations are correct.

When you add books to RefWorks, e.g. from SOLO, you need to check the **Ref Type** is correct.

- **Authored book:** choose Book
- **Edited book:** choose Book, Edited Collection
- **Chapter within an edited book:** choose Books, Section

You do not need to cite individual chapters of authored books.

## Authored books

When you import a book from SOLO, it will usually assume that the book is an **authored book** and RefWorks will have the reference type **Book**. For authored books, this is fine and you do not need to make any changes.

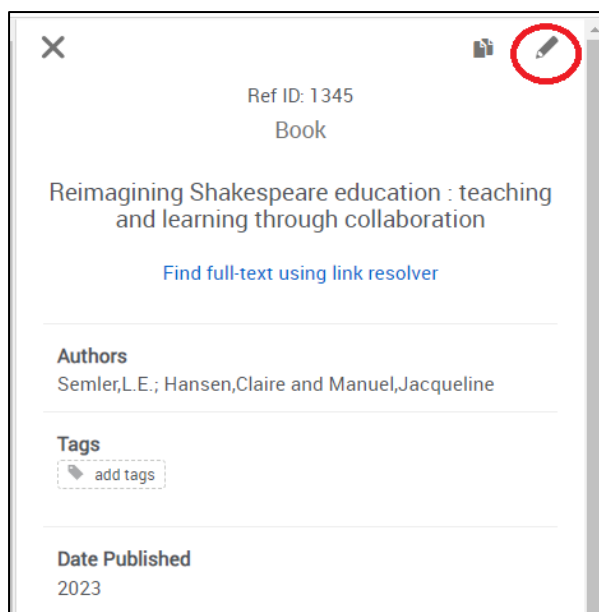
## Edited books

When you import an **edited book** from SOLO, RefWorks will usually still assume that it is an authored book and incorrectly give it the **Ref Type**.

Imagine you have exported from SOLO to RefWorks the book *Reimagining Shakespeare education: teaching and learning through collaboration* edited by L. E. Semler.

The screenshot shows a book record in RefWorks. On the left is a sidebar with navigation links: TOP, EXPORT OPTIONS, FIND & REQUEST, DETAILS, LINKS, BROWSE RELAT..., and TAGS. The main content area displays the book's cover, title, editors (Semler, L. E., Hansen, Claire, Manuel, Jacqueline), publication year (2023), publisher (Cambridge University Press), page count (xxiv, 345), and format (illustrations; 24 cm). It also shows an Altmetric score of 8 and a 'Find & Request' button. Below the title, there is a link to 'Chapters of this book (41)'. At the bottom, there is an 'Export Options' section with icons for Excel, Citation, Print, Permalink, Email, BibTeX, Mendeley, RefWorks, and RIS.

1. In RefWorks, change the reference type from **Book** to **Book, Edited Collection**, by clicking the pencil icon in the top-right and choosing from the **Ref Type** drop-down menu.



Ref ID: 1345  
Book

Reimagining Shakespeare education : teaching and learning through collaboration

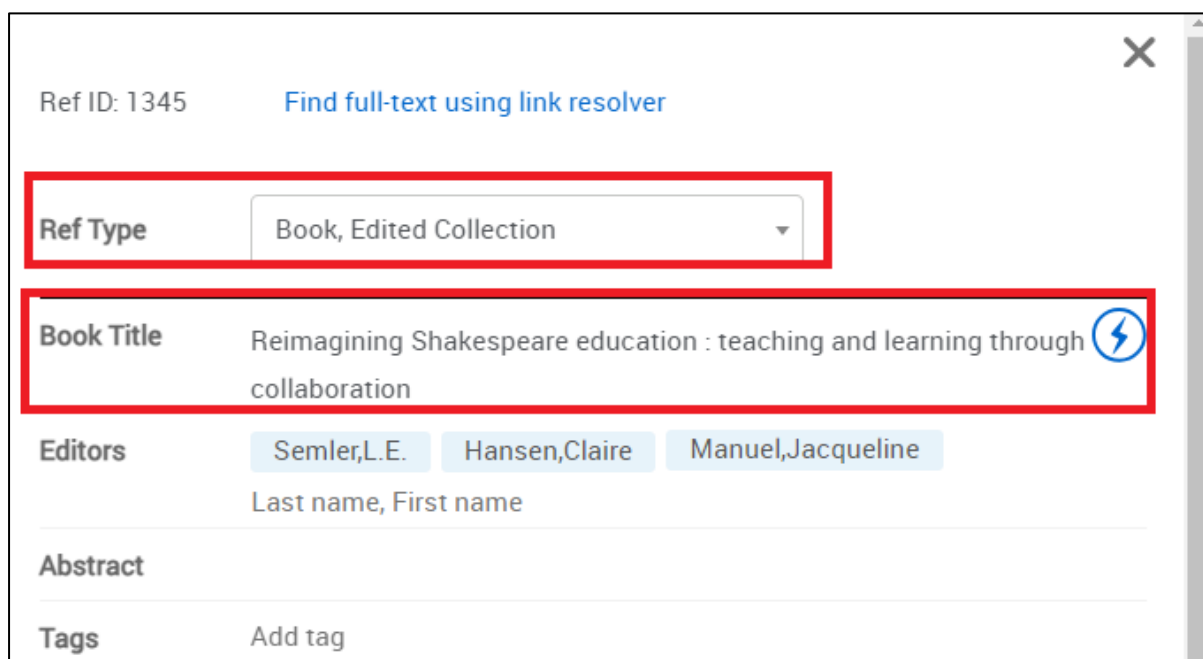
[Find full-text using link resolver](#)

**Authors**  
Semler,L.E.; Hansen,Claire and Manuel,Jacqueline

**Tags**  
[add tags](#)

**Date Published**  
2023

2. The **Authors** field has automatically changed to **Editors** and the same names are there, so you do not need to add them. Check the other details are correct and click **Save** at the bottom of the screen.



Ref ID: 1345 [Find full-text using link resolver](#)

**Ref Type** Book, Edited Collection

**Book Title** Reimagining Shakespeare education : teaching and learning through collaboration

**Editors** Semler,L.E. Hansen,Claire Manuel,Jacqueline  
Last name, First name

**Abstract**

**Tags** Add tag

### Book chapters

1. To add a book chapter from an edited book, first import or add the details of the whole book, e.g. from SOLO.
2. Click the pencil icon to edit the reference and change **Ref Type** to **Books, Section**.

3. You now need to move the book title from **Section Title** to **Book Title** and manually add the chapter title to **Section Title**.

Ref ID: 1345 [Find full-text using link resolver](#)

Ref Type: Books, Section

**Section Title** Reimagining Shakespeare education : teaching and learning through collaboration

Authors: Semler, L. E. Hansen, Claire Manuel, Jacqueline  
Last name, First name

Abstract

Tags: Add tag

Attachments: Add file(s)

Date Published: 2023

DOI

Editors: Last name, First name

Book Title

Pages: 11-21

Publisher: Cambridge University Press

Ref ID: 1345 [Find full-text using link resolver](#)

Ref Type: Books, Section

**Section Title** Shakespeare and Citizenship in France

Authors: Semler, L. E. Hansen, Claire Manuel, Jacqueline  
Last name, First name

Abstract

Tags: Add tag

Attachments: Add file(s)

Date Published: 2023

DOI

Editors: Last name, First name

**Book Title** Reimagining Shakespeare education : teaching and learning through coll

Pages: 11-21

Publisher: Cambridge University Press

Place of Publication: Cambridge

4. You also need to move the editors of the book from **Authors** to **Editors** and manually add the chapter author(s). You can click each editor's name and cut and paste it, or type it in manually.

Ref ID: 1345 [Find full-text using link resolver](#)

Ref Type: Books, Section

Section Title: Shakespeare and Citizenship in France

Authors: Semler, L.E. Hansen, Claire Manuel, Jacqueline  
Last name, First name

Abstract

Tags: Add tag

Attachments: Add file(s)

Date Published: 2023

DOI

Editors: Last name, First name

Book Title: Reimagining Shakespeare education : teaching and learning through coll

Pages: 11-21

Publisher: Cambridge University Press

Place of Publication: Cambridge

Ref ID: 1345 [Find full-text using link resolver](#)

Ref Type: Books, Section

Section Title: Shakespeare and Citizenship in France

Authors: March, Florence Last name, First name

Abstract

Tags: Add tag

Attachments: Add file(s)

Date Published: 2023

DOI

Editors: Semler, L.E. Hansen, Claire Manuel, Jacqueline  
Last name, First name

Book Title: Reimagining Shakespeare education : teaching and learning t

Pages: 11-21

Publisher: Cambridge University Press

Place of Publication: Cambridge

ISBN: 9781108478670

5. The last thing to do is to check the other details and add the page range for the chapter in **Pages**.

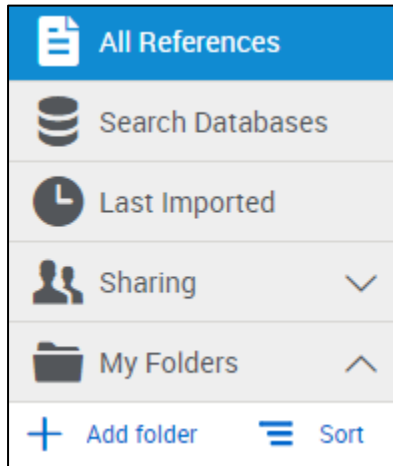
You should make certain you also have an entry for the edited book itself, as well as any other sections you cite, as both are likely to be needed for your bibliography.

### Using folders

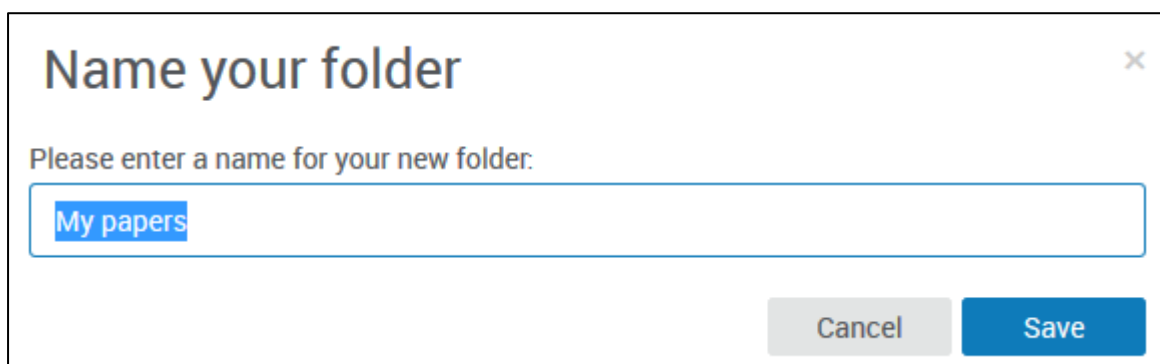
You can organise references within your RefWorks account by using the Folder function.

### Creating folders

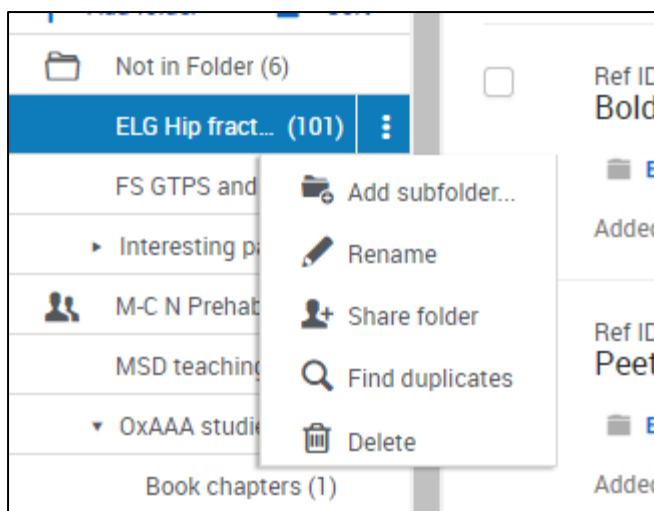
- Click on **My Folders** from the menu on the left-hand side of your screen.
- Click on **+Add folder**.



- Give your folder a name and click **Save**

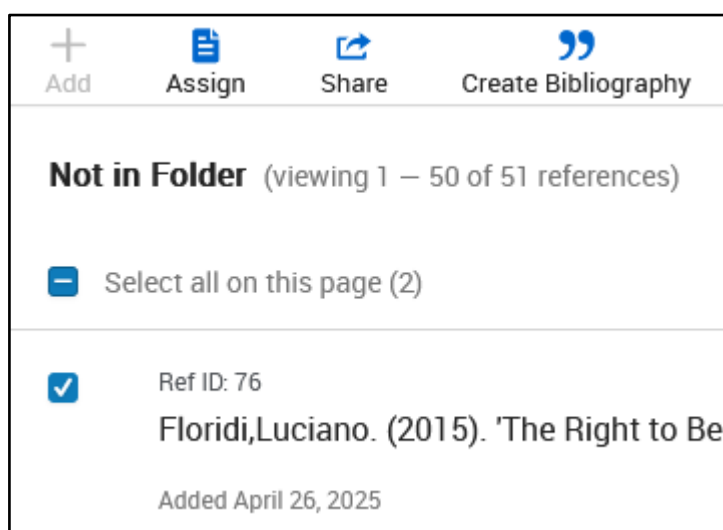
A screenshot of a dialog box titled 'Name your folder' with a close button (X) in the top right corner. Below the title, it says 'Please enter a name for your new folder:'. There is a text input field containing the text 'My papers'. At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save'.

- You can also create subfolders of a folder by click the three dots next to a folder and choosing **Add subfolder...**



### *Adding references to folders*

- Click **My Folders** from the menu on the left-hand side of your screen.
- Click the **Not in Folder** option. This will display all references that haven't yet been filed.
- Select the references you want to file by clicking the tick box next to the relevant references. Click on **Select all on this page** if you want to transfer all references on a page.
- Click the document icon **Assign** at the top of the screen



- Click the tick box next to the appropriate folder and click **Apply**. You can tick several boxes to include the references in multiple folders (this does not duplicate the references).

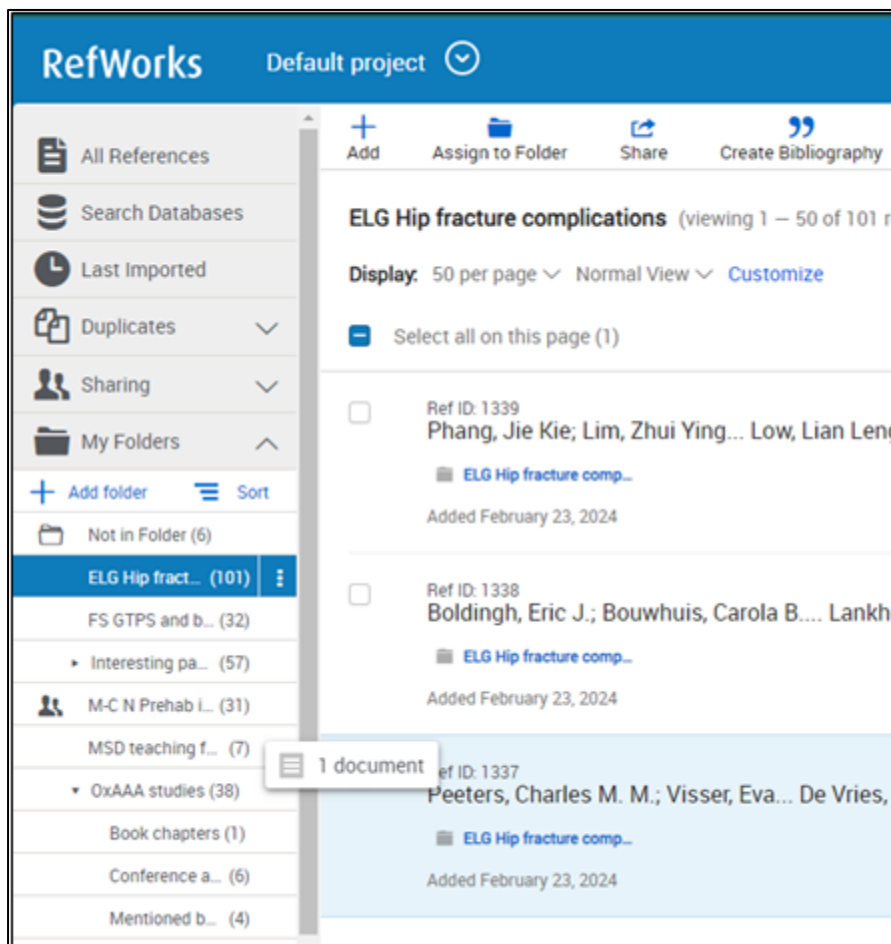


- You will get confirmation at the top of the screen that references have been transferred to the selected folder



Alternatively, you can drag and drop references into a folder.

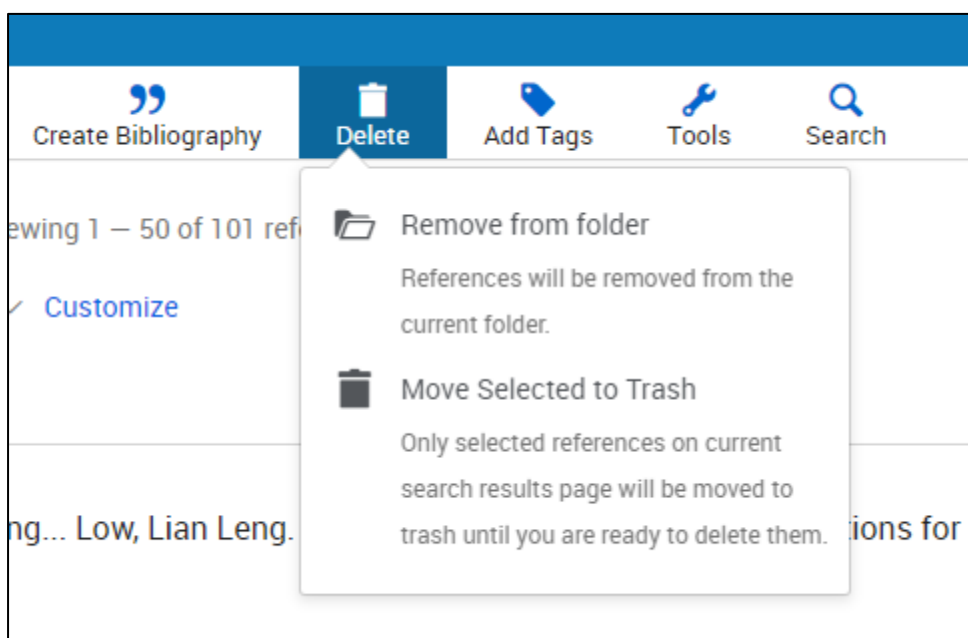
- Click on My Folders from the menu on the left-hand side of your screen.
- Your list of folders will be displayed.
- Click on one or more references and drag across to the appropriate folder



All references will always appear in the **All References** folder.

### *Removing references from a folder*

- To remove references from a folder, click on the folder and use the tickboxes to select the references you want to remove.
- Click **Delete** and select **Remove from folder** rather than **Move selected to Trash**.



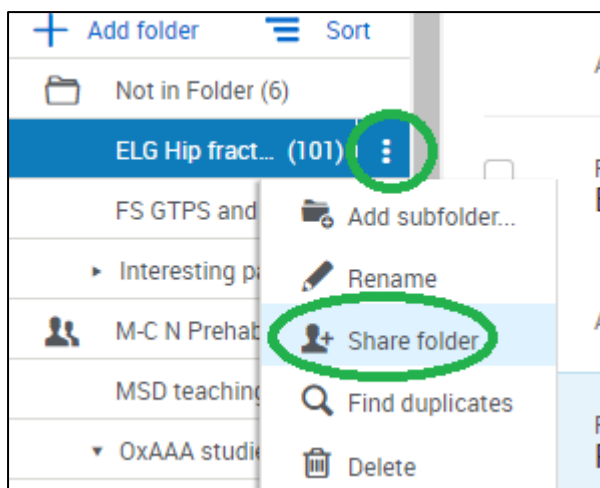
The reference will only be removed from the folder, not deleted. It will still appear in the **All References** folder and any other folders you have put it into (or the **Not in Folder** folder).

### *Sharing folders*

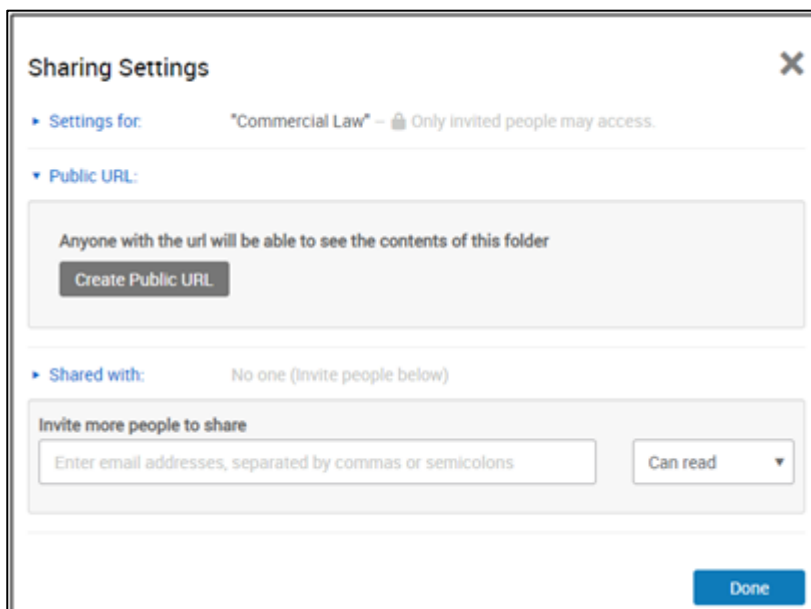
You can share a folder of references in your RefWorks library with another RefWorks user or make the folder available for everybody at the University of Oxford. You can also share a Public URL with anybody which gives them read-only access to the folder.

### *Choosing a folder to share*

- Click **My Folders** on the left of the RefWorks screen.
- Identify the folder you wish to share and then click the three dots on the right.



- From the menu that opens, choose **Share folder**.
- A new box will appear showing the sharing options selected for the current folder.



- Click on **Settings for**. You can then choose to share the folder only with specific people or have it available for anybody at the University of Oxford to find and view.
- Clicking on **Public URL** will allow you to create a URL which you can send to people. They will only be able to view the contents of the folder, not edit or change them.
- Clicking on **Shared with** allows you to make your folder available only to particular people who are also RefWorks users. You can also specify the level of access each person has to the folder.

- **Can read** – allows another individual to view but not change references in the shared folder
- **Can annotate** – allows another individual to add additional notes to references but not modify or delete the references themselves
- **Can modify** – allows another individual to edit the references in the shared folder
- To invite somebody to join your shared folder, type in their email address (this must be the email address associated with the other person's RefWorks account) and choose what level of editing access they can have to the shared folder using the dropdown menu.
- When you have completed setting your sharing options, click the blue 'Share Folder' button at the bottom of the window.

**Sharing Settings**

Settings for: Reading List

☒ Only invited people may access.  
☐ Anyone within your organization may join this folder.

Shared with:

oliver.bridle@bodleian.ox.ac.uk Owner ✓

Invite more people to share

joe.blogs101@med.ox.ac.uk

Optional Message

Can read  
Can read  
Can annotate  
Can modify

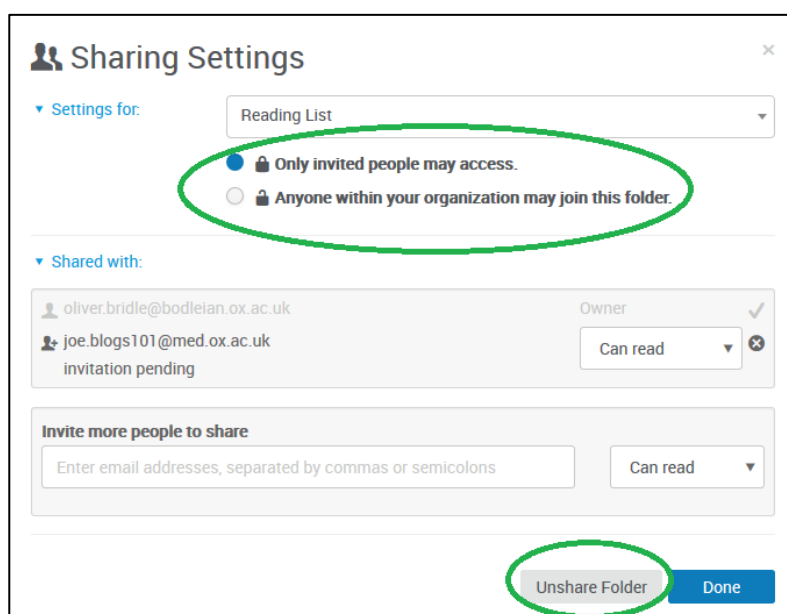
Cancel Share Folder

- If you have invited a person to share your folder they will receive a notification by email and will be able to see the shared folder in their RefWorks library.

## How to turn off folder sharing

If you wish to turn off the sharing for a folder you can either restrict sharing for the whole folder or remove particular individuals.

- Find the folder you wish to alter sharing options for, click the three dots to the right of the folder name and choose the **Sharing settings** option.



- If you have previously chosen to share the folder with anyone at Oxford, simply change the sharing option to **Only invited people may access**. RefWorks will warn you that access to the shared folder will be removed for anybody who has added the shared folder to their RefWorks library. Confirm this warning message if you wish to continue.
- If you have shared your folder with specific individuals you can remove access for a specific person or for everybody.
  - To remove an individual, open the **Shared with** options. You will see a list of all the people who share the folder. Click **X Remove** to remove their access.
  - To remove access for everybody, simply click **Unshare Folder** button at the bottom of the Sharing Settings window.

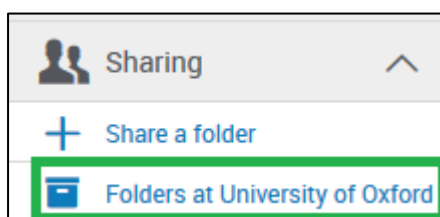
### Accessing a shared folder

If another person has shared a folder with you, you will receive an invitation via email. A notification will also appear under the **Sharing** section on the left-hand side of the RefWorks screen.

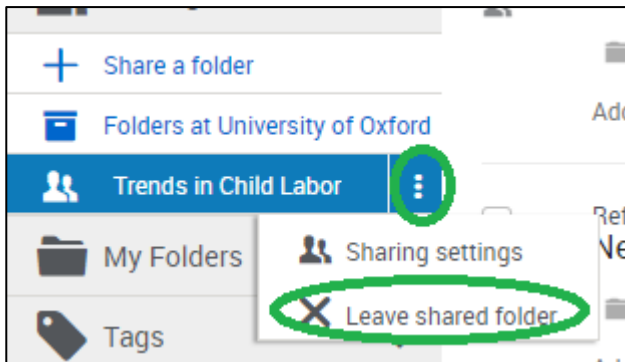
Once you have accepted the invitation you will see the shared folder appear under the **Sharing** section of your RefWorks library.

You can also browse all folders that have been shared with everybody at the University of Oxford.

- Click on **Sharing** on the left of the main RefWorks screen. From the options that open, click on **Folders at University of Oxford**.



- A list of available folders will appear along with details of each folder's owner. To join a particular folder, click on the grey **Join** button to the right of each folder.
- The folder will appear under the **Sharing** section of your RefWorks library.
- To remove a shared folder from your library, find the folder you don't want and click on the further options button.
- From the options that appear, choose **Leave shared folder**. RefWorks will ask you to confirm that you no longer want to have access to the shared folder.



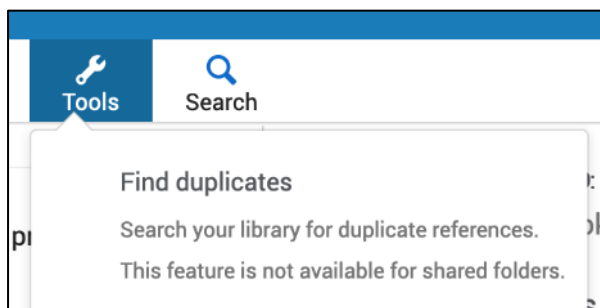
#### Finding and deleting duplicate references

RefWorks offer the functionality to search your references for duplicate entries. This might happen if you import the same reference on multiple occasions.

If you do not remove the duplicate reference it may appear in your bibliography twice, so it is important to remove additional entries.

#### *How to find duplicate references*

To find and remove any duplicates click **Tools** (or the spanner icon) and choose **Find duplicates**.



You can also click **Duplicates** and **Find duplicates** on the left-hand navigation pane.

If you are in **All References**, RefWorks will automatically search for duplicates in all of your references. If you are in one of your folders when you click **Find duplicates**, you will be asked whether you would like to find duplicates in all references or in a single folder or subfolders.

### Find duplicate references

☒ Current folder "OxAAA studies" and all subfolders

☒ OxAAA studies
☒ Book chapters
☒ Conference abstracts/posters
☒ Mentioned but not directly used
☒ Theses

☐ Only the current folder (excludes subfolders)
☐ Entire "Default project" project

You can decide the primary reference that RefWorks will keep – this can be the most complete reference, the oldest (added longest ago) or newest (added most recently). You will be able to override this for particular references if you wish to.

Primary reference determined by

Completeness (the reference that has the most information available)

**Completeness (the reference that has the most information available)**

Newest (the reference that was most recently added)

Oldest (the reference that was added first)

Next, decide on the matching settings. You can choose between **References must match exactly** and **References that are similar** (we recommend choosing References that are similar as different databases may format titles and author names slightly differently).

You can also choose which fields RefWorks will look at to find duplicates. The default is Title, Author and Year but you could also consider Journal Title and DOI.

Click **Find Duplicates**.



Matching Settings

References that are similar  
 References must match exactly  
**References that are similar**

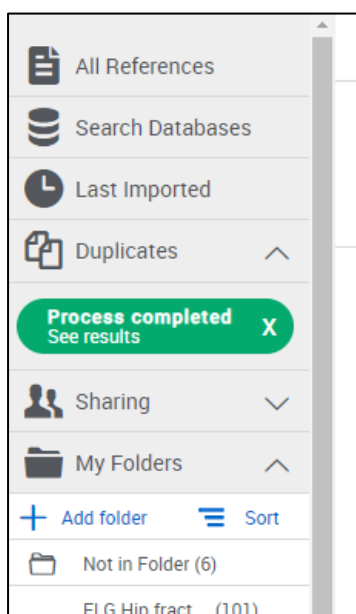
Note: If you select Year, ISBN, ISSN, DOI, Page Number, or Reference Type, close matches will appear for those references where an absolute match is found in the selected fields.

Select the fields you would like to use (only the selected fields will be considered when we compare references to find any duplicates):

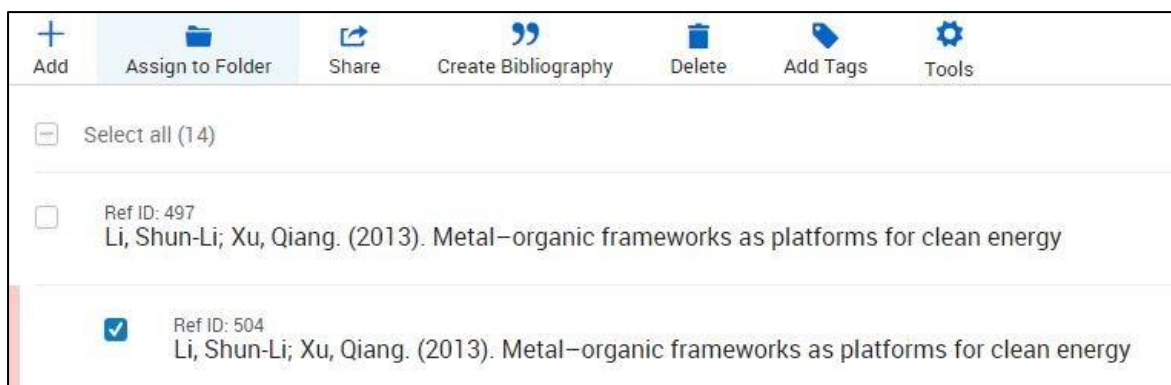
<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Author	<input checked="" type="checkbox"/> Year
<input type="checkbox"/> ISBN ⓘ	<input type="checkbox"/> ISSN ⓘ	<input type="checkbox"/> DOI ⓘ
<input type="checkbox"/> Page Number	<input type="checkbox"/> Volume	<input type="checkbox"/> Issue
<input type="checkbox"/> Journal Title	<input type="checkbox"/> Publisher	<input type="checkbox"/> Reference Type

**Find Duplicates**

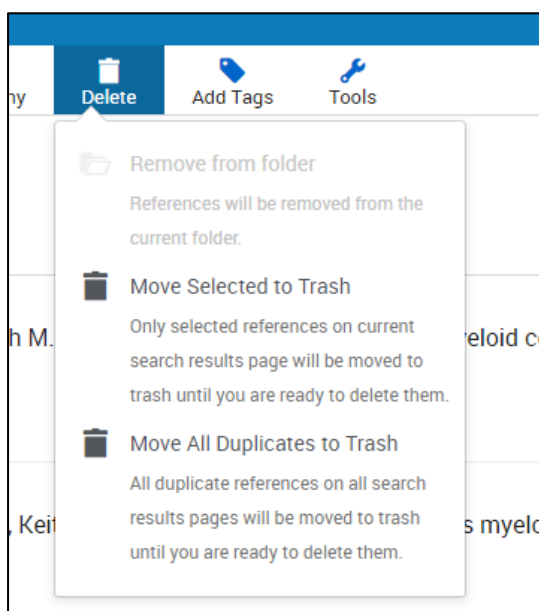
RefWorks will run the deduplication in the background and you can continue working while it runs. Depending on the number of references it is working on, this could take a few minutes. When it is finished, you will see a green button on the left-hand side saying **Process completed**. Click this to view the results.



RefWorks will then show you any duplicate references and you will be able to delete those you do not wish to keep. RefWorks uses the setting you chose earlier (completest, oldest, or newest) to determine which version it will keep, but you can use the tickboxes to delete a different version if you prefer.



When you are happy that you can delete the ticked references, click Delete and choose **Move Selected to Trash** or **Move All Duplicates to Trash**.



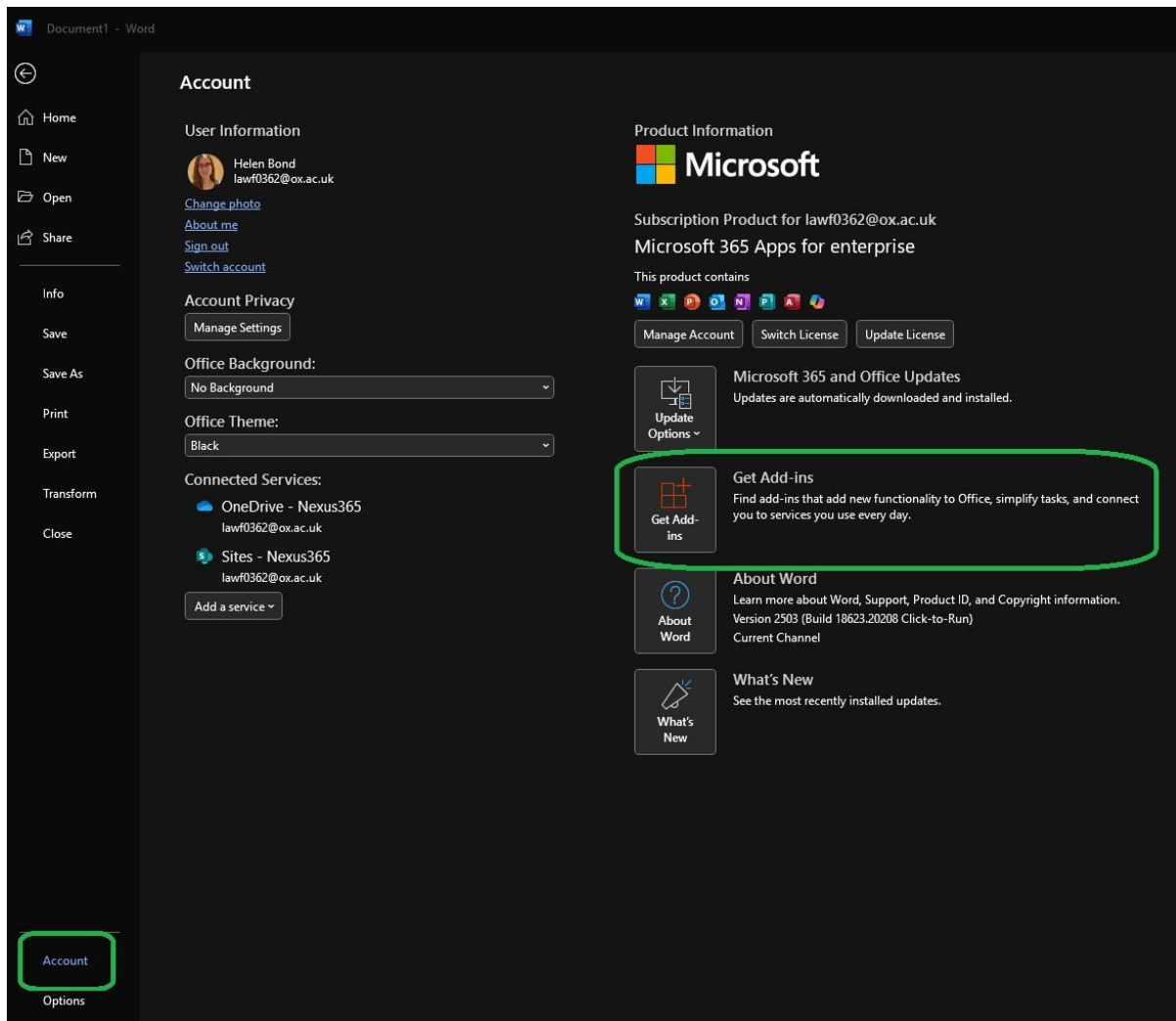
### Inserting references into a word-processed document

RefWorks enables you to insert references from your account into word-processed documents. RefWorks is compatible with Microsoft Word, on Windows and Mac computers, and Google Docs. You will need to install a piece of software called a plugin into the word processor so that it can connect to RefWorks. Instructions on how to install the plugin and insert references into your document are outlined below.

### Installing RefWorks Citation Manager in Microsoft Word and citing references

To access RefWorks Citation Manager (RCM), open your Word document.

Click on **File > Account > Get Add-ins**.



In the dialogue box that opens, conduct a keyword search for RefWorks and click **Add** next to the result named 'RefWorks - RCM'. Note, the older version of the plugin will appear as 'RefWorks Citation Manager' in the results list; do not select this option.

## Office Add-ins

MY ADD-INS | ADMIN MANAGED | **STORE**

Add-ins may access personal and document information. By using an add-in, you agree to its Permissions, License Terms and Privacy Policy.

Sort by: **Popularity** ▾

Category
  
All
  
Best Apps of the Year
  
Communication

**RefWorks - RCM**
  
Install new RefWorks Citation Manager for Word:
  
<https://appssource.microsoft.com/en-us/product/office>
  
**Additional purchase may be required**
  
★★★★☆ (5)

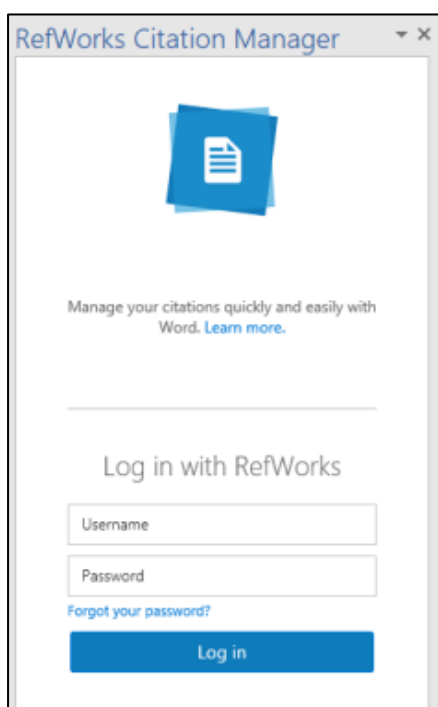
**Add**

If you don't see 'RefWorks - RCM' come up, try clicking the **Admin Managed** tab in the dialogue box where you will hopefully find the plugin.




After you install RCM, you can open it by clicking **RCM** in the ribbon at the top of Word and clicking **RefWorks Citation Manager**.

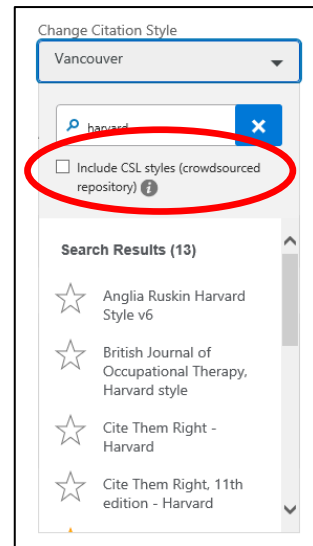
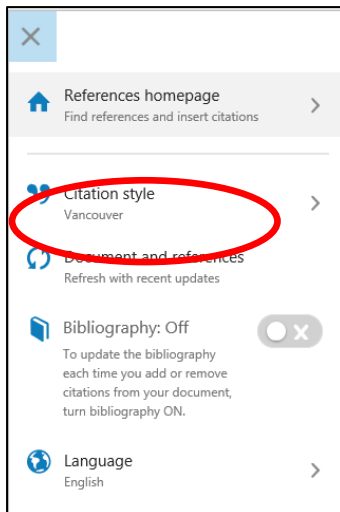
RCM will appear on the right-hand side of Word. Log in with your RefWorks username and password.



### *Choosing a citation style and inserting a reference*

Click on the  menu icon at the top of the RCM pane and choose **Citation style** to select the appropriate style for your work.

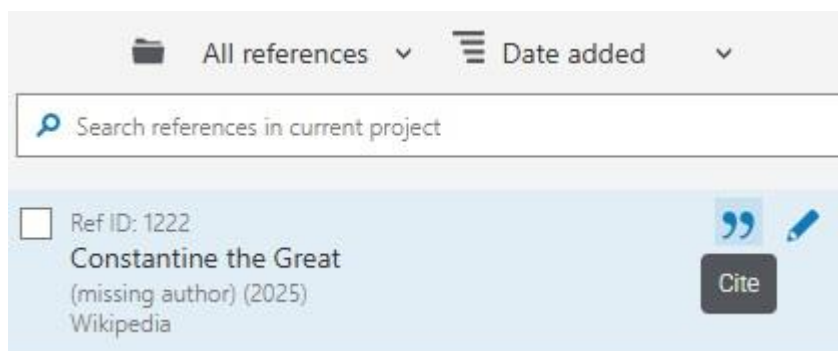
You should untick the box next to **Include CSL styles** – these are crowdsourced and may not work correctly.



### *Inserting citations (author-date style)*

Place your cursor in your Word document at the point where you would like to insert a citation.

Find the item you wish to cite in RCM. You can browse your folders or collections or search using keywords.



Once you have found the correct reference, click on the double quotation mark icon to insert the reference into the text.

### *Adding page numbers to a citation and suppressing author/date*

You can add page numbers whilst you are inserting the citation, or retrospectively.

### **Adding page numbers whilst inserting a citation**

Find the reference in RCM and click on **Edit this** instead of **Cite This**.

To add a page number, tick the top tick-box and make sure 'Page' is selected. Insert the page number into the 'Value' field.

☒ In-text ☐ Footnote

---

Preview ⓘ

(Thompson *et al.*, 2003, p. 25)

Ref ID 1221  
Information literacy meeting of experts : Prague, the Czech...  
Thompson,Spenser, Cody,Jill, United States. National Commis...  
(missing data)

☒

Page ▾

25 ⓘ

☐ Display as Author (Year)

☒ Include author

☒ Include date

Add prefix/suffix

prefix

 [reference] 

suffix

[Add reference\(s\) to this citation](#)

Delete Citation

Update Citation

Some citation styles do not support values such as page numbers in the citation. If the value does not appear, enter the page number in the **Suffix** box. You will need to enter a space first (so that there is a gap between the rest of the citation and the page number). Then add the page number using the abbreviations used by your citation style e.g. p. 65 or pp. 65-67.

You can also use this section to add a **Prefix**, for example, if you want your citation to read “see...”

When using an author-date style you can choose to hide the author's name or year if you have already mentioned these in the main text e.g. If your sentence reads "Brown established....", you may want to hide the author's name from the citation so that it is not repeated and reads "Brown established....(1984)". If so, untick **Include Author**. Similarly, you can untick **Include Date** if your sentence has already included the date.

You can preview your citation at the top of the dialogue box.

When you are ready, click **Insert Citation**.

### **Retrospectively inserting page numbers to a citation**

Find the citation in your text and click on it. This will bring the reference up in the RCM pane on the right of the screen.

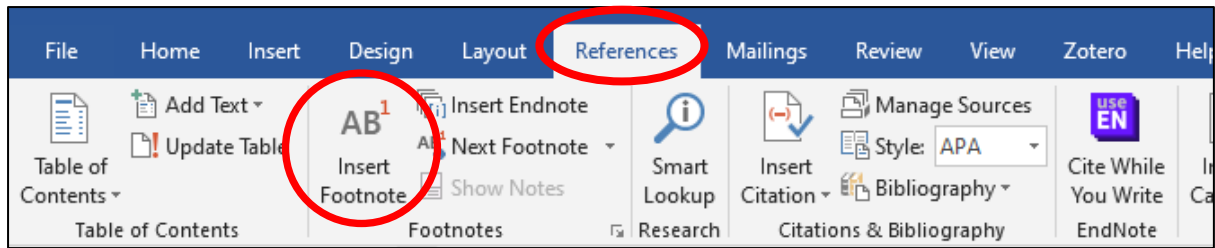
Follow the steps outlined in the section above.

### *Using footnotes*

Choose an appropriate citation style by clicking the menu icon in the RCM pane followed by **Citation style**, for example Chicago 17<sup>th</sup> Edition (Notes & Bibliography).

Tick the box next to **Format for footnotes**. If you do not do this, your citation will appear as footnotes but in author-date style.

At the point in your document where you wish to insert a citation, in Word choose **References** and then **Insert Footnote**. This will add a superscript number to your document and take your cursor to the bottom of the page.



Find the reference you want to cite in the RCM pane and choose **Cite This** or if you need to add page numbers etc. choose **Edit this**.

#### *Editing a reference*

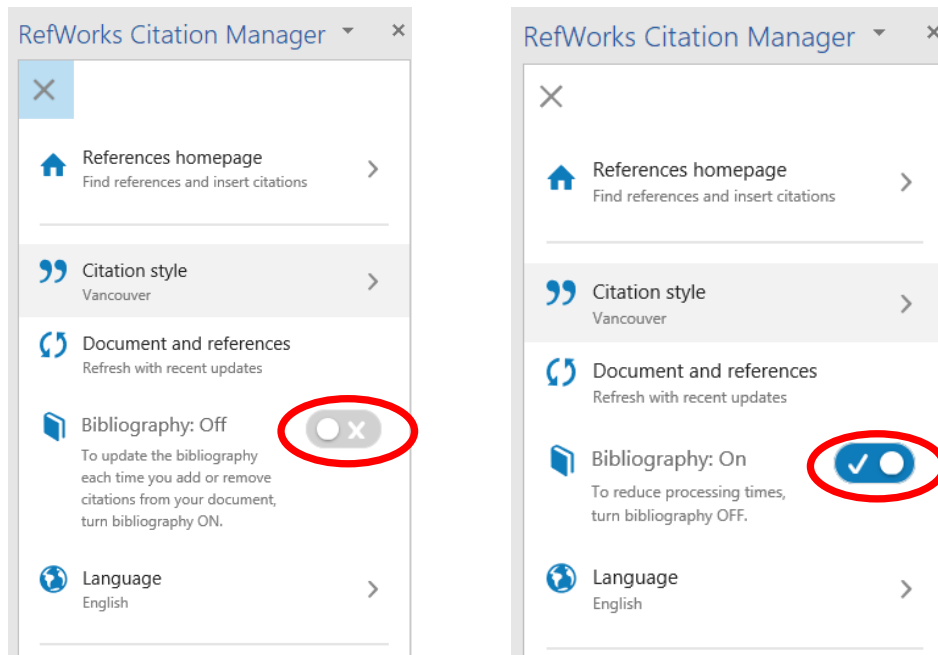
If you would like to edit a reference in any way (e.g. exclude the date, add a prefix), you can do this in two ways:

- 1) Click **My Citations** at the top of the RCM pane and click the pencil icon to edit the relevant citation
- 2) Click on the relevant citation in the text of your document, which will bring it up in the RCM pane.

#### *Generating a bibliography automatically in Word*

You can generate a bibliography while inserting citations by clicking on the RCM menu icon, scrolling down to **Bibliography** and clicking the slider to turn it on; or, complete adding your citations and then turn Bibliography on. A bibliography will be inserted into your document. To refresh your references and bibliography at any time, click the **Document and references** button.

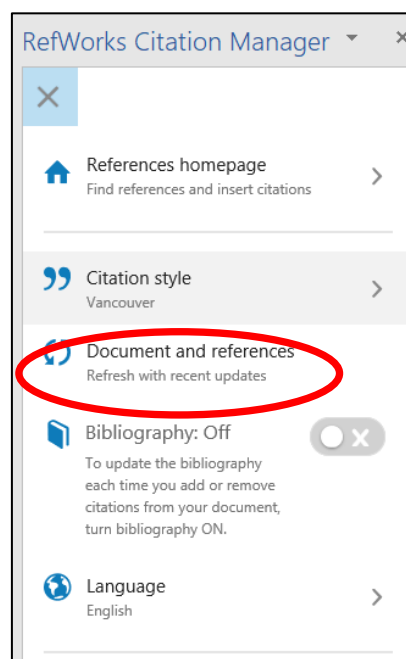




### *Correcting mistakes in your references*

If you spot an error with a reference (a typo or missing information), it is tempting to correct it in Word. However, these changes will be lost if you update your references or cite that source again elsewhere.

Instead, correct the error in RefWorks, and then click **Document and references** to refresh your Word document.



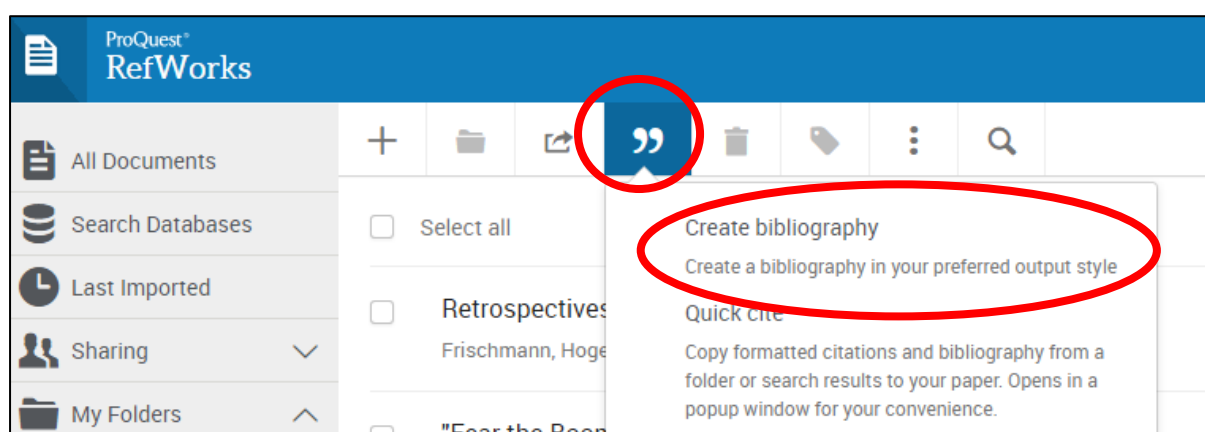
## Creating a reference list in RefWorks

Whilst generating a bibliography automatically in Word using RefWorks Citation Manager will provide a list of all works cited in your document, you may want to provide a list of all works you have read, not just those cited. This can be achieved in RefWorks.

If you have been adding your references to a particular folder in RefWorks as you imported them, it is very easy to create a bibliography of everything in the folder. You might do this to create a reference list with separate sections, such as primary and secondary sources.

Select the items you want to add to your reference list using the tick boxes. Alternatively, if you want to create a reference list of all the items in a folder, go to the **My Folders** dropdown menu on the left and click on the folder you wish to use.

Click the quotation mark symbol at the top of the list and choose **Create Bibliography**.



A reference list of your chosen items/folder will appear. This will be formatted either in the default citation style or if you have used **Create Bibliography** before, in the style you most recently used.

You can choose another style from the drop-down menu above the bibliography.

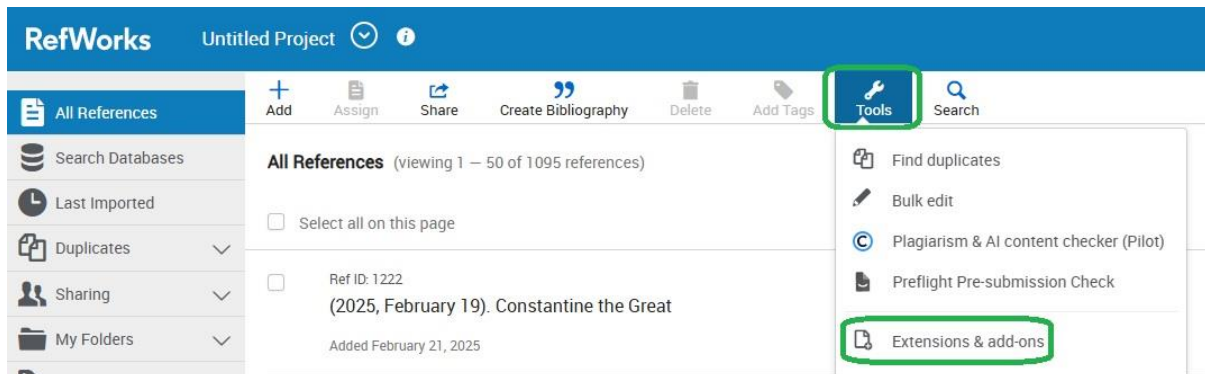


To copy and paste the reference list into a word-processed document, email or other application, click **Copy to Clipboard** on the right. Then paste it into Word or another application.

Installing RefWorks Citation Manager in Google Docs and citing references



*Installing Cite in Google Docs*

Log into RefWorks and click **Tools > Extensions & add-ons**.

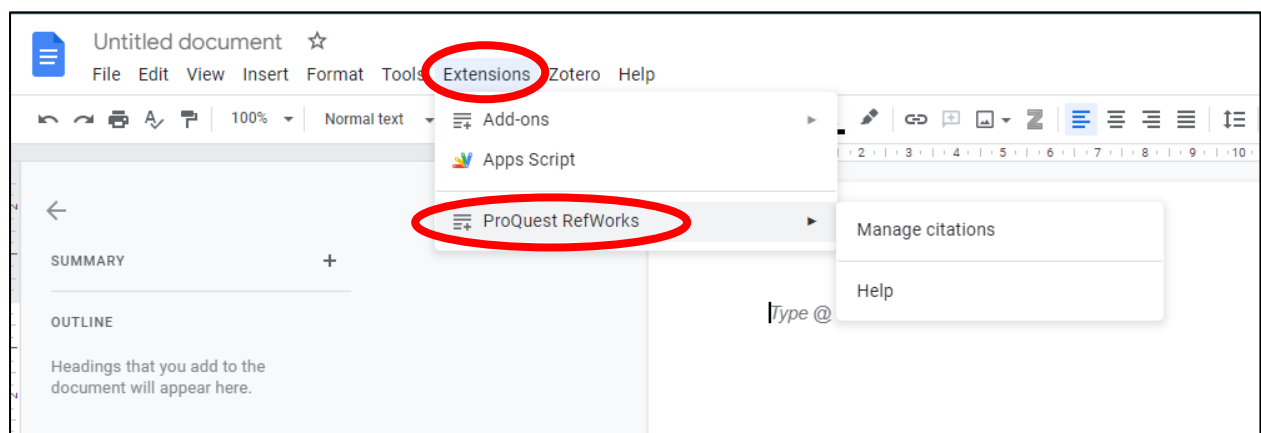


Under **RefWorks writing tools**, select the **Google Docs** tab.

Click **Get the Add-on**. Click **Install**.

You may have to click  **FREE**  . You will be prompted to log in with your Google username and password and will be asked to give ProQuest permission to access your Google account.

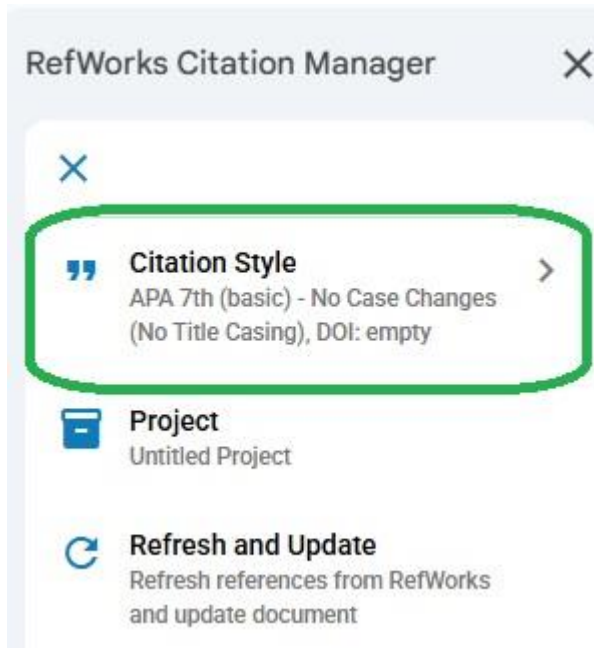
Once you have given permission, the **ProQuest RefWorks** option will appear in the **Extensions** menu in Google Docs.



### *Add citations to Google Docs*

To add citations to your Google Doc, hover over **ProQuest RefWorks** and click **Manage Citations**. A list of your citations will appear in a pane on the right of the screen.

To set the citation style, click the three-line menu button at the top of the pane and click **Citation style**.



Search for the citation style you wish to use (beware not to use styles that end with CSL. These are open-source styles that are not guaranteed to work or be accurate) and click **Apply style**.

You can search for a specific citation or browse your references. Make sure the cursor is where you would like the citation to be inserted. Once you have found the citation or citations you would like to insert, tick the box(es) to the left of the citation(s). A preview box will appear at the bottom of the pane. If you would like to add page numbers or suppress the author and/or year before inserting the citation(s), expand the citation in the preview box and edit the relevant options. Click **Insert citation** at the bottom of the pane to insert the citation into your text.

### *Using Quick Cite to create in-text citations, footnotes and bibliographies*

Quick Cite is a feature in RefWorks which allows you to quickly copy one or more citations. You might like to use this to paste a citation into an email, for instance.

Quick Cite can be used for in-text citations, footnotes and bibliographies.

The advantage of Quick cite is that you can use it with word processors (e.g. Pages) or other applications (such as email applications) that do not support RefWorks plugins.

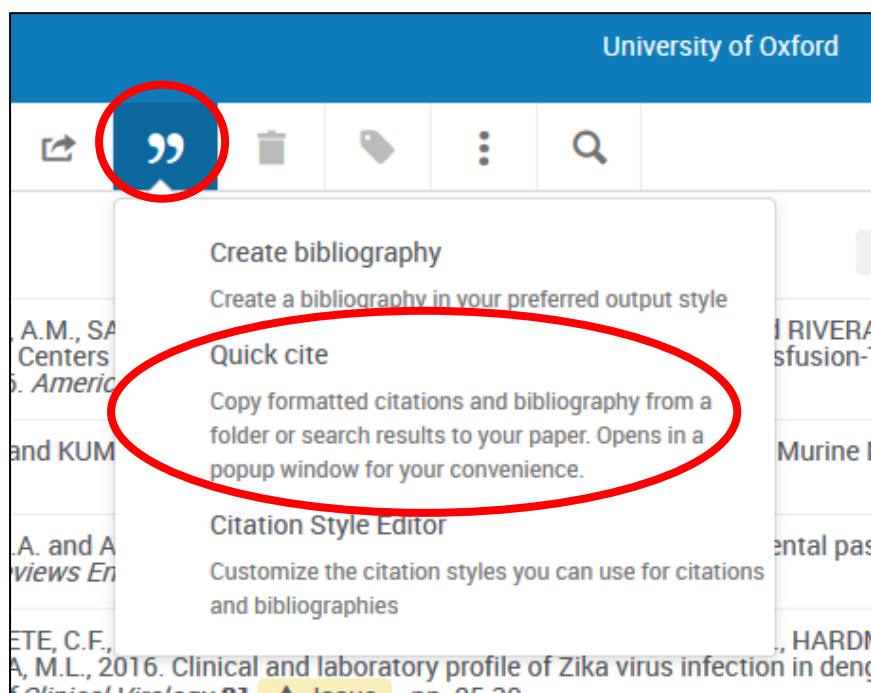
Note that when you use Quick Cite, you must add each reference you want one at a time and RefWorks will not automatically update in-text citations and bibliographies. Using Quick Cite is therefore not recommended for long or complex documents. It is also not recommended for styles that order the bibliography according to the order items are cited in the text (as opposed to alphabetical order). For these types of documents, consider instead using the plugins for either Microsoft Word or Google Docs.

### *Using Quick Cite*

Begin by logging in to your RefWorks account.

Select either a folder or **All References** for documents of interest.

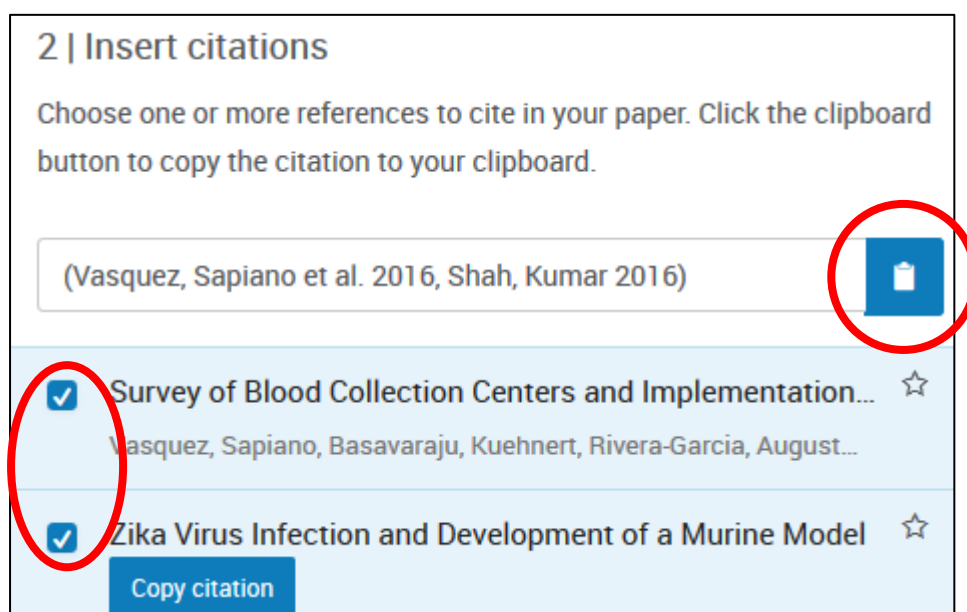
Click on **Create Bibliography** at the top of the screen and choose **Quick cite**.



In the window that opens, begin by selecting the citation style you wish to use. Untick the box next to **Include CSL styles** – these are crowd-sourced and may not work correctly. Click on **Continue....**

From the next screen, choose the document(s) for which you wish to create a citation and bibliography entry. Tick the check boxes next to the documents you want. As you do so, you will see an in-text citation created at the top of the screen.

Click on the clipboard icon to copy the formatted in-text citation to your computer's clipboard. You can now paste the citation into any other application you like.



When you have copied the in-text citation, click on **Continue to bibliography** at the bottom of the screen.

RefWorks will now provide bibliography entries for the reference. You can again copy and paste them into an application of your choice. To copy the references, click on **Copy to Clipboard** at the bottom of the screen.

To finish, close the window.

[Further help with RefWorks](#)

Reference management helpline supported by Bodleian Libraries and IT Services staff:  
[reference-management@bodleian.ox.ac.uk](mailto:reference-management@bodleian.ox.ac.uk)

Managing your References online guide: <https://libguides.bodleian.ox.ac.uk/reference-management>

Submit a case to RefWorks: <https://support.proquest.com/s/submit-a-case>

Use Help from the RefWorks menu