

RefWorks is a browser-based reference management tool. You can access it from any computer, but it has limited offline functionality.

It is easy to add references into RefWorks from many databases and catalogues and generate citations and bibliographies in a wide range of citation styles.

RefWorks works well with Microsoft Word and Google Docs but does not work with other word processors such as Open Office or Pages.

RefWorks is currently free to members of Oxford University members and alumni.

Which version of RefWorks?

There are currently two different versions of RefWorks available:



1. ProQuest RefWorks – This is the ‘new’ version of RefWorks launched in 2016. It is recommended for all those who are new to RefWorks.
2. Legacy RefWorks – This is an older version of RefWorks, no longer updated and due to be retired in June 2023. Users who have in-progress documents containing citations from Legacy RefWorks should complete them **before** migrating to ProQuest RefWorks. For more information see <https://libguides.bodleian.ox.ac.uk/reference-management/RefWorks>

Signing up

- Go to RefWorks at <https://refworks.proquest.com/>
- Choose **Create Account** and follow the onscreen instructions.
- Sign up with your Oxford email address – this will allow you to continue to use RefWorks after you leave Oxford. You can also use ‘login with your institution’ to sign in with your SSO, but this will need to be switched over to email before you leave Oxford and your SSO expires (more info here: <https://libguides.bodleian.ox.ac.uk/reference-management/RefWorks>)

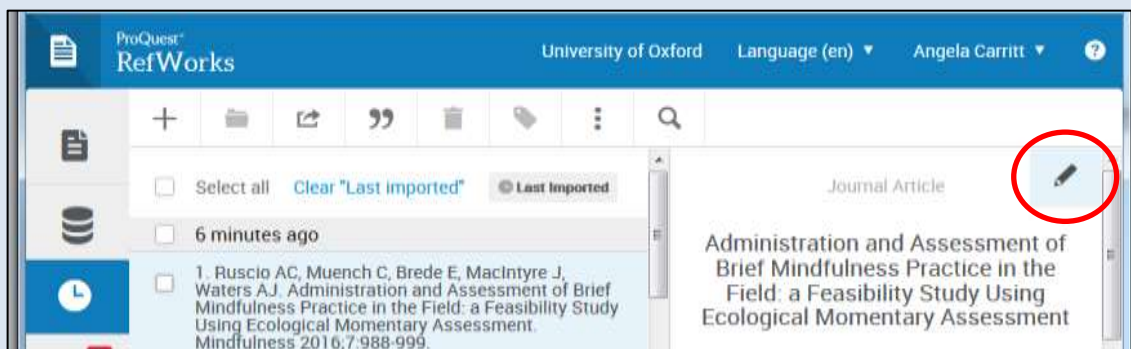
Adding references to RefWorks from databases and catalogues

Most major databases and library catalogues allow you to easily send references to RefWorks.

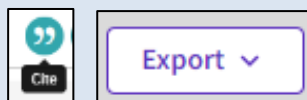
- Go to SOLO and search for a topic of your choice <http://solo.bodleian.ox.ac.uk>
- Select a few items from your results list using the tick boxes. 
- Select the three dots at the top of the results and choose **RefWorks**. 
- Select **Yes, export to the newest version of RefWorks**.
- Select **Import** and then **OK** when the references are imported.

It's a good idea to check the references are accurate, as sometimes information is missing or incorrect. This is particularly true of references to edited books.

Select the reference, then click the pencil icon to edit.



This method of adding reference to RefWorks will work for most databases: look for an export or cite button.



Try it with a database of your choice from <https://libguides.bodleian.ox.ac.uk/az.php> now.

Detailed instructions for many other databases are available at

<https://www.bodleian.ox.ac.uk/ask/workshops/reference-management-workshop-handouts#collapse3093781>



Adding references by dragging and dropping PDFs

- Drag a PDF from your computer into RefWorks.
- Drop the PDF onto the blue circle saying **Drop files here**.
- RefWorks will attempt to find a matching reference and add it to your Library. Check it as it may be missing key information.



Adding references using the 'Save to RefWorks' bookmarklet

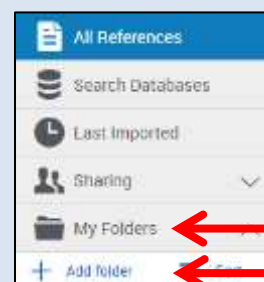
You can also add references to RefWorks using the **Save to RefWorks** browser bookmarklet. This is particularly useful if you want to add references from websites or blogs to RefWorks.

- Install the **Save to RefWorks** bookmarklet by going to RefWorks and selecting the **Tools** icon at the top, followed by **Tools**. 
- Select **Install Save to RefWorks**.
- Drag the **Save to RefWorks** button onto your bookmarks/favourites bar. You must have your bookmarks/favourites showing in your browser. 
- Whenever you want to add a web page or blog to RefWorks click **Save to RefWorks**. If you select **Save to RefWorks** on a page listing more than one item (e.g. a page listing search results), a dialogue box will appear prompting you to choose items to add to RefWorks. Check these references carefully!

Creating a folder and adding references to it

Organising your references into folders can help you to find them easily later on.

- Create a folder by selecting **My Folders** followed by **+ Add folder** and give the folder a name.
- You can drag and drop references into your new folder or use the tick boxes and select **Assign to Folder**. Each reference can be added to more than one folder and will always be in All References.



Adding documents to RefWorks and making annotations

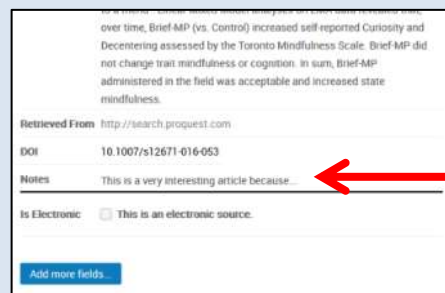
When you add references into RefWorks you will get bibliographic details (author, title, publication date etc.), but not the full text of the book or article. You can add documents to references in your RefWorks library, add notes, and annotate PDFs within RefWorks.

- Save the full text of an article to your computer.
- In RefWorks, select the reference you want to add the PDF to so that the full details appear on the right.
- Drag and drop the PDF over the right-hand pane. A blue circle will appear saying **Drop file here to add to reference**.
- To annotate the PDF, select **Read**. You can highlight and add comments.
- You can add other files like Word documents to a reference, but not annotate them.



You can also add personal notes about references within RefWorks:

- Select the pencil icon to edit a reference.
- Scroll down the reference to find the **Notes** field and add your notes.
- Click **Save** at the top when you are finished.



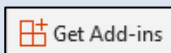
Creating citations and bibliographies

To insert in-text citations or footnotes in Microsoft Word or Google Docs you need to install different tools.

- Word 2016 or later: RefWorks Citation Manager
- Google Docs – ProQuest Refworks extension

RefWorks Citation Manager (RCM) for Word 2016 or later

- Download the RCM by opening Word and choosing **Insert**, then **Get Add-ins**. You may also need to click **Admin Managed**.




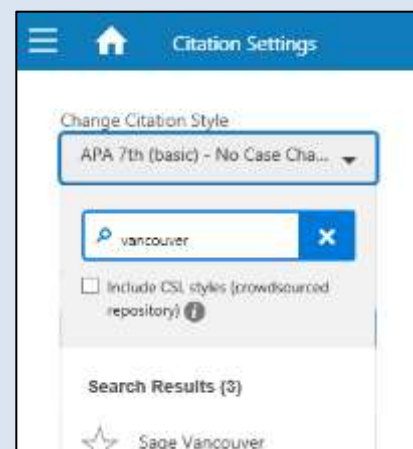
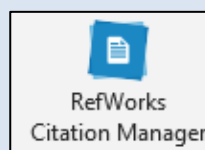
Search for RefWorks and click **Add**.



- RCM will appear on the top ribbon.

- Select **RCM**, then **RefWorks Citation Manager**, and log in with your RefWorks login.

- Choose a citation style by clicking the menu icon  and select **Citation style**. Search for the style you want (we recommend unticking **Include CSL styles** as these may not be accurate).



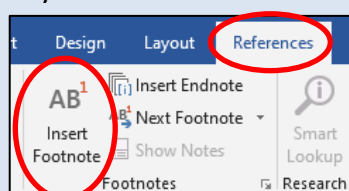
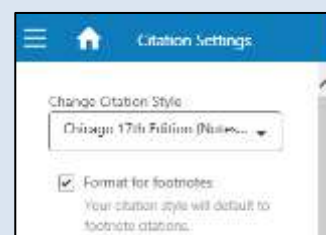
To add in-text citations

- Place your cursor in the text where you wish to enter a citation.
- Decide on a citation and select **Cite This** underneath to it, or tick several and select **Insert Citation**.
- You can add page numbers by choosing **Edit this**, adding the page numbers in the suffix and selecting **Update citation**. Or click the citation in the text to see options to edit.



To add footnotes

- You will need to select a citation style which uses footnotes. Select the menu icon, select **Citation style**, and choose a suitable style, e.g. Chicago 17th Edition (Notes & Bibliography). Tick the **Format for footnotes** box.
- Place your cursor in the text where you wish to insert a footnote.
- In Word choose **References**, then **Insert footnote**. This will add a superscript number to your document and take your cursor to the bottom of the page.

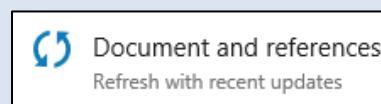


- Search for a citation and select **Cite This** next to the reference you want, or tick several and select **Insert Citation**.
- You can add page numbers by choosing **Edit this**, adding the page numbers in the suffix and selecting **Update citation**. Or click the citation in the text to see options to edit.

Correcting errors

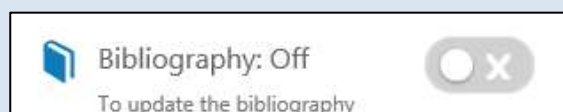
If you need to edit a mistake in a reference, you need to do this in RefWorks in your browser, not in Word. If you make the correction in Word, it will be overwritten by RefWorks the next time RefWorks syncs.

Once you have made your correction in RefWorks, you can update your references in Word by selecting the menu icon and selecting **Document and References**.



Creating a reference list/bibliography

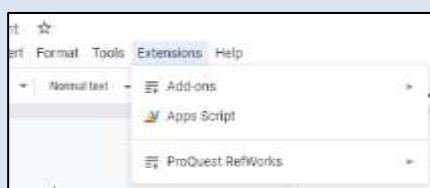
To create a list of your references at the end of your document, select the menu icon and select the slider next to **Bibliography: Off**.



Using RefWorks in Google Docs

- Go to RefWorks <https://refworks.proquest.com>
- Select the Tools icon and choose **Tools**.
- On the Tools page select the **Google Docs** tab.
- Select **Get the Add-on**. This will take you to the ProQuest RefWorks extension on Google Workspace Marketplace.
- Select **Install**. 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.

- In Google Docs, you will now see ProQuest RefWorks under Extensions.



- To add citations to your Google Doc, go to **Extensions**, then **ProQuest RefWorks**, and select **Manage citations**. A list of your citations will appear in a bar on the right of the screen.
- To set the citation style, select the cog icon and select **Change citation style**.
- Search for the citation style you want and select **Update**.
- Once you have found the citation you would like to insert, hover over it and choose **Cite this** or **Edit and Cite** to add page numbers first.
- A bibliography is automatically added at the end of the document.

Creating a standalone bibliography

If you are writing a document in software which doesn't support RefWorks, or would like to copy and paste some references into an email, you can create a standalone bibliography in RefWorks in your chosen style.

- Go to RefWorks <https://refworks.proquest.com>
- Choose the references that you want to include in your bibliography by selecting them using the check boxes. To create a bibliography of all the references in a folder, click on the name of the folder (or for your entire library choose **All Documents**).
- Select **Create Bibliography** and then **Create Bibliography**.
- A bibliography will appear on screen. To change citation style, click on the style menu at the top of the screen. When you are ready, select **Copy to Clipboard**. You can then paste the bibliography into a document or email.

