
Managing References

Adding References

Finding References to Add to RefWorks

To search for references to add to RefWorks use any of the following workflows:

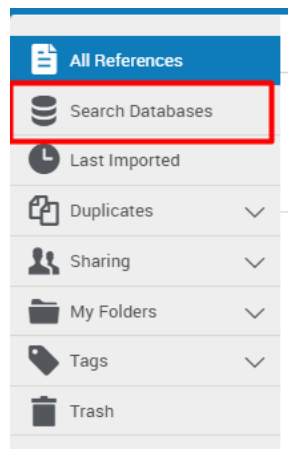
- If you have references in files (PDFs, Word Documents, videos, etc.), you can upload them to RefWorks (see [Uploading Files as References](#)).
- Add references to RefWorks directly from websites using direct export (where supported) or use the Save to RefWorks bookmarklet. See [Save to RefWorks](#).
- From within RefWorks, you can search an external database for references, if enabled by your institution. See **Search Databases** below.
- You can add references from folders that are shared with you by other users. See [Working with Shared Folders of References](#), below.
- When configured by your institution, you can search for references in your local library catalog. When you find an item in your library's catalog that you want to add to RefWorks, select **Send to > RefWorks** on the item page, or download the reference and upload it to RefWorks. To open your library's catalog from within RefWorks, select **Add > Create New Reference** and in the Reference Details, select **Find full-text using link resolver** (your institution may have renamed this link).
- When configured by your institution, you can search for reference information at [Unpaywall.org](https://unpaywall.org). Unpaywall link appears for references where DOI is present and located in the Unpaywall database. Depending on reference in Unpaywall, link will offer a new webpage with information or start PDF download.

Searching an external database from within RefWorks

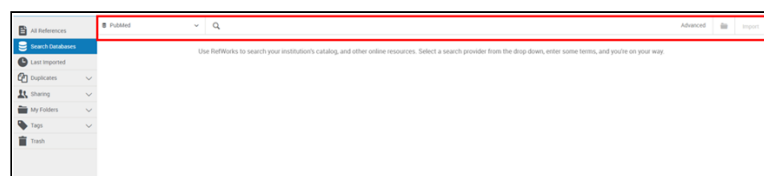
Note

The Search Databases option does not appear if disabled by your admin.

1. Select **Search Databases** in the Reference Organization area. RefWorks replaces the Reference Actions area with a search bar.



Search Databases option



Search Databases

2. Select the database from drop down. You may search for database if not automatically listed. This field uses auto-complete.
3. Use the basic search to search all fields, or select **Advanced** to search in specific fields.
4. Select anywhere in a result to view details about the reference in the Reference Details. To add results as references, select one or more results and click **Import**. If you have multiple projects, references will be added to your current project. References are added to the Last Imported tab. To add the selected references directly to a specific folder, select the folder icon and the folder name.

Adding References from bX Recommender

In Normal or Citation view, you can check the "Related articles" tab in the Reference preview pane, select desired articles, and import them. You can also assign them to a folder and avoid duplicates during import.

Ref ID: 156
Journal Article | Electronic

Video-based self-assessment: implementation and evaluation in an undergraduate nursing course

Reference details **Related articles** ⓘ

Select all 10 articles

Video-based self-assessment: implementation and evaluation in an undergraduate nursing course.
MS, Yoo.
Nurse Education Today. 2009-08-01, Vol. 29(6), p. 585-589

First-year medical students' assessment of their own communication skills: A video-based, open-ended approach
Zick, Amanda.
Patient Education and Counseling. 2007, Vol. 68(2), p. 161-166

Vital signs.
Rose, Louise.
The American journal of nursing. 2010-05, Vol. 110(9), p. 13-13

Novice to expert advanced practice nurse role transition: guided student self-reflection.
Latham, Christine L L.
The Journal of nursing education. 2006-01-01, Vol. 45(1), p. 46

Nursing students' self-evaluation using a video

Related articles - in reference preview pane

Ref ID: 156
Journal Article | Electronic

Video-based self-assessment: implementation and evaluation in an undergraduate nursing course

Reference details **Related articles** ⓘ

Import References

Select a folder to import 2 selected references.

Assign to Folder(s)

Not in folder ▼

Ignore duplicates ⓘ

Powered by  Recommender

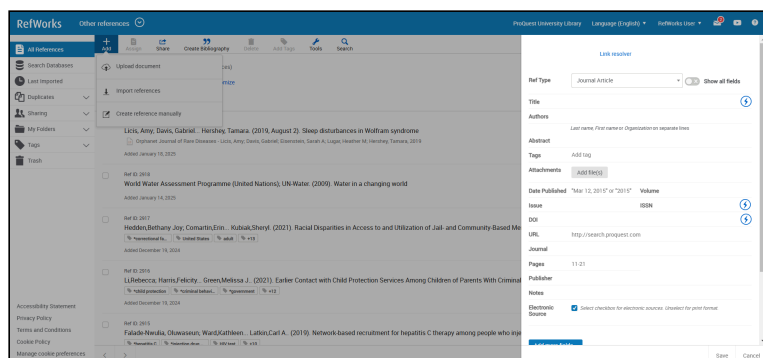
Note

bX Recommender searches for related articles based on Journal Article Ref Type only.

Manually Adding References

To manually add a reference:

1. Select **Add > Create New Reference**. The Reference Editor appears.



Reference Editor

Note

To add a reference directly to a folder, select the folder in the Navigation area and then select **Add > Create New Reference**.

2. Select the reference type. The remaining fields on the sidebar change depending on the type you select.
3. Enter a title or as much of the title as you can. You can optionally select the

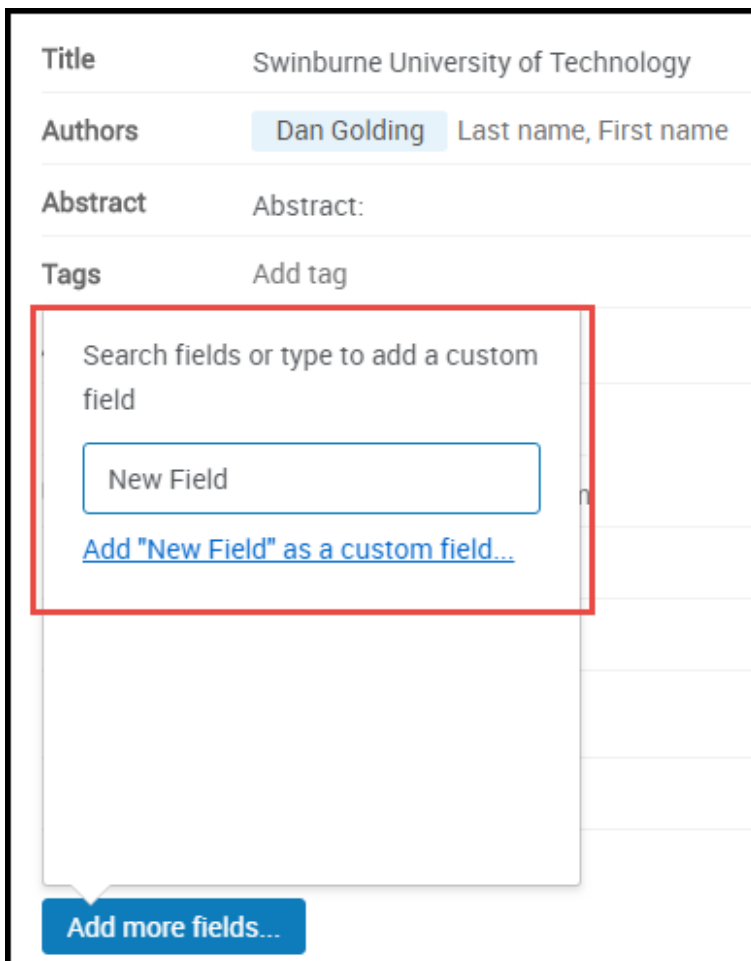


button in the **Title** field to have RefWorks match the title with an item in the library. This button is also available after you enter a value in the **DOI** field, which appears for most reference types (select **Add more fields** to see this field, if it is available), as well as for the **ISSN/ISBN** fields. RefWorks shows possible matches at the bottom of the Reference Editor. If you select one, RefWorks completes the title and fills the fields with information from the library. If no suitable match is found, you can enter the rest of the metadata manually.

Note

When clicking on **Title** in the suggestion list, the contents of the reference will be replaced. When clicking on ISSN, ISBN or DOI, the contents of the reference will be supplemented. We recommend [duplicating a reference](#) before using the **Title** look up, to prevent any data from being overwritten.

4. If your reference is a file on your computer, or you have any other associated information in a file, drag and drop the file to the Reference Editor or select **Add an attachment** to upload the file. For a list of supported file types, see [Valid Attachment File Formats](#).
5. Enter any required tags for this reference. If any tags currently exist for other references, you can select them. Tags are used for filtering references on the **Tags** tab in the Navigation area; see [Organizing References by Tags](#).
6. Fill in as many of the remaining fields that you can.
 - For more information, see [Editing References](#).
 - If you have defined any custom fields (see [Configuring Basic Information](#)), you can select **Add more fields** to add them to the reference and then enter values for them.
 - You can also create and add custom fields while creating or editing the reference. Enter the custom field name in **Add more fields** and select **Add "..."** as a custom field.



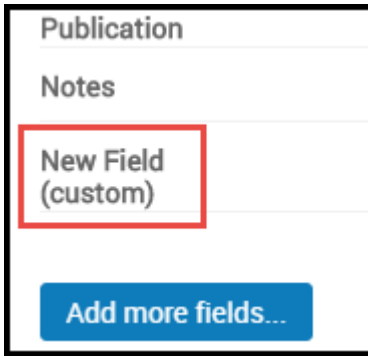
The screenshot displays the Reference Editor interface. The main form has the following fields:

- Title:** Swinburne University of Technology
- Authors:** Dan Golding (Last name, First name)
- Abstract:** Abstract:
- Tags:** Add tag

A modal dialog is open, titled "Search fields or type to add a custom field". It contains a text input field with the text "New Field" and a blue button labeled "Add 'New Field' as a custom field...". At the bottom of the main form, there is a blue button labeled "Add more fields...".

Add Custom Field

The custom field is saved and added to the reference. The custom field is now available to be added to all references.



New Custom Field

7. When you are finished, select **Save**.

Uploading Files as References

To upload files to RefWorks:

Either drag and drop a file into the Main area or select **Add > Upload Document** and select the file. The file can be in any format.

The file uploads as a reference with type **Generic**. RefWorks attempts to automatically extract as much information as it can from the uploaded file. Edit the reference to correct and complete the information.

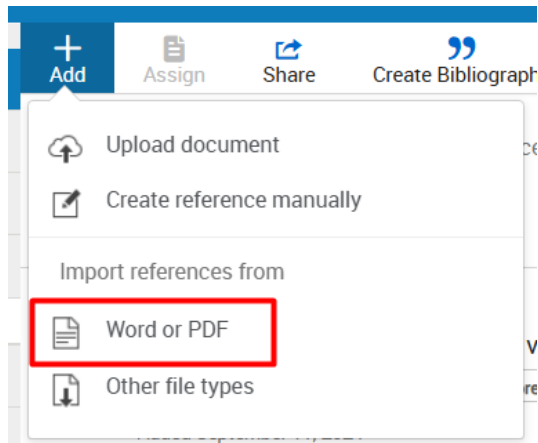
If you drag and drop multiple files at one time, a reference is created for each file.

Importing References

Users can import references from any reference management service. You can import directly from Mendeley. For other services, such as Zotero, you can import a file that you have exported from that service.

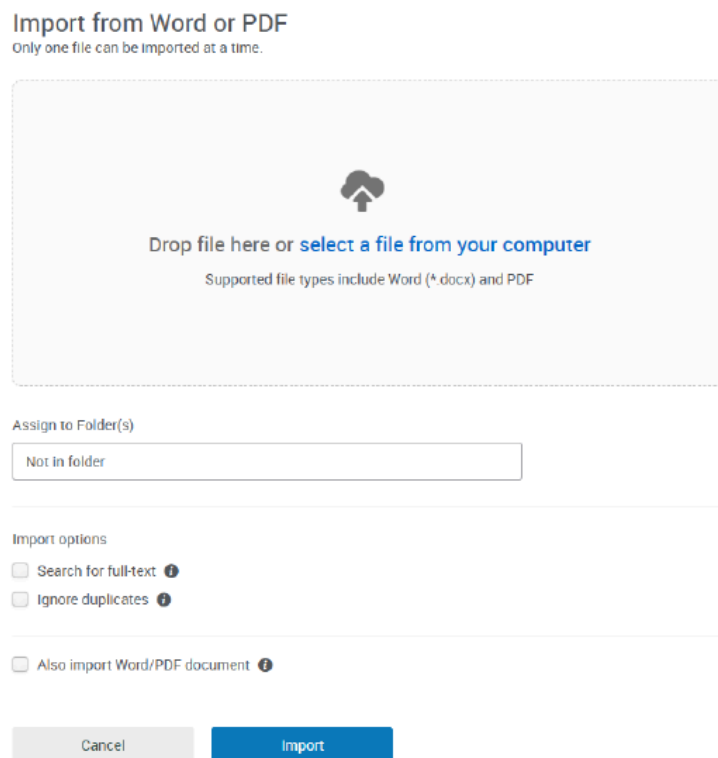
Importing references listed in Word or PDF document

1. Select **Add > Word or PDF**. You will be directed to the Import from Word or PDF page.



Add menu Word of PDF option

2. On the Import from Word or PDF page, RefWorks will recognize your file format. Here you can choose if you would like to **Search for full text** and **Ignore duplicates** during import. You may also choose to import your document, which will create a separate reference with the attachment included.



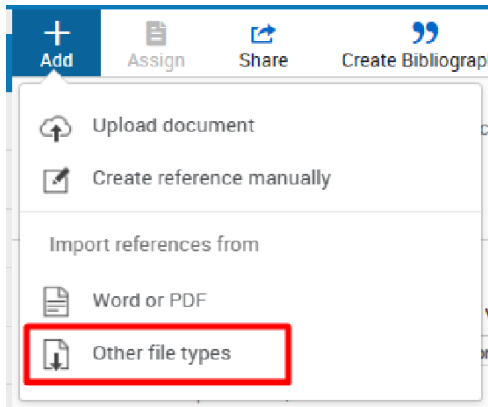
Import from Word of PDF screen

Note

Read more about [Importing References from Word or PDF Files into RefWorks](#)

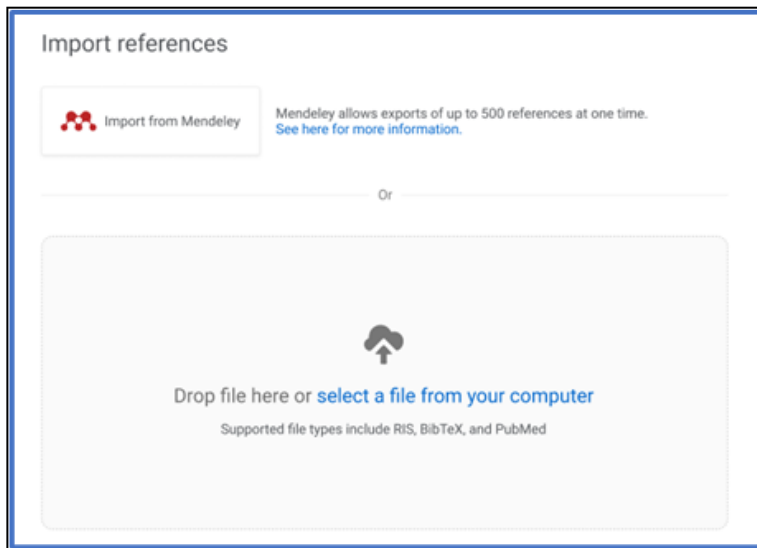
Importing references from files

Select **Add > Other file types**. You will be directed to Import references page.



Add menu **Other file types** option

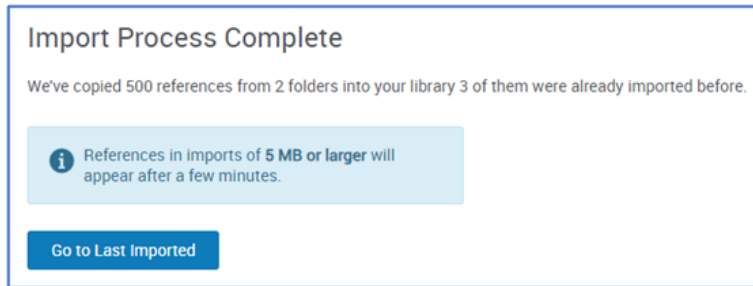
Import references page



Import references page

To import references from Mendeley:

1. Select the **Import from Mendeley** button and **Authorize** on the following page.
2. Sign into your Mendeley account and the import process will be initiated.
3. The "Import Process Complete" message will inform you how many references were copied. Your Mendeley library will not be altered.



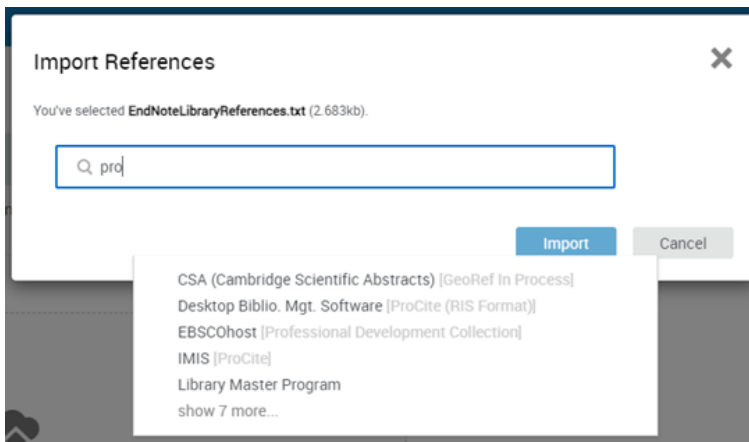
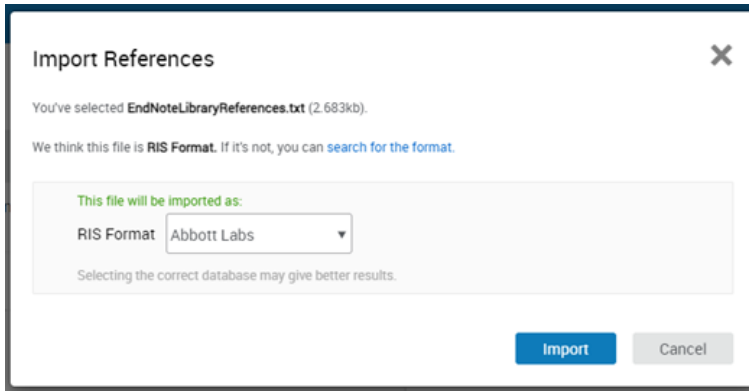
4. Select **Go to Last Imported** to view imported references.

Note

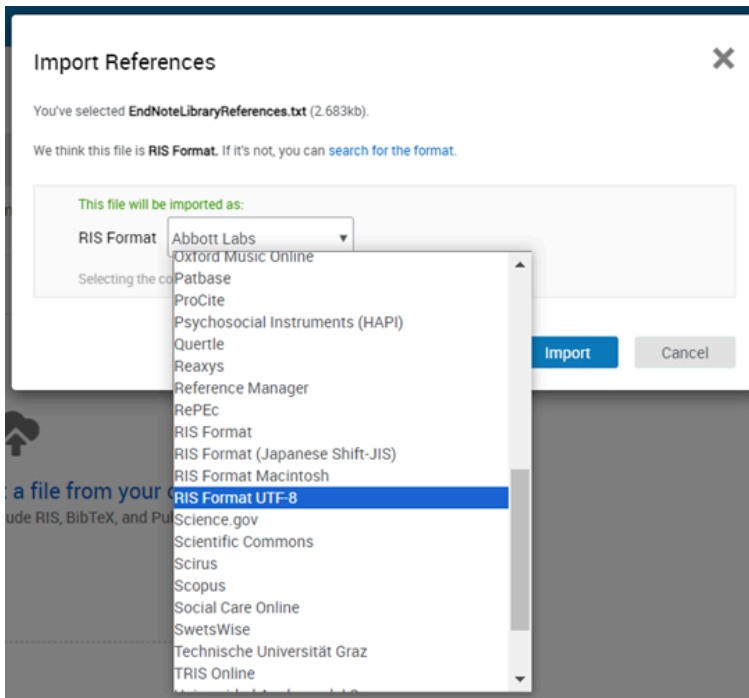
Mendeley allows exports of up to 500 references at one time and does not retain folder structure. [See here for more information.](#)

Importing from a reference management services, or database

1. Export a file from that service to one of the following formats: NLM PubMed, RefWorks Tagged, RefWorks XML, RIS or Web of Science. For example:
 - **Zotero**: Select references and select **Export Library** from File menu or **Export Items...** from the right-click menu. Select the **RIS** format and save the file. Import the file into RefWorks.
 - **EndNote**:
 - Select **Edit > Output Styles > Open Style Manager** and select **RefMan (RIS) Export**.
 - In your library, select the references, select **File > Export**, and save the file as **RefMan (RIS) Export**.
 - **ReadCube**: From the library view, select the article or articles, select **Export to RefMan (RIS) file** from the right-click menu, and save the file.
 - **Papers**: In your library, highlight the references, select **File > Export ...**, select **Refman RIS**, and save the file.
 - **PubMed**: Do one of the following:
 - Select the references that you want to exportOR
 - Select to export all references. Select **Save**. Select the **RIS** format and then select **Create File**. Save the file to your computer.
2. **Drag and drop** a file from your computer or select the **select a file from your computer** option and choose a file to open.
3. On the Import References modal, RefWorks will recognize your file format and ask how you would like your file imported.
 - i. If you would like to change the format, select the **search for the format** option.



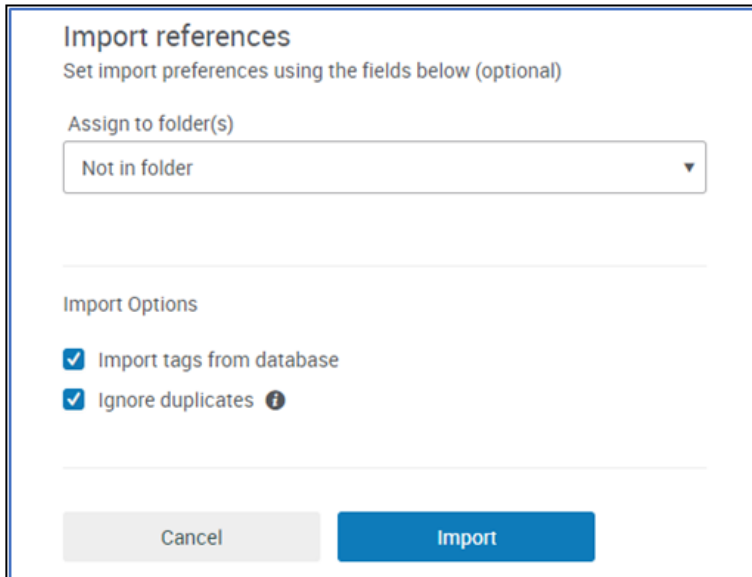
ii. Choose your format from the dropdown.



iii. Select **Import**.

iv. You can assign references to a folder, or create a new Folder, by selecting the drop-down arrow next to Not in

folder. Select if tags should be imported and whether duplicate references should be ignored. Deduplication during import is based on Exact Match for: Author, Title and Year. It is based on the same algorithm as [Finding Duplicate References](#).



Import references
Set import preferences using the fields below (optional)

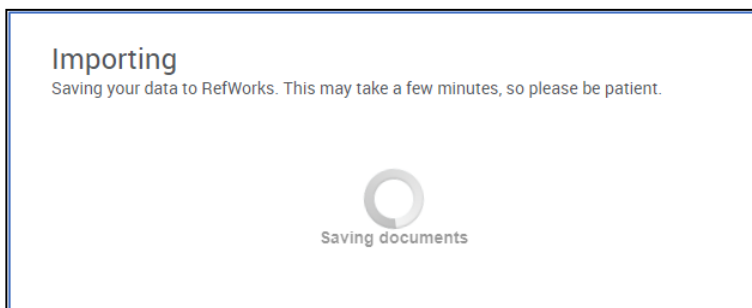
Assign to folder(s)
Not in folder ▼

Import Options

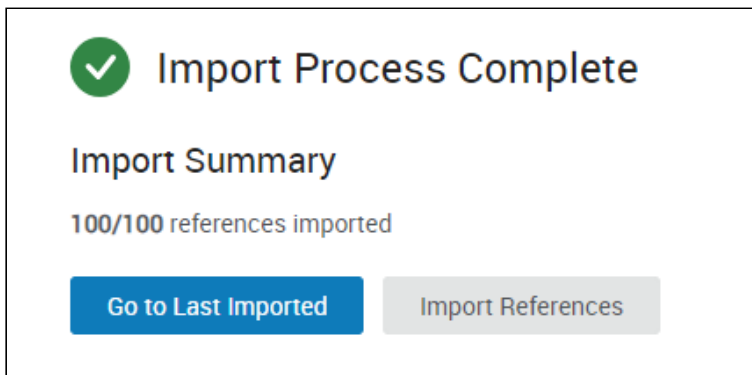
- Import tags from database
- Ignore duplicates ⓘ

Cancel Import

- v. Select **Import**.
- vi. If you are importing a large file, you may see the Importing page.



- vii. The **Import Process Complete** page will appear when the process has completed.



Import process complete confirmation page

Note

References in imports of 5 MB or larger will appear after a few minutes.

Adding References via My Research

See [here](#) for details on adding references via My Research.

Organizing References

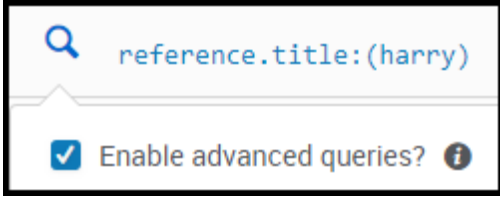
Viewing Your References

You can view a list of your references, a subset of your references, folders of shared references, or deleted references by searching, or by selecting the relevant tab in the Reference Organization area (see [RefWorks User Interface](#)). Each reference includes a unique reference ID (Ref ID).

Your options for viewing references include the following:

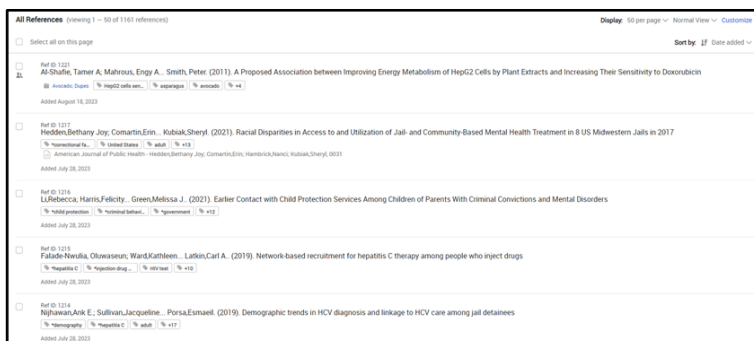
Reference View Options

View	Description	Sortable
All References	All records available in your RefWorks library except those placed in the Trash folder.	Yes
Search Databases	Search area to discover items in external databases. Visible if enabled by Institutional Administrator.	No
Last Imported	References added within the last 30 days. Select Delete to remove references. They are still available in My Folders (if they were previously placed there).	Yes
Duplicates	Find and/or remove duplicate references. See Finding Duplicate References. See last results of your most recent duplicates search.	No
Sharing	References shared with you. See Working with Shared Folders of References .	Yes
My Folders	References in a specific folder or subfolder, or Not in folder. Subfolders can be nested up to three levels, for example: main > sub1 > sub2 > sub3.	Yes
Tags	Search for tags in this area. After selecting a tag, the encoded query string that matches references associated with that tag displays in the basic search box.	Yes
Trash	Deleted references are moved to the Trash folder. You can restore references using the Undo action. To permanently remove a set of references, select the relevant references and select Delete > Delete selected, and then select Yes in the confirmation dialog box. To remove all references, select Delete > Delete all.	Yes
Search	Use the basic search to search all fields, including text in an attached PDF (provided the PDF is properly OCR'd). In the basic search, enter a tag name or any search string. After entering your search criteria, your search appears as an encoded query string in the basic search box and the matching references display in the center pane. Use Advanced for a more customized search such as searching in specific fields, or folders, or by entering an encoded query string. If advanced queries are enabled, the search text appears in blue.	Yes

View	Description	Sortable
	 <p>Enable Advanced Queries You can enter an encoded query string directly in the basic search field. For example, to search for a reference that is not in a folder and that contains the author "Rowling" and the tag "mandatory", the search string is <code>_missing_:collectionIds (authors:(rowling) reference.tags:(mandatory))</code>. For a list of how to format an advanced query, see RefWorks Reference Fields and Types.</p>	

The number of references which appear on the page is displayed at the top of the page. You can change the number of references displayed per page, and switch between view options. Select **Customize** for Normal and Full views to display the Folders and Tags checkboxes. Clearing the checkboxes hides the folders and tags from the list of references. Pagination on the bottom of the page enables you to move between reference pages.

- **Normal view** – A minimalist view. Each reference's associated folders and tags display, whether the reference was added by another user, as well as an icon if access to the full text is available. Users can see when the reference was Added or last Modified, depending on which view criterion is applied: *Date added*, or *Date modified*.



References Normal View

- **Table view** – Another minimalist view. References display in a table for easy sorting. Table View does not allow for sorting by Date added. When switching to Table view from any other view which displays Date added, references will be resorted by Date. All visible columns, except for Issue and Pages enable sorting in the table header row.

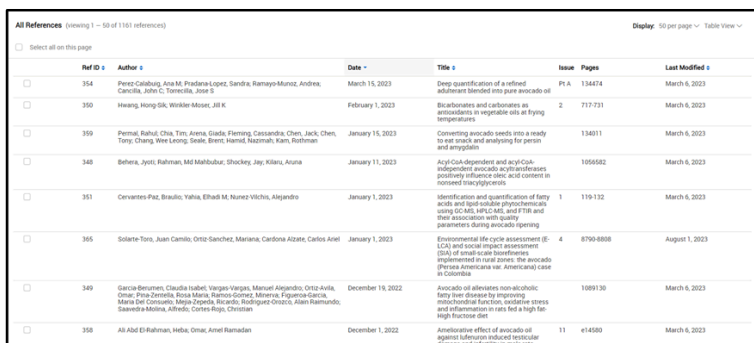


Table View

- **Full view** – An expanded view with details, displaying Date Published, Date Added and Date Modified, regardless of

which criterion is applied. Select a tag to refresh the page with all references associated with the tag. Select the text link to view the full text, if available. Select any other field to open the Reference Editor and edit that field.

Full View

- **Citation view** – A bibliographic view. References are displayed in chosen citation style. Select the gear icon



in the view options menu to select your preferred style.

RefWorks highlights missing fields that are required or recommended by the selected citation style. Select the highlighted area to open the Reference Editor and edit that field.

Citation View

Note

If you display a large number of references on one page, especially if you use full view, RefWorks may take a while to display the reference list.

Accessing Full Text from RefWorks

When viewing a reference with electronic access to partial or full text, you can access it from the Reference Details. This may be access to the text within the library or on an external site, or the uploaded file.

Generic

Rethinking Challenges in Games and Stories

Rethinking Challenges in Games and Stories
Ernest W. Adams
 2007 Game Developers' Conference

[Read](#)

This is an approximate transcript of the text of my lecture at the 2007 GDC on March 9, 2007. I present it in this form because the nature of the original document is that it is not a verbatim transcription.

Adams-Ernest Rethinking Challenges in Gam...

Introduction

I'm bad at a lot of video games. I realize that by admitting this, I've probably destroyed my credibility with some of you, and those people should go ahead and leave. But the truth is, a lot of games are simply too hard for me and I'm not ashamed to admit it. The problem is produced

Authors
Ernest W. Adams

Tags
add tags

Reference Details

When viewing a list of references in full view, select the text link (if available) to view the text.

Harry Potter and the spectre of imprecision

Reference Type Journal Article

Authors Stone

Publish Date 2010

Journal Analysis

Volume 70

Issue 4

Pages 638-644

URL www.jstor.org

Tags add tags

ISSN 0003-2638

Publisher [Analysis Committee, Oxford University Press]

Date Retrieved August 7, 2018

Rethinking Challenges in Games and Stories

Reference Type Generic

Authors Ernest W. Adams

Tags add tags

Attachments [Adams-Ernest Rethinking Challenges in Games and Stories.doc](#)

Full View: Links to URL and Uploaded File

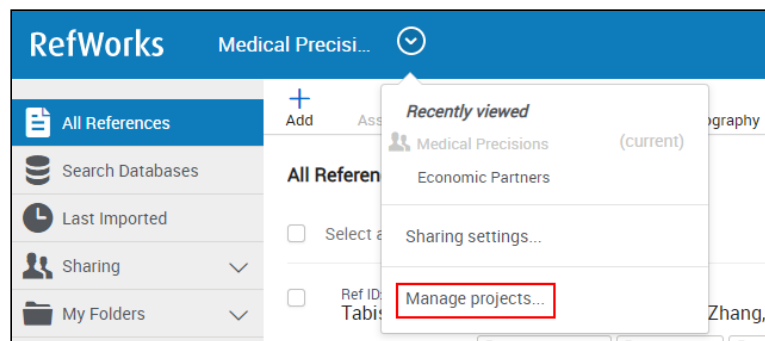
For some references, such as uploaded PDF files and HTML pages, full view of the reference is provided directly in RefWorks. The RefWorks reader enables you to download the document, and for PDF files, it enables you to highlight text passages, and add comments and notes.

Organizing references with Projects

You can create projects in RefWorks. Projects enable you to maintain separate reference collections for different research projects.

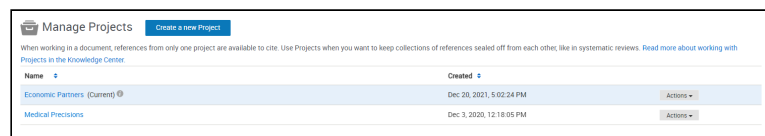
To manage projects:

1. Select the arrow next to your project in the header and select **Manage projects**.



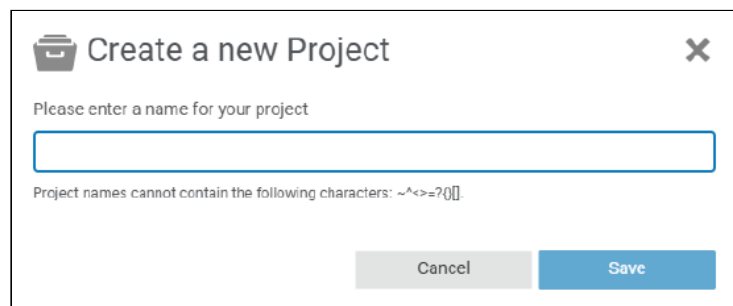
Manage projects

The My Projects page appears:



My Projects

2. To create a new project, select **Create a new Project**. The following appears:



Create a new Project modal

1. Enter a name for the project
2. Click **Save**. Now the project is added to the list of projects. You can navigate between projects from the Project Menu at the top of the page.
3. To rename or delete a project select **Actions > Rename** or **Actions > Delete**.
4. To set a project as the current project:

Perform one of the following to set a project as the current project:

- From the Manage Projects page, select **Actions > Set as Current Project** for the project.
- Select the project name. The project is set as the current project and its page is opened.

The following import options are available with Projects:

When searching in a database and using the **Direct Export to RefWorks** feature and in **Save to RefWorks (StR)** you can select one or more Project(s) to import.

Import references
Set import preferences using the fields below (optional)

Select a Project
Animals

Assign to Folder(s)
Not in folder

Remove

Select a Project
Main Research

Assign to Folder(s)
Not in folder

+ Add to another project

Import Options

Import tags from database
 Search for full-text ⓘ
 Ignore duplicates ⓘ

Cancel Import

Import into multiple Projects

Sharing Projects

You can share your projects with other users of RefWorks. This gives them full permissions within the project, including adding, deleting, and modifying folders and references. Any shared owner of the project can delete the project, as long as it is not the current project of any shared owner.

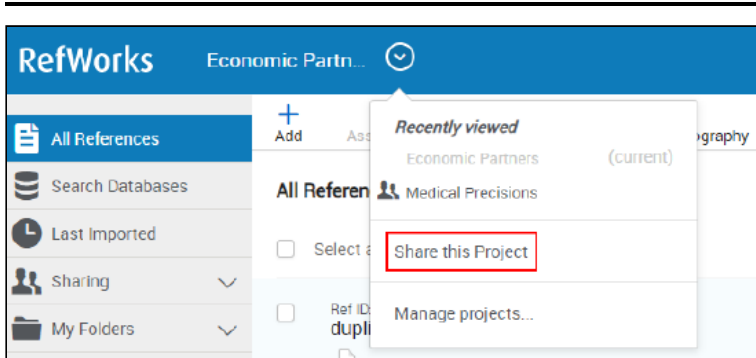
Sharing a project enables you to work collaboratively with other project owners when using RefWorks Citation Manager (RCM). A document with citations from the shared project can be emailed between users to which each owner can contribute. Each collaborator works on the document separately and then emails it to the other owners for further work, rather than multiple users simultaneously editing the document.

Note

Reference IDs within a project are unique. Therefore, when you add a reference to a shared project, it may receive a RefID that is not consecutive to the last RefID of a reference you created.

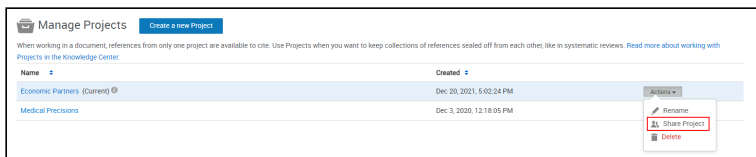
You share a project by selecting **Share this Project**:

- From the Project Menu:



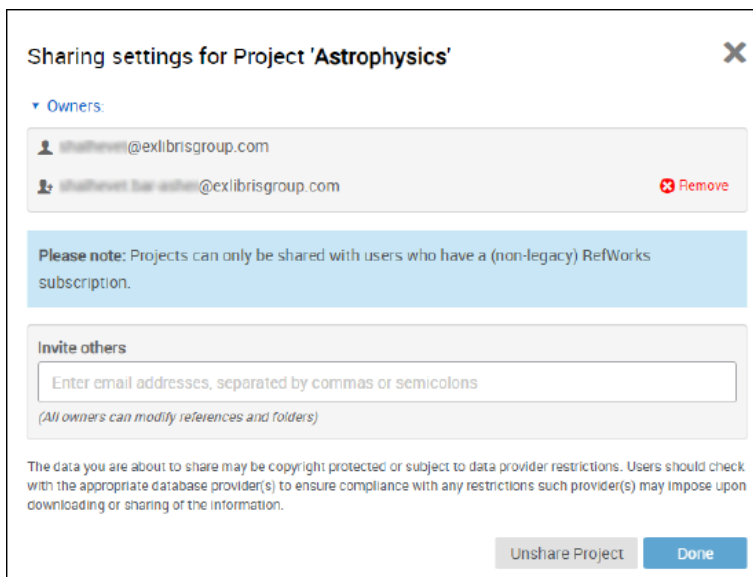
Share Project from Project Menu

- From a project's **Actions** button on the My Projects page (**Project Menu > Manage Projects**):



Share Project from Action Button

The Project Sharing Settings page appears, displaying the people with whom the project is shared.



Project Sharing Settings

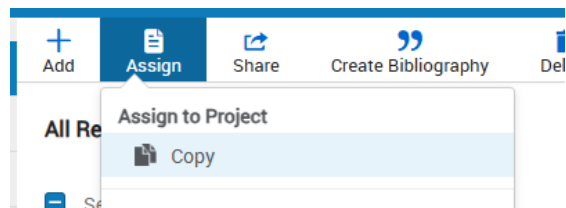
The following actions are available from this page:

- To share the project with a member, enter an email address in the **Invite Members to Join** field and select **Done**.
- To unshare the project with a member, select **Remove** next to the member's email address and select **Done**.
- To unshare the project with all members, select **Unshare Project**.

To copy references or copy/move Folders from one Project to another:

To copy references from one Project to another Project:

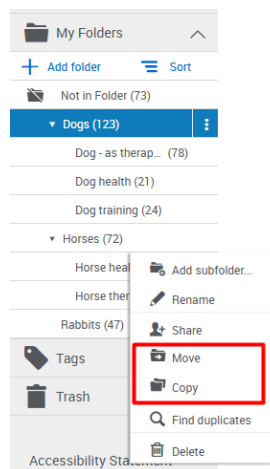
1. Select the references you would like to copy to another Project.
2. Navigate to **Assign** action.



3. Under Assign to Project, click **Copy**.
4. In the the *Copy selected references to another project* modal, select which Project you would like to copy references. You may choose to select current Project, this will duplicate your selected references in the same Project, with new Ref IDs and click **Copy**.
5. Your selected references are unchanged in your current Project and are now created as new references in your destination Project; they are assigned new unique Ref IDs.

To copy/move Folders from one Project to another Project:

1. In My Folders section, click on the three dots *more options...* next to Folder name and click to either **Move** or **Copy** action

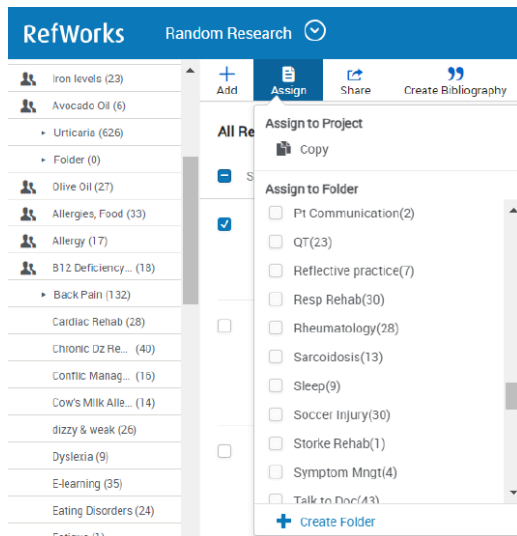


2. Follow steps in modal to complete copy or move actions.
3. When moving folder from one Project to another, references in current Project will remain, but they will no longer be assigned to the Folder you are moving.
4. When Copying Folder, the Folder remains unchanged in original Project and is created new in destination Project. References in destination Project will be assigned new unique Ref IDs.

Organizing References by Folders

To manage the folders for one or more references:

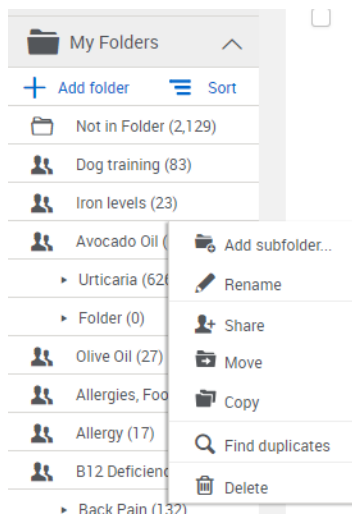
Select the references and select **Assign**. You can assign the selected references to an existing or new folder or remove them from a folder. You can also copy selected references to another Project.



Assign References Options

Folders appear in the **My Folders** tab in the Navigation area. The number of references in a folder appears after each folder name.

When the **My Folders** tab is expanded, you can drag and drop references to a folder. In addition, you can use this area to add a folder or a subfolder, or rename, delete, or share a folder. You may also Move or Copy the folder to another Project or Find Duplicates in the folder. There is no limit for number of folders, but subfolders can be up to three levels deep, for example: main > sub1 > sub2 > sub3.



Additional Folder Actions

Organizing References by Tags

To manage the tags for one or more references:

Select the references and select **Add Tags**. You can associate the selected references with an existing or new tag or remove their association with a tag.

Use the Tags tab on the left navigation menu for quick search.

Use Bulk edit to change Tags info for multiple references at once.

Use Advanced search to find references based on Tags details.

You can also manage tags when editing a reference in the Reference Editor.

Editing References

- **To edit a single reference - normal view:** Select the reference in the Main area. This opens the reference details in the Reference Editor. Select the edit icon

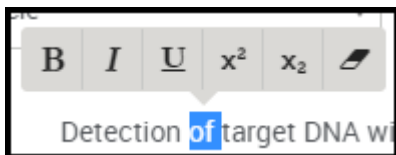


, edit the reference, and select **Save**. If you have defined any custom fields (see [Configuring Basic Information](#)), you can add or edit them as well. For more information, see [Manually Adding References](#).

When configured by your institution, you can add full text to a reference by searching for the reference in your local library catalog. When you find an item you want to add to RefWorks, select **Send to > RefWorks** on the item page, or download the text and upload it to the reference. To open your library's catalog from within RefWorks, when editing the reference select **Full Text Search** (your institution may have renamed this link).

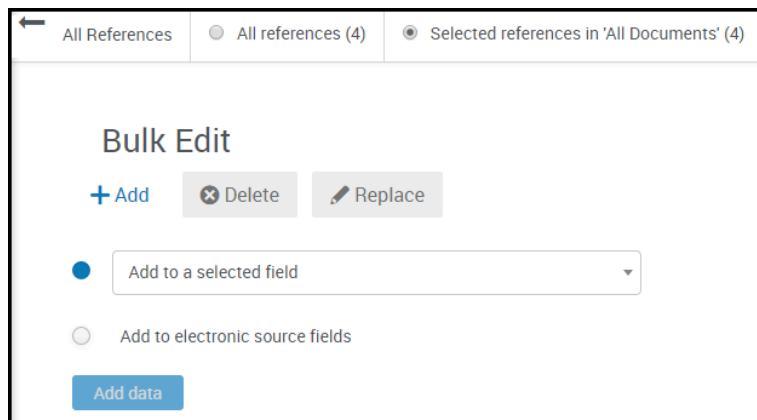
- **To edit a single reference - full or citation view:** Select any field in the reference to open the Reference Editor directly in edit mode (you do not have to select the edit icon).

A rich-text edit bar is available when you select contents within certain text fields (including **Title**, **Alternate Title**, **Abstract**, **Notes**, and any custom fields that you added to RefWorks).



Rich Text Edit Bar

- To edit references in bulk:
 1. Select one or more references and then select **Tools > Bulk Edit**. The Bulk Edit page appears.



Bulk Edit

2. Optionally, select to edit all references and not only the references you selected in step 1.
3. Select whether to add a field, delete a field, or replace part of a value in a field.
 - Add: either add a field or add to the electronic source fields.
 - Add a field: select **Add**, select the field name, enter the value, and select what to do if the field already contains a value: leave the value alone, overwrite the value, or append the new value to the existing value. You cannot append a date field. Select **Add Data** and select **Yes** in the confirmation dialog box.
 - Add to the electronic source fields: select **Add**, select **Add to electronic source fields**, enter values for **Source Name**, **Source DB**, **URL**, and/or **Date Retrieved**. Select what to do if the field already contains a value: leave the value alone, overwrite the value, or append the new value to the existing value. Select **Add Data** and select **Yes** in the confirmation dialog box.
 - Delete: select **Delete**, select the field, select **Delete Data**, and select **Yes** in the confirmation dialog box.
 - Replace: select **Replace**, select the field, enter the string to replace - you can select whether to match case and/or match a whole word only - and the new string, select **Replace Data**, and select **Yes** in the confirmation dialog box.

Note

You cannot use regular expressions of any kind in either string: only simple text strings. Every instance of the matching string in the selected field is replaced with the new string.

Duplicating References

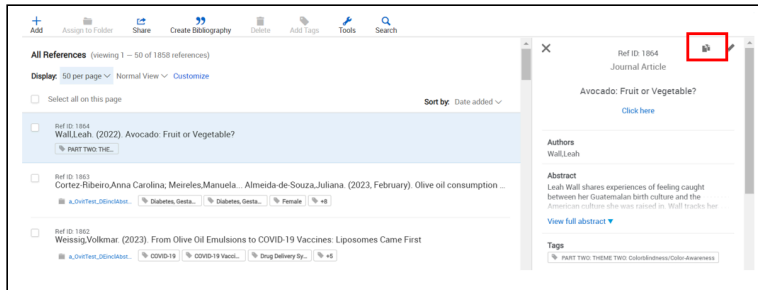
If you are working on several sections is the same source material, it is helpful to be able to duplicate a reference to save time and only have to change a few fields.

Note

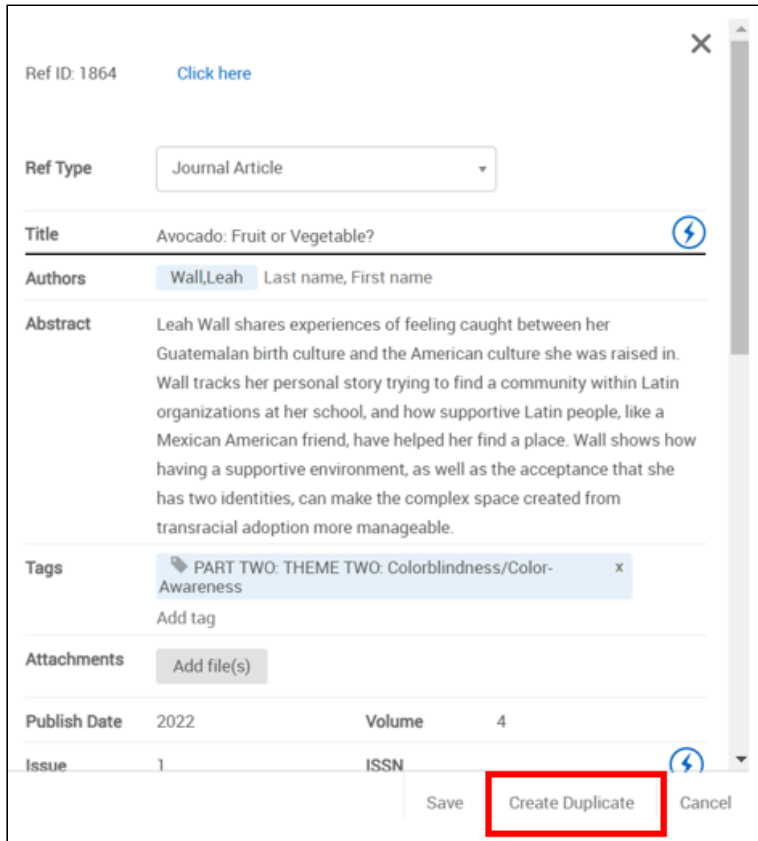
Attachments are not automatically duplicated and must be attached, if needed.

To duplicate a reference:

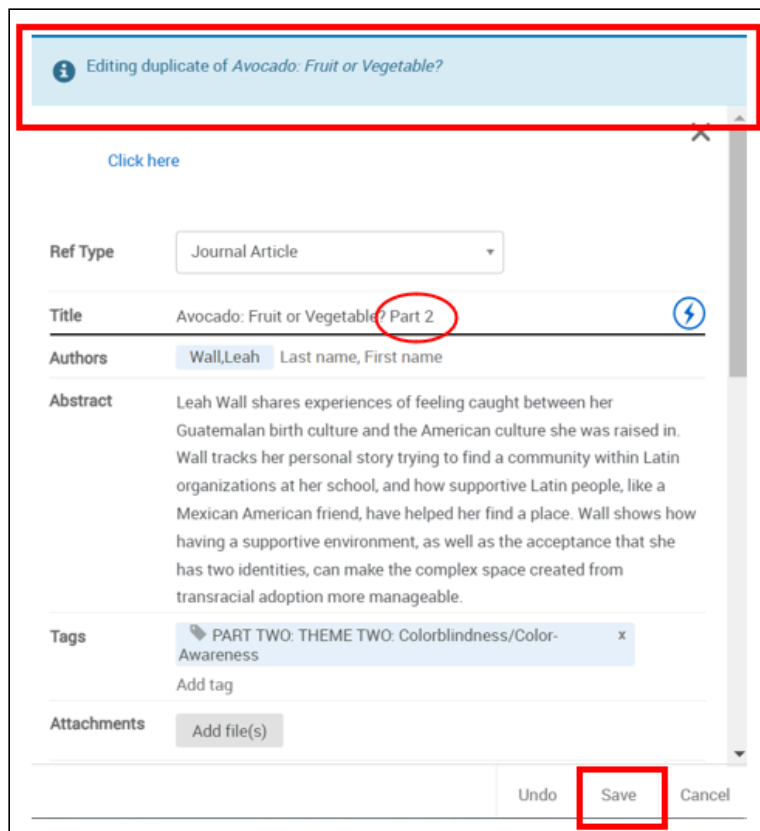
1. Select the reference you would like to duplicate.
2. In the Reference pane, click on the **Create a duplicate** icon.



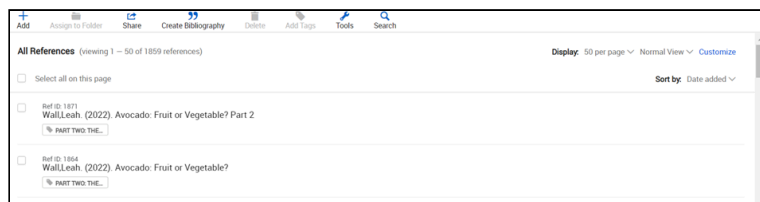
You may also create a duplicate by opening the **Reference Editor** pane and clicking on **Create Duplicate**.



3. Make changes to any field in the **Reference Editor** and click **Save**.



4. Your reference is now duplicated with changes you have made.



Finding Duplicate References

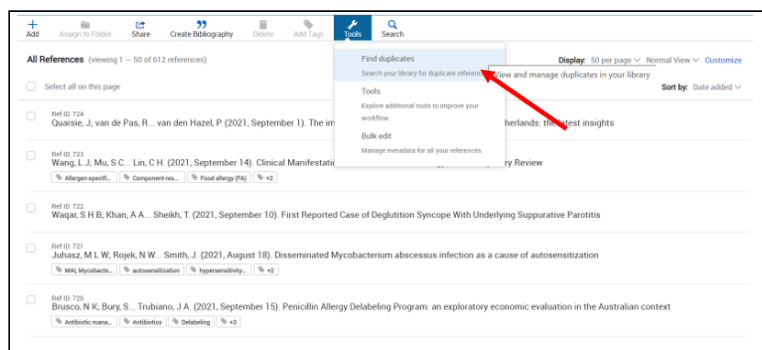
If you have many references or you have added references in bulk from several sources, it can be helpful to have RefWorks find any duplicates in your collection..

Note

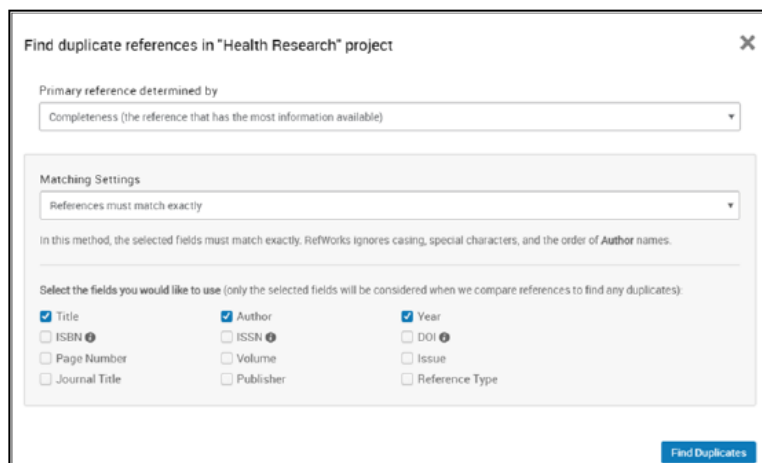
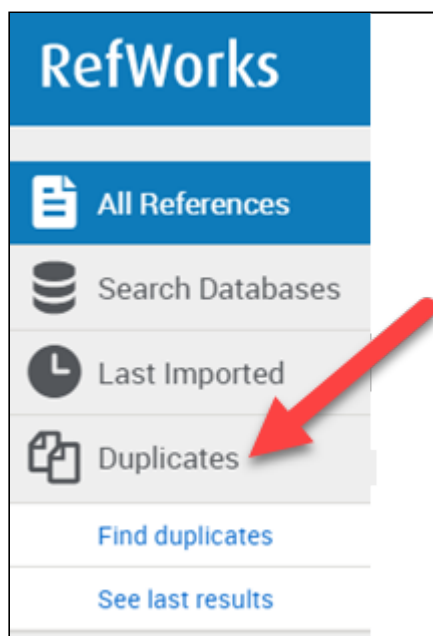
- When searching for duplicates in entire Project, folders you own are included in the search, but folders shared with you by another owner are omitted. You may search within each shared folder to find duplicates.
- Find Duplicates is available in shared folders when the user has “can modify” access. When searching in shared folder, you can delete duplicates and the folder will then be updated with your changes for all users with access.
- RefWorks will display up to 100 original references per page in search results, plus all associated duplicates.

To find duplicate references:

1. When in a **Project** select **Tools > Find Duplicates**.



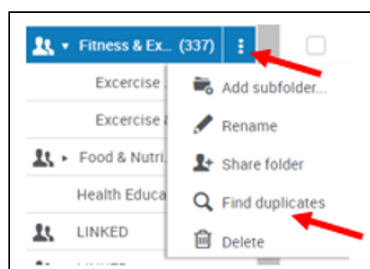
OR
In the left navigation select **Duplicates** and then **Find Duplicates**.



Note

If you are in a specific folder or sub-folder, RefWorks will search for duplicates in that location.

To look for duplicates in a specific folder or sub-folder, in the **My Folders** tab in left navigation, select **Find Duplicates** in the folder action list.



2. Select how you would like RefWorks to prioritize finding your duplicate references by choosing **Primary reference determined by:**
 - a. **Completeness** - Reference that has the most information available – RefWorks will choose the reference where most metadata fields are populated.
 - b. **Newest** - Reference that was most recently added.
 - c. **Oldest** Reference that was added first.
3. Select your **Matching Settings:**
 - a. **References must match exactly** – In this method, the selected fields must match exactly. RefWorks ignores casing, special characters, and the order of **Author** names.
If Author, Year, ISBN, ISSN, DOI or Page Number field(s) is/are chosen in conjunction with **Title**, RefWorks also includes elements that appear empty. For example, selecting Title and Year where Title is found to be a match, but Year is blank in one record and populated in another, will result in a match.
 - b. **References that are similar** - In this method, RefWorks weighs data for similarity for selected fields. If enough items are similar, RefWorks will suggest a match.

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

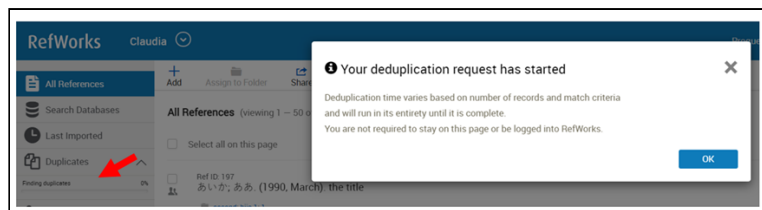
If Author, Year, ISBN, ISSN, DOI or Page Number field(s) is/are chosen in conjunction with **Title**, RefWorks also includes elements that appear empty. For example, selecting Title and Year where Title is found to be a match, but Year is blank in one record and populated in another, will result in a match.

Note

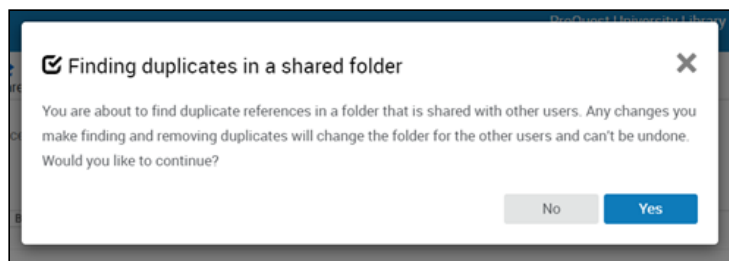
RefWorks “References that are similar” match is based on the [Levenshtein Algorithm](#).

4. Select the fields you would like to use; Title, Author and Year fields are pre-selected, but not required.
5. Click **Find Duplicates**. You will be informed that a deduplication request has started and will see a **Finding duplicates progress** message in left navigation under **Duplicates**. You are not required to stay on this page or be

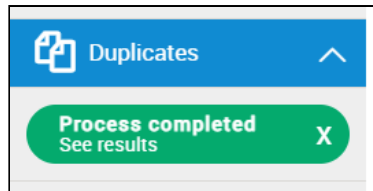
logged into RefWorks while the process is running. The deduplication time varies based on the number of records and match criteria, and will run in its entirety until it is complete.



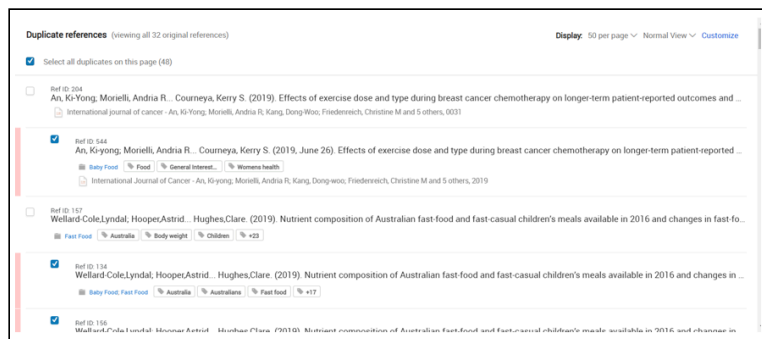
If you are searching for duplicates in a shared folder, you will first see the following message, with a choice to abandon or proceed.



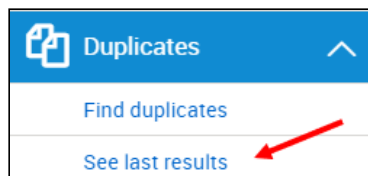
6. After the deduplication request is completed, you can click on the **Process completed See results** link in left navigation under **Duplications**.



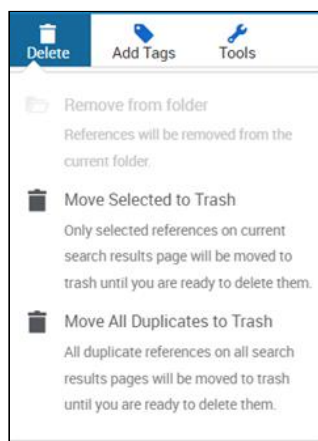
7. If any duplicates are found, they are indented, marked with red bar and pre-selected to make them easy to identify.



Any time after performing a **Find Duplicates** search, you can click on **See last results** to view the most recent Duplicate References search results.



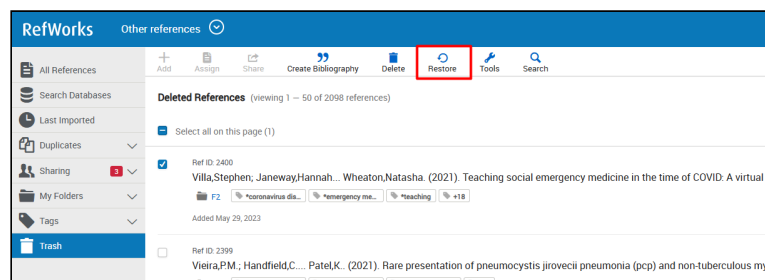
You may choose to move all duplicate references on the current search result page to trash, or move all duplicate references on all search results pages to trash.



The Find Duplicates how-to video can be viewed [here](#).

Restoring Deleted References

If you deleted a reference from any folder or tab other than the **Trash** folder, you can restore it. To restore a reference go to the **Trash** folder, select the references to restore, and select **Restore**.



Restore Selected References Button

Copying References from RefWorks to Your Document

When citing your references in a document, such as Microsoft Word or Google Docs, you can use RefWorks to format one or more of your references for easy insertion into the document. You can insert a single reference or multiple references, and you can insert them inline and/or as a bibliography. You can select an out-of-the-box citation style (RefWorks or CSL style) or create your own style.

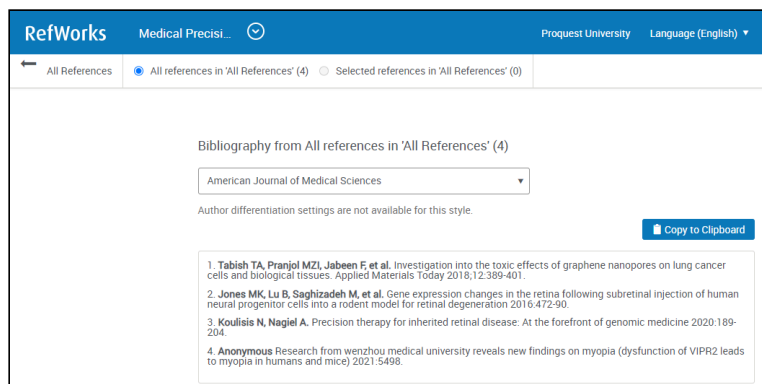
To manage styles, see [Managing Citation Styles](#).

It is easy to create references in RefWorks to copy to your document, but it is even easier to add references while working in your document using a RefWorks add-on: In addition, you can manage references in a document using one of these add-ons (delete, re-add, re-style, and so forth).

Use **RefWorks Citation Manager (RCM)** to add and manage your document's references while working in Microsoft Word or Google Docs. See [Using RefWorks Citation Manager](#).

To create a bibliography from one or more references:

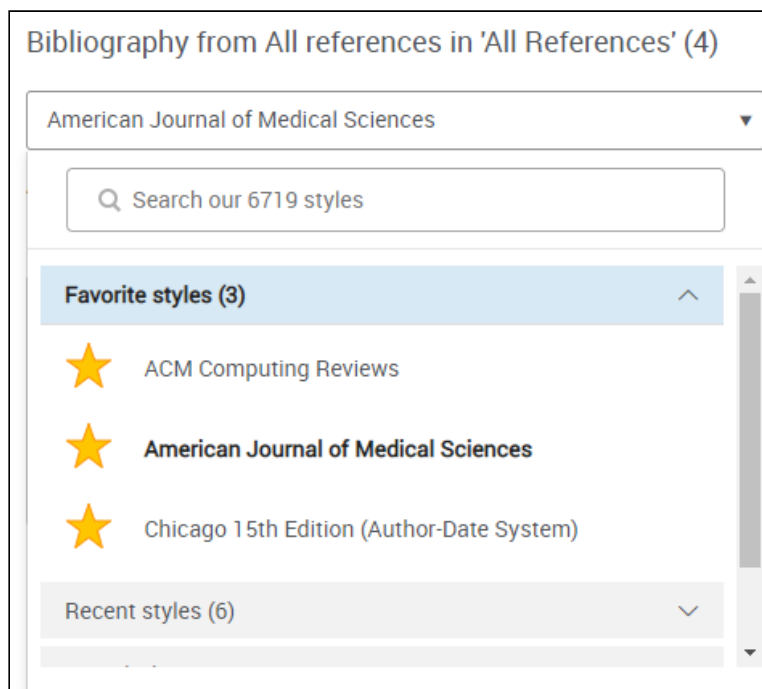
1. While viewing a list of references, select the desired references (or select none to use all references) and select **Create Bibliography > Create bibliography**. The following page appears:



Create Bibliography

2. Optionally select a different citation style. By default, the bibliography appears in the last style you used in RefWorks.

There are three drop-down lists that help you find styles: Recent Styles, a custom list, and Institutional. You can mark a style as a favorite by selecting the star icon next to the style in a list. The style then appears in the Favorite styles drop-down list, which appears if there is at least one style marked as a favorite. To remove a favorite from the list, clear the star icon. The style is removed from the Favorites list when RefWorks is refreshed.



Favorite Styles

3. Select **Copy to Clipboard** and paste it into your document.
-

Note

Bibliography numbering and sorting is limited to 2000 references when using RefWorks citation styles. CSL styles numbering and sorting is limited to 500 references. After the limit is reached, numbering and sorting restarts.

To insert one or more inline citations (with or without a bibliography).

1. While viewing a list of references, select **Create Bibliography > Quick Cite**. A dialog box appears.
 2. Select a citation style and select **Continue....**
-

Note

If you require numbered references, we recommend creating citations and a bibliography within Word or Google Docs. Using Quick Cite, you must enter numbers or correct them manually in your document.


RefWorks

Citation Style Insert Citations Bibliography

1 | Choose your citation style

Choose the type of citation you'd like to add to your paper.

American Journal of Medical Sciences ▼

 **This is a numbered style**

This style is dependent on the order your citations are used in your paper. We highly recommend you first [try one of our word processor plugins](#). If you cannot use a plugin use Quick Cite to order your citations as they appear in your paper and then create your bibliography from the citations you used.

[Continue...](#)

Quick Cite, Citation Style Tab

3. To insert all citations, select **Continue to bibliography**.

Note

To select specific citations, select the relevant citations and select **Continue to bibliography**.

RefWorks

Citation Style **Insert Citations** Bibliography

2 | Insert citations

In this citation style each reference is assigned a number based on its placement in the paper. Choose the references in your paper by clicking on the star next to each one. Cite the references using the examples below.

IN-TEXT CITATION EXAMPLES FOR THIS STYLE:

Sentence with one citation 1 .
Sentence with multiple citations 1, 2 .

Investigation into the toxic effects of graphene nanopo... ☆
Tabish, Tanveer A.; Pranjol, Md Zahidul I.; Jabeen, F.; Abdullah, ...

Gene expression changes in the retina following subreti... ☆
Jones, Melissa K; Lu, Bin; Saghizadeh, Mehnoosh; Wang, Sha...

Precision Therapy for Inherited Retinal Disease: At the ... ☆
Koulisis, N; Nagiel, A, 2020

Research from Wenzhou Medical University Reveals Ne... ☆
2021

[Back](#) [Continue to bibliography](#)

Quick Cite, Insert Citations Tab

4. Select **Copy to Clipboard** and paste it into your document.

RefWorks

Citation Style Insert Citations **Bibliography**

3 | Add your bibliography

Copy and paste the bibliography into your document.

1. **Tabish TA, Pranjol MZI, Jabeen F, et al.** Investigation into the toxic effects of graphene nanopores on lung cancer cells and biological tissues. *Applied Materials Today* 2018;12:389-401.
2. **Jones MK, Lu B, Saghizadeh M, et al.** Gene expression changes in the retina following subretinal injection of human neural progenitor cells into a rodent model for retinal degeneration 2016:472-90.
3. **Koulisis N, Nagiel A.** Precision therapy for inherited retinal disease: At the forefront of genomic medicine 2020:189-204.
4. **Anonymous** Research from wenzhou medical university reveals new findings on myopia (dysfunction of VIPR2 leads to myopia in humans and mice) 2021:5498.

[Back](#) [Copy to Clipboard](#)

Quick Cite, Bibliography Tab

Sharing References and Working with Shared References

You can share folders of references with specific users and/or (when enabled) all other users at your institution and can view folders of references that are shared with you or your institution. You can view the references that have been shared with you, and in some cases add comments or change the references. If you want to edit or export references that have been shared with you, you must first copy them to your own reference folders.

Sharing Folders of References

To share folders:

1. Select **Share > Share folder**

OR in the **Sharing** area of the Reference Organization, select **Share a folder**;

OR in the **My Folders** area select **Share folder** in the row action list.

The Sharing Settings dialog box appears.

Sharing Settings

2. In the **Settings for** area, select the folder to share.
3. In the **Settings for** area, select whether to share the folder only with the email addresses you enter in the **Shared with** area, or with all users at your institution. You can change this at a later time.
4. In the **Public URL** area, select **Create Public URL** to create a URL that you can use to share the contents of folders and sub-folders with others who do not have a RefWorks account.

Note

Users who view publicly shared folders with the URL have limited access:

- Access is read-only – references cannot be edited, added, or deleted.
- References may be exported to a file.
- Bibliographies can be created from any citation style available, except user custom styles or Institutional styles.

-
5. Select **Remove URL** to delete the URL and remove public access to the folder.
 6. In the **Shared with** area, enter the email addresses with which you want to share the folder. For each address, select whether the user:
 - Can read – Read references only.
 - Can annotate – Read and add comments and highlights to references.
 - Can modify – Add and remove references, add notes to references, and read and annotate attached supported PDF files.

You can optionally enter a message to the user. The user receives an email notifying them about the invitation.

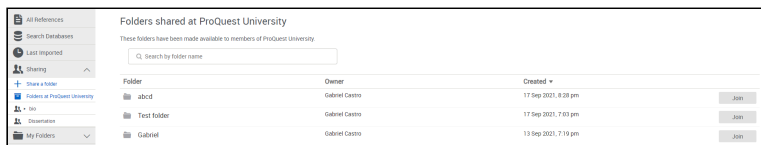
You can view users with whom you have already shared the folder, and can change or remove their access.

7. When you are done, select **Done**.

To unshare the folder at any time, select **Unshare Folder** on the Sharing Settings dialog box and select **Yes** in the confirmation dialog box.

Working with Shared Folders of References

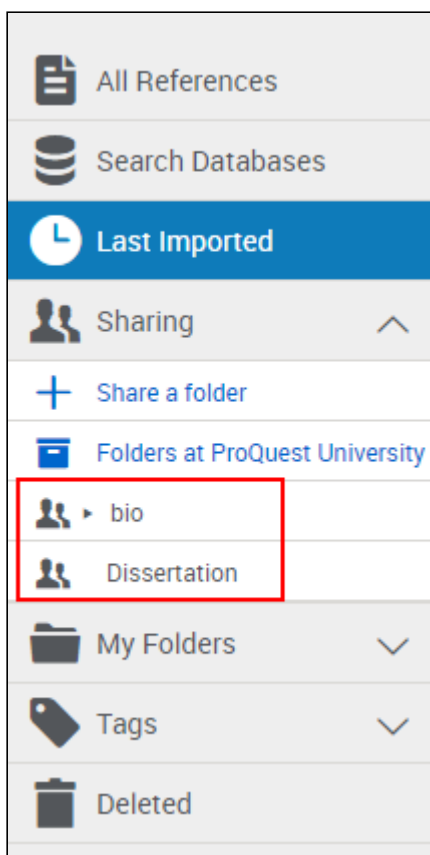
When a folder is shared with you, you receive an email indicating this. You can view the folder in the Sharing tab in RefWorks. All folders shared with you from a single institution are grouped together.



Folder	Owner	Created
abcd	Gabriel Castro	17 Sep 2021, 8:28 pm
Test folder	Gabriel Castro	17 Sep 2021, 7:03 pm
Gabriel	Gabriel Castro	13 Sep 2021, 7:19 pm

All Folders Shared by ProQuest University

To view the references in a shared folder, you must accept the invitation: select **Join** in the folder's row.



Folders Shared by ProQuest University

The folder appears in your Reference Organization in the **Sharing** area. All tags for references in this folder are added to your list of current tags.

- You can view the references and citations of shared folders. When enabled by the person who shared the folder, you can also add comments and notes to the citations or even remove or add citations to the references.
- To export these references or to synchronize shared citations with Dropbox (when enabled by your institution, see [Configuring Site Settings](#)), you must copy the references to your own list of references: drag and drop the references to

a folder or select **Assign to Folder**.

- You can remove your own access to a shared folder using the action menu in the folder's row. If you remove your own access to a shared folder, any tags that are associated only with references in that folder are removed from your list of tags.

Exporting References to a File

You can export your references so that another user can import them without logging in to your account, or in order to import them to another citation manager. Also see [Importing References](#).

To export references:

- 1.
2. **Navigate to the folder you want to export, or from All References, or from any search results, select [Share > Export references](#). The Export references dialog box appears.**

Export references ✕

From

All references in 'All References' (817)

Selected references (50)

Format

BibTeX

BibLaTeX (Beta)

RIS Format

Tab Delimited (.tsv)

XML format

ID output

RefWorks default
e.g. 'RefWorks.RefID:1245-smith2020research'

authoryeararticle
e.g. 'smith2020research'

Ref ID only
e.g. '1245'

Export references modal

3. Export file
 1. Select whether to export all references in the current folder / search results or only selected references.
 2. Select the output format: BibTeX, BibLaTeX, RIS, tab-delimited, or XML.
 3. Select the output ID: default, authoryeararticle string, or Ref ID only
4. Select **Export**. The references are exported, including their field names and Ref ID. In a tab-delimited file, the first row contains the field names.

Exporting Attachments

You can export your attachments from the cloud in several ways.

Exporting from a specific reference record

1. Click on the reference in library list to open the Reference Preview panel on right
2. In Reference Preview panel
 1. Click to read the attached PDF, which will open the PDF in the Reader
 1. On top menu, click to Print, or
 2. Click to Download
 2. If attachment is not a PDF which can be Read in Reworks, click to download

Exporting from specific Folder, or selected group of references

1. When in specific folder, or when specific references are selected, on Reference and Tools Actions menu, click **Share** -> **Export Attachments**
2. Note selection on the Export attachments modal and proceed to Export

Exporting all attachments

1. On Reference and Tools Actions menu, click **Share** -> **Export Attachments**
2. Ensure all references option is selected and proceed to Export

Note

If you synced your account with Dropbox, you may find all your attachments in your Dropbox account. To sync with Dropbox, see [this article](#).

Additional References

- [Managing Citation Styles](#)
- [RefWorks Overview](#)