

# Specifications for Direct Export into RefWorks from Database Service

## Overview

Direct Export is a seamless way for users of your Database Service program to easily get records into RefWorks. Currently, users have to go to your Database Service, save the records to a text file in a tagged format in the Database Service program, go to the Import page in RefWorks, select the filter and database, and specify the text file from your program, and then they can start importing. This multi-step process is neither easy nor intuitive to many users. The problem areas are:

1. The users do not save the records in the correct *tagged* format in the Database Service program. If there is more than one format option for saving, the user may get confused on which format to choose.
2. The users do not save the records to a *text* file. Some Database Service programs save in other formats, like their own custom format or in HTML. The user is not aware that they need to check the file type and make sure it is set to *text* when saving.
3. The users do not select the correct import filter and/or database on the RefWorks Import page.
4. The users forget where they saved the file.

With Direct Export, these problem areas are eliminated and the process is automated for the user. The user is able to export records directly into RefWorks with a click of a button. This can increase usage of both the Database Service program and RefWorks and decrease the need for technical support.

## Database Service Provider Implementation

There are two ways to implement passing records to RefWorks

1. **Callback Implementation** - Pass RefWorks a URL which does a callback returning the records in a text tagged format.
2. **Form Post Implementation** - Do a Form Post to RefWorks which has the records in a tagged format in a Form field.

## Callback Implementation

1. In your Database Service program, add an "Export to RefWorks" button or hyperlink.
2. When the user clicks on this button/hyperlink, open a new browser window with the following properties:

URL: <https://api.refworks.proquest.com/api-ipa/express>, with the query parameters listed below.

Using a WAYFless link with direct export:

Add to the link that's being sent to RefWorks (the link that starts with: [api.refworks.proquest.com/api-ipa/express](https://api.refworks.proquest.com/api-ipa/express)...) the following: `&providerID=IDP Encoded&rwssso=true`

1. For IDP Encoded

\* If you don't know your IDP, contact RefWorks support

\* You can encode the IDP in various tools such as <https://meyerweb.com/eric/tools/dencoder/>

Query Parameter	Description
vendor (Required)	Name of the Database Service, e.g. "Your Service Name"
filter (Required)	Name of the Import Filter that will be used to parse the records in text tagged format, e.g. "RefWorks Tagged"

	Format". Click here for our <a href="#">list of filters</a>
database (Optional)	Name of the database source of the records as it appears in the filter. Click here for our <a href="#">list of filters</a> . If the records are from more than one database, omit this query string. If not specified, it will use the default database specified in the filter. <a href="#">Contact RefWorks</a> if you are unsure about whether to include this information.
URL (Required)	The URL we will call that returns the records in text tagged format. E.g. " <a href="#">https://www.yoursite.com/yourpage.as...3&amp;SEARCH=heart</a> ". In order for RefWorks to parse the records correctly, do not include any HTML tags.
encoding (Optional)	If the URL page is encoded using a specific character set, specify the encoding in this parameter so the characters appear correctly when imported into RefWorks. For example if the page is in UTF-8, pass "encoding=65001" in the query string. If not specified, it will use the default encoding specified in the filter.

Example:

<https://api.refworks.proquest.com/api-ipa/express?>

vendor=

<VendorName>&filter=<FilterName>&database=<DatabaseName>&encoding=<EncodingNumber>&url=<URL>

**Note:** Be sure to escape out spaces, ampersands, punctuation marks, accented characters, and any other non-ASCII characters in the VendorName, URL, FilterName and DatabaseName.

## Form Post Implementation

If you already save your records in a tagged format, check our [list of filters](#) to see if we have a filter defined for it. If we do have a filter, then save your records in that tagged format and use that filter. If you save your records in the RIS Format, use the filter, "RIS Format". Otherwise, we recommend saving your records in our own RefWorks Tagged Format (see [specifications](#)) which has a tag for each specific field in the RefWorks database and uses the filter, "RefWorks Tagged Format".

[Contact RefWorks](#) if you are unsure about which tagged format to use.

Sample code - A hyperlink and the callback returns records in RefWorks Tagged Format encoded in UTF-8:

```
<A href="https://api.refworks.proquest.com/ap...SEARCH%3Dheart" target="RefWorksMain">Export to RefWorks</A>
```

URL: <https://api.refworks.proquest.com/api-ipa/express>, with the query parameters below.

Using a WAYFless link with direct export.

Add to the link that's being sent to RefWorks (the link that starts with: [api.refworks.proquest.com/api-ipa/express](https://api.refworks.proquest.com/api-ipa/express)...) the following: &providerID=IDP Encoded&rwssso=true

1. For IDPEncoded

\* If you don't know your IDP, contact RefWorks support

\* You can encode the IDP in various tools such as <https://meyerweb.com/eric/tools/dencoder/>

Query Parameter	Description
vendor (Required)	Name of the Database Service, e.g. "Your Service Name"
filter (Required)	Name of the Import Filter that will be used to parse the records in text tagged format, e.g. "RefWorks Tagged Format". Click here for our <a href="#">list of filters</a>

database (Optional)	Name of the database source of the records as it appears in the filter. Click here for our <a href="#">list of filters</a> If the records are from more than one database, omit this query string. If not specified, it will use the default database specified in the filter. <a href="#">Contact RefWorks</a> if you are unsure about whether to include this information.
encoding (Optional)	(Optional) If the URL page is encoded using a specific character set, specify the encoding in this parameter so the characters appear correctly when imported into RefWorks. For example if the page is in UTF-8, pass "encoding=65001" in the query string. If not specified, it will use the default encoding specified in the filter.

Example:

<https://api.refworks.proquest.com/api-ipa/express?>

vendor=<VendorName>&filter=<FilterName>&database=<DatabaseName>&encoding=<EncodingNumber>

**Note:** Be sure to escape out spaces, ampersands, punctuation marks, accented characters, and any other non-ASCII characters in the *VendorName*, *FilterName* and *DatabaseName*.

If you already save your records in a tagged format, check our [list of filters](#) to see if we have a filter defined for it. If we do have a filter, then save your records in that tagged format and use that filter. If you save your records in the RIS Format, use the filter, "RIS Format". Otherwise, we recommend saving your records in our own RefWorks Tagged Format (see [specifications](#)) which has a tag for each specific field in the RefWorks database and uses the filter, "RefWorks Tagged Format".

[Contact RefWorks](#) if you are unsure about which tagged format to use.

Sample code - A form with an ImportData field containing the records in RefWorks Tagged Format encoded in UTF-8:

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```
<FORM
name="ExportRWForm" method="POST" target="RefWorksMain" action="https://api.refworks.proquest.com/
ap...encoding=65001">
<TEXTAREA name="ImportData" rows=30 cols=70>
RT Journal
ID 11579
A1 Mazzone,P. J.
A1 Arroliga,A. C.
T1 Lung cancer: Preoperative pulmonary evaluation of the lung resection candidate
JF The American Journal of Medicine
JO Am.J.Med.
YR 2005
FD Jun
VO 118
IS 6
SP 578
OP 583
AB Lung resection provides the best chance of cure for individuals with early stage non-small
cell lung cancer. Naturally, lung resection will lead to a decrease in lung function. The
population that develops lung cancer often has concomitant lung disease and a reduced ability
to tolerate further losses in lung function. The goal of the preoperative pulmonary assessment
of individuals with resectable lung cancer is to identify those individuals whose short- and long-
term morbidity and mortality would be unacceptably high if surgical resection were to occur.
Pulmonary function measures such as the forced expiratory volume in 1 second and the
diffusing capacity for carbon monoxide are useful predictors of postoperative outcome. In
situations in which lung function is not normal, the prediction of postoperative lung function
from preoperative results and the assessment of exercise capacity can be performed to further
clarify risks. Published guidelines help to direct the order of testing, permitting us to offer
resection to as many patients as possible.
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PP United States
SN 0002-9343
AD Department of Pulmonary, Allergy, and Critical Care Medicine, The Cleveland Clinic
Foundation.
AN 15922686
LA eng
SF Journal Article; AIM; IM
DO S0002-9343(05)00147-6 [pii]; 10.1016/j.amjmed.2004.12.024 [doi]
</TEXTAREA><br>
<INPUT type="submit" name="Submit" value="Export to RefWorks">
</FORM>
```

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### RefWorks Behavior

- If the user is not already logged in, a new browser window or tab will open to the RefWorks login page. If the user is already logged in, it will bring the RefWorks browser to the front.
- RefWorks either calls the URL to get the records from the Database Service's server or gets the records from the hidden field and then downloads the records to the RefWorks server for processing.
- RefWorks imports the records.