Step by Step Introduction to Refworks

RefWorks is a reference manager used to gather and manage your references and create bibliographies from your list of references. Refworks can also import references automatically from many databases/platforms such as Discover. Refworks runs entirely in your Web browser. You must create a personal profile in Refworks before using this system.

Whilst Refworks can be used to automate much of the referencing process such as outputting a bibliography list, you should always review all outputs before submitting your work and make any manual modifications or additions necessary.

Please read the Step-by-Step guide below before attempting to use Refworks, also see the guidelines, video and tutorials shown at the end of this guide.

To create a profile on Refworks:
Either follow a link to Refworks shown in the Referencing LibGuide (if you are located off-campus you will need to supply the 'Group Code' – this is shown in the Referencing LibGuide or side menu of the Library for Online Programmes):

Additionally, a link to Refworks is provided in the side menu of the Library for Online Programmes:

Click on 'Sign up for New Account'. You may be prompted to log into 'Ezproxy' unless you are already logged into the Library:

Create a Refworks account using login credentials of your choice, your Refworks login is not related to your University login and will never expire. If you are registering off-campus, you may be prompted to enter the Group Code (this is viewable from the Referencing LibGuide or the left menu of the Referencing page in the Library for
Online Programmes):

Once you've created an individual account you will be able to login to Refworks using your chosen Login Name and Password:

How to Log into Refworks

You can see a link to log into Refworks by visiting the University Library's referencing support page http://libguides.liverpool.ac.uk/referencing then see the Refworks support page http://libguides.liverpool.ac.uk/referencing/refworks you can see a link to Refworks at the top of the page.

Note for Online students - if you are using the Library for Online Programmes you can also see a link to Refworks in the left menu http://libguides.liverpool.ac.uk/onlineprogrammes

Note for Alumni/ Graduates

You will have perpetual access to your Refworks profile after you graduate. If you have already registered for a Refworks account but have graduated and no longer have a University network login then you will need to visit Refworks.com then sign in with your usual Refworks profile, you will need to enter the Group Code shown in the
left menu, if you are unable to view the Group Code on this page please contact the Librarian.

The Refworks Interface

Key Features of the Refworks interface include:

- **References** (top navigation) - manually add or automatically import/export references in your list.
- **View** (top navigation) - view all references in your list, manage duplicates and view deleted items.
- **Search** (top navigation) - search your reference list by author, title, periodical etc. (also search for content via the University Library Catalogue).
- **Bibliography** (top navigation) - Create a bibliography list from your reference collection, automatically format a word-processed document to display your references, manage your output styles/ favourite styles, preview output styles.
- **Tools** (top navigation) - install helper applications such as Write-n-cite and RefGrab-it (see below for further details).
- **Help** (top navigation) - tutorials and index of help documents.
- **New Folder** (top button) - Create a new folder to manage your references.
- **Create Bibliography** (top button) - Automatically generate a bibliography from your reference list.
- **New Reference** (top button) - Manually add a new reference.

![Refworks Interface](image-url)
Setting Favourite Output Styles in Refworks

You can output your reference list in Refworks as a fully formatted bibliography; this can be output in many standard citation styles including APA and OSCOLA. You should add your preferred style(s) to the ‘Favourites’ area of your output styles in Refworks. To manage your ‘favourites’ move your mouse over the ‘Bibliography’ button and select ‘Output Style Manager’:

You will see the list of available output styles in the left pane and your ‘Favourites’ in the right pane, you can add available styles to your favourites area using the arrows shown, your favourites will be readily accessible to you when creating a bibliography from your list of references:

Harvard output styles in Refworks

Unless otherwise instructed by your tutors, you should refer to the “Cite them Right - Harvard” style, this is the Library’s recommended Harvard style. This style is supported by a range of online databases and referencing platforms. For further help
Managing References in Refworks

You can easily add references in Refworks by clicking ‘New Reference’; you can then choose your preferred output style e.g. 'Liverpool (Harvard)'.

Direct Import of citations from databases/ collections into your Refworks list

You can automatically export citations from most collections/databases/platforms when viewing a particular e-resource, e.g. in the example below we have viewed an e-journal article in Discover (EBSCO), by clicking the item title we can see further details about the item, including an option in the right menu to export the citation to our chosen referencing manager, e.g. ‘Refworks’:

If you are already logged into Refworks in another Browser window you should see a new screen confirming the citation has been imported into your Refworks account, if you have not logged into Refworks you will be prompted to log into your Refworks profile.
Creating a Bibliography in Refworks

To create a bibliography using your reference collection (or folder selection) click the 'Create Bibliography' button:

You should see some options to select the range of references to be used and output style/file type, e.g. in the example below we have chosen the APA referencing style, All references available and 'Word for Windows 2000 or Later' as the file type, after clicking 'Create Bibliography' in the lower-right we should be presented with the reference list, you may need to accept a Web Browser prompt if opening a new window or file:

Select an Output Style: APA 6th - American Psychological Ass
References to Include
- Selected (0) [ ] Page (19) [ ] All in List (19)
File Type
- Word for Windows (2000 or later)

Import/Export Reference List

You can export your reference list from within Refworks to create an archive or for import into another Reference management application or for later import into your own or another Refworks profile.

You can either choose to select individual references by ticking the check-box next to references in your list or begin by selecting a folder under 'Organize and share folders', if you don't select any group of references you will be exporting all references in your Refworks profile.

*NOTE* - you cannot save attachments you may have attached to individual references using Import/Export tools, if you need to export/import attachments you will need to use the profile backup option (see later section of this guide).
To export references go to References > Export

When you see the popup window asking you to choose a format, choose 'Bib Tex' and click 'Export References':

You may be prompted to save the file (a TXT file) to your computer, or may see the file displayed on-screen in your Web browser, if this occurs use the File > Save As option from the pull-down menu in your Web browser (if you can't see any pull-down menu options you will need to activate the 'menu bar' in your Web browser):

When you have saved the export file to a location on your computer you can now import this into Refworks later, import into another Reference management application or into another Refworks profile.
To import a reference file in Refworks go to **References > Import**

You will now need to choose several settings to import the reference list:

- **For the Import Filter/Data Source** - choose the 'Bib TeX' format we selected earlier, you must choose the same format you used to save the reference list otherwise the import will not be successful.
- **For the Database** - choose 'Multiple databases'.
- **For Select Text File** - choose the 'reflist.txt' file you saved earlier from the location you specified when saving.
- **For Encoding** - choose ANSI Latin I
- **Under Import To** - you can leave this option at default to save into your 'Last imported' folder, the references will merge with your main list, or you choose an existing folder to store the references.

**Import References**

![Import References](image)

**Sharing Readings in RefShare**

You can share a folder/list containing citations in Refworks by sharing a folder then providing a stable URL to this folder to colleagues or peers, please see our
Sharing Readings in Refworks (using Refshare). See our guideline on using Refshare.

**Refworks Profile Backup/ Restore**

To backup or restore your Refworks profile go to **Tools > Backup & Restore:**

Select the backup options you need to save, including References, Attachments and RSS Feeds then click 'Perform Backup', you may be prompted to 'Open', 'Save' or 'Save As' an **RWB** file from your Web browser interface (these options will vary depending on your Web browser):

To restore your profile, expand the **Restore** link on the 'Backup & Restore' page and select the options you wish to restore, including References, Attachments, RSS Feeds and Output Styles, then browse for the **RWB** backup file on your PC.

**IMPORTANT** - if you use the **Restore** option the contents of the existing profile will be effectively destroyed and all the settings/ references/ attachments in the RWB file will be used to build a new reference list, if you wish to save any references in the current profile before restoring from a saved profile you should use the **Export** feature (see above) to save any references to the export file, then perform your **Restore** function, then **Import** your saved references into the profile,
your profile will contain the restored profile contents + the saved (export file) references.

Write-n-Cite and RefGrab-It

Write-n-Cite enables you to access your RefWorks database of references in order to insert citations and bibliographies into your Word documents. The Library currently recommends using the Write-N-Cite 3 plugin, which provides a RefWorks tab within Word. See the guidelines below for help using Write-n-Cite.

RefGrab-It is a Web Browser plugin which allows you to directly import references from Web content being viewed in your Web Browser, there are several versions of the plugin for various Web Browsers, e.g. IE Plugin, Addon for Firefox.
You can install either of these applications from the ‘Tools’ option when logged into Refworks.

Further Help

You can see further advice and workbooks on using Refworks on our Refworks LibGuide page. If you have any questions please contact your Librarian (see list of Liaison Librarians and Librarian for Online Programmes).