

## Tips on building the best institutional RefWorks webpage to support your users

To help you promote the use of RefWorks at your institution, we have provided you with a webpage template layout based on real life examples. The information in this page will make it easier for your users to find what they need to get started and will help your institution promote the best solution for your users.

**How to get started:** Mix and match to find the layout that best works for you:

- Dedicate a page or more to RefWorks on your institutional library website
- Review the webpage template options below
- Utilize links to the RefWorks login page and to RefWorks resources
- Items to consider including in your RefWorks webpage
  - What is RefWorks
    - Add a statement explaining how RefWorks supports your community, and include its most important features for your users
    - Add links to the library page
    - Add videos
  - How to create an account
    - Short How to
    - Any particular instructions pertaining to your institution
  - What a user needs to get started
    - Top 3 intro videos
    - User guides
    - Key resources
    - Support
    - How to get further training from the library

### Layout options

The template below is based on a webpage with two tabs, which you can customize:

- Your website can't support multiple tabs? Arrange the content in one page
- Using multiple tabs? Consider moving the RefWorks resources information to a dedicated 3<sup>rd</sup> tab

Text appearing in the template in square brackets and italics serves as instructions for creating the page

# RefWorks

[find the logo [here](#)]

[Add an image or a video, for example  
<https://youtu.be/z8octXrA0xE>]

Welcome to [RefWorks](#)

[For academic institutions:]

A user-friendly reference management service that maximizes research productivity with an easy-to-use tool for managing references and formatting citations and bibliographies.

[For all institutions:]

A user-friendly reference management service that simplifies research, collaboration, data organization, and paper writing.



## Set up your RefWorks account today!

[If **not** using Single Sign On (Shibboleth / Open Athens):]

- Go to the [RefWorks login page](#)
- Click on **Create account**
- Enter your institutional email address
- Click on **Check** and select your institution
- Enter a password and select **Sign Up**
- Check for an email from RefWorks and click on the link in the email to activate your account
- Login and fill in your user information to complete registration

[If **using** Single Sign On (Shibboleth / Open Athens):]

- Log into your institution's network
- Go to the [RefWorks login page](#)
- Click on **Use login from my institution**
- Select your institution from the list
- Fill in your user information to complete registration

Have an account but forgot your password? No worries

- Go to the [RefWorks login page](#)
- Click on **Forgot your password?**
- Enter your email address
- A password reset email will be sent to you

## Become familiar with RefWorks resources

### New to RefWorks?

Watch these tutorials to help you get started:

- [Introduction to RefWorks](#)
- [RefWorks Basic Functionality](#)
- [Accessing RefWorks](#)

### Additional Video Tutorials

- [RefWorks YouTube Channel](#)
- [RefWorks for Faculty overview](#)
- [RefWorks for Users overview](#)

**User Guides** *the quick guides can be customized with your institutional logo; customizable versions can be found [here](#)*

- [RefWorks User Guide](#)
- [RefWorks Quick Guide](#)
- [RefWorks Quick Start Guide](#)

### RefWorks [Knowledge Center](#)

Can't find what you need? Feel free to reach out to the [RefWorks Support Team \(Chat option is available during working hours\)](#)

## Join RefWorks training sessions

The Library has a webinar on RefWorks that takes place regularly.

### New sessions:

Choose a date and time from the list below and click to go to the registration page.

- [RefWorks – Introduction](#)  
Date, Time
- [RefWorks – Sharing](#)  
Date, Time

### Past recordings:

Need further instructions? Contact your library support.

## Getting Started with RefWorks

## Using RefWorks

RefWorks offers many features and functionality. On this page we have highlighted the most common features you will use.

[Select the most relevant features for your users and provide guidelines on using the feature; always add a link to documentation and/or a video. Depending on your page layout you can create expanded sections or new tabs for each feature.]

### Creating an Account

#### Importing and creating references

- Direct Export
- Save to RefWorks
- Uploading references
- Creating a reference manually
- Search Databases in RefWorks

#### Editing reference metadata

#### Viewing and organizing references

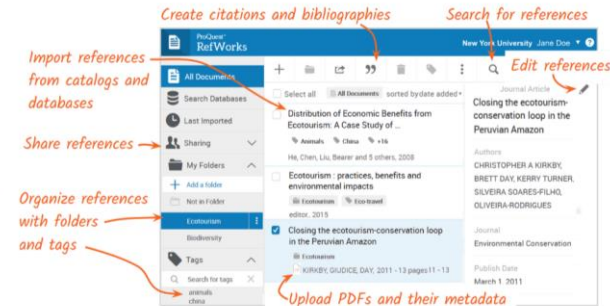
#### Writing tool add-ons

- RefWorks Citation Manager
- Write-n-Cite
- RefWorks for Google Docs

#### Citation styles / Creating citations and a bibliography

#### Collaboration using Folders and Projects

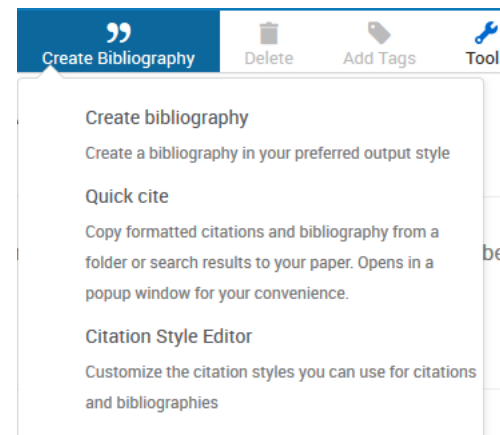
### Add an image



[You can follow this example for creating the feature sections]

### Creating citations and a bibliography from within RefWorks

- Go to the folder with the references you want to cite and select **Create Bibliography** from the top toolbar. From the opened menu select **Create Bibliography** to create a bibliography only, or **Quick Cite** to create citations and optionally a bibliography.



- RefWorks will remember the last citation style you used. You can change styles by selecting a style from one of the menus or by searching for the style.
- Choose the references you want to include (for **Create Bibliography** make sure you select them before accessing the menu) and proceed to creating the citations and/or bibliography. Copy them to the clipboard and past them into your document.