

Upgrade from Legacy RefWorks to the New RefWorks – User Guide

Welcome to the New and Improved RefWorks!

The newest version of RefWorks offers a new, exciting and intuitive way to collect, share and cite research.

What unique features does the new version of RefWorks offer?

- Auto-completion of references and suggestions from Summon
- Save pages from the web and from popular research websites to document library with a click of a button
- Automated recognition of uploaded documents
- Share documents with collaborative annotation (ability to highlight and add notes) as well as various levels of sharing (read-only, annotate, modify)
- Built-in document reading, with zoom capability, supports PDF and Office files
- Read saved web pages in 'distraction-free' mode, stripped of ads and navigation
- Google Docs Add-in for writing and formatting papers

What unique features does legacy RefWorks have?

- De-duplication by folder and upon import
- Global editing of citation information
- Administration customization tools
- Integrated RSS Feed Reader
- Indexes by author/descriptor/periodical
- Ability to add z39.50 compliant library catalogs for searching from within an account
- Ability to post an Institution-wide Output Style
- Ability to store multiple file attachments to a single reference
- Ability to share a folder or database publicly via a unique URL

If your institution has enabled one of our migration options, moving from legacy RefWorks to the newest version of RefWorks is easy – and only requires a few steps on your part:

1. Make sure you bookmark the new login page: <http://refworks.proquest.com>. This is where you'll log in now (unless you are accessing via ProQuest Summon).
2. Depending on your institution's preference, you may have a link to create a new RefWorks account from within your current account.



Alternatively, you maybe be prompted to create a new account as soon as you try to log in to RefWorks. Either way, you will create a new login name and password. Your login name will be an email – preferably tied to your institution – and you can set your own password. Your references, file attachments, folders and custom output styles will automatically be moved into your new RefWorks account (Note: references in the new RefWorks can only have one file attachment per reference so if you had more than one file attachment connected to a reference, a duplicate reference will be created for each file attached to it).

3. Be sure to install the new Save to RefWorks browser bookmarklet to capture reference data (and sometimes even full-text) from web pages. To install, simply click on your name in the upper right-hand corner, click “Tools”, then “Install Save to RefWorks” and drag the new Save to RefWorks bookmarklet onto your browser's favorite's bar.
4. Writing a paper and Write-N-Cite: We do not recommend migrating to the new RefWorks if you are working on a deadline for a paper, grant, dissertation or thesis. The best time to migrate is after a project is completed, or when you have ample time to make the migration and learn the new tool before your next project is due.

Papers started in legacy RefWorks will not be compatible with new RefWorks, so we recommend you keep their current legacy RefWorks account until they complete their work.

5. Windows users: Should you wish to install the latest version **of Write-N-Cite for Windows** (formerly known also as ProQuest for Word), you'll want to uninstall **ProQuest for Word** for Window (if you are currently using it) first. The latest version has some bug fixes as well as has new branding. (*Note: Summon users with limited-feature accounts will not have access to this feature.*) This version does not support Word 2007 and does not work with 64-bit versions of Word 2010, but will work with Word 2016, 2013 and 32-bit version of 2010. If you need assistance in uninstalling Write-N-Cite/ProQuest for Word, please contact RefWorks Technical Support at refworks.support@proquest.com
6. Windows users: We also offer an Add-on for Google docs to help write and format your paper. Institutional users can locate and install the Add-on by clicking on your name in the upper right hand corner and selecting "Tools".
7. Mac users: We do not yet have a version of Write-N-Cite that works with Word 2016. Word 2016 users can use our Quick Cite feature or use our Google Docs add-in. The current version of ProQuest for Word will also work with the new RefWorks for Mac users who have not yet upgraded to Word 2016.
8. Shared Folders: Shared folders will need to be re-shared from within your new RefWorks account. The new version of RefWorks allows you to assign unique user permissions to each person you share with, including the ability to edit references. Public sharing via unique URL is not yet available in the new RefWorks.
9. Support: Be sure to update your contact list to include Tech Support at refworks.support@proquest.com and check out our Introduction to new RefWorks webinars to learn about the exciting new features now available to you at www.proquest.com/go/webinars-refworks.
10. Finally, don't hesitate to contact us if you have any issues! RefWorks help is available at the ProQuest support center: www.proquest.com/go/refworks-help.