RefWorks Citation Manager: Migrating References

Purpose:
The purpose of this document is to introduce users of the old RefWorks platform to the new RefWorks platform, and aid them in migrating their references from the old platform to the new platform.

Students and faculty who are new to RefWorks can still follow these instructions up to step number nine for creating a RefWorks account in the new version. Students and faculty who have used the old RefWorks in the past and who wish to migrate their references from the old RefWorks to the new RefWorks should follow all of the instructions from beginning to end.

Definition:
RefWorks is an online research management, writing and collaboration tool designed to help researchers easily gather, manage, store and share all types of information, as well as generate citations and bibliographies in a variety of documentation systems (MLA, APA, Chicago, and many others). Users must create an account to store citations.

Background:
Students and faculty who have attended Central Connecticut State University may remember using a version of RefWorks older than the current edition. The older version of RefWorks is currently still available for use; however, all students and faculty should create an account in the new version of RefWorks as the old version will be phased out.

Requirements:
• A valid CCSU email address

Creating an account in the new RefWorks:
1. If you are off campus, you will first have to log into CentralSearch from the library homepage at library.ccsu.edu. For help logging into CentralSearch, follow these instructions.
2. Navigate to the list of databases by clicking the “Databases” tab on the library homepage and then clicking on the “See a list of all databases” link.
3. Choose “Citation Tools” from the “Database Type” drop-down menu. There will likely be two versions of RefWorks listed. Choose the version labeled as the new platform.

4. Click the “Create Account” link on the RefWorks login screen. Even if you have an account in the old RefWorks, you will need to create a new account in the new RefWorks.

5. When creating your new RefWorks account, you will be prompted to enter your CCSU provided email address.

6. After entering your CCSU provided email address, you will be prompted to create a password. You must also check the box to consent to the Privacy Policy and Terms and Conditions of use. Then click the button “Sign Up”. 
7. Once you click “Sign Up” an email will be sent to your CCSU email. You must go to your inbox and open the email to click the validation/activation link before you can use RefWorks.

8. Once you have activated your new RefWorks account, you will be prompted to enter your first and last name as well as status and course of study at CCSU.

9. At this point you have successfully created an account in the new version of RefWorks. You can begin using RefWorks to create and manage your citations. If you have an account in the old Refworks, and you want to move all your citations from the old version to the new version, continue on to the next step.
Importing References from the old RefWorks:
Use the following steps to import references from your old RefWorks account into the new RefWorks account.

1. Log into the new RefWorks account, and on the top left-hand corner of the screen click on “Add”, and click on “Import References” from the drop-down menu.

2. The new RefWorks gives you the option to import references from the old RefWorks or from Mendeley. Choose “RefWorks”.

3. Click on the “Authorize” button to be taken to the login screen for the old RefWorks.

4. Log into the old RefWorks using the username and password you created when you created the old RefWorks account.
5. Once you have logged into the old RefWorks, the new RefWorks will import all your citations.

6. At this point, you should be all set to use the new RefWorks moving forward. You should no longer use the old version of RefWorks as it will be phased out in the coming semesters.