How to do RefWorks Individual Sharing

By Anna Do, June 2019

RefWorks has easy-to-use sharing functions which allow you to collaborate with other RefWorks users. There are two types of sharing in RefWorks: individual and institutional. This tutorial will focus on individual sharing.

1. In RefWorks, click “Sharing” to expand the area.

2. Directly beneath the sharing header, click “Share a folder” to open the sharing dialogue box.
3. In the “Settings for” dropdown box, select the folder you wish to share. The default options are for individual sharing. The “shared with” portion of the dialogue box will appear, and you can enter one or more email addresses, separated by commas or semicolons.

4. You can assign access options (read, annotate, or modify) using the drop-down box to the right. If you wish to assign different access rights to individuals, enter the individuals for one access level, select the level, and click “Share Folder.” Follow this procedure for each person and level you wish to assign.
5. When you are finished inviting people, click “Done.” Individuals will receive an email notifying them of your invitation, along with a notice in RefWorks.

6. When the sharing area is expanded, each invitation appears with a checkmark to accept the share, and an “X” to refuse the share. Once you accept to share, the folder name appears in the sharing area.

For a step-by-step tutorial on how to do RefWorks Individual sharing, check out this video on YouTube: https://youtu.be/3_Zh2T9hhiU

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