

Transferring Records from a 30-Day Trial/Demo Account to a new Institutional Account

What follows are instructions for moving your references from a 30-Day Trial/Demo account to a new account under your institution's subscription:

To create a new Institutional account –

- 1) From a computer on-campus, visit our website at <http://www.refworks.com/refworks> and follow the instructions for signing up for an individual account.
- 2) From a computer off-campus, you will need to have your institution's **Group Code** or another method of accessing your institution's computing network. With the **Group Code**, visit the RefWorks web site mentioned above, enter the code into the space provided under the **Remote Access** tab and follow the instructions for individual account subscription from there.

*The **Group Code** is typically available from an institution's library staff or web site – many institutions treat the **Group Code** as sensitive information and therefore, it is not included with this document.*

Now that a new Institutional account has been established, your references will need to be moved from the 30-Day Trial/Demo account to the new Institutional account:

To move your references –

- 1) login to the 30-Day Trial/Demo account by visiting <http://www.refworks.com/RWSingle>, enter the **Group Code** "refworks" and the trial account username and password
 - 2) from either the **Tools** or **References** headings, select **Backup/Restore** from the drop-down menu
 - 3) select **Backup** and mark all checkboxes: **Include References**, **Include RSS Feeds**, and select the **Check All** button to include any custom output style you may have created
 - 4) select the **Perform Backup** button
 - 5) at the prompt, save the file to the desktop for use later
 - 6) log out of the 30-Day Trial/Demo account, and log into the new Institutional account:
 - a. from on-campus visit <http://www.refworks.com/refworks> and enter the new login information
 - b. from off-campus visit <http://www.refworks.com/RWSingle>, enter the institution's Group Code and login
 - 7) return to the **Backup/Restore** page and select the **Restore** option
- WARNING:** The **Restore** process will overwrite existing records. This process should be completed immediately and prior to adding any records to the new account.
- 8) **Browse** to the appropriate back up file saved on the desktop (the file extension will be *.rwb)
 - 9) mark all checkboxes: **Include References**, **Include RSS Feeds**, and **Include Output Styles**
 - 10) select the **Perform Restore** button and wait for the process to complete

When you are finished with the account transfer process, **please inform us here at RefWorks and we will delete the Trial account.** If you have any questions or concerns, please contact support@refworks.com again. Good luck!