



# RefWorks *flow*

**Welcome to Flow!** Flow helps you collect, manage and organize research papers and documents. Once entered into Flow you can read, annotate, organize, and cite your documents. You can also collaborate with friends and colleagues by sharing collections.

## **Collecting documents**

There are a number of ways to add documents and references to Flow:

- Using the “Add” button adds a document or reference. You can upload a PDF or Office file and enter the related reference information. Flow will suggest matching references for you as you type, or recognize the document as you upload it.
- Drag-and-drop one or more documents (PDF or Office) into your library. Flow will try to recognize the documents and fill in the reference. Or you can click ‘edit reference’ on a document to fill in, or edit, the reference yourself.
- Whenever you’re on a web page that has an item you want, click the “Save to Flow” button to save the reference or document to your library.
- Many research sites offer an “Export to RefWorks” option which works with Flow as well, allowing you to import references directly to your Flow library.

## **Organizing documents into collections**

Incoming documents will be automatically placed in the ‘All documents’ and ‘Recently Added’ collections in Flow. To move an item to an existing collection you can simply drag it and drop it into another collection. To create a new collection, simply choose ‘New Collection’ from the collection options and give the collection a name.

## **Reading and annotating**

Click on a document in your library to view it in Flow’s reader. To highlight or annotate, in the reader click the highlight or annotation button and select text. Highlights and annotations are saved automatically.

## **Sharing and collaborating**

With Flow, you can provide colleagues or project members with access to a collection(s). To share a collection, open the collection and click the ‘share’ button and follow the instructions. You determine the level of access for each collaborator.

## **Creating bibliographies**

Flow has two ways for you to use your documents and references in your papers:

- First, from within Flow, click the “Bibliography” button. You can create a bibliography from a collection or from all your documents and have it formatted in a specific style. simply copy and paste the displayed references into your paper.
- Or, go to the “tools” page (under the dropdown that has your email address in it) and download Flow for Word. This is an extension to Microsoft Word that connects to your Flow library — so you can cite your references into your paper and have the bibliography created and update automatically!

**For more help, click the  button in the top of the screen.**

Thanks for using Flow!