Upgrade to New RefWorks - Soft Migration Step 2

RefWorks Soft Migration

The second step in the process of upgrading to new RefWorks is the Soft Migration. Support will enable access to new RefWorks for all users affiliated with this institution. This will allow any user affiliated with the institution to create and/or access an access on the new platform.

Existing Legacy RefWorks

After Soft Migration has been enabled, those users that have an existing Legacy RefWorks account, a link will appear within their account that will allow them to create an account on the new platform. This link will appear at the top of their Legacy account and look like this:

Once the user has clicked on this link, they will be prompted to create an account and all of the contents (references, folder structure, attachments and custom styles) within their Legacy account will be moved over to the New RefWorks automatically.

Non Existing Legacy RefWorks

For those users that do not have an existing Legacy account, they will have four (4) options on creating an account on the new RefWorks.

Those options are as follows:

1. Create an account with an institutional email address. This method requires that you have an email address with your institution’s email domain (i.e., @myinstitution.edu). If you do not have an institutional email address, please sign up using one of the other methods listed below. Instructions on this option.
2. Create an account via an institutional unique URL on-campus (or within your Institution’s IP range). Instructions on this option.
3. Create an account via an institutional unique URL and access code when off-campus (or outside your Institution’s IP range). Instructions on this option.
4. Receive an email from an institutional administrator with a link to create an account. Instructions on this option.
**NOTE:**
*Users are able to **maintain both** legacy & new RefWorks accounts in parallel.
**Migration from legacy to new can occur multiple times (new RefWorks will only import new references from legacy on subsequent imports) - however it is a **one-way migration**, meaning reference changes will not migrate back to legacy from new RefWorks*

**Next Step:** The next step after Soft Migration, Institutions can implement the Hard Migration requires all user to move their account from legacy to new RefWorks. This step is not available at this time.

**Resources:** In addition we have creates multiple materials to assist you through this upgrade process

- The RefWorks Support Center accessed user guides admin materials, and training
- Library support tools – New datasheets and marketing toolkits
- Side by side view of new vs legacy RefWorks – *Coming Soon!*
- Sign up for notifications so you can stay up to date on feature improvements.
- Live training webinars to help you quickly get acquainted with RefWorks