Introduction to RefWorks

A Guide to Prepare & Submit your Personal Academic Publication List
# Table of Contents

Introduction to RefWorks .............................................................................................................. 1

1. Introduction ................................................................................................................................. 3

2. Logging into RefWorks .................................................................................................................. 3

3. Creating a RefWorks Account ..................................................................................................... 5

4. Creating Folders .......................................................................................................................... 7

5. Adding References into RefWorks ............................................................................................... 8

  5.1 Adding References Manually .................................................................................................. 8

  5.2 Importing References into your account ................................................................................. 12

  5.2.1 HyDi ................................................................................................................................. 12

  5.2.2 Google Scholar ................................................................................................................. 14

  5.2.3 Google Scholar User Profile (GSUP) ............................................................................... 15

6. Creating your Publication List ..................................................................................................... 17

  6.1 Submitting your Publications List ......................................................................................... 18

  6.2 Selecting publications for the UM Profile ............................................................................ 21

7. RefWorks Help ............................................................................................................................ 22
1. Introduction

- This user guide is aimed at academic staff to help them compile a publication list using RefWorks and send a shared link to publist@um.edu.mt
- The list of publications will eventually be displayed in your staff profile page on the University website.
- For the purpose of the publication list, use RefWorks Legacy (orange logo).

What is RefWorks?

- RefWorks is a web-based bibliographic tool which allows you to create your own database of bibliographic references.
- It allows you to organise references in separate folders for different projects you might have.
- References can be imported directly from an online database or inputted manually.

2. Logging into RefWorks

1. In your browser (Firefox or Google Chrome) type the following URL:
   https://www.um.edu.mt/library/researchtools/bms

IMPORTANT: You should always log in RefWorks using the above URL. You should NEVER log in from any other page.
2. In the **Username** field, type your UM Username e.g. jbor1.

3. In the **Password** field, type your password.

4. Click **Login** button.

   - If you have never used RefWorks before, you will be prompted to create an account in RefWorks as indicated further down. If you have used RefWorks before (and the following screen is displayed), you may skip this point.
3. Creating a RefWorks Account

1. **Step 1: Account Information.** In the Email Address: and Re-enter Email Address: fields type in your **University of Malta Email Address**.
2. Click **Next** button.
3. **Step 2: User Information.**

   a. **Fill in your name.**

   b. **Select your Area of Focus:** from the drop-down menu.

   c. **Select the appropriate option from the Type of User:** drop-down menu.

   d. **Enter the codes in the field below the images.**

   e. **Click Create Account button.**

   f. **You should be redirected to the RefWorks welcome page.**
4. Creating Folders

1. Click the **New Folder** button below the main menu.

2. Give a name to your folder. In this case the folder name has to be your **UM Username**.

3. Click **Create** button.
5. Adding References into RefWorks

- References can be added into RefWorks either by manual entry or by direct export through online data vendors (databases or Google Scholar).

5.1 Adding References Manually

- References which are not listed in any online database must be entered manually.

1. Log in RefWorks.
2. Click the quick button **New Reference**. The Add New Reference dialog box is displayed.

3. RefWorks allows you to pick an output style (such as APA, MLA, Harvard etc) in order to create a more complete reference. Selecting the style is optional but recommended.
4. Click the drop down arrow next to **View fields used by:** and choose the preferred style. (If you are not sure which style to use select “Harvard – British Standard”).
5. Choose the type of reference it is (journal article, book, conference proceeding etc.)

When you select the reference type, the screen will refresh to display the specific fields of information.

6. Enter your reference information (Title, Author, etc.)

7. If you wish, you may include a link to your full-text publication from OAR@UM. To do that, paste the link in Other Pages field:
8. **Add to Folder**: Select the folder with your Username. This is where you will save the reference in.

9. When you are finished click **Save Reference** button.
• To locate the reference you’ve just entered click the folder in which you saved your reference, located in the green toolbar (on the right of the screen).

![Image of Folders]

• By default, reference details will be displayed in the Standard View. You may change how reference details are displayed from the drop-down menu at the top right corner of the Reference section.

![Image of Reference Details]

• To see the full details of a reference click View (magnifying glass icon). To make changes to a reference click Edit (paper and pencil icon).
5.2 Importing References into your account

- There are several different ways to import references into your account from different sources. Below are instructions on importing references from HyDi and Google Scholar.

5.2.1 HyDi

1. Access HyDi, the Library search system, via the Library homepage. To learn how to use HyDi, check the HyDi Online help menu: https://www.um.edu.mt/library/hydi_help
2. Leave a tab with RefWorks open in the background
3. Perform a search on HyDi
4. Find the record and click on the dotted symbol for more options
5. Click the icon.
6. Click the Export to legacy RefWorks button (orange logo).
7. Click View Last Imported Folder and move the imported reference to your folder.
To do this:

i. Click View Last Imported Folder in the window which comes up when a reference is imported from an outside source.

![Import References window]

ii. Drag the reference from the grey bar towards the folder with your UM Username at the side of the page.

![References window]

Alternatively

i. Tick the checkbox next to the reference.

ii. Click the Add to icon (yellow folder with a green plus).

iii. Choose the folder with your UM username. This is where you will save the reference.
5.2.2 Google Scholar

- References can be also imported into RefWorks via Google Scholar. This is a fast and effective way to import references for articles and books.

1. Leave RefWorks open in the background.
2. Open a new tab and type in www.scholar.google.com
3. Google Scholar allows you to find books and articles that you can quickly import into your RefWorks account.
4. Run a search in Google Scholar
5. Click the Citation marks icon beneath the result to be exported.

6. Click the option RefWorks so that the reference will be directly exported to RefWorks.
7. Click the **Export to legacy RefWorks** button (orange logo).

8. RefWorks will open automatically, showing that the import was successful. Click on View Last Imported Folder to view your reference and move it into your chosen folder.

### 5.2.3 Google Scholar User Profile (GSUP)

- References can be also imported into RefWorks via the Google Scholar User Profile (GSUP). This is a fast and effective way to import references of all the publications which UM researchers included in their GSUP.

  1. Leave the tab with RefWorks open in the background.
  2. Open a new tab and type in [https://scholar.google.com/](https://scholar.google.com/)
  3. Sign in with your UM username and password to access your GSUP.
  4. Select the publications available in your profile which you wish to export.
  5. Click the ‘Export’ button and select RefMan – a .ris file will be automatically downloaded.
6. Save the .ris file on your computer.
7. Go back to your RefWorks account.
8. Click the option ‘References’ and click ‘Import’

9. In the pop up window select the following options:
   - Import Filter/Data Source : RIS Format
   - Database : RIS Format UTF-8
   - Encoding : UTF-8

10. Click on ‘Choose File’ and select the .ris file which you downloaded and saved and click ‘Import’
11. The publications list will now appear in the Last Imported Folder. Move the publications list from the Last Imported Folder to the folder with your UM username.

6. Creating your Publication List

1. Start by creating a folder with your UM Username as a Folder Name. It is very important to name the folder with your UM Username since this will allow us to identify you as the owner later on in the process.

2. Click the New Folder button below the main menu.

3. Type your UM Username.
4. Click Create button.

- When you import your references into RefWorks these are often stored in a folder called Last Imported. In this case you would need to move them to your publication list folder (i.e. the one you created with your UM Username as the folder name).

- Once you have finalized your publications list it is important that you submit it so that its contents can be downloaded into the University database. To do this you need to share your publications folder.

6.1 Submitting your Publications List

1. Click Organize & Share Folders tab.

   ![Organize & Share Folders tab]

2. Click the folder with a green arrow icon next to the folder name where you saved your Publication List (i.e. the one with your UM Username).

   - It is very important that your folder has your UM Username.

3. Click Share button.

   ![Share button]

   Are you sure you want to share your folder, jbor1?
RefWorks will show you the folder sharing options. Please leave the default options as they appear.

4. Click Limitations.

5. If the Email field is empty, enter your UM Email Address.

6. Click Save.
7. Close the dialog box window.

8. The folder named as your Username should now have the icon on its far right. Click this icon.

9. A menu will open. Click Email this share.

10. Type the following email address in the To field: publist@um.edu.mt

11. Click Send Email button.
NOTE

- Kindly allow 24 hours for the references to be visible on your profile.
- Once you submit your publication list folder it will be regularly synchronized and any new references added to the folder will be automatically downloaded to the UM database. Eventually this list will be displayed on the UM staff profile page as your official list of publications.
- Therefore it is important that you keep your list complete and current at all times.

### 6.2 Selecting publications for the UM Profile

- Once the publication list has been created on RefWorks and shared with publist@um.edu.mt, you will have to select which publications should be visible on your profile’s page.

1. Open University of Malta website and from the Quicklinks select: Manage UM IT Account.
2. On the left side of the screen, click: **Update Details & Profile**.

3. Click on the tab: **Research Interests & Publications**

4. Tick your preferred publications and click **Submit** at the bottom of the page. You can select as many publications as you would like to appear on your profile. Your references should be instantly visible on your profile.

7. **RefWorks Help**

Remember, if you get stuck you can always select help from the menu. Also, when accessing any of the Help sections, a new tab opens, allowing you to keep the help information available while working within RefWorks.

- **Email Your Librarian**: open an email addressed to refworks.lib@um.edu.mt
- **Tutorial**: RefWorks 2.0 Fundamentals video tutorials
- **Launch Help File**: a searchable help on all the features in RefWorks

Enjoy using this bibliographic tool!