Introduction to RefWorks

A Guide to Prepare & Submit your Personal Academic Publication List

Stefania Cassar
Outreach Librarian
Email: refworks.lib@um.edu.mt

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Table of Contents

1. Introduction: What is RefWorks.......................................................................................... 3
2. Logging into RefWorks ........................................................................................................ 3
3. Creating a RefWorks Account .......................................................................................... 5
4. Logging out of RefWorks .................................................................................................. 7
5. Navigating RefWorks ........................................................................................................ 8
6. RefWorks Help .................................................................................................................. 8
7. Creating your Publication List .......................................................................................... 9
8. Adding References into RefWorks .................................................................................... 10
   8.1 Importing References from a Data Vendor ................................................................. 11
   8.2 Adding References Manually ....................................................................................... 15
   8.3 Importing from other Bibliographic Management Programs ..................................... 18
   8.4 Exporting from online Library Catalogue ................................................................... 19
      8.4.1 Exporting a Single Reference from the online Library Catalogue ...................... 19
      8.4.2 Exporting Multiple References from the online Library Catalogue .................... 25
   8.5 Importing a BibTex File ............................................................................................... 28
      8.5.1 Copy and Paste Option ....................................................................................... 28
      8.5.2 Importing a BibTex File ....................................................................................... 31
9. Submitting your Reference List ......................................................................................... 34
10. Additional Help .................................................................................................................. 37
1. Introduction

This user guide is aimed at academic staff to help them compile a publication list using RefWorks and send a share link to publist@um.edu.mt

The list of publications will eventually be displayed in your staff profile page on the University website.

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, imported from a Text File or inputted manually.

2. Logging into RefWorks

1. In your browser (Firefox, Internet Explorer) type the following URL:

   www.um.edu.mt/go/refworks

   IMPORTANT: You should always log in RefWorks using the above URL. You should NEVER log in from any other page.
The screen will display the following:

2. In the **Username** field, type your UoM 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), skip to 7. **Creating your Publication List**.
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. Logging out of RefWorks

- To correctly log out of RefWorks, it is essential to:
  1. Click Log out at the top-right corner of the RefWorks webpage, and
  2. Close your web browser.

When working on a public computer, closing your browser completely is very important as subsequent users may still see your information if the browser is not closed after logging out.
5. Navigating RefWorks

- Navigating RefWorks is easy! Everything can be accessed from the toolbar highlighted above.
- The toolbar is located at the top of every RefWorks webpage.

6. RefWorks Help

Remember, if you get stuck you can always select help from the menu.

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
7. Creating your Publication List

- Start by creating a folder **with your UoM Username** as a Folder Name.

It is very important to name the folder with your UoM Username since this will allow us to identify you as the owner later on in the process.

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

2. Type your UoM Username

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

References can be added into RefWorks in 3 ways:

1  Importing References from a Data Vendor ............................................................... 11
   When your reference is already listed in an online database (such as Academic
   Search Complete or Google Scholar) this procedure enables you to export the
   Reference directly into your RefWorks account (thus avoiding the need to enter it
   manually)

2  Adding References Manually ................................................................................ 14
   Follow this procedure when your publication is not on an online database thus
   cannot be imported. Such references must be entered manually.

3  Importing from other Bibliographic Management Programs .............................. 18
   It is also possible to import from another Bibliographic Management Program if you
   already use one (e.g. Endnote, Reference Manager etc.).

4  Exporting from online Library Catalogue ................................................................ 19
   Directly export publications which are available at the UoM Library such as books
   and journal articles found in the Melitensia Department

5  Importing a BibTex File ........................................................................................ 28
   Directly import into RefWorks BibTex files which you might have saved on your
   computer

In the following pages we will explain each of these options in more detail.
8.1 Importing References from a Data Vendor

- You can import your references directly into RefWorks from a database which supports export of bibliographic references. Some examples are:
  - Google Scholar
  - EBSCO Host
  - CSA
  - JSTOR
  - BioMed Central

- RefWorks provides a list of all the online data vendors it supports and a specific guide for each database on how to add references into RefWorks from it.

- If your publications are available on an online database and you wish to import directly to RefWorks from the database, it is important to consult this list!

- To access this:
  1. Click Help from the toolbar
  2. Click launch help file from the drop down menu.
• A new window will open.

3. Select **Contents** from the top bar

4. Click **Getting References into Your Account**

5. Select **Importing from Online Data Vendors**
• Click the title of the database (e.g. JSTOR) where your publications are available on. You will be directed to a step-by-step guide on how to export the reference directly from that particular database.

• You may need to set your browser to allow pop-ups from the database website for the process to work.

• 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 UoM Username as the folder name).
• To do this:
  
  • Click **View Last Imported Folder** in the window which comes up when a reference is imported from an outside source

  ![View Last Imported Folder](image)

  • Drag the reference from the grey bar towards the folder with your UoM Username at the side of the page

  ![References](image)

  Alternatively

  • Tick the checkbox next to the reference
  
  • Click the **Add to** icon (yellow folder with a green plus)
  
  • Choose the folder with your UoM Username. This is where you will save the reference.
8.2 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.

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.

3. 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”.)
1. **Add to Folder**: Select the folder with your Username. This is where you will save the reference in.

2. 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.

3. Select the **Source Type** (either Print or Electronic).

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

5. When you are finished click **Save Reference** button.
To locate the reference you’ve just entered click the folder with your Username located in the green toolbar (on the right of the screen).

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.

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).
8.3 Importing from other Bibliographic Management Programs

If you already use another Bibliographic Management tool such as EndNote or Reference Manager you can find specific help on RefWorks on how to import your publication list into RefWorks.

To find step-by-step instructions on how to import your publication list from specific Bibliographic Management Programs:

1. In the toolbar click Help

   ![Toolbar Screenshot]

2. Click launch help file

   ![Help File Screenshot]

   A new window will open.

   1. Click Contents button
   2. Click on Getting References into Your Account
   3. Select Converting from Other Bibliographic Management Programs
   4. Click the name of the program you are using (e.g. Reference Manager) and follow the step-by-step guide on how to import your references into RefWorks.
8.4 Exporting from online Library Catalogue

References can be imported into the RefWorks database via the Library Online Catalogue. This is a fast and effective way if one has published material which can be found in print at the Library such as books, dissertations or journal articles at the Melitensia Department.

8.4.1 Exporting a Single Reference from the online Library Catalogue

1. Log in RefWorks and keep the page open in the background.
2. In another page/tab in your browser (e.g. Firefox, Internet Explorer) type the following URL to visit the Library website:

   www.um.edu.mt/library

3. Click Books, etc tab.
4. Enter your keyword in the Search for: field.
5. Select options from the other fields accordingly.
6. Click search button.
7. Tick the check box next to the book title preference.

8. Click the Export to RefWorks button (top right hand side).

9. You will be directed to an information screen.

10. Press Continue with Export (bottom right of the screen)
A message indicating that the publication details are being exported from the online Library Catalogue is displayed.

**Exporting bibliographic details to Refworks**

*RefWorks* will open automatically, showing that the import was successfully complete.

11. Click **View Last Imported Folder** button to view your reference.
12. Store the imported publication details in the folder with your UoM Username it in your chosen folder.
If you are not logged into RefWorks, when you click on Continue with Export, a different screen will show up. RefWorks will ask you to log in. Do not enter your UoM Username and password in the Login Name and Password fields.
13. From the **Login using other credentials** section, click **My Institutions’ credentials (Shibboleth)**

Choose **University of Malta** from the drop down menu.

![Login to your RefWorks Account](image)

Enter your **UoM Username** and **Password** in the following screen.

![Shibboleth](image)

**IT Services** will NEVER ask for your password by email or phone. Do NOT reply to any email asking for your password or other personal details.
RefWorks will open showing that the reference is now imported.

14. Click on View Last Imported Folder button to view your reference.

Store the imported publication details in the folder with your UoM Username folder by following the steps on page 14.
8.4.2 Exporting Multiple References from the online Library Catalogue

1. Log in RefWorks and keep the page open in the background.

2. In another page/tab in your browser (e.g. Firefox, Internet Explorer) type the following URL to visit the Library website:

   www.um.edu.mt/library

3. Click **Books, etc** tab.

4. Enter your keyword in the **Search for:** field.

5. Select options from the other fields accordingly.

6. Click **search** button.

7. Tick the check boxes next to the book titles.

8. Click **Export to RefWorks** button at the top right hand side.
9. You will be directed to an information screen. Press **Continue with Export** (bottom right of the screen)

A message explaining that the exportation is taking place will show up

**Exporting bibliographic details to Refworks**
10. **RefWorks** will open automatically, showing that the import was successfully complete. Click on **View Last Imported Folder** to view your reference and store it in your chosen folder.
8.5 Importing a BibTeX File

BibTeX is a reference management software for formatting lists of references that is commonly used primarily by the maths, engineering, physics and computer science communities. The BibTeX tool is typically used together with the LaTex document preparation system. RefWorks provides the facility to import directly from the BibTeX format: either by Copy and Paste Option (see Section 8.5.1) or via a BibTeX file (see Section 8.5.2).

8.5.1 Copy and Paste Option

1. Open the desired BibTeX file.

2. Highlight the desired reference and copy (Right click and select Copy) You can select more than one reference at once.
3. Log in RefWorks

4. From the toolbar select References and click Import.

5. In the drop down menu next to Import Filter/Data Source select BibTeX

6. The Database field from which the reference is taken is optional. If the Database is not listed it can be left as <Multiple Databases>
7. Click the heading **From Text** and paste the BibTex reference in the blank space.

8. Click **Import**

9. Click on **View Last Imported Folder** to view your BibTex reference.
8.5.2 Importing a BibTex File

Follow this procedure if you have a BibTex file already stored on your computer.

1. Log in RefWorks
2. From the toolbar select References and click on Import

3. Click the From Text File title to expand settings for this particular import method.
4. In the drop down menu next to Import Filter/Data Source select BibTeX
5. The **Database** field from which the reference is taken is optional. If the Database is not listed it can be left as `<Multiple Database>`

6. Click **Browse** next to the **Select Text File:** field. A new window will open.

7. Locate and select the file on your computer. Click **Open**
8. Click Import

9. Click on View Last Imported Folder to view your BibTex reference
9. Submitting your Reference List

- Once you have finalised your publication 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.

1. Click **Organize & Share Folders** tab

![Organize & Share Folders tab](image)

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 UoM Username)

![Folder with green arrow icon](image)

It is very important that your folder has your UoM Username.

3. Click **Share** button.

![Share button](image)
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 UoM 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

![Send Email dialog box]

NOTE

- Once you submit your publication list folder it will be regularly synchronised wand any new references listed in the folder will be automatically downloaded to the UoM database. Eventually this list will be displayed on the UoM staff profile page as your official list of publications.

- Therefore it is important that you keep your list complete and current at all times.

10. Additional Help

- RefWorks has built-in video tutorials to help you out. Just click Help, Tutorial

- Direct emails can be sent to the UoM Library Help Desk from RefWorks by clicking Help and Email your Librarian

- Should you need further help please do not hesitate to contact: refworks.lib@um.edu.mt

Enjoy using this bibliographic tool!