

RefWorks is a web-based bibliographic management software package that allows you to store and manage your references, and to create correctly assignments and bibliographies.

**VERY IMPORTANT NOTE:** There are two version of RefWorks - Legacy and New. We are using the Legacy version while RefWorks improve the options and features within their new interface. Please ensure that you use the Legacy version - New RefWorks is not yet powerful enough for our users. We hope to move to the updated system in summer 2019 and will notify users of this in advance.

This worksheet is designed to take you through the basics of using RefWorks and will cover the following:

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### STEP 1: Register for a RefWorks account

**If you DO NOT have a RefWorks account, do the following:**

There is a Library guide called **RefWorks – quick guide** in your pack (also available online at <https://www.abdn.ac.uk/library/documents/guides/ggrfw002.pdf>). To set up a new RefWorks account, follow Step 1 in the guide. Please note the different process when registering off campus.

RefWorks will send you an email confirming your account login details. Keep this email safe as it contains the Group Code you may need to access your account when off-campus.

**If you DO have a RefWorks account, do the following:**

Go to RefWorks at [www.refworks.com/refworks](http://www.refworks.com/refworks) and log in with your RefWorks username and password.

### STEP 2: Create a folder to organise references

We recommend you organise your references in folders to make it easier to keep track of references needed for particular pieces of work. References stored in your RefWorks account can be filed in more than one folder. You should only ever have one copy of a reference in your account. This worksheet covers removing any duplicate references from your account and why you must do this (see Step 8 of this worksheet). A reference is always held in your account until you delete it. Once a record is deleted the RefWorks ID number associated with it is deleted and is never re-used.

**Instructions for creating a folder:**

1. In RefWorks click on the **New Folder** button. This is located near the top of the screen.
2. Name the new folder **workshop**. Click on the **Create** button.
3. Go to the top right-hand corner and **log out** of your RefWorks account. You will return to your account once you have found some records to save to it.

For more information see our online Library Guide on how to organise your references with folders at <https://www.abdn.ac.uk/library/documents/guides/ggrfw004.pdf>.

### STEP 3: Importance of planning your searches

The process for planning a good information search is covered in a separate information skills workshop. **Please use the example given below in Step 4** so that you can spend time looking at how RefWorks works and also have records in your RefWorks account in readiness for RefWorks Part 2.

## STEP 4: Import references to RefWorks from the Scopus database

Many databases allow you to send records straight to your RefWorks account, e.g. Scopus, Medline, and Web of Science. This workshop exercise uses Scopus to demonstrate how to use this feature.

**IMPORTANT:** Please use the search terms given in the example below to search Scopus and then send references to your RefWorks account. Once you learn the steps below you can follow them for your own research later.

**IMPORTANT:** Log out of RefWorks and close the tab/browser before carrying out the steps below.

### Exercise 1.1: Access Scopus

1. Go to <https://www.scopus.com>
2. If you are **ON CAMPUS** go to **Exercise 1.2: Search Scopus.**
3. If you are **OFF CAMPUS** you will need to log in to Scopus:
  - a. Click on **Other Institution Login** near the middle of the screen
  - b. Click on the drop-down arrow next to **Select your region or group.**
  - c. Select **UK Access Management Federation.**
  - d. Scroll down and select **University of Aberdeen.**
  - e. Enter your University of Aberdeen computer username and password.

### Exercise 1.2: Search Scopus

On Scopus' **Document Search** screen:

1. Click on the **+** at the end of the search box. This will open a 2nd search box.
  - a. In the 1st box type the following, exactly as given, including spaces: **athlete\* OR sports\***
  - b. In the 2nd box type the following, exactly as given, including spaces: **"jet lag" OR jetlag**
2. Click on **Search.**

The **Documents results** screen will now display a list of records that match your search criteria.

### Exercise 1.3: Send references from Scopus to RefWorks

1. Click the check box to the left-hand side of 10 different records.
2. In the navigation bar above the list of results click on the **Export** button. A new window will open.
3. In the top half of the window under **Select your method of export:**
  - Click the button next to **RefWorks.**
4. In the bottom half of the window under **What information do you want to export?:**
  - Leave **Citation information** selected; click the button next to **Abstract & keywords.** Having this additional information helps you to identify references in your RefWorks account.
5. Click **Export** in the bottom right-hand corner of the window. You will be returned to the results list.

A separate tab will open in your web browser.
6. You will be asked **Which version of RefWorks would you like to export to?** Click in the left-hand box (orange icon) to **Export to legacy RefWorks.**
7. The RefWorks Login webpage will now open. Enter your RefWorks username and password and click **Login.**

Once you have logged in a status window will open indicating that your references are being imported.
8. Click on the **import Log** link to check that there are no problems with the references. If **Tag not identified; Not imported** is listed you will need to double-check these references in your RefWorks account. Sometimes parts of references are not imported correctly, so always check new references for their accuracy. You can edit references and add missing information. This is covered in Step 7 of this worksheet.
9. Click on the **View Last Imported Folder** button. These new references will have been automatically placed in your **Last Imported Folder** in RefWorks.

10. To fill your records in the **workshop** folder you created on page 1 of this worksheet:
  - a. Click on the **All in List** button located above the list of new references.
  - b. Hover the cursor over the **Add to** icon (folder with a plus sign) beside the **All in List** button, scroll down the drop-down menu and click on **workshop**.

A small box will appear in the bottom right-hand corner telling you that this action has been completed, i.e. the new references have been successfully filed in the **workshop** folder.
11. Above the list of results in RefWorks, click on the **Organize and Share Folders** tab.
12. Click on the **workshop** folder to see that your new references have been successfully filed in this folder.

You can move individual references to any number of folders but you will still only ever have one copy of that reference within your RefWorks account.

## STEP 5: Import references to RefWorks from other databases and Primo

**Exercise 2:** Refer to the **Import Methods** handout in your workshop pack and select another database.

**IMPORTANT:** Log out of RefWorks and close the tab/browser before carrying out the steps below.

1. Search your selected database, using the same search terms as for the Scopus search. Export up to 10 records to your RefWorks account.
2. File these records in your **workshop** folder.

The import instructions for all University of Aberdeen subscription databases are available online at <https://www.abdn.ac.uk/library/documents/guides/importing.pdf>

**Exercise 3:** Refer to the **Import Methods** handout in your workshop pack and follow the instructions for moving references from Primo to RefWorks using the following example:

**Moore, N. (2000) *How to do research: the complete guide to designing and managing research projects*, Great Britain: Library Association.**

## STEP 6: Create a new reference manually

It may be necessary to create a reference manually in your RefWorks account, e.g. when referencing webpages. Instructions on how to do this are in the **Import Methods** handout in your workshop pack under **Manual records**.

## STEP 7: Edit a reference in your account

It is very easy to make amendments and additions to any reference in your RefWorks account.

1. Click on **References** (red link, above the list of references, on left-hand side) to return to the full list of references in your account.
2. Click on the **Edit** icon (piece of paper and pencil) next to an individual record. It will open in a pop-up window.
3. Click on the **Fields used by** drop-down arrow to change the referencing style.
4. Click on the **and Reference Type** drop-down arrow to change the type of resource you wish to reference e.g. Book, Section. The fields required will automatically change to reflect the reference type selected.
5. Click on **Additional Fields** and scroll down to add your own notes. Any information in the **Additional Fields** will not appear in your bibliography/reference list but it can be a useful place to record your own thoughts.
6. Once you have edited the record, click on the **Save Reference** button. Close the pop-up window by clicking on the **X** in the blue bar at the top of the window.

## STEP 8: Remove duplicate references from your RefWorks account

You may not find duplicates today but it is good practice to run a check for duplicates regularly. RefWorks gives the option to do this each time you import records and we recommend you get into the routine of using it. Removing newly imported duplicates of records you already have avoids potential confusion later on. However, if you do not carry this out at the time of import the following steps outline the housekeeping procedure that can be applied.

### Never delete records that you know you have already cited in your work – only the later duplicates.

1. In your RefWorks account click on the **View** menu at the top of the screen. Scroll down to **Duplicates** and click on **Close Duplicates**. Always select **Close Duplicates** as this is the best way of checking for them.
2. All duplicate records will now be displayed (if you have any). RefWorks automatically selects the newest version of a reference to be removed (it will have the highest Ref ID number – the unique number given to each reference as it is added to your account) because you are more likely to have used an older record in a piece of work.
3. To delete **all** of the selected duplicate records: click on the **Selected** option at the top of the list. Then click on the **Delete** icon (a red cross), also at the top of the list.
4. To delete an individual record: click on the **Delete** icon (a red cross) at the top of the individual record.
5. Deleted references can be retrieved for up to 30 days. To retrieve a reference, click on the **View** menu at the top of the screen and select **Deleted References**. Select the relevant reference and click on the **Restore** icon above the list of references.

### STEP 9: Create a standalone bibliography (list of references)

If you are required to produce a reference list for your supervisor or a standalone bibliography, RefWorks can create this in a wide range of output styles and formats. You can produce a bibliography of all the references in your account or of the references in a particular folder.

**Exercise 4:** Create a standalone bibliography from the records in your **workshop** folder.

1. Click on the **Create Bibliography** button. A small pop-up window will open.
2. **References to Include From:** indicates the folder from which the bibliography will be created. Change this by going to the folder list in the right-hand side column and clicking on your **workshop** folder. Select **All in List**.
3. **Select an Output Style:** for this exercise click on the drop-down menu and select **Harvard**.
4. **File Type:** select **Word for Windows (2000 or later)**.
5. Click on the **Create Bibliography** button. If the MS Word document does not open automatically, go to the **Completed** box in the bottom right-hand corner of the screen and click on **click here**.
6. **Save** your bibliography to your **Home filespace** (also known as your H: Drive).
7. **Keep the workshop folder created in these exercises for use in the RefWorks Part 2 exercises.**
8. You must always **proofread** the bibliography created by RefWorks as it may not produce a perfect result every time. RefWorks relies on the accuracy of the input from external sources (database suppliers, or you if the reference has been created manually). There may be errors and it is your responsibility to check and correct them.
9. RefWorks' output styles work to broad international standards but there can be a wide variation in the formatting of a named style. Your lecturer may specify **Vancouver** or **Harvard** style but it may not exactly match RefWorks' versions of Vancouver or Harvard. Check your lecturer/supervisor's requirements. It is possible to edit existing styles but this is a time-consuming process.

### STEP 10: Help and advice

If you have any problems accessing RefWorks please contact the IT Service Desk:

Log any IT problems at <https://myit.abdn.ac.uk/sw/servicedesk/>

Tel: 01224 273636 (24 hour service available – out-of-hours service is only available by phone)

The Library's Information Consultants and Adviser can help with using RefWorks and subject specific difficulties:

Information Consultant subjects and contact details are at

<https://www.abdn.ac.uk/library/support/contacts-106.php#panel162>