



How reference management supports the research journey

Survey results expose how much RefWorks features are valued by students and researchers



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To ensure we understand and serve our RefWorks audience, in February 2025, the user experience team conducted a Features Feedback survey which received over 250 responses from researchers and students.

Valuable insights:

Many features resulted as being both valuable and/or not known about, indicating we, the RefWorks product and development, and RefWorks administrators should invest in exposing and training about these

features so more users can benefit from them. We know not all users use the same workflows. Some users will not take advantage of Projects feature or have the need to export references in BibLaTeX format.

"Through survey comments and follow up conversations with responders, we learned that the survey increased overall awareness of new features. This is prompting us to promote features more widely than before".

Amanda Dilworth,
RefWorks User Experience Designer

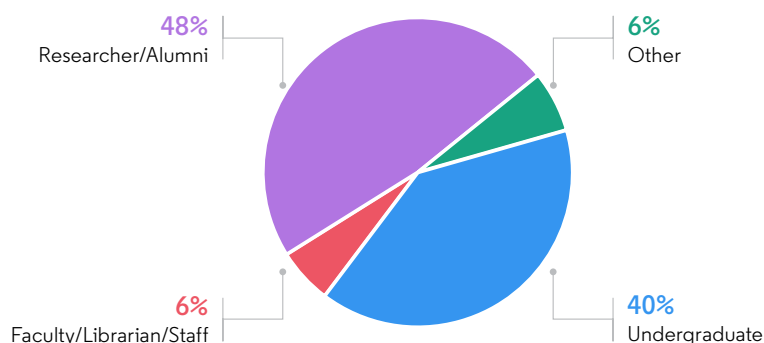
Participant survey scope

We asked users to let us know if they used the new feature and rank their satisfaction from extremely satisfied to extremely dissatisfied.

We are delighted to see very few features were rated at any degree of dissatisfaction. This is a testament to how we choose to implement features, with end users and Board of Advisers participation.

Figure 1: RefWorks user base '24-'25.

Graduate and Researches: 60%, Undergraduate: 40%



Source: 2024-2025 YTD RefWorks active user base

What are the new features and how valuable are they to users?

We chose 9 features to highlight in the survey:



Import into Multiple Projects

Users can import references into multiple Projects at the same time when using direct export from databases or via Save to RefWorks. This enables easier workflows for organizing research and eliminates the need to move or copy references between projects.



Author Field Improvements

The names/author fields in the Reference Editor offer more flexibility. Users can freely edit text, copy and paste and change order and type in non-Latin characters.



RefWorks Citation Manager (RCM) for Word and Google Docs page field and Narrative Citation Formatting

Users can edit citations in integral or narrative citation format: Author (year). Users can now directly add page numbers to in-text citations.



Move or copy folders or references between projects

Users can copy or move Folders and copy references from one Project to another.



Folder Names and Quick View of Sharing

Users can clearly see full Folder name and Sharing settings by mousing over the Folder in the list in the side navigation bar.



My Citations Tab in RefWorks Citation Manager (RCM) for Word

Users have an easy way to view and access references cited in their document in the new My Citations tab. My Citations tab lists all references cited in the document. Users can view references in citation view or in bibliography view and can see how many times the reference was cited, in which citation.



BibLaTeX format export

Users can export references in BibLaTeX format. BibLaTeX is a powerful bibliographic management for creating high-quality technical documents like articles, reports, theses, and books.



New Labels for Sharing in RefWorks or RefWorks Citation Manager (RCM)

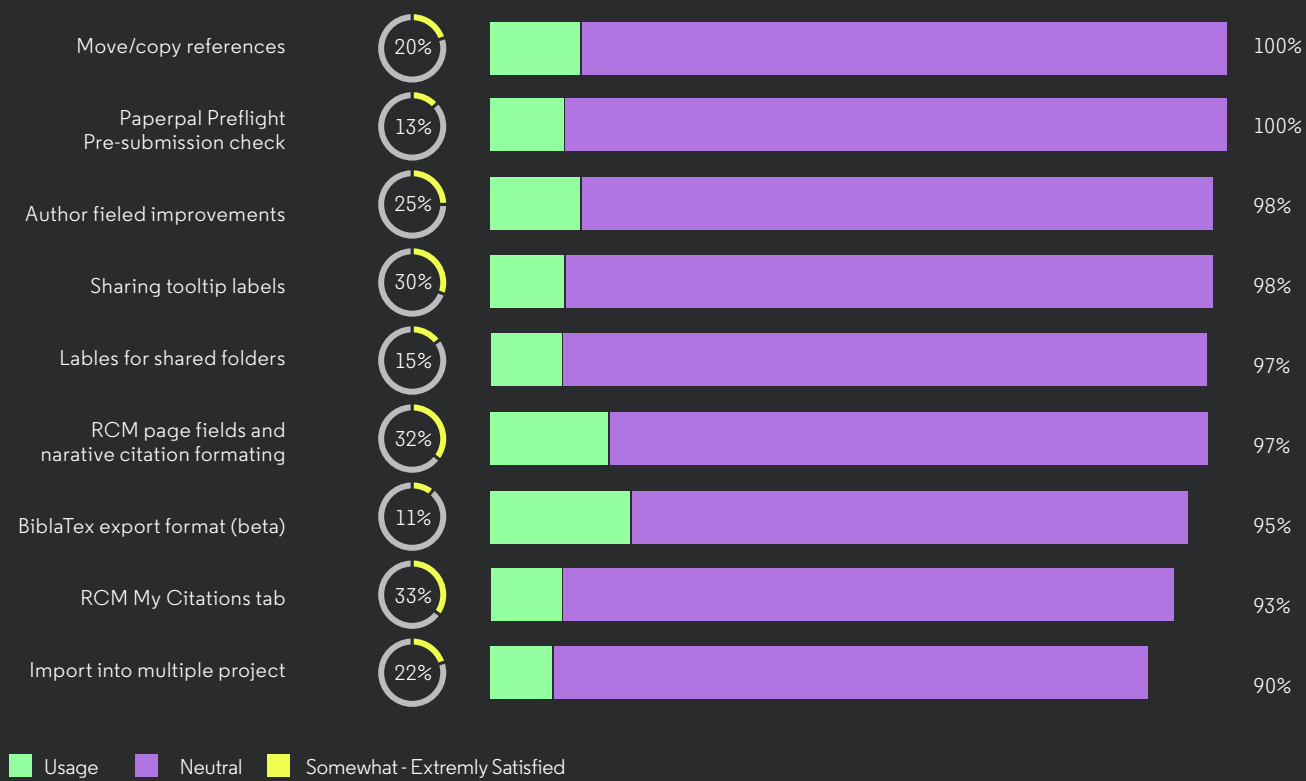
Users can clearly distinguish which reference(s) are added by them, or other users. A notification banner is displayed when a list of references that contains references added by other users has the same Ref ID as those in your library. Folder icons next to links indicate whether the folder is only the owner's or is shared with or by the owner.



Integration with Paperpal Preflight Pre-submission Check

Users have access to RefWorks Paperpal Preflight via RefWorks Citation Manager (RCM) for Word and Google Docs. With this new integration, Paperpal will enhance the process by providing language and technical compliance checks, ensuring manuscripts are submission ready.

Figure 2: New features usage and satisfaction rate.



Source: 2025 Features Feedback User Survey



Results Analysis

Overall, for all features listed we saw a high satisfaction rate from those who had experience using the feature.

We did notice that there were a few features that still have low usage, primarily BibLaTeX export format, Paperpal Preflight Pre-submission check, and Labels for shared folders.

In the case of the BibLaTeX export format feature, the low usage is attributed to the fact that not many of RefWorks users use BibLaTeX nor BibTeX formatted output compared to other output types.

As for Paperpal Preflight Pre-submission check, since the feature is only accessible by clicking on the hamburger menu within the word processing add-on tools, our hypothesis is that the feature has low views. There may be opportunities to bring more awareness to the tool by increased marketing initiatives or by changing the location of the tool in the user interface.

Lastly, regarding Labels for shared folders, we saw that many respondents don't use shared folders, and this could explain why they haven't seen this functionality in the UI.

In conclusion

Results from surveys like this help validate or update our product roadmap, identify areas where we should improve RefWorks or better communicate with our users, and let us know what we are doing well.

The team is committed to improving and adding new training videos and knowledge articles and will continuously take the pulse of our users through surveys like this one.

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