

RefWorks Quarterly Webinar

Feb. 8, 2022

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Agenda

- RefWorks Community Updates
- Dec.-Feb. Release Highlights
- Coming Soon!
- 2022 Roadmap
- Q&A

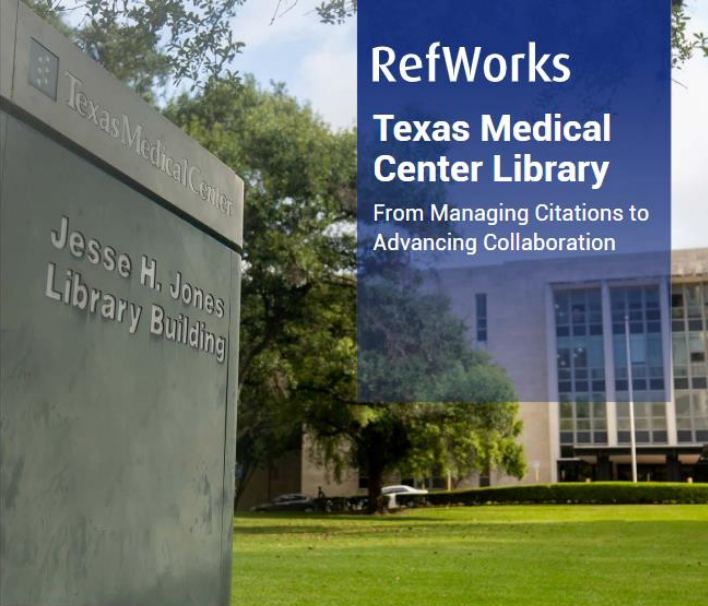


RefWorks Community Updates

New Resources

- Case study: [From Managing Citations to Advancing Collaboration](#)

“For creating bibliographies alone, students love RefWorks because it saves them so much time. And they are excited about new features that are always coming out.”







The graphic features a photograph of the Jesse H. Jones Library Building at the Texas Medical Center. A blue overlay on the right side contains the text: "RefWorks Texas Medical Center Library From Managing Citations to Advancing Collaboration".

The Jesse H. Jones Library Building

RefWorks
Texas Medical Center Library
From Managing Citations to Advancing Collaboration

The **TMC LIBRARY**
Health Sciences Resource Center

How **RefWorks** Enables Librarians at the Texas Medical Center Library Do What They Do: Help People

    about.proquest.com

ProQuest.
Part of **Clarivate**

New Resources

- Case study: [From Managing Citations to Advancing Collaboration](#)
- RefWorks promotional videos
 - [Why RefWorks?](#)
 - [RefWorks Benefits Faculty Members](#)
 - [Simplify Your Research Workflow with RefWorks](#)



Why RefWorks?

RefWorks



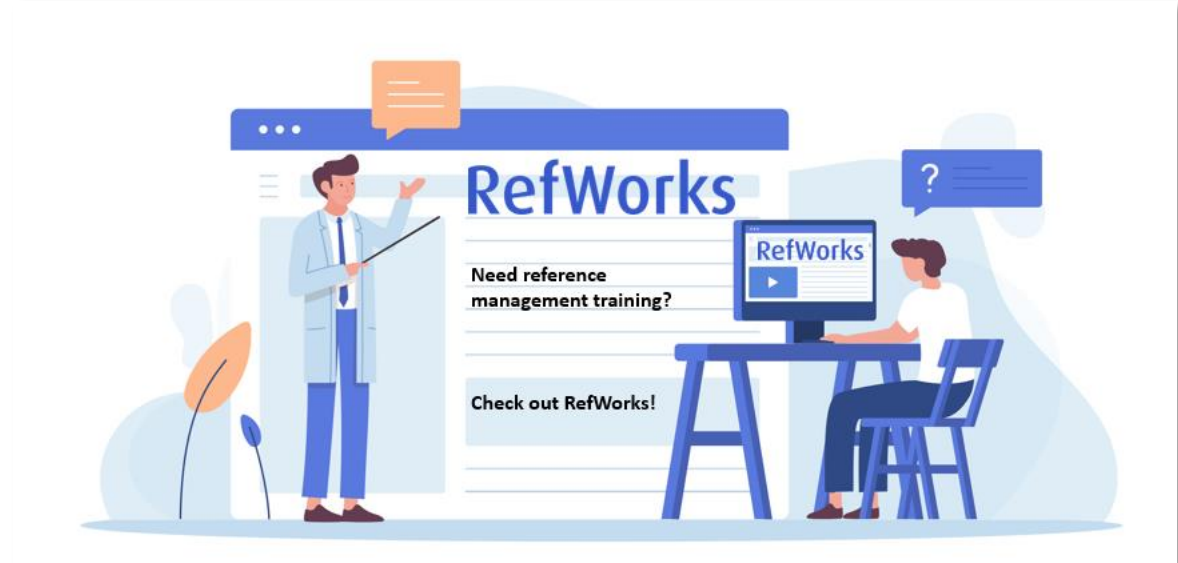
RefWorks Benefits Faculty Members



Simplify Your Research Workflow with RefWorks

New Resources

- Case study: [From Managing Citations to Advancing Collaboration](#)
- RefWorks promotional videos
- [End User Training tweets](#)



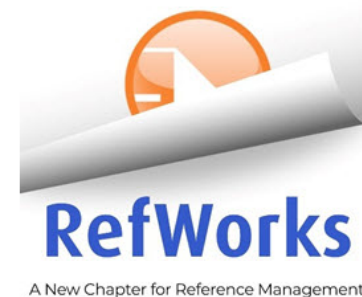
New Resources

- Case study: [From Managing Citations to Advancing Collaboration](#)
- RefWorks promotional videos
- End User Trainings – promotional images
- Updated! [Admin Upgrade Guide](#)

Upgrading from Legacy RefWorks to RefWorks (Admin)

◀ Upgrade Toolkit | How to Upgrade your Institution ▶

In this page you will find everything you need to know about upgrading your institution from legacy RefWorks to (new) RefWorks and becoming a RefWorks-only institution: the upgrade options available to you and your users, considerations when creating your upgrade plan, actions to take before and after upgrading, extensive FAQs, and more.



– Table of content


1. What Does an U
2. Why Should we
 - 2.1. Differences
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 - 3.2. Disable Leg
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4. Upgrade Option
 - 4.1. Institutional
 - 4.2. User Upgra
5. After Upgrading
 - 5.1. Training
 - 5.2. Inviting Use

Coming Soon!

- Video Tutorial: RefWorks Administration – Settings Checklist

Admin Checklist

As a new RefWorks Administrator, perform the following steps to get RefWorks up and running:

1. Log on to [RefWorks](#).
2. [Designate users as administrators](#).
3. Configure the following basic [administration settings](#):
 - Invite users – edit and send an email to your users inviting them to set up a RefWorks account. (See [Five ways to introduce RefWorks to your institution community](#).)
 - Institution name – the institution name you create appears on the top right of the RefWorks page.
 - Institution URL – enter your institutional name and Website link to create a hyperlink to your Website.
 - Link Resolver Label and URL – this allows users to find full text of their references.
4. Review the [RefWorks tutorial videos](#).
5. Build a  [RefWorks webpage](#) on your library website with key messaging and links to support your users.
6. Train your fellow librarians/administrators.

At any time, you can:

- Onboard new faculty or staff members.
- Configure remaining administration settings:
 - Sync with Dropbox – allow users to sync full-text references with their Dropbox account.

Coming Soon!

- [Panel Discussion](#): RefWorks at medical institution libraries
 - March 10, 11AM EST, 4PM GMT



Krista Clement

Reference Librarian
BC Cancer



Kelsey Koym

Research & Instruction
Librarian Liaison
TMC Library



Emma Silva

Research & Instruction
Librarian Liaison
TMC Library



Sara Loree

Medical Library
Manager
St Luke's



Lindsay Zamara

Medical Librarian
St Luke's



Dec.-Feb. Release Highlights

December 9 Platform Release

My Research

Documents (2)

Searches (1)

Alerts (0)

RSS feeds (0)

Widgets

Account

RefWorks Settings

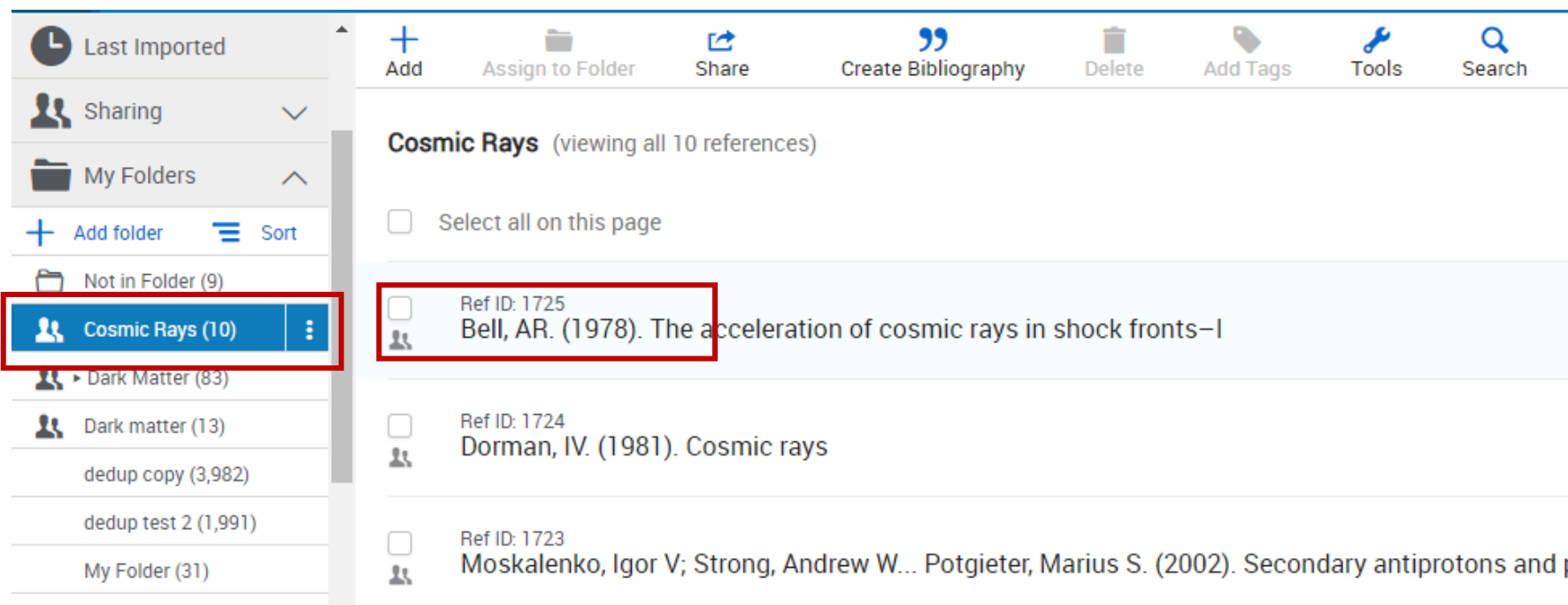
Use the link below to connect your RefWorks account to My Research, so that you can add documents to RefWorks with a single click from the ProQuest platform. You will also be able to create folders, organize citations, and delete citations in either RefWorks or My Research. The changes you make will appear in both places.

Already have documents saved in My Research? Make sure that they are added to RefWorks **before** you connect your accounts, or you will lose them. [Learn more...](#)

[Connect RefWorks to My Research](#)

(you will be asked to log into RefWorks to confirm that you wish to connect your account)

December Release



The screenshot displays a software interface for managing references. On the left, a sidebar lists folders: 'Last Imported', 'Sharing', 'My Folders', 'Add folder', 'Sort', 'Not in Folder (9)', 'Cosmic Rays (10)', 'Dark Matter (83)', 'Dark matter (13)', 'dedup copy (3,982)', 'dedup test 2 (1,991)', and 'My Folder (31)'. The 'Cosmic Rays (10)' folder is highlighted with a red box. The main area shows the 'Cosmic Rays' folder (viewing all 10 references) with a toolbar containing 'Add', 'Assign to Folder', 'Share', 'Create Bibliography', 'Delete', 'Add Tags', 'Tools', and 'Search'. Below the toolbar, there is a 'Select all on this page' checkbox and a list of references. The first reference, 'Ref ID: 1725 Bell, AR. (1978). The acceleration of cosmic rays in shock fronts-I', is highlighted with a red box. Other visible references include 'Ref ID: 1724 Dorman, IV. (1981). Cosmic rays' and 'Ref ID: 1723 Moskalenko, Igor V; Strong, Andrew W... Potgieter, Marius S. (2002). Secondary antiprotons and p'.

Ref ID: 1725
Bell, AR. (1978). The acceleration of cosmic rays in shock fronts-I

Ref ID: 1724
Dorman, IV. (1981). Cosmic rays

Ref ID: 1723
Moskalenko, Igor V; Strong, Andrew W... Potgieter, Marius S. (2002). Secondary antiprotons and p

December Release

The screenshot displays the RefWorks interface. On the left, a sidebar lists folders, with 'Cosmic Rays (10)' highlighted in a red box. The main workspace shows a document with the text 'I can cite from my shared folder (Bell, 1978, pp. 147–156).', where the citation is enclosed in a red box. On the right, the 'RefWorks Citation Manager' window is open, showing a list of references from the 'Cosmic Rays' folder. The first reference is highlighted in a red box:

- Ref ID: 1725
The acceleration of cosmic rays in s...
Bell, AR (1978)
Monthly Notices of the Royal Astronomical S...

Other visible references include:

- Ref ID: 1724
Cosmic rays
Dorman, IV (1981)
MolzN
- Ref ID: 1723
Secondary antiprotons and propag...

January Release

```
@article{RefWorks:RefID:1-patel2011magnetic,  
  author={Uday B. Patel and Fiona Taylor and Lennart Blomqvist  
  year={2011},  
  title={Magnetic resonance imaging-detected tumor response for  
  journal={Journal of Clinical Oncology},  
  volume={29},  
  number={28},  
  pages={3753-3760}  
}
```

```
@misc{RefWorks:RefID:360-smith1998<b><i><u><sub>this,  
  author =      {Jhon Chelanga Smith and Alfonso Peter},  
  year =      {1998},  
  title =      {This is the title},  
  journal =    {Periodical, Full: Popular Science},  
  volume =    {Medium},  
  pages =     {Start : 56-Other Pages: 87},  
  note =      {ID: RefID:37-chelanga1998title; Notes: Includes index.  
  abstract =   {Abstract: Addison-Wesley series in electrical  
  isbn =      {8405-0550445741},  
  language =   {Language: English},  
  doi={Misc}  
}
```

January Release

The screenshot shows the RefWorks interface for editing a reference. The breadcrumb navigation at the top left reads "← Alpine Research (Institutional)". On the right, there are "Options" and "Save" buttons. The main area is titled "Bibliography settings for Generic references" and contains a single reference entry: "author, 1. *Generic reference*, www.google.com". Below the entry is a rich text editor with formatting options (B, I, U, T², T₁) and a toolbar with fields for "Authors", "Publish Date (Year)", "Title", "Series Title", "Series Editors", "Alternate/ Translated Title", "Translators", "Editors", "Edition ed.", "Vol. Volume", "Place of Publication", "Publisher", "URL", and "(accessed Date Ref)". An "Options" dropdown menu is open on the right, listing actions: "Style base on:", "AAAR - Arctic, Antarctic, and Alpine Research", "Revert to original", "Rename", "Duplicate", "Stop sharing with my institution", and "Delete". The "Delete" option is highlighted with a red box.

Upgrade to the latest RefWorks version!

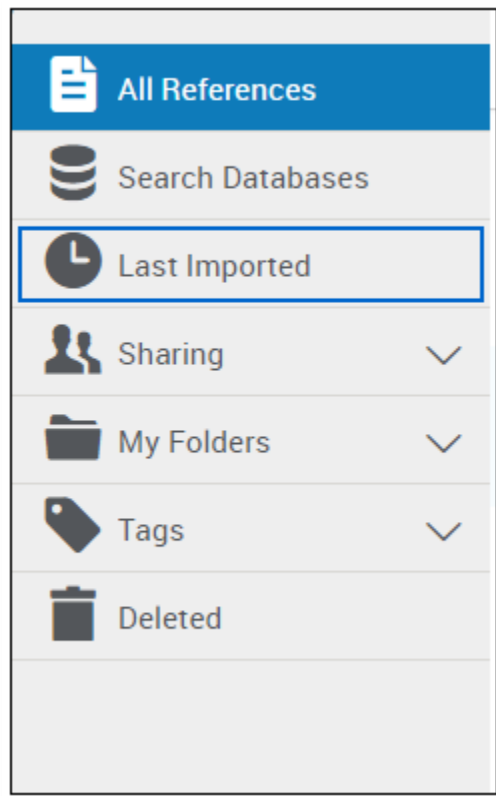
RefWorks

Import from another reference manager

Legacy RefWorks

Mendeley

February Release



Direct Export using WAYFLess link

February Release

The screenshot displays the Web of Science interface. At the top, the navigation bar includes 'Web of Science™', 'Search', 'Marked List', 'History', 'Alerts', and a user profile for 'Robert Poolman'. The main search area shows '31,722 results from Web of Science Core Collection for: crispr (Topic)'. Below the search bar are buttons for 'Analyze Results', 'Citation Report', and 'Create Alert'. A 'Refine results' sidebar on the left offers filters for 'Quick Filters' (Highly Cited Papers, Hot Papers, Review Articles, Early Access, Open Access, Associated Data) and 'Publication Years' (2022, 2021, 2020). The main results area shows two entries. The first entry, 'Characterization of distinct m...', has an export menu open with options like 'EndNote online', 'EndNote desktop', 'Add to my Publons profile', 'Plain text file', 'RefWorks', 'RIS (other reference software)', 'BibTeX', 'Excel', 'Tab delimited file', 'Printable HTML file', 'InCites', 'FECYT CVN', and 'More Export Options'. The second entry, 'CRISPR-RT: a web application...', is also visible. The interface includes a 'Sort by: Relevance' dropdown and a page indicator '1 of 635'.



Coming Soon!

Institutional Upgrade



RefWorks Logout
Site Administrator Tool for RefShare University

Administrator Central ▾ Usage ▾ Subscriber ▾ Preferences ▾ Customize ▾ Help ▾

Automated Upgrade Tool

Use this page to upgrade legacy RefWorks users at your institution to (new) RefWorks in bulk.

Please note:

- We recommend you disable the creation of new legacy accounts before performing the upgrade. [Learn how to disable the creation of new legacy accounts.](#)
- Multiple accounts associated with the same user will be upgraded to a single RefWorks account, with each legacy account in a separate Project.
- References (excluding references in Deleted References), attachments, folders, and custom citation styles will be transferred.
- Any folders that were publicly shared in legacy RefWorks should be shared again in RefWorks after upgrading.
- For more information about the Automated upgrade process, [visit the knowledge center](#) or [watch this video tutorial](#).

1. Generate and download spreadsheet with current legacy user account information

Click on the 'Generate list' button to create a spreadsheet containing the most up-to-date legacy user account information.

2. Once you've indicated accounts for upgrade in the spreadsheet, upload the spreadsheet

- a. Go to the 'Legacy users for Upgrade' tab
- b. Go to the 'Select Accounts' column (Column A). Click on a cell to activate the dropdown menu options ('Upgrade', 'Do not upgrade')
 - i. By default, Legacy accounts that have not been upgraded are pre-selected for 'Upgrade'.
 - ii. If an account is not available for upgrade, a dropdown menu will not appear until an email address



2022 Roadmap

2022 Focus Areas & Roadmap



BROADEN ACCESSIBILITY

Q1-Q2 Expand accessible features*

- Make the global header responsive
- Improve keyboard accessibility, starting with the Reference Organization pane



IMPROVE & EXPAND EXISTING WORKFLOWS

Q2 Improve deduplication

- Expand search capabilities with folder search and partial search
- Load and interact faster with reference list



INTRODUCE NEW WORKFLOWS & FEATURES

Q3 Give access to open-source full text (Unpaywall)

- Add reference types: Archival materials, Dissertation
- Speed up reference management by identifying duplicates when importing



PROVIDE MORE ADD-ON FEATURES

Q3 Implement RCM features in Google Docs add-on

- Support institutional and individual Word (and Hangul) upgrades by converting WnC docs to RCM
- Simplify RCM login for Single Sign On users

* Refer to the [RefWorks Accessibility Statement](#) for details.

Q & A

Thank you!

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