

RefWorks Quarterly Webinar

June 28, 2022

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ProQuest[®]


Part of **Clarivate**

Agenda

- RefWorks Community Updates
- March – May Release Highlights
- June Release
- Legacy to RefWorks Institutional Upgrade Feature
- Q&A

RefWorks Community Updates

New Resources

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.

RefWorks Panel Discussion

- RefWorks at medical institution libraries – [Recording](#)



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

March - May Release Highlights

March Release

Implementation of New Logo across RefWorks



Old Logo



New Logo

The screenshot shows the RefWorks web interface. At the top, a blue header bar contains the "RefWorks" logo and a dropdown menu for "Earth Sciences". Below the header is a navigation sidebar with options: "All References", "Search Databases", "Last Imported", "Sharing", "My Folders", "Tags", and "Trash". The main content area features a toolbar with icons for "Add", "Assign to Folder", "Share", "Create Bibliography", "Delete", "Add Tags", "Tools", and "Search". Below the toolbar, the "All References" section is displayed, showing a list of references. The first reference is "Yager, R.R.; Filev, D.P. (1992). Identification of nonlinear systems by fuzzy models" with tags "Fuzzy systems", "Parameter esti...", "Probability distr...", and "+9". The second reference is "Yaager, R.R.; Filev, D.P. (1993). Unified structure and parameter identification of fuzzy models".

April Release

RCM Prominence in Tools Section

Use RefWorks add-ons for your papers

Microsoft Word Google Docs Hangul

If you use Microsoft Word for writing papers, you'll love how easy RefWorks makes citing references. The add-ons allow you to quickly insert and edit citations and bibliographies as you write.

Word 2016 and Above: RefWorks Citation Manager (RCM)

For Word 2016 (Windows and Mac) and above, install RCM from the Microsoft Store in Word.

Other Word Versions: Write-n-Cite

For other Word versions, [install Write-n-Cite](#).

Visit the [knowledge center](#) to learn more about installing plug-ins and add-ons.

RefWorks Citation Manager

APA 7th - No Case Chan...

This format only supports in-text citations.

(Xiang et al., 2020) [Edit](#)

Clear Selection(s) [Insert Citation](#)

All references [Date added](#)

Search all references

Ref ID: 517
The association of socio-economic sta...
Xiang,B., Wong,H.M., Perfecto,A.P. and 1 more. (...)
Quality of life research : an international journal...

RefWorks add-ons for your papers

April Release

Removed Library Views from Admin Analytics



ProQuest RefWorks

- Users
- Settings
- Account Creation
- Analytics
 - Usage Analytics
 - Publications Added
 - Publications Cited
 - Publications Read
 - Publications Viewed
 - Library Views**

Library Views

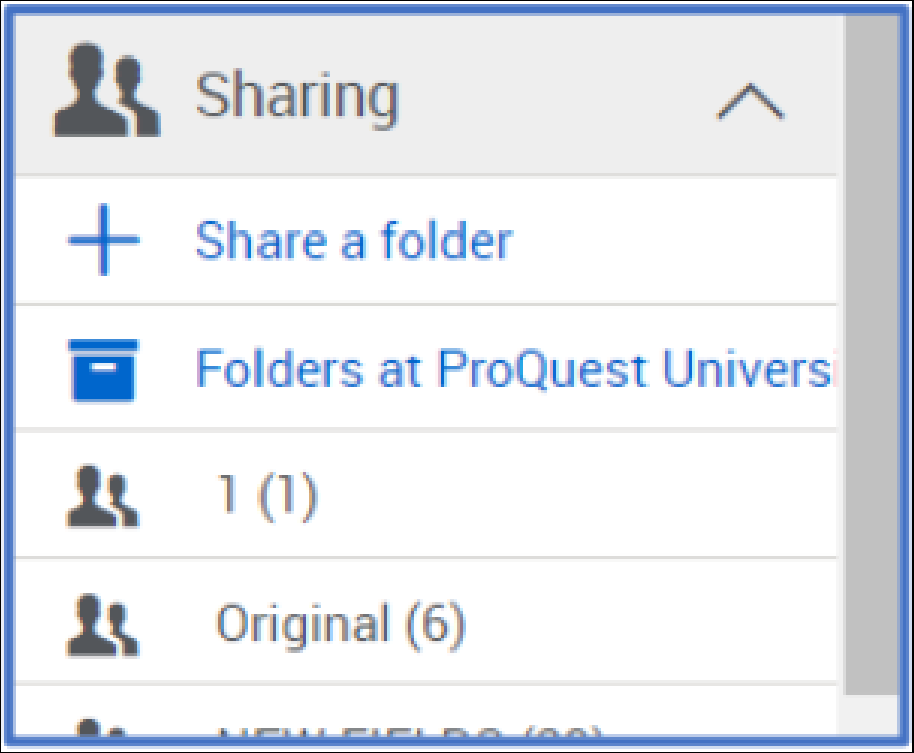
May Release

Reference and Folder Info Added to User Data in Admin Analytics

The screenshot shows the 'Users' management interface in Admin Analytics. On the left is a navigation menu with 'Users', 'Settings', 'Account Creation', and 'Analytics'. The main area has a search bar for 'email address' and a 'Search' button. There is an 'Invite Users' button in the top right. Below the search bar, there is an 'Actions' dropdown and a checkbox for 'Show deactivated accounts'. A blue button 'Download all users as CSV' is located on the right side. At the bottom, a table header is visible with the following columns: 'Email', 'Name', 'Status', 'Last active', 'No of Folders', and 'No of References'. The 'No of Folders' and 'No of References' columns are highlighted with a blue box.

May Release

Improvements to Folder Count for Shared Folders and Folder Actions



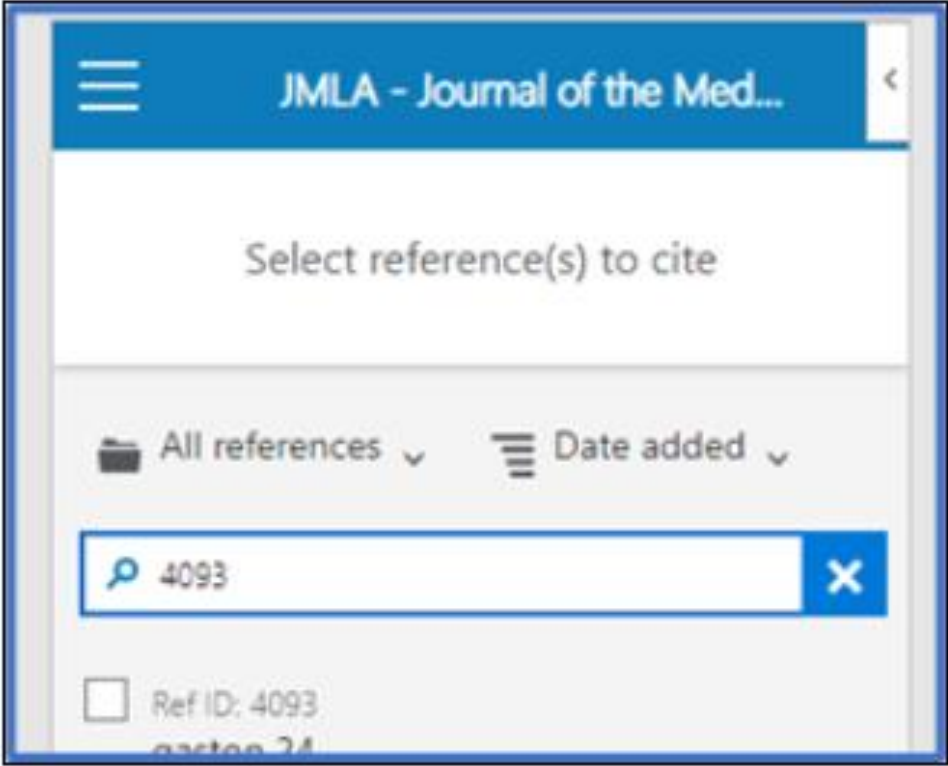
Reference Count for Folders



Actions Menu for Folders

May Release

Search for References by RefID in RCM



RCM with RefID

May Release

Improved URL Field in References Metadata

URL

www.google.com

www.times.com



Idea Exchange

March – June Releases: Accessibility Updates

- Keyboard enabled focused states and responsive navigation: in Search area and in Footer on login page
- Enhancements made to the top banner site elements are in compliance with accessibility standards to provide a clear and consistent focus state on each page
- Several changes were done to improve accessibility for Reference Actions for screen reader and speech-input users
- RCM accessibility improvements: checkboxes and upper left main menu are now keyboard accessible and include screen reader, implemented overall RCM screen contrast improvement

June Release

June Release


Users can add references to folders in Table View

Reference Editor button placement changes



Ref ID: 249

Ref Type:

Title: Handbook of Blended Learning: Global Perspectives, Local Designs 
Editors: Curtis J. Bonk and Charles R. Graham, to be published by Pfeiffer Publishing

Authors:

Abstract

Tags:

Attachments:
 [57fade7be4b077309e7cd12b.pdf \(226 KB\)](#)

Publish Date: "Mar 12, 2015" or "2015"

URL:

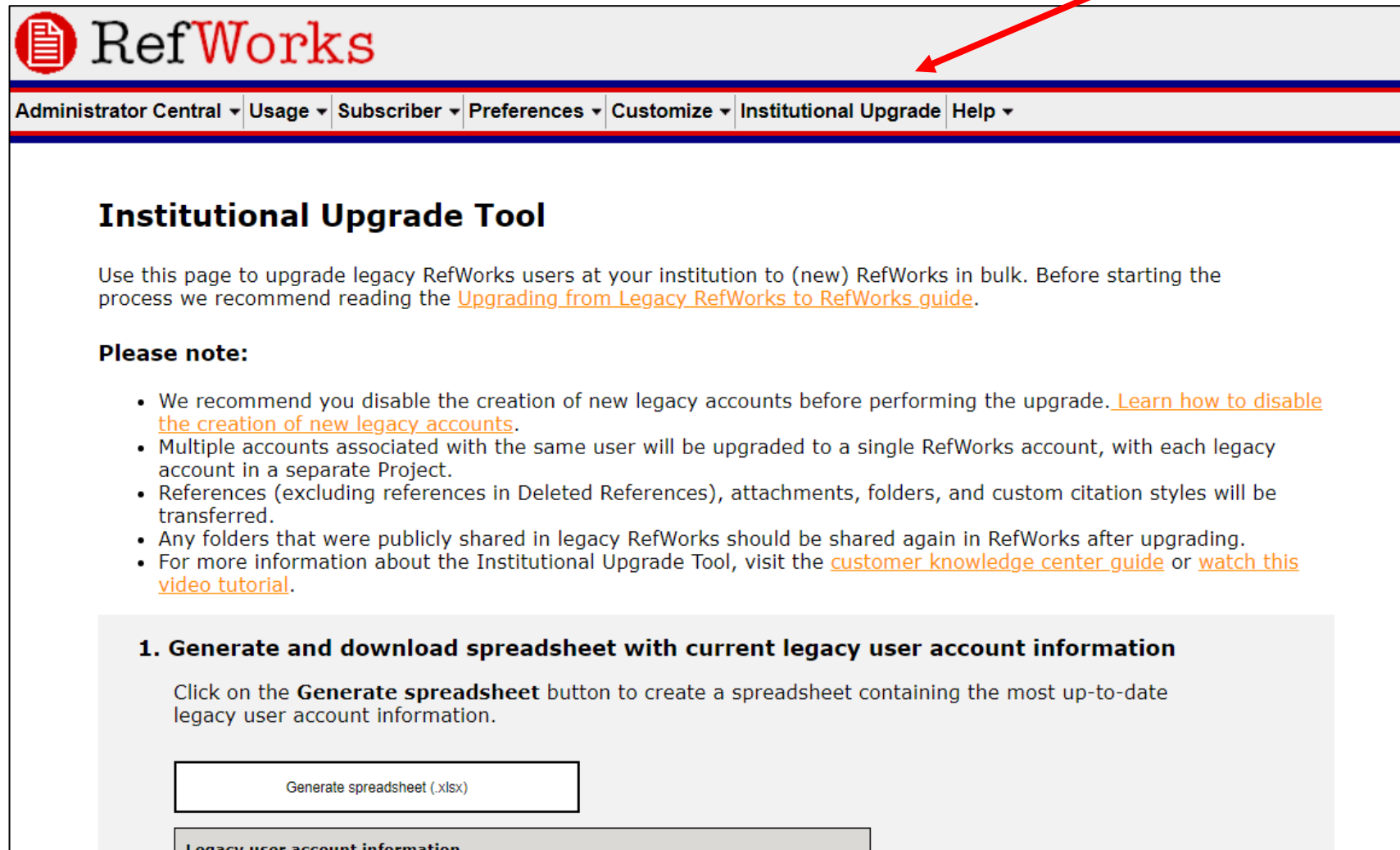
Publication


Publisher



Institutional Upgrade

Institutional Upgrade for Legacy Institutions



 RefWorks

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

Institutional Upgrade Tool

Use this page to upgrade legacy RefWorks users at your institution to (new) RefWorks in bulk. Before starting the process we recommend reading the [Upgrading from Legacy RefWorks to RefWorks guide](#).

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 Institutional Upgrade Tool, visit the [customer knowledge center guide](#) or [watch this video tutorial](#).

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

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

Generate spreadsheet (.xlsx)

Legacy user account information

Institutional Upgrade - What You Need To Know

Q: Who does this feature and change affect?

A: Only those institutions who offer access to, and have active users on, legacy RefWorks are affected.

Q: What does the release of Institutional Upgrade mean for legacy RefWorks?

A: It's time for you to upgrade your institution to RefWorks.

Q: Does this mean legacy RefWorks will no longer be available?

A: We plan to deactivate legacy RefWorks in 1 year on **June 30, 2023**.

Institutional Upgrade - What You Need To Know

Q: Why is this the right time to deactivate legacy RefWorks?

A:

- 1) We are now offering Institutional Upgrade tool for Admins, which provides ability for you to upgrade legacy users in bulk
- 2) RefWorks provides an enhanced user experience and is continuously improving

Institutional Upgrade - What You Need To Know

Q: Is Institutional Upgrade training available?

A: Yes, we will host multiple training sessions throughout the year and have a [How-To training video](#) ready for you to view at your convenience. [Detailed documentation](#) is also available.

[Training Video](#)



Webinars

Tuesday July 26 – [Register](#)

AMERICAS (New York) 11:00 am

EMEA (London) 4:00 pm, (Germany) 5:00 pm

Tuesday August 24 – [Register](#)

Korea only - 10:00 am

Tuesday September 20 – [Register](#)

EMEA (London) 11:00 am, (Germany) 12:00 pm

Institutional Upgrade - What You Need To Know

Q: When is the best time to upgrade?

A: You can upgrade when it is convenient for you and your users; you may want to consider the academic calendar or other institution-wide scheduling. Note: The current legacy deactivation date is June 30, 2023.

Q: How do we communicate to our end users?

A: We recommend you email your users and post in-app message in legacy to communicate your approach and timing. Furthermore, review and update your library resources: libguides, links to [RefWorks](#), trainings and user guides.

Institutional Upgrade - What You Need To Know

Q: Can RefWorks make this upgrade for us?

A: Yes, our team is ready to help. You may [submit a request](#) for upgrade. You will still need to communicate your upgrade approach to your users.

Q: How easy is it to use the Institutional Upgrade feature?

A: We have customer beta tested the process, made suggested improvements, and found the process to be easy.

“This process is all very straight forward” - Beta test institution Admin

Institutional Upgrade - What You Need To Know

Q: What do we do after we have upgraded all users at our institution?

A: Notify Us!

Once all your institution's legacy accounts have been upgraded to RefWorks, contact [RefWorks Tech Support](#) to deactivate your legacy access. We will save user data for 120 days after deactivation before deletion.

Institutional Upgrade - What You Need To Know

Key Resources

[Upgrading from Legacy RefWorks to RefWorks](#) (Admin) guide with all options and details

[Institutional Upgrade documentation](#)- instructions on how to use institutional upgrade feature

[Institutional Upgrade How-To training video](#)

[Disabling Legacy RefWorks Account Creation](#)

To request that RefWorks deactivate your institution's legacy access or to ask questions about the Institutional Upgrade process, please [contact RefWorks Tech Support](#)

Q&A

Thank You

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