

A woman with long brown hair, wearing a plaid shirt, is looking down at a laptop in a library. The background is filled with bookshelves. Overlaid on the image are several semi-transparent data visualizations: a pie chart on the left with segments labeled 45%, 12%, 23%, and 10%; a bar chart in the center with five bars of increasing height; a line graph on the right with a map of Europe; and another bar chart in the top right corner with five bars of increasing height.

# RefWorks® Reference Management Service

Maximize research productivity

# Agenda



1. **Welcome Board of Advisors**
2. **Q1 Features Review**
3. **Q2 Feature Commitments**
4. **Other Enhancements**
5. **Beyond 2018**
6. **Q&A**

# Introductions



ProQuest  
**RefWorks**



**Todd Vaccaro**  
**Lead Product Manager, RefWorks**  
**+1-646-714-2808**  
[Todd.Vaccaro@proquest.com](mailto:Todd.Vaccaro@proquest.com)






## What To Expect with ExLibris.



# RefWork and ExLibris- The Power of Collaboration



ExLibris  
a ProQuest Company  
idealexchange

Have an Idea for Ex Libris?

Share your ideas

Welcome to Ex Libris Idea Exchange! We'd love to hear from you. To suggest an idea, please select one of the following forums:

Alma

Primo

Rosetta

campusM

Content

ExLibris Knowledge Center

How can we help you?

Home

Summon

Product Documentation

Access the latest product documentation

Release Notes

Stay informed about new releases included in each product

Developer Network

Docs Tech Blog Code & Apps Forum Dashboard

Search

Put Ex Libris products at the center of your library ecosystem.

Learn Code & Apps

Primo Alma Rosetta Leganto Summon SFX Alep

ExLibris System Status


System Status Single Tenant Privacy Policy Security

The System Status page presents the latest information on the availability of all multi-tenant instances. You may check this page at any time to see the current status information, or subscribe to be notified via email of interruptions to any individual service. If you are experiencing a real-time, operational issue that is not indicated below, please inform us by opening a customer support request.


Product: All Region: Europe

Remember my instances Reset


Instances	Email Alerts	Current Status	Nov-22	Nov-21	Nov-20	Nov-19	Nov-18	Scheduled Maintenance
Alma EU00	✉	✓	✓	✓	✓	✓	✓	
Alma EU01	✉	✓	✓	✓	✓	✓	✓	
Alma EU02	✉	✓	✓	✓	✓	✓	✓	
PC CR01	✉	✓	✓	✓	✓	✓	✓	
Summon CR01	✉	✓	✓	✓	✓	✓	✓	




Idea Exchange




Developer Network




Product Working Groups




Knowledge Center



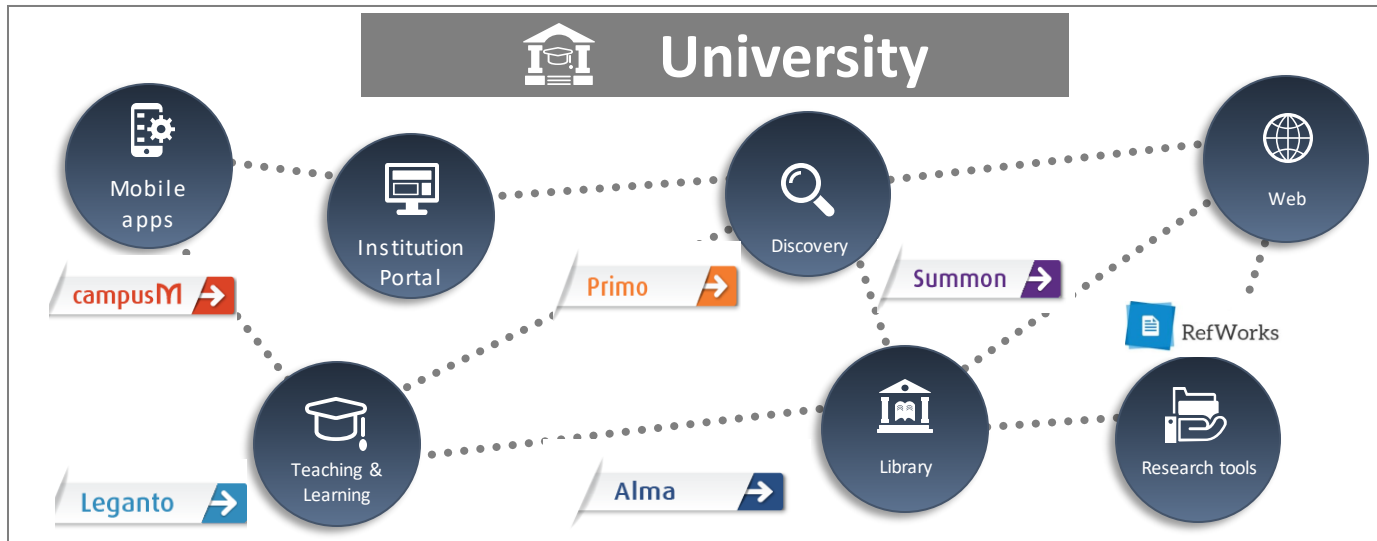
24/7 HUB



Product Release Cycle



# RefWork and ExLibris- Leveraging Synergies



# RefWork and ExLibris- Leveraging Synergies

 ExLibris Leganto

## Integration with teaching and learning tools

- Easy way to add material from RefWorks to the reading list
- Use RefWorks as a central personal workspace

 ExLibris Primo

 Summon®

## Integration with Discovery tools

- Search in Primo/Summon via the RefWorks interface
- Use RefWorks as a central personal workspace

# Board of Advisors



**University of Toronto**  
**Christina Tooulas-Santolin**

We still would like  
one from the UK.



**University of Helsinki**  
**Teijo Kuvaja**  
**Taina Kettunen**

Any volunteers?



**Grand Canyon University**  
**Alaina Dowd**



**New York University**  
**Margaret Smith**



**University of Maryland University College**  
**Christine (Chris) Moua**  
**Cynthia Thomes**



- Legacy will not be decommissioned in 2018
  - Extended for 2019
  - Will provide method to move entire institution
- What are the top priorities for you to move to New RefWorks?

# Roadmap Areas and Highlights 2018

## Performance

- Simple and Accurate Imports
- **Improve Processing of All PDFs/files**
- Improve import webpage PDF and BibTeX accurate
- Make processing consistent
- **UI Improvements - Show import process**
- Improve Style Export Accuracy

## Writing Tools (WNC,RCM, Gdocs)

- Document Compatibility
- High Priority Bug Fixes
- Improve installation and syncing WNC
- Improve quality of the editing a citation in RCM/GDoc
- RCM Word Online (Office 365)

## Administrator Tools

- Usage Analytics
- Deactivate User
- Restrict folder sharing
- Upgrade user to NRW - entire institution
- Reset User Password
- Custom style sharing
- Custom Roles and Focus Area (Discipline)

## Features for Systematic Review

- View, Organize, and Manage thousands of citations in a collaborative manner
- Create Projects for multiple accounts
- Tab-delimited export
- Show all citations in folder on 1 page
- Reader fixes
- **Improve Deduplication**
- Public URL citations

## API/Integrations

- Developer area
- Integration with other PQ/ExL products, e.g. Integrate the "lightning bolt in DOI"
- Integration with 3<sup>rd</sup> Party products
- bX Recommender
- **CSL integration/normalization**
- **GDPR**

# RefWorks 2018 Plan: Q1 - Complete

The following features were released covering some of the critical features and issues.

- A percentage of development time is spent addressing user-submitted issues.

**RELEASE 1**  
**2/6/18**

**RELEASE 2**  
**3/6/18**

**RELEASE 3**  
**4/3/18**

## FEBRUARY

- **Performance:** Save to RefWorks Bug Fix
- **Writing Tools:** Improve installation diagnostics
- **Admin Tools:** bulk deactivate users
- **Systematic Review:** Tab Delimited Export

## MARCH

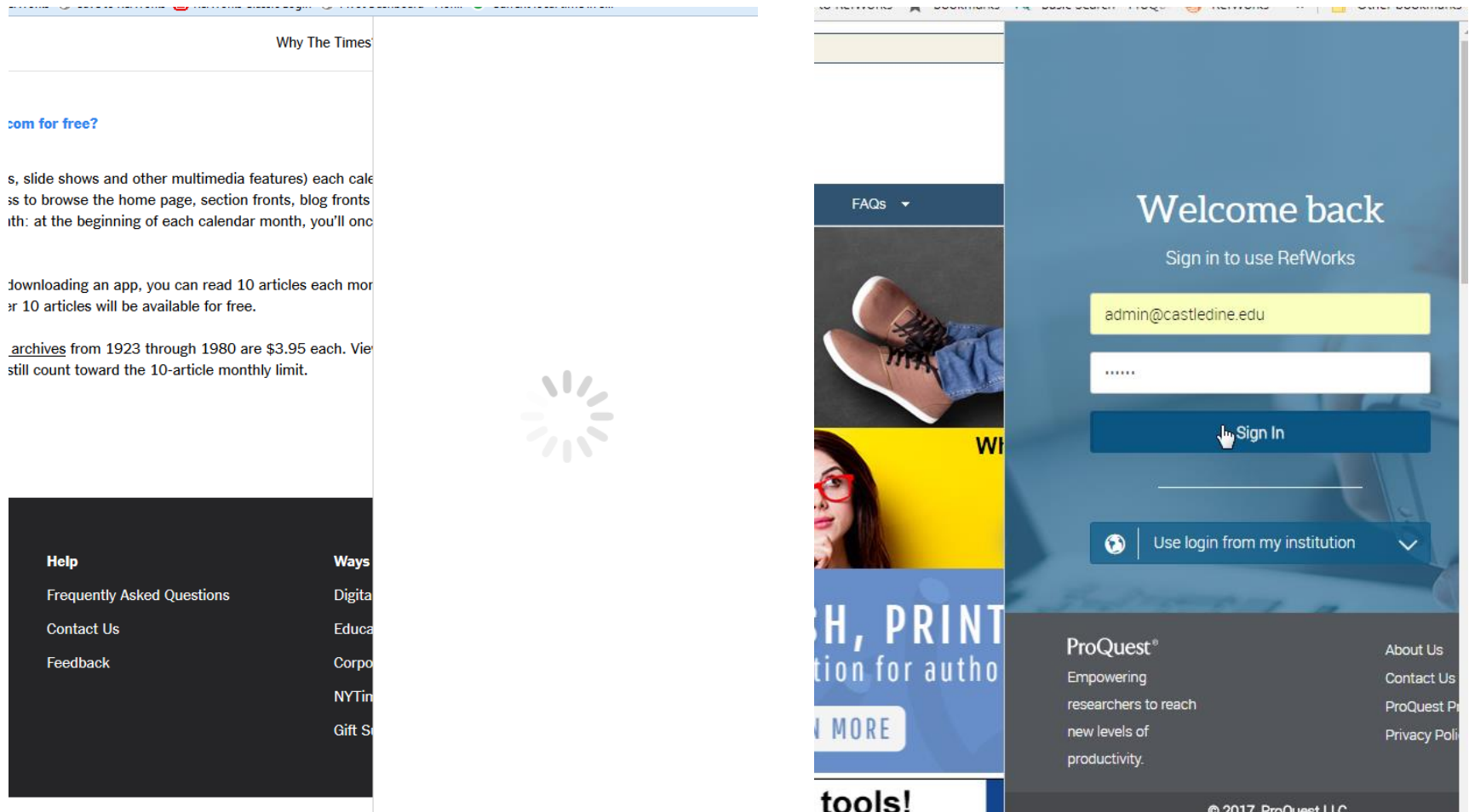
- **Performance:** PDF progress bar
- **Writing Tools:** Improve Synching in Write-N-Cite
- **Admin Tools:** Password Reset Workflow Improvements
- **Systematic Review:** View, Organize, and Manage thousands of citations collaboratively
- Idea Exchange launch

## APRIL

- **Writing Tools:** Document Compatibility
- **Writing Tools:** Write-N-Cite installation fixes (based on diagnostic)
- **Admin Tools:** Usage Analytics
- **API:** Integrate the "lightning bolt in DOI" when editing/importing a document/citation
- Support site moved and edited to KnowledgeCenter in ExLibris

# Save to RefWorks Not Loading Issue Fixed

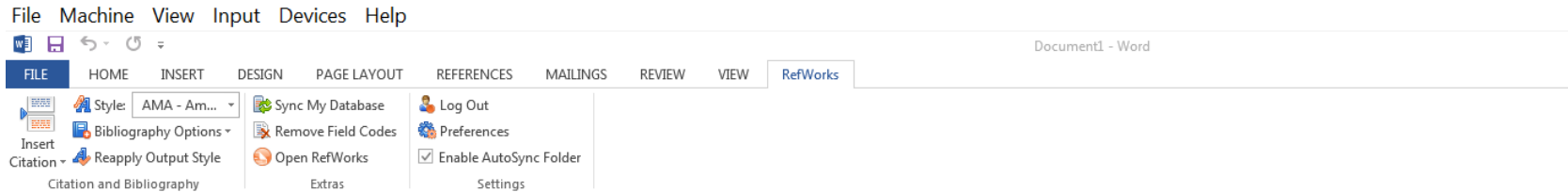
It still has more fixes left to do, but it works for most databases.



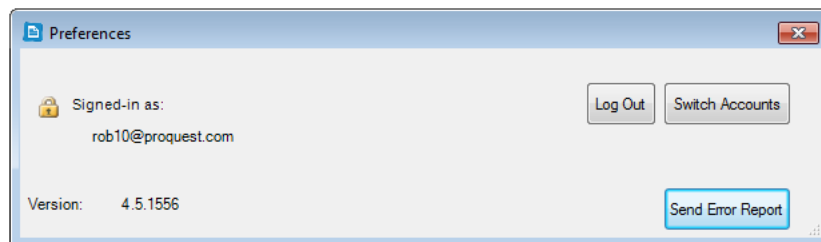
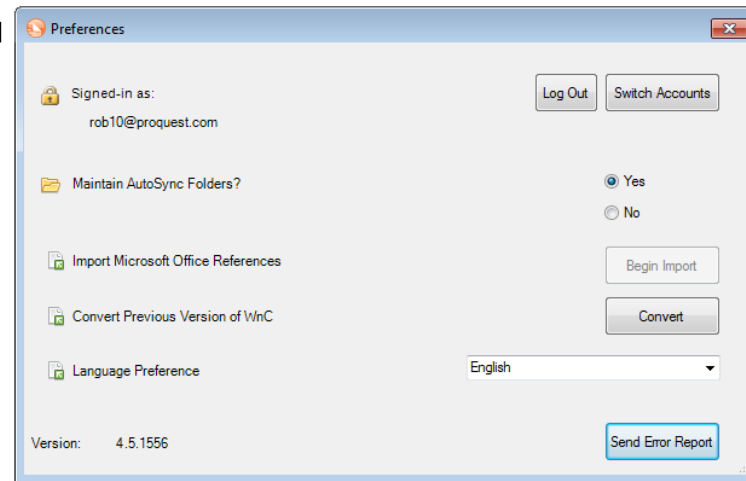
✓ More monitoring and logging of the Save to RefWorks too.

# Improve diagnostics

One-click Write-n-Cite error report submission: Gathers the users' document information and sends it to our support team.



- For LRW and NRW
- Faster support
- Improved fixes





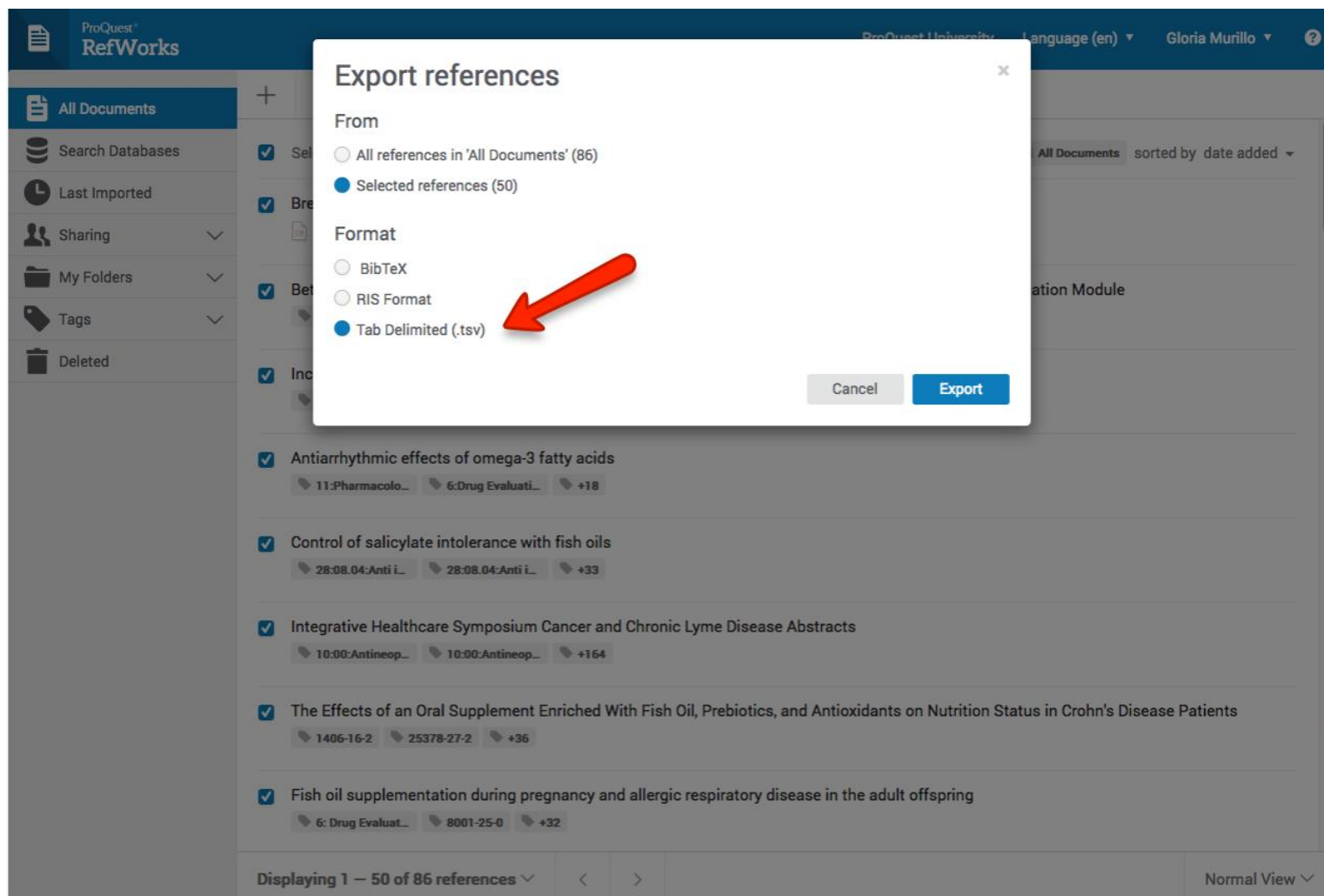
## Bulk actions; deactivate users

From within the Administrator Area, Admins can use a bulk action to deactivate multiple users.

The screenshot displays the ProQuest RefWorks 'Users' management page. The top navigation bar includes 'ProQuest University', 'Language (en)', 'Stephen Kemsley', and a help icon. The left sidebar has 'Users', 'Settings', and 'Analytics'. The main content area has a search bar, a 'Search' button, and an 'Invite users' button. Below the search bar is a 'Deselect All' link and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: 'Make Admins', 'Remove as Admins', 'Reactivate Users', and 'Deactivate Users'. The 'Email' checkbox in the left sidebar is checked. The 'Show deactivated accounts' checkbox is also checked. The user list table has columns for 'Name', 'Status', and 'Last active'. The first row shows 'Usersem...' with status 'Invited'. The second row shows 'Usersemal@email.com' with status 'Admin'. The third row shows 'Usersemal@email.com' with status 'Admin'. The fourth row shows 'Usersemal@email.com' with status 'Active'. A modal dialog titled 'Confirm Deactivation' is overlaid on the bottom right, showing a warning message and a 'Deactivate User' button.

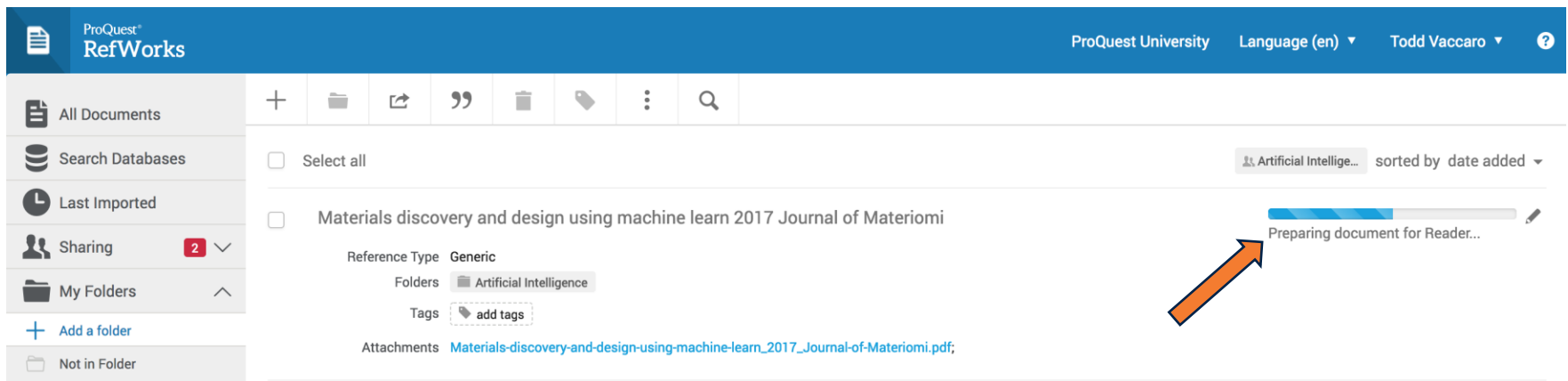
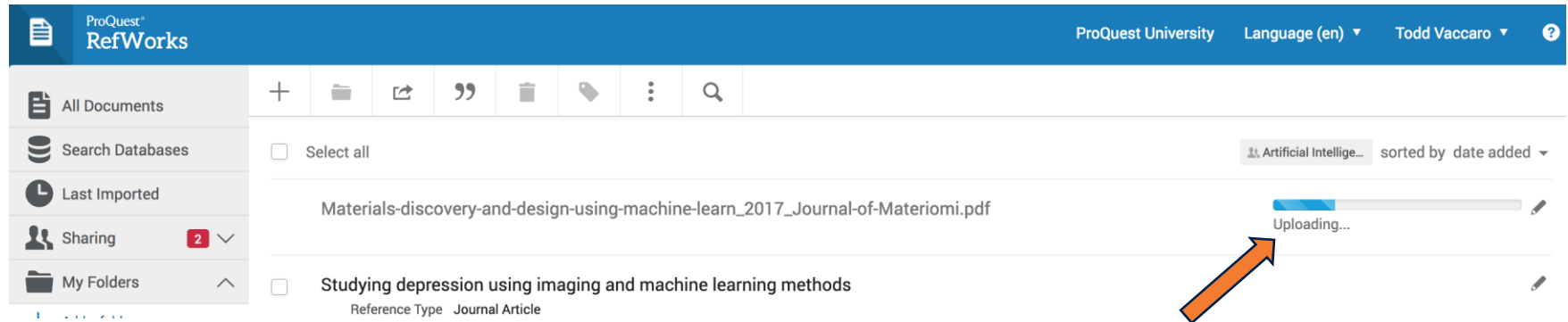
# Tab Delimited Export

Users can export all their citations to a Tab Delimited format (.tsv) so they can view their citations in Excel.



# PDF progress bar

Users can view multiple files uploading into RefWorks and then see the progress as RefWorks prepares the document for use in the reader.



# Performance: PDF progress bar

And in the last step they can see the progress of extracting the full-text of a document, but can see that the citation information is available and ready to use.

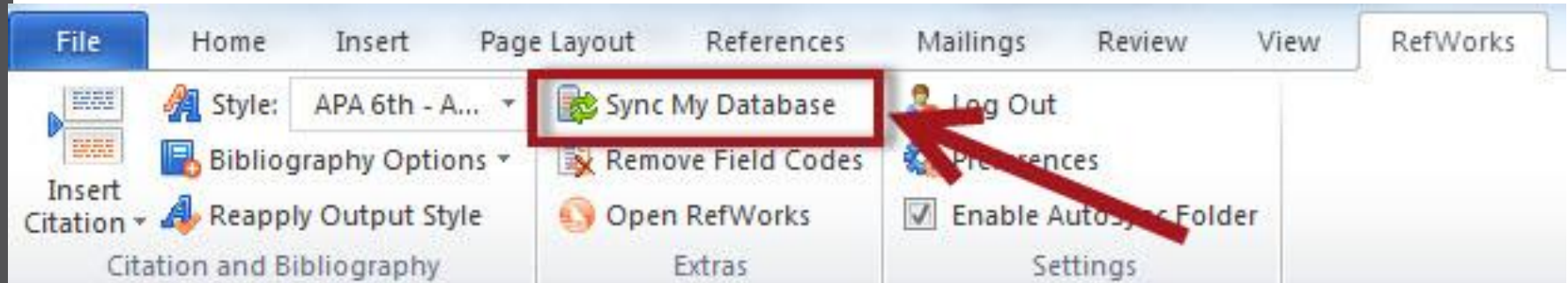
The screenshot displays the ProQuest RefWorks web interface. The top navigation bar includes the ProQuest RefWorks logo, user information (ProQuest University, Language (en), Todd Vaccaro), and a help icon. The left sidebar contains a list of folders and documents, with 'Artificial Intelligence' selected. The main content area shows a document titled 'Materials discovery and design using machine learning'. The document details include:

- Reference Type: Journal Article
- Authors: Yue Liu, Tianlu Zhao, Wangwei Ju, Siqi Shi
- Publish Date: September 1, 2017
- Journal: Journal of Materiomics
- Volume: 3
- Issue: 3
- Pages: 159-177
- URL: [doaj.org](https://doi.org/10.1016/j.jmat.2017.08.002)

The abstract text is visible, starting with 'The screening of novel materials with good performance and the modelling of quantitative structure-activity relationships (QSARs)'. A progress bar at the top right of the document view indicates 'Extracting text for full text search...'. The bottom of the interface shows the document's attachments, including a PDF file named 'Materials-discovery-and-design-using-machine-learn\_2017\_Journal-of-Materiomi.pdf'.

# Improved Syncing with Write-N-Cite

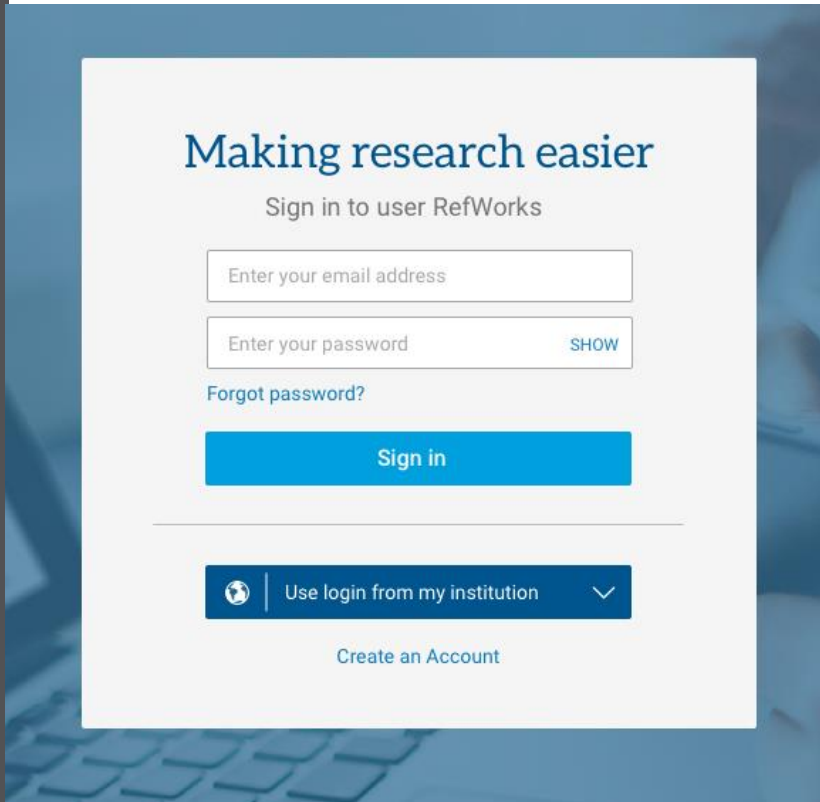
Sync Write-N-Cite 28% quicker with your RefWorks library to create a citation from a reference in RefWorks.





# Password Reset Workflow Improvements

Reducing the issues when logging in to new or legacy RefWorks, we updated the workflow and unified them so that when users upgrade it's a similar experience.



Making research easier

Sign in to user RefWorks



Enter your email address

Enter your password [SHOW](#)

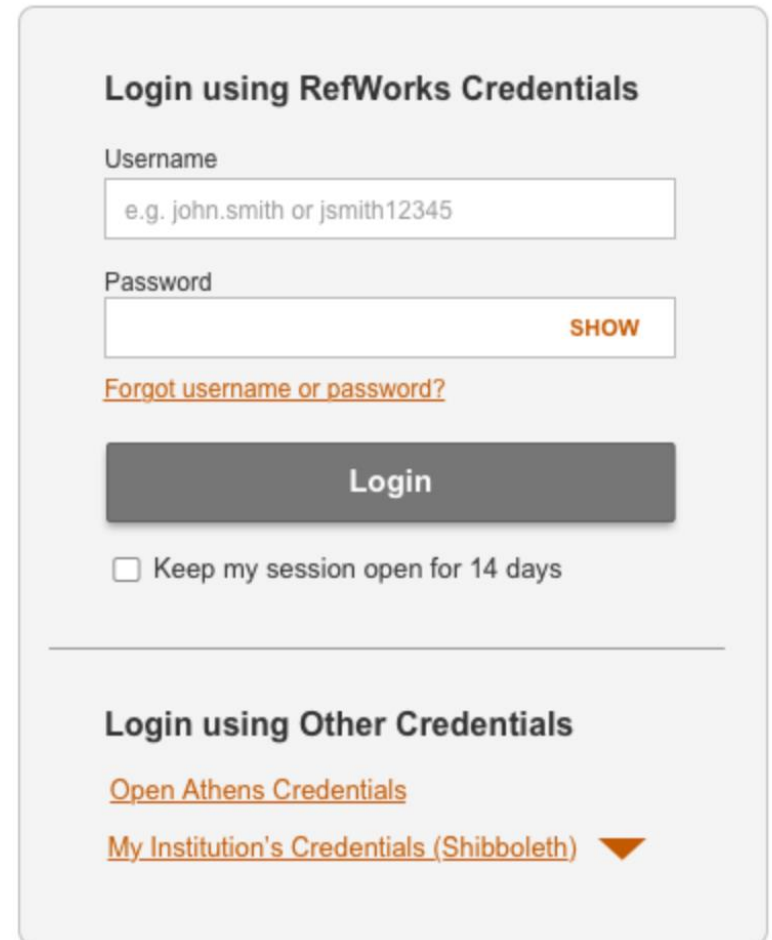
[Forgot password?](#)

[Sign in](#)

---

 Use login from my institution 

[Create an Account](#)



**Login using RefWorks Credentials**

Username

e.g. john.smith or jsmith12345

Password

[SHOW](#)

[Forgot username or password?](#)


[Login](#)

☐ Keep my session open for 14 days

---

**Login using Other Credentials**

[Open Athens Credentials](#)

[My Institution's Credentials \(Shibboleth\)](#) 

New to RefWorks? [Sign Up for a New Account](#)

# Idea Exchange

Launched the Idea Exchange and in two months received 72 items and hundreds of votes for some great ideas. <https://ideas.exlibrisgroup.com/forums/909445-refworks>



- We factor these into our development plans.
- Keep up the voting!
- Thank you!

## RefWorks

Your feedback matters to us. Help us improve RefWorks by telling us what you'd like to see using the message areas below. You can also support something already posted.

We would love to be able to respond to every idea that is submitted, but this is not feasible. We are, however, committed to responding to the most popular ideas—those that have received the most points.

For more information please review our [FAQ](#) and [guidelines](#). Thank you.

### How can we improve RefWorks?

**Hot Ideas**

Top

New

Category

Status

My feedback

9

votes

[Vote](#)

### "Remove from folder" once you run the duplication checker

When users search multiple databases during the course of a project the chances are good that they'll need to de-duplicate a folder just in case they have multiple copies of the same citation. There is no option for users to "remove from folder" once they have run the duplication checker. More specifically, the option exists, but is greyed out and the user can't select the option.

Per ExLibris support: "The deduplication feature assumes a user will want to delete the duplicates and not just remove them from a folder so the remove from folder functionality is not available after running... [more](#)



Screen\_Shot\_2018-04-02...  
1109 KB

0 comments · Search and Deduplication

3

votes

### It would be helpful if the list of folders included an indication of the number of items in each folder. Thank you!

0 comments · Organizing References

New and returning users may [sign in](#)

### RefWorks

Post a new idea...

All ideas

My feedback

Administrator Tools 4

Importing References 8

Organizing References 10

Other 10

Search and Deduplication 5

User Interface 4

Writing Tools 6



Alma 1,141

campusM 145

Content 382

Leganto 90

Primo 372

RefWorks 47

Rosetta 52

Summon 119

# View, Organize, and Manage thousands of citations collaboratively

New RefWorks now displays up to 2,000 references on a single page to help with Literature and Systematic Reviews

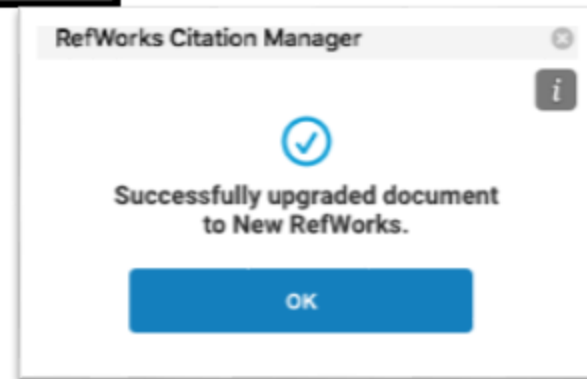
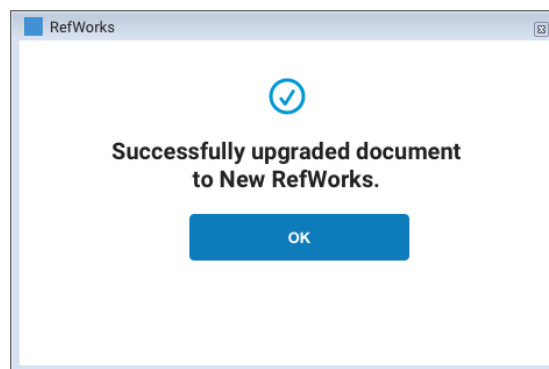
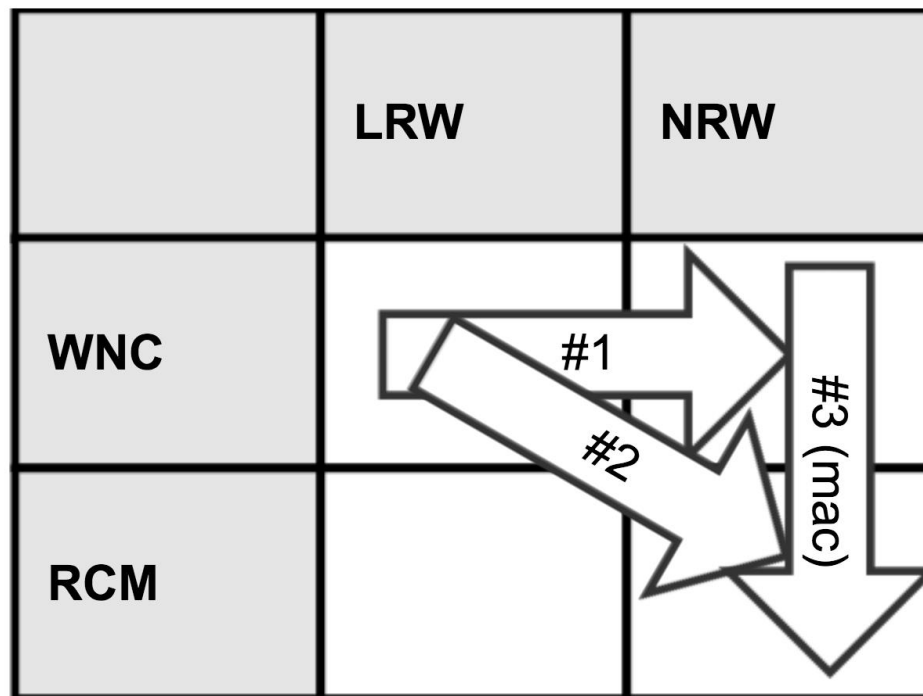
The screenshot displays the ProQuest RefWorks web interface. The top navigation bar includes the ProQuest logo, the text 'ProQuest University', 'Language (en)', 'Gloria Murillo', and a help icon. A left sidebar contains navigation links: 'All Documents', 'Search Databases', 'Last Imported', 'Sharing', 'My Folders', 'Tags', and 'Deleted'. The main content area shows a list of references, each with a checkbox, a title, and a tag count. The references listed are:

- ☐ Select all (tag: +6)
- ☐ Breaking News, World News & Multimedia
- ☐ Better duplicate detection for systematic reviewers: evaluation of Systematic Review Assistant-Deduplication Module (tags: Algorithms, Databases, Bib..., +6)
- ☐ Increasing fish oil intake--any net benefits? (tags: 11:Pharmacolo..., 6:Drug Evaluati..., +14)
- ☐ Antiarrhythmic effects of omega-3 fatty acids (tags: 11:Pharmacolo..., 6:Drug Evaluati..., +18)
- ☐ Control of salicylate intolerance with fish oils (tags: 28:08.04:Anti i..., 28:08.04:Anti i..., +33)
- ☐ Integrative Healthcare Symposium Cancer and Chronic Lyme Disease Abstracts (tag: +164)
- ☐ Enriched With Fish Oil, Prebiotics, and Antioxidants on Nutrition Status in Crohn's Disease Patients
- ☐ Pregnancy and allergic respiratory disease in the adult offspring (tag: 2)
- ☐ Birth when stabilizing global temperatures at 1.5 degrees C or 2 degrees C warming (tags: climate, +4)

A dropdown menu is open over the 'References per page' section, showing options: 25, 50, 100, 500, 1000, 1500, and 2000. An orange arrow points to the '2000' option. At the bottom, a status bar indicates 'Displaying 1 – 50 of 86 references' and 'Normal View'.

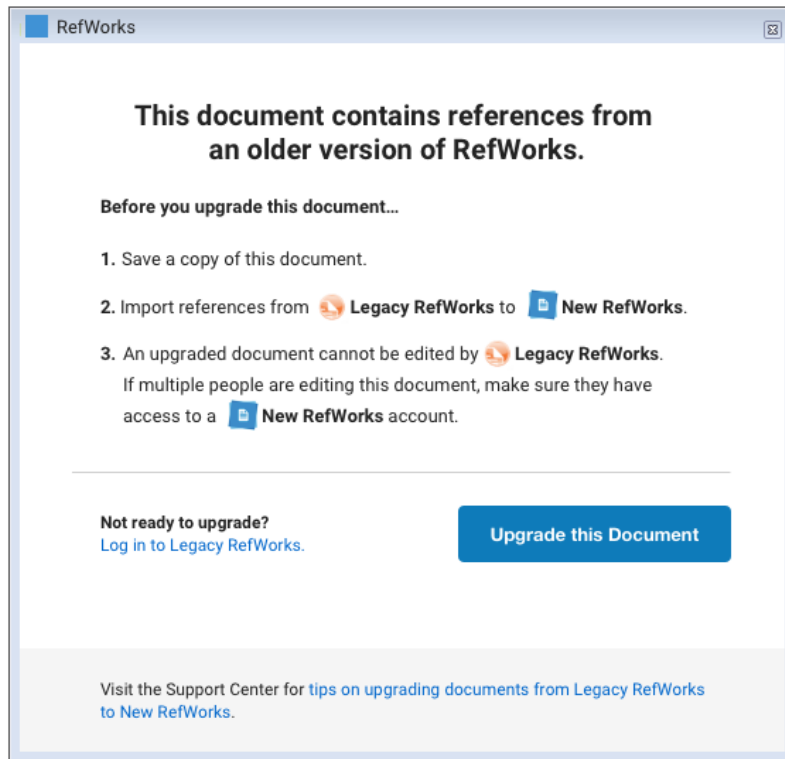
# Document Compatibility

Upgrade from one writing environment to another without interruption of the writing process whether you are in Write-N-Cite or RefWorks Citation Manager.

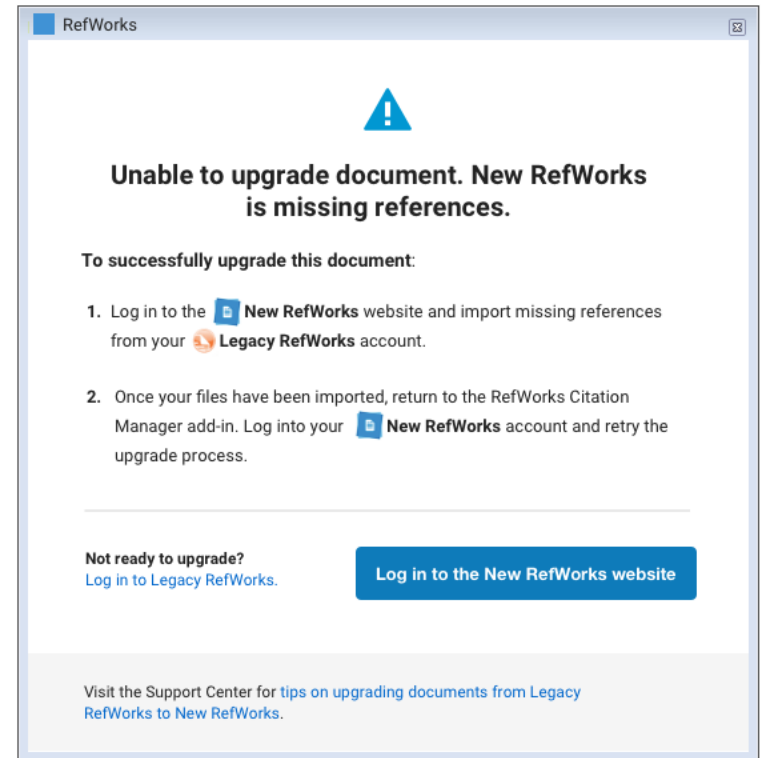


# Document Compatibility in Write-N-Cite (WNC)

Automatically detects a document with legacy RefWorks Citation IDs and when logged in to new RefWorks prompts the user to upgrade the document to new RefWorks Citation Format.



If the user isn't ready to upgrade the document they can login to legacy RefWorks.  
Support links are at the footer.



If missing a reference, directions provide information to import missing legacy citations into new RefWorks or to proceed with using legacy RefWorks.



# Document Compatibility in RefWorks Citation Manager (RCM)

RefWorks Citation Manager

**This document contains references from an older version of RefWorks.**

**Before you upgrade this document...**

1. Save a copy of this document.
2. Import references from **Legacy RefWorks** to **New RefWorks**.
3. An upgraded document cannot be edited by **Legacy RefWorks**. If multiple people are editing this document, make sure they have access to a **New RefWorks** account.

**Ready to Upgrade?**

**Step 1:** Log into your Legacy RefWorks account so we can prepare your references.

**Step 2:** Log back into New RefWorks and click on the "Upgrade this document" button below.

Upgrade this Document

**Not ready to upgrade?**  
[Log in to Legacy RefWorks.](#)

Visit the Support Center for [tips on upgrading documents from Legacy RefWorks to New RefWorks.](#)

RCM same as WNC - Automatically detects a document with legacy RefWorks Citation IDs and when logged in to new RefWorks prompts the user to upgrade the document to new RefWorks Citation Format or provides instructions to import the missing references to new RefWorks.

RefWorks Citation Manager

**Unable to upgrade document. New RefWorks is missing references.**

**To successfully upgrade this document:**

1. Log in to the **New RefWorks** website and import missing references from your **Legacy RefWorks** account.
2. Once your files have been imported, return to the RefWorks Citation Manager add-in. Log into your **New RefWorks** account and retry the upgrade process.

Log in to the New RefWorks website

**Not ready to upgrade?**  
[Log in to Legacy RefWorks.](#)

Visit the Support Center for [tips on upgrading documents from Legacy RefWorks to New RefWorks.](#)

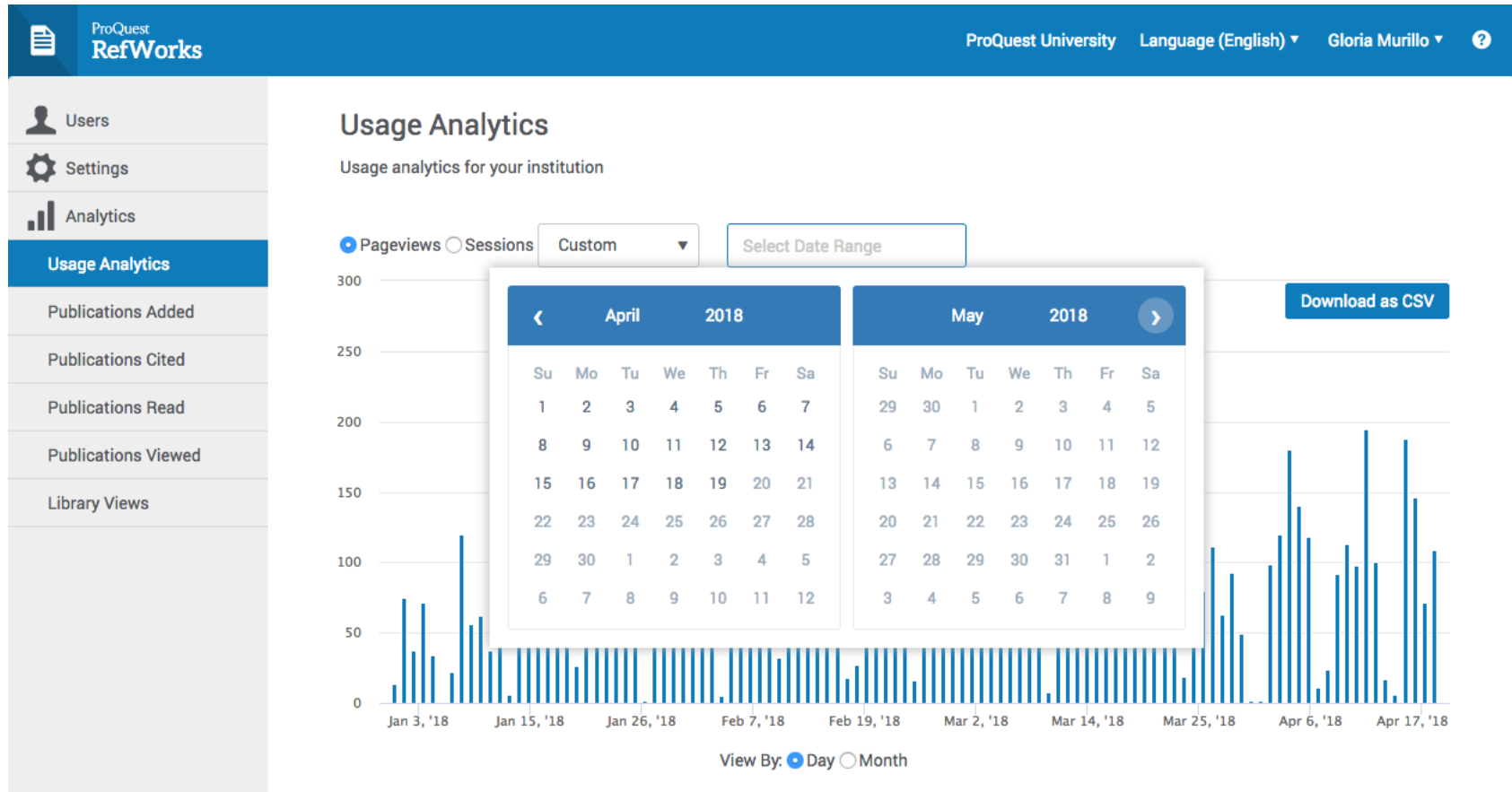
# WnC Installation fixes (based on diagnostic)

Unfortunately, this is delayed because of not enough information to pinpoint the issue.  
We are working with specific customers to address the issue.



# Usage Analytics

New Admin report provides institutional usage stats for page views and visits/session. These reports can be displayed in either a Daily, Monthly or Custom view.



- **Pageview:** A pageview is an instance of a page being loaded (or reloaded) in a browser. Pageviews equals the total number of pages viewed.
- **Session:** A session is the period of time a user is active on the site, as a sequence of page views in a user visit to RefWorks.

# Search Ex Libris Discovery Services on the DOI

New method to autocomplete a citation using only the Digital Object Identifier (DOI) – just find the lightning bolt.

The screenshot shows the ProQuest RefWorks interface. The top navigation bar includes the ProQuest logo, 'RefWorks', 'ProQuest University', 'Language (en)', and 'Todd Vaccaro'. The left sidebar contains a list of folders and documents, with 'Todd's Happiness' selected. The main area displays a list of references. The first reference, 'Empathy', is selected and its details are shown on the right. The second reference, 'Yeasts for Global Happiness: report of the 14th International Congress on Yeasts (ICY14) held in Awaji Island', is also visible.

**ProQuest RefWorks** ProQuest University Language (en) Todd Vaccaro

**Left Sidebar:**

- All Documents
- Search Databases
- Last Imported
- Sharing 2
- My Folders
- + Add a folder
- Not in Folder
- Blockchain Prezo
- Happiness
- sub folder test
- CRISPR
- Artificial Intelligence
- LINKED
- Test Folder MARK
- LINKED
- CRMS
- LINKED
- Todd's Happiness**
- Tags
- Deleted

**Main Reference List:**

- ☒ **Empathy**  
Reference Type: Journal Article  
Folders: Todd's Happiness  
Tags: add tags  
DOI: 10.1371/journal.pone.0170730
- ☐ **Yeasts for Global Happiness: report of the 14th International Congress on Yeasts (ICY14) held in Awaji Island**  
Reference Type: Journal Article  
Authors: Watanabe, Takagi  
Publish Date: February 2017  
Journal: Genes to cells : devoted to molecular & cellular mechanisms  
Volume: 22  
Issue: 2  
Pages: 130-134  
Abstract: The 14th International Congress on Yeasts (ICY14) was held at Awaji Yumebutai International Conference Center (Awaji, Hyogo) in Japan from 11 to 15 September 2016. The main slogan of ICY14 was 'Yeasts for Global Happiness', which enabled us to acknowledge the high-potential usefulness of yeasts contributing to the global happiness in terms of food/beverage, health/medicine and energy/environment industries, as well as to basic biosciences. In addition, two more concepts were introduced: 'from Japan to the world' and 'from senior to junior'. As it was the first ICY meeting held in Japan or other Asian countries, ICY14 provided a good opportunity to widely spread the great achievements by Japanese and Asian yeast researchers, such as those by the 2016 Nobel Laureate Dr. Yoshinori Ohsumi, and also, to convey the fun and importance of yeasts to the next generation of researchers from Asia and all over the world. As a result, a total of 426 yeast lovers from 42 countries (225 overseas and 201 domestic participants) with different generations attended ICY14 to share the latest knowledge of a wide range of yeast research fields and to join active and constructive scientific discussions.  
Folders: Todd's Happiness  
Tags: Yeasts/physiology  
ISSN: 1365-2443

Displaying 1 – 50 of 601 references < > Full View

# Support Site Moved to ExLibris Knowledge Center

With this move, the site is now grouped together.

In one place you can find:

- Release notes
- Product documentation for new RefWorks
- Training materials
- Frequently asked questions
- Featured topics

Legacy Support coming soon to the Ex Libris Knowledge Center

The screenshot shows the ExLibris Knowledge Center interface. At the top, there's a navigation bar with 'ExLibris Knowledge Center' logo, a search bar, and links for 'More Sites', 'System Status', and 'Submit a Case'. Below the navigation bar, a breadcrumb trail shows 'Home > RefWorks'. The main heading is 'Welcome to ProQuest RefWorks'. A welcome message states: 'Welcome to the RefWorks Support page. On this page you will find the most up-to-date information and resources for RefWorks including: how to upgrade to new RefWorks, user guides, training, and more.' Below this, a section titled 'What is the new RefWorks?' explains that the new RefWorks is a premier reference management service. The main content area features five tiles: 'Legacy RefWorks (RW2)' with a 'Coming Soon...' message; 'Product Documentation' with the text 'Access the latest Users and Admins documentation for RefWorks'; 'Training' with the text 'Expand your search skills and experience real-time training with our experienced training specialists right from your desk!'; 'Product Materials' with the text 'Stay informed about the features and capabilities included in each product release, download the brochure and Logo.'; and 'Knowledge Articles' with the text 'Search our knowledge base for answers to commonly raised questions'. At the bottom, a 'Featured Topics' section lists: 'RefWorks/Pivot Support and Knowledge Services Integration FAQ', 'Tips for Advanced Document Searching in the Customer Knowledge Center', and 'RefWorks Release Notes'.

ExLibris Knowledge Center

Search under current path

RefWorks

Home > RefWorks

## Welcome to ProQuest RefWorks

Welcome to the RefWorks Support page. On this page you will find the most up-to-date information and resources for RefWorks including: how to upgrade to new RefWorks, user guides, training, and more.

**What is the new RefWorks?**  
The new RefWorks is a premier reference management service that supports the needs of students, faculty and librarians. With a refined user experience, full-text management, collaboration and other features you'd expect from a reference management solution, RefWorks enables students and faculty to have a more efficient and reliable process for producing the best research papers and grants. Libraries are able to offer this powerful service and have full administrative controls and analytics that provide a consistent source of patron and content usage.

### Legacy RefWorks (RW2)

Coming Soon...

### Product Documentation

Access the latest Users and Admins documentation for RefWorks

### Training

Expand your search skills and experience real-time training with our experienced training specialists right from your desk!

### Product Materials

Stay informed about the features and capabilities included in each product release, download the brochure and Logo.

### Knowledge Articles

Search our knowledge base for answers to commonly raised questions

#### Featured Topics

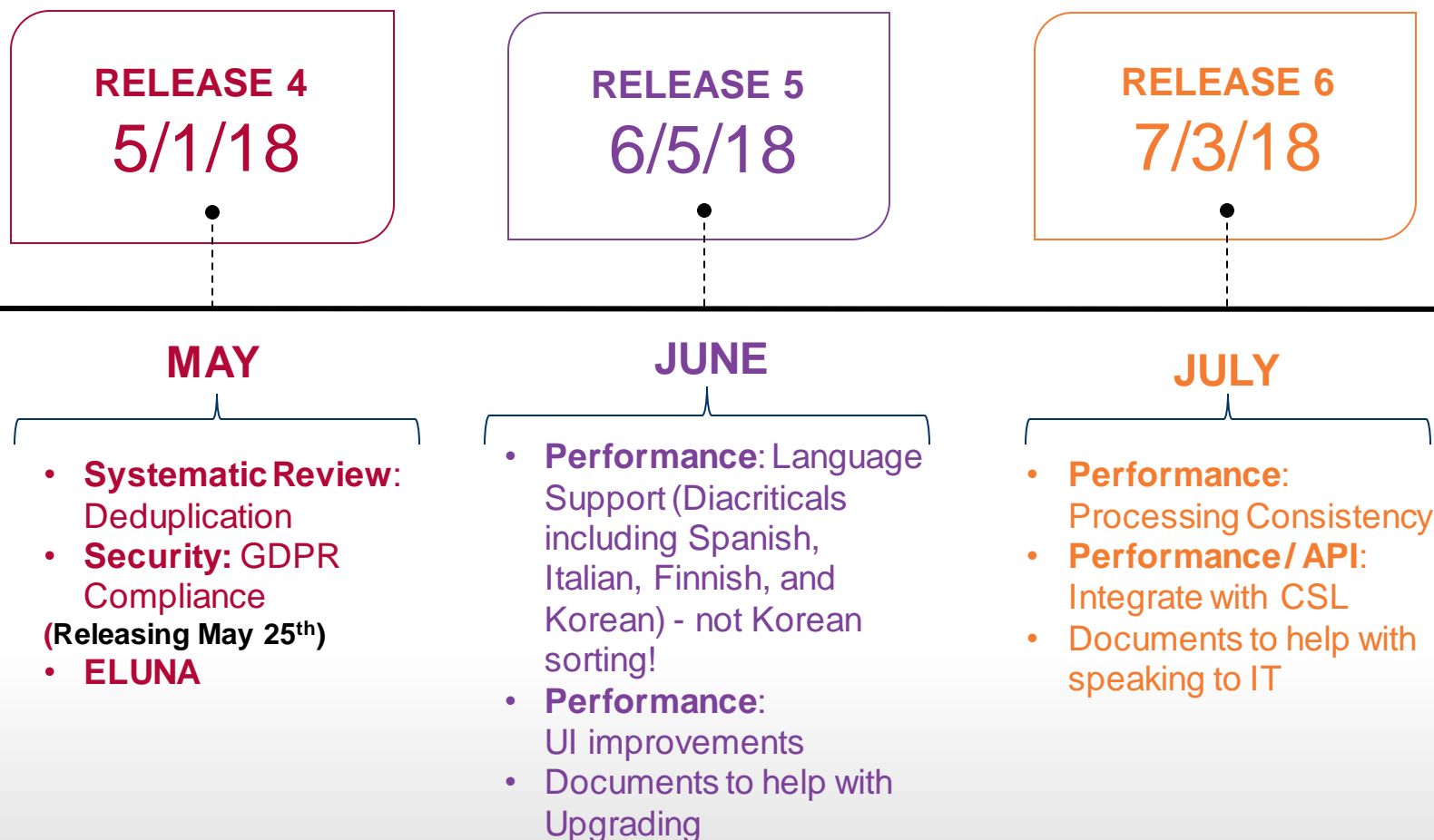
- RefWorks/Pivot Support and Knowledge Services Integration FAQ
- Tips for Advanced Document Searching in the Customer Knowledge Center
- RefWorks Release Notes



# RefWorks 2018: Q2

The following features were released covering some of the critical features and issues.

- A percentage of development time is spent addressing user-submitted issues.

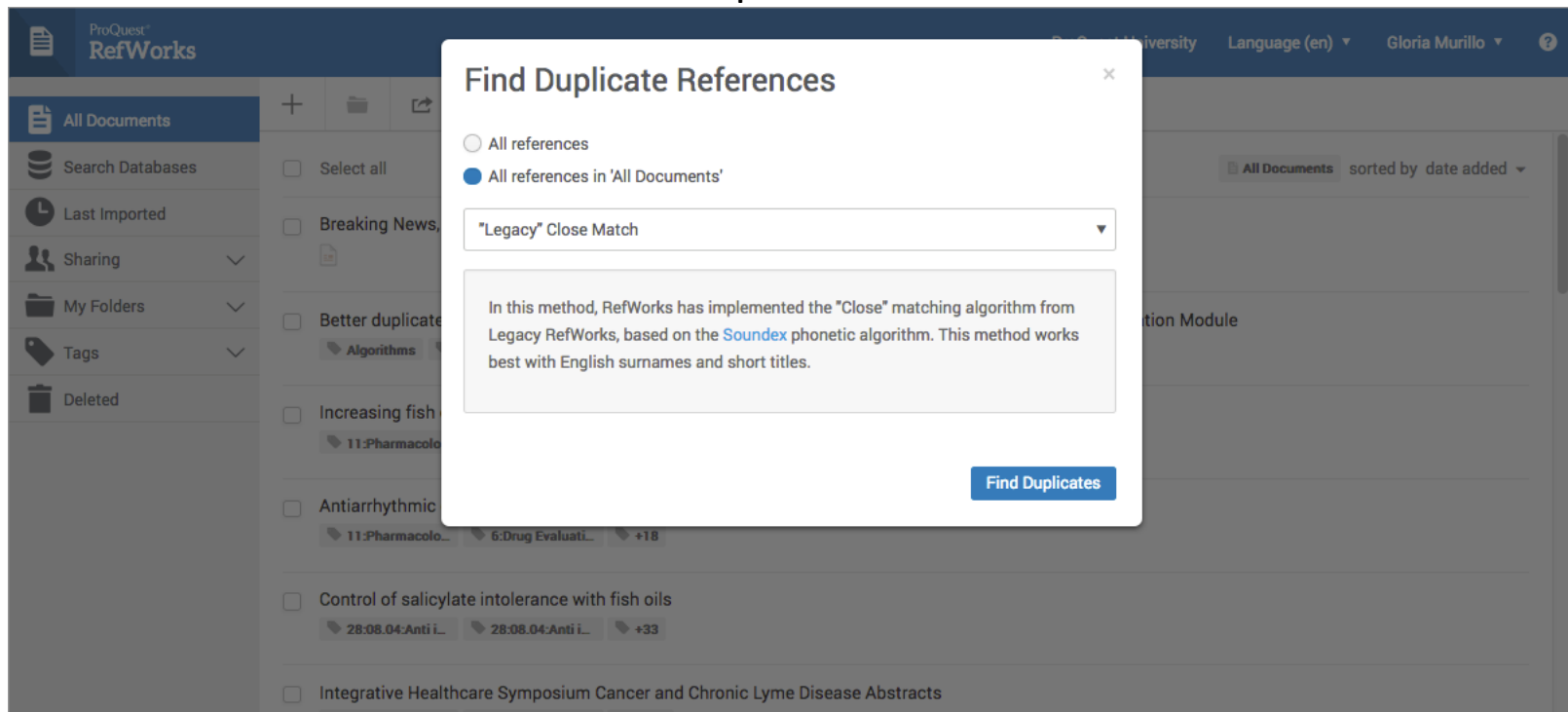


- A percentage of development time will be spent addressing user-submitted issues.

# MAY Release: Deduplication

Added a new form of deduplication similar to the method used in legacy RefWorks

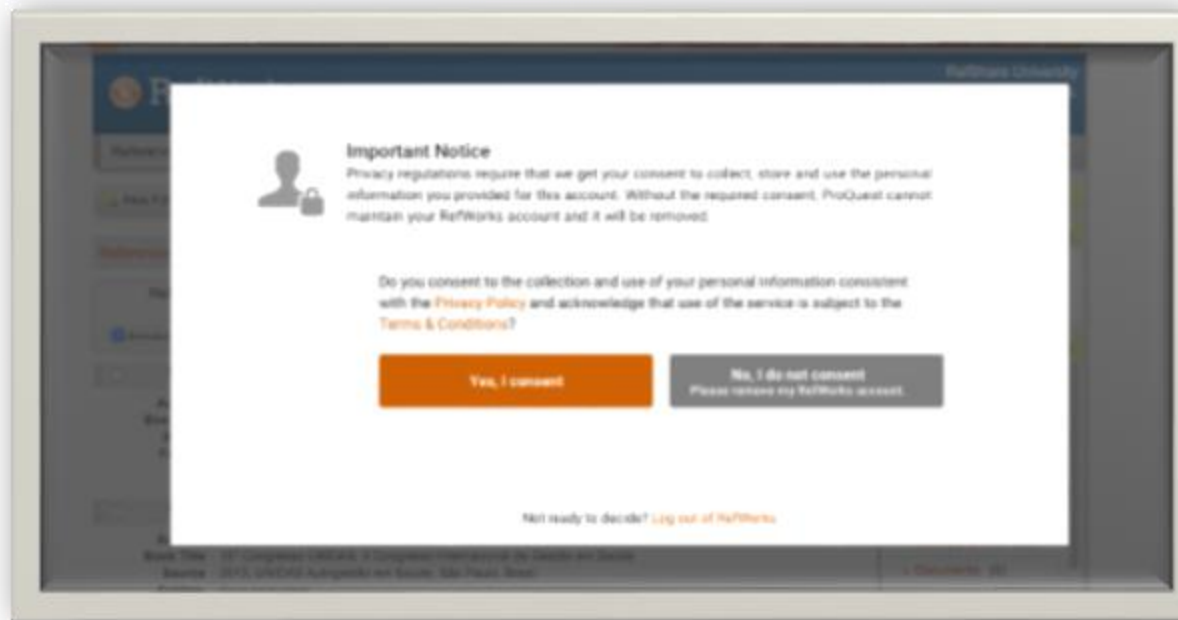
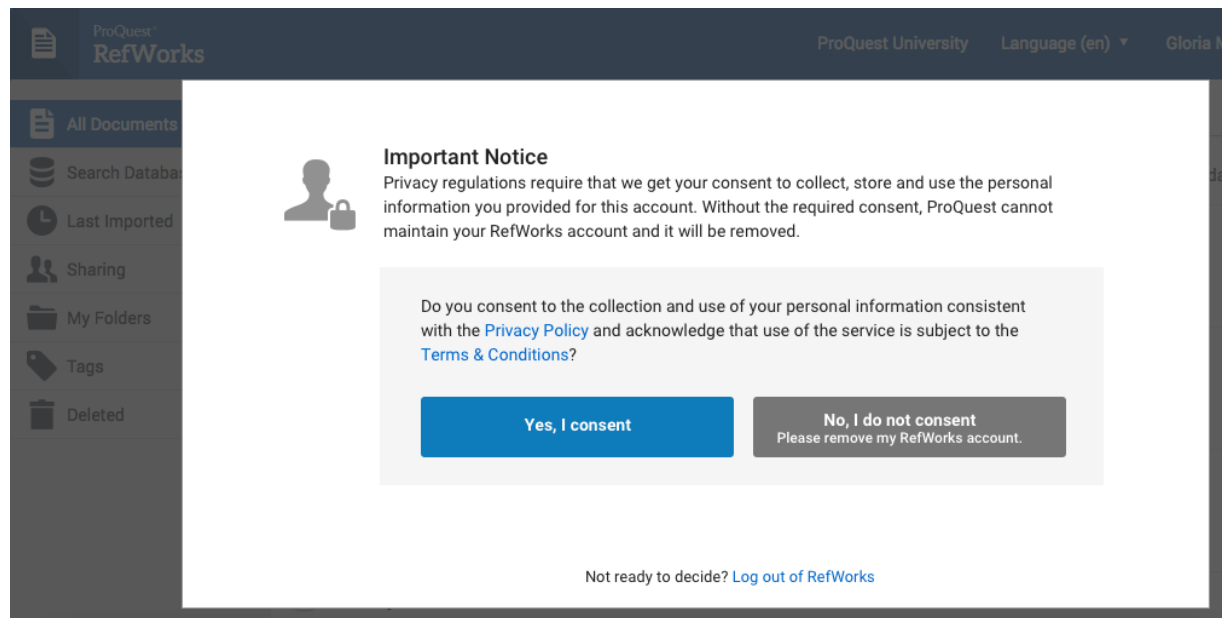
- Minor fixes to deduplication
- Added 'Legacy' Close Match.
  - based on the Soundex phonetic algorithm.
  - method works best with English surnames and short titles”
- Changing the names: Exact Match, Close Match
- More work will be done on deduplication in H2 2018



# MAY Release: GDPR

On May 25<sup>th</sup> 2018, the most significant piece of European data protection legislation to be introduced in 20 years will come into force. The [EU General Data Protection Regulation](#) (GDPR) and new RefWorks and legacy RefWorks will be ready.

- Conducted a full audit which resulted in a gap analysis
- Releasing May 25th



# JUNE Release: Language Support

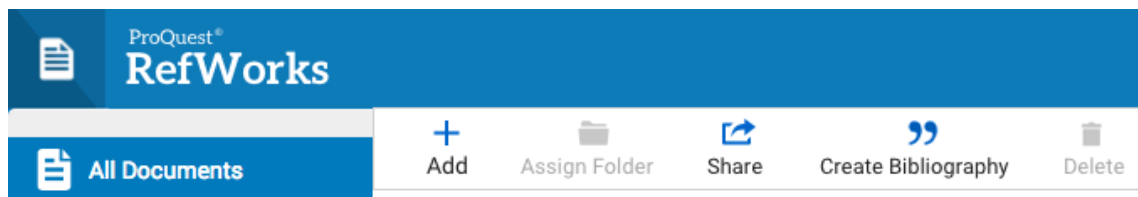
Focusing in on diacriticals and glyphs during export from databases and importing PDFs.

The screenshot shows the Saint Peter's University search interface. The search bar contains 'la aceleración'. The results are sorted by relevance, showing 34,943 results. The first result is 'EVALUATION OF ACCELERATION OF ATMOSPHERIC ELECTRONS DUE TO HIGH POWER HF TRANSMISSION TO EARTH IONOSPHERE/EVALUACIÓN DE LA ACCELERACIÓN DE ELECTRONES DE LA ATMÓSFERA DEBIDO A TRANSMISIÓN HACIA LA...'. The second result is 'Uma avaliação do Programa de Aceleração do Crescimento (PAC) no estado da Bahia (2007-10) Una evaluación del Programa de Aceleração del Crecimiento (PAC) en el Estado de la...'. An orange arrow points to the second result.

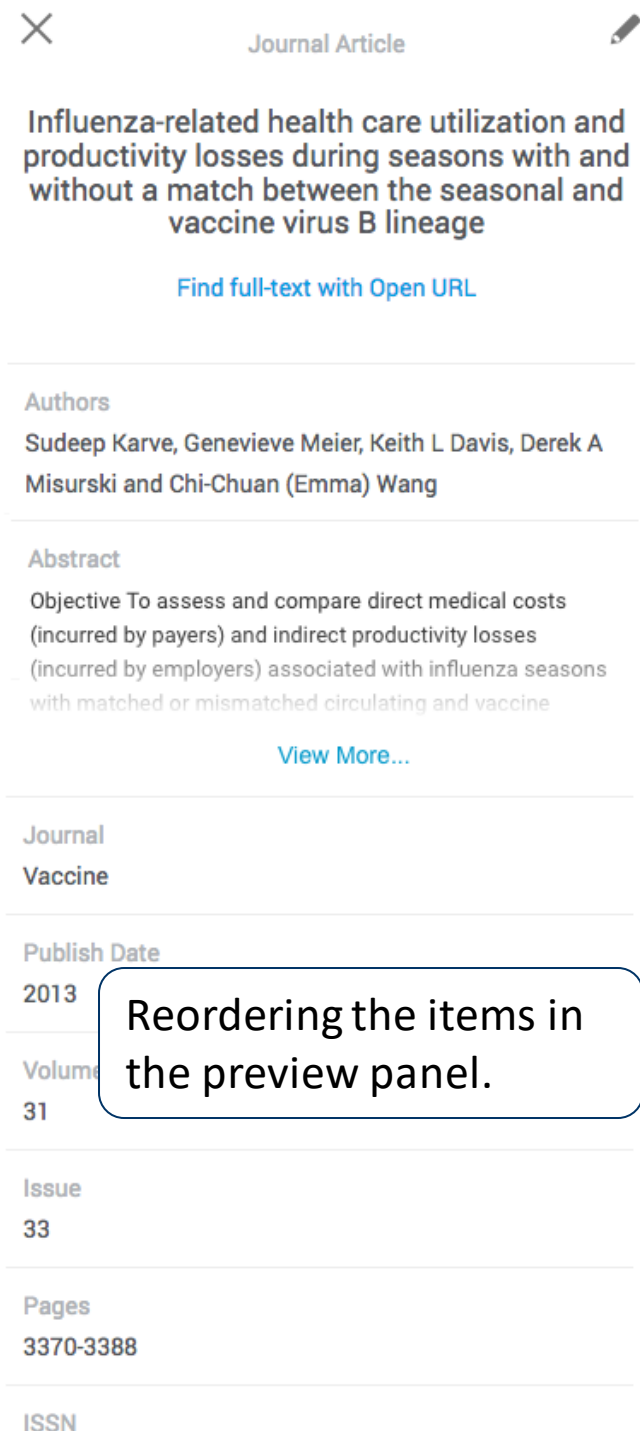
The screenshot shows the ProQuest RefWorks interface. The top bar includes 'ProQuest RefWorks', 'Back to Library Search', 'ProQuest University', 'Language (en)', and 'Frances McCowey'. The left sidebar shows 'All Documents', 'Search Databases', 'Last Imported', 'Sharing', 'My Folders', and 'Tags'. The main area shows a list of documents. The first document is 'Uma avaliação do Programa de Aceleração do Crescimento (PAC) no estado da Bahia (2007-10) Una evaluación del Programa de Aceleração del Crecimiento (PAC) en el Estado de la Bahia - Brasil (2007-10) An evaluation of the Growth Acceleration Program (PAC) in the state of Bahia - Brazil (2007-10)'. An orange arrow points to this document.

# JUNE Release: UI Improvements

Little changes go a long way; updating the UI and UX so that finding the most important aspects is easier and faster.



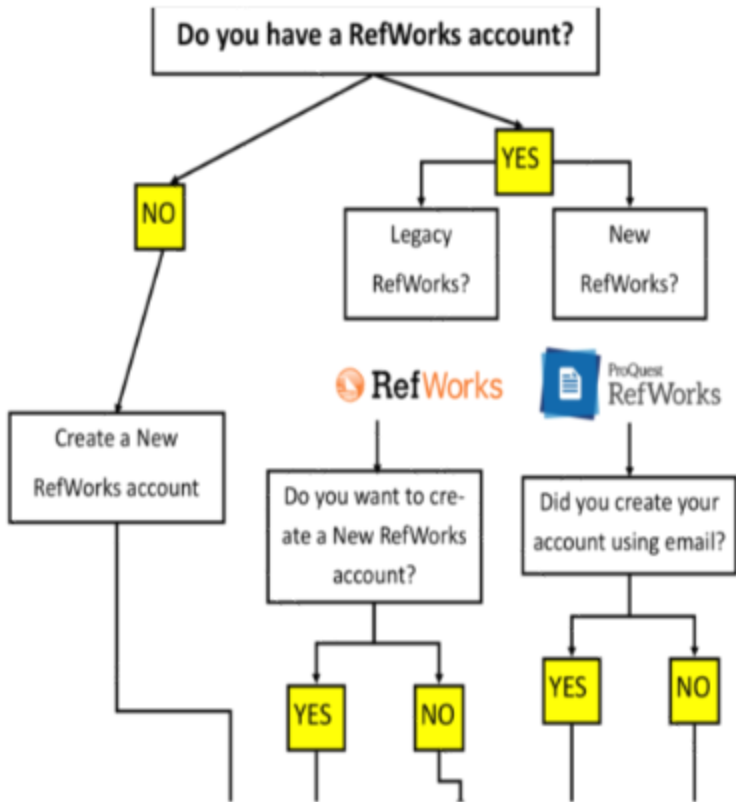
Labels for main navigation.



Reordering the items in the preview panel.

# JUNE Release: Upgrade Documentation

Simple and concise methods to help guide your institution to upgrade from LRW to NRW



## 10 REASONS to Take a Look at the New RefWorks

### 1. Accurate robust citations

Citations are validated and enhanced by RefWorks' new integration with the Summon Discovery Service index. Higher accuracy input means better quality output.



### 2. Cross-platform, cross-styles

Mobile-friendly, platform agnostic. The style-view highlights missing elements of citations, based on the requirements of each of over 4,000 citation styles to ensure high compliance with citation style requirements.



### 3. Controlled sharing for peace of mind

Why risk copyright exposure? Full-text sharing can be limited to within the institution, controllable by the library.



### 4. Breadth of Add-ins

Updated add-ins for Google Docs and Office 2016 with no download required. Students no longer require IT permission to create their bibliographies while writing. The process is easier, more secure and you don't have to explicitly install anything.



### 5. Free isn't really free

Those "free" services are missing something. RefWorks provides training, a dedicated support staff, and ongoing development to support your end-users.



### 6. Unlimited storage

RefWorks supports PDFs, PowerPoint, Word, and Excel files so your researchers can manage their research and their data in one place.



### 7. Collaborate and annotate

Whether institution-wide or to a select group, you determine the level of access each participant is given, from read-only to annotate/markup to full edit permissions.



### 8. Creating new Citation Styles is fun

No, really! With new RefWorks the days of arduous construction of custom styles is gone. Drag and drop. What you see is what you get.



### 9. Institutional Analytics

Rather than having your vendor analyze what your users are doing, use the robust analytics platform to gain your own insight into their behavior so you can tailor the best experience.



### 10. Better than ever!

With these enhancements and more, the New RefWorks reclaims the title of best-in-breed. Let us show you what's in store for you.



# JULY Release: Processing Consistency

Focusing on the performance of RefWorks we will make import faster and more consistent.





# JULY Release: Integrate with Citation Style Language (CSL)

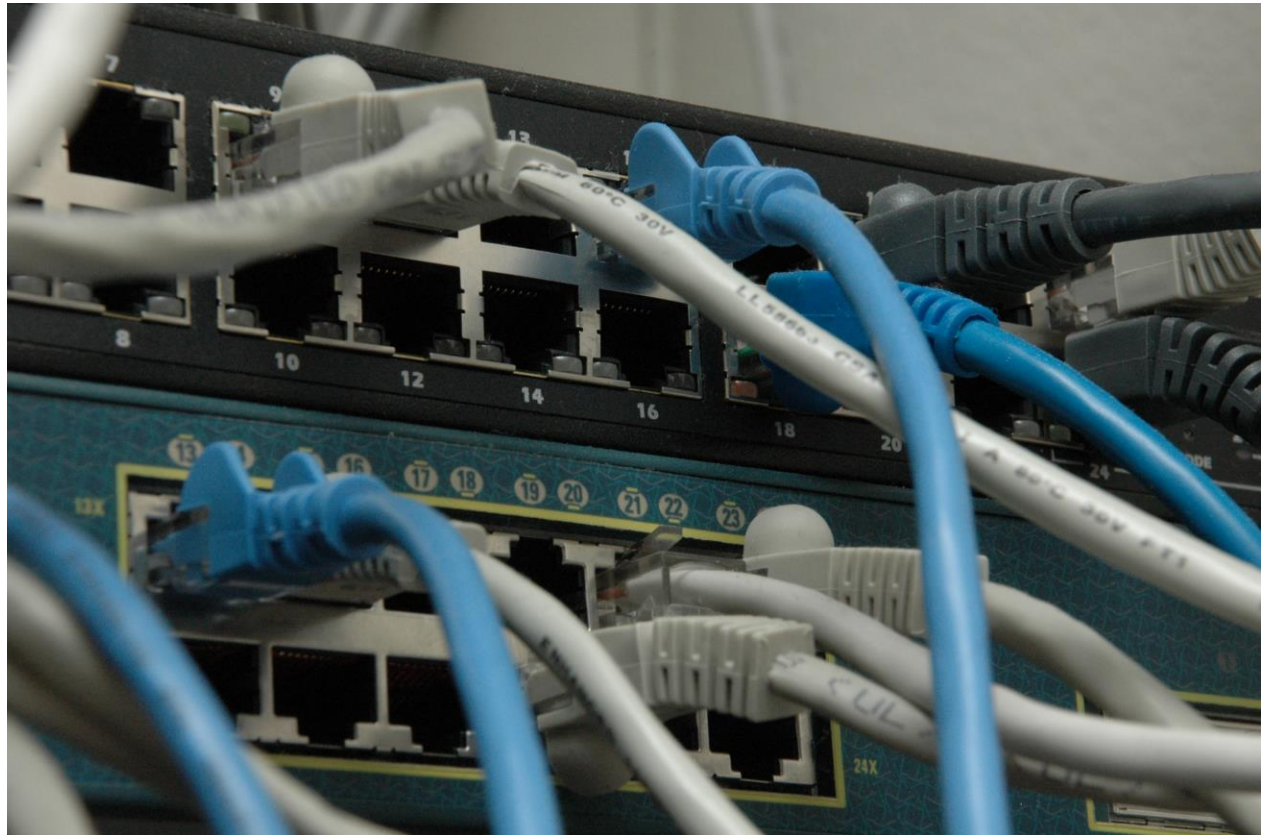
Utilizing the 8500 styles freely available under a Creative Commons [Attribution-ShareAlike \(BY-SA\) license](#) RefWorks will be [integrating](#) these styles to offer more variations of citation styles.



This doesn't mean we won't have our current set of citation styles, it's just an addition. This will be seamless for admins and end-users.

# JULY Release: Documents for IT

Handouts for how to speak to your institution's IT Dept about RefWorks regarding the technical details of a WNC or RCM campus-wide installation.



# Other Areas of Improvement

1

## Daily Emergency Triage

Meet with customer support daily to review any emergency issues reported to us.

2

## Adding more Developers

Added three developers  
Total development team is 14

3

## User Testing

Working together with you to determine our UI and UX improvements.

Focused on user testing for Projects

4

## Up-time status monitor

Now you can see the status of RefWorks with regards to connection issues.

[status.exlibrisgroup.com](https://status.exlibrisgroup.com)

5

## Knowledge Articles

Product Documentation, release notes, and training materials for legacy and new RefWorks

<https://knowledge.exlibrisgroup.com/RefWorks>

6

**Monthly Release Notes:** In the Knowledge Center and email.

**Community Site:** A home for Administrators to share and collaborate with each other and learn more about RefWorks. <http://refworkscommunity.ning.com/>

**Social Media:** Interacting with students and researchers on Facebook and Twitter ([@refworks](#)).

A group of diverse students in a library setting. Several students are raising their hands, indicating participation in a class or discussion. The background is filled with bookshelves.

## Going into H2 2018

# RefWorks 2018 Planned: Q3

The following features will be released based upon feedback from our Board of Advisors and the Idea Exchange.

**RELEASE 7**  
**8/7/18**

**RELEASE 8**  
**9/4/18**

**RELEASE 9**  
**10/2/18**

## **AUGUST**

- **Systematic Review:**  
Table View
- **IGeLU:** Czech  
National Library of  
Technology in Prague  
from August 20-23



## **SEPTEMBER**

- **Systematic Review:**  
Folder Counts
- **Systematic Review:**  
RefIDs
- **Systematic Review:**  
Export to XML

## **OCTOBER**

- **Systematic Review:**  
Deduplication Part 2 (UI)

- A percentage of development time will be spent addressing user-submitted issues.



# Reference IDs and Folder Counts

View the number of references in folders and each reference has their unique ID.







The screenshot displays the ProQuest RefWorks interface. The top navigation bar includes the ProQuest logo, 'ProQuest University', 'Language (en)', and the user name 'Gloria Murillo'. Below this is a toolbar with icons for 'Add', 'Assign to Folder', 'Share', 'Create Bibliography', 'Delete', 'Add Tags', 'Tools', and 'Search'. The left sidebar contains a 'My Folders' section with a tree view showing folder counts: 'Climate Change (86)', 'Biodiversity (38)', 'Greenhouse (27)', 'Hydrology (14)', 'Source-sink interactions (7)', and 'Group Paper (25)'. Two orange arrows point to the 'Climate Change' folder and the 'Biodiversity' subfolder. The main area shows a list of references, each with a checkbox, a unique ID, and a title. The references listed are:

- Ref ID: 152: The energetics of fish growth and how it constrains food-web trophic structure.
- Ref ID: 153: Ecosystem service flows from a migratory species: Spatial subsidies of the northern pintail
- Ref ID: 154: Nanoparticle-Based Mucosal Vaccines Targeting Tumor-Associated Antigens to Human Dendritic Cells
- Ref ID: 155: Gap Detection with Electromagnetic Terahertz Signals
- Ref ID: 156: System for receiving and enhancing electromagnetic radiation input signals
- Ref ID: 157: Ochratoxin A, fungal contamination and antioxidant property of defective Arabica coffee in Benguet, Philippines
- Ref ID: 158: Science with the space-based interferometer LISA. IV: probing inflation with gravitational waves
- Ref ID: 159: Signals from SN 1987A in Amaldi-Weber antennas as the possible detection of scalar gravitational waves
- Ref ID: 160: Some astrophysical consequences of a dynamical interpretation of gravitation
- Ref ID: 161: Observational manifestations of gravitational waves in ground based interferometers and the Cosmic Microwave Background radiation

At the bottom, a status bar indicates 'Displaying 151 – 200 of 1173 references' and a 'Normal View' dropdown.

# Table View


A sortable view of references to make it easier during systematic reviews.

	Author 	Year 	Title 	Publication 	Issue	DOI 	Database 
<input type="checkbox"/>	Barneche DR, Allen AP.	2018	The energetics of fish growth and...	Ecol Lett.	Ecol Lett.	10.1111/ele.12947 [doi]	Medline
<input checked="" type="checkbox"/>	Barneche, Diane R...	2018	The energetics of fish growth and...	Ecol Lett.	12-17	10.1111/ele.12947 [doi]	Chochrane
<input type="checkbox"/>	Betts RA, Alfieri L...	2018	Changes in climate extremes, fresh...	Philos.Trans.	376(2119)	20160452 [pii]	Medline
<input checked="" type="checkbox"/>	Betts Randolph A...	2018	Changes in climate extremes, fresh.....	Climate Change...	376(2119)		
<input checked="" type="checkbox"/>	Betts Randolph A...	2018	Changes in climate extremes, fresh...	Philos.Trans.	376(2119)	20160452 [pii]	Chochrane



# Deduplication Part 2

Clearer user experience of reviewing and identifying duplicates.


 ProQuest<sup>®</sup>  
RefWorks


ProQuest University


Language (en) ▾

Gloria Murillo ▾

← All Documents







## Find Duplicates

All Documents ▾

Strict Match ▾

Find Duplicates

2 sets of duplicates found in "All Documents" using Strict Match Selected (3)

Document 1

☐

The energetics of fish growth and how it constrains food-web trophic structure. Barneche DR, Allen AP. **Ecol Lett.** 2018 Apr 3. 10.1111/ele.12947 [doi].

☒

The energetics of fish growth and how it constrains food-web trophic structure. Barneche DR, Allen AP. **Climate Change Proceedings.** 2017 Apr 3.

Document 2

☐


Changes in climate extremes, fresh water availability and vulnerability to food insecurity projected at 1.5°C and 2°C global warming with a higher-resolution global climate model. Betts RA, Alfieri L, Bradshaw C, Caesar J, Feyen L, Friedlingstein P, Gohar L, Koutroulis A, Lewis K, Morfopoulos C, Papadimitriou L, Richardson KJ, Tsanis I, Wyser K. **Philos.Trans.A.Math.Phys.Eng.Sci.** 2018 May 13;376(2119). 20160452 [pii].

☒

Changes in climate extremes, fresh water availability and vulnerability to food insecurity projected at 1.5°C and 2°C global warming with a higher-resolution global climate model. Betts RA, Alfieri L, Bradshaw C, Caesar J, Feyen L, Friedlingstein P, Gohar L, Koutroulis A, Lewis K, Morfopoulos C, Papadimitriou L, Richardson KJ, Tsanis I, Wyser K. **Philos.Trans.A.Math.Phys.Eng.Sci.** 2018 May 13;376(2119). 20160452 [pii].

☒


Changes in climate extremes, fresh water availability and vulnerability to food insecurity projected at 1.5°C and 2°C global warming with a higher-resolution global climate model. Betts RA, Alfieri L, Bradshaw C, Caesar J, Feyen L, Friedlingstein P, Gohar L, Koutroulis A, Lewis K, Morfopoulos C, Papadimitriou L, Richardson KJ, Tsanis I, Wyser K. **Philos.Trans.A.Math.Phys.Eng.Sci.** 2018 May 13;376(2119). 20160452 [pii].


Journal Article 


The energetics of fish growth and how it constrains food-web trophic structure


[Find it @ ProQuest](#)


Tags


 Biomass


 climate change

 efficiency

 fisheries

 physiology

 productivity

 trophic pyramids

Authors

D R Barneche, A P Allen

Journal

Ecology Letters

Publish Date

April 3, 2018

ISSN

1461-0248

Abstract

The allocation of metabolic energy to growth fundamentally influences all levels of biological organ...

Publisher

© 2018 Ex Libris | Confidential & Proprietary



# Roadmap Areas and Highlights 2018

## Performance

- Simple and Accurate Imports
- **Improve Processing of All PDFs/files**
- Improve import webpage PDF and BibTeX accurate
- Make processing consistent
- **UI Improvements - Show import process**
- Improve Style Export Accuracy

## Writing Tools (WNC,RCM, Gdocs)

- Document Compatibility
- High Priority Bug Fixes
- Improve installation and syncing WNC
- Improve quality of the editing a citation in RCM/GDoc
- RCM Word Online (Office 365)

## Administrator Tools

- Usage Analytics
- Deactivate User
- Restrict folder sharing
- Upgrade user to NRW - entire institution
- Reset User Password
- Custom style sharing
- Custom Roles and Focus Area (Discipline)

## Features for Systematic Review

- View, Organize, and Manage thousands of citations in a collaborative manner
- Create Projects for multiple accounts
- Tab-delimited export
- Show all citations in folder on 1 page
- Reader fixes
- **Improve Deduplication**
- Public URL citations

## API/Integrations

- Developer area
- Integration with other PQ/ExL products, e.g. Integrate the "lightning bolt in DOI"
- Integration with 3<sup>rd</sup> Party products
- bX Recommender
- **CSL integration/normalization**
- **GDPR**



# Beyond 2018





# Leganto and RefWorks

# Enrich Reading Lists With Authoritative Citations



## Better Together

- Connect research and teaching activities
- Save instructors time
- Leverage comprehensive, accurate references

# Easily Integrate Citations into Leganto

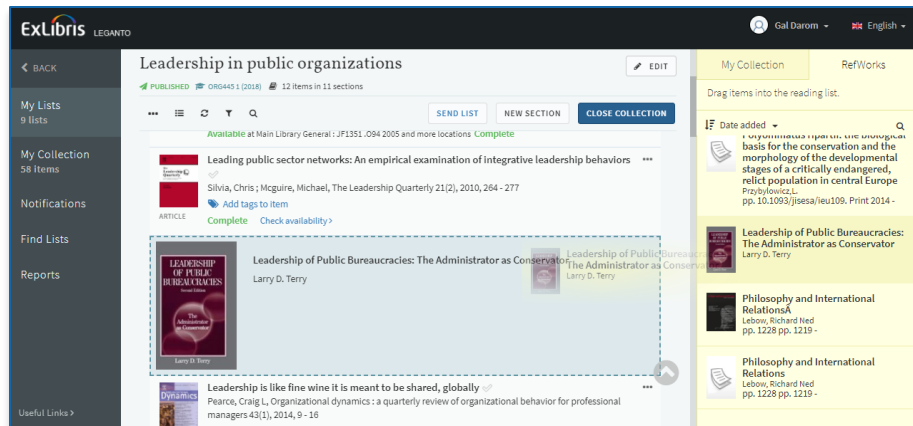
## Step 1

Your RefWorks citations available directly inside Leganto



## Step 2

Drag-and-drop citation to the relevant section





A high-angle photograph of a group of diverse students sitting in a circle on a library floor. They are gathered around a small round wooden table, looking at books and tablets. The students are engaged in a collaborative study session. In the background, there are bookshelves filled with books, and other students are visible standing and reading. The floor is made of light-colored wood, and there are large, tufted leather ottomans around the group.

# Summon and RefWorks



# Provide a Seamless Workflow For Researchers



## Better Together

- Integration with the Summon index
- One click actions in RefWorks for searching and saving research
- Get complete references from Summon while staying in RefWorks
- Comprehensive metadata to enrich RefWorks citations

# Using Summon and RefWorks together

## Approach 1

Search topic in Summon and easily export citation to your RefWorks account

The screenshot displays the Duke University Libraries Summon search interface. At the top, a search bar contains the term "happiness". Below the search bar, the results are sorted by relevance, showing 730,684 results. The left sidebar offers various filters, including "REFINE YOUR SEARCH" (Full Text Online, Peer-Review, Open Access, Library Catalog) and "CONTENT TYPE" (Newspaper Article, Journal Article, Book / eBook, Magazine Article, Book Review). The "PUBLICATION DATE" section allows filtering by "Last 12 Months", "Last 3 years", and "Last 5 years". The main results area lists three items, all titled "HAPPINESS". The first item is by Kim Holden, from the Phi Kappa Phi Forum, 12/2017, Volume 97, Issue 4. The second item is by Grace Schulman, from The Yale Review, 04/2016, Volume 104, Issue 2. The third item is also by Schulman, Grace, from The Yale Review, 04/2016, Volume 104, Issue 2. A context menu is open over the first result, showing options: "Read Online", "Export to", "RefWorks", "EasyBib", "EndNote", "Zotero", "BibTeX", and "Citiavi". The "Export to" option is highlighted. On the right side, there is a "From Credo Reference" section titled "Happiness" with a paragraph of text and a "Read more" link. Below that is a "Related Topics" section with links for "The Emotions", "Mental health", and "Fear".

# Using Summon and RefWorks together

## Approach 2

Search your topic in Summon, add to a folder, and send to RefWorks

The screenshot displays the Summon search interface. The search term 'happiness' has yielded 730,684 results. The left sidebar offers filters for 'REFINE YOUR SEARCH' (Full Text Online, Peer-Review, Open Access, Library Catalog) and 'CONTENT TYPE' (Newspaper Article, Journal Article, Book / eBook, Magazine Article, Book Review). The 'PUBLICATION DATE' filter is set to 'Last 12 Months'. The search results list three items, all titled 'HAPPINESS' by Kim Holden. A blue arrow points from the 'Export To...' button in the search results to the 'ProQuest RefWorks' export option in the '1 Saved Items' panel.

Off Campus? Log in to access full text and more content.

Duke University LIBRARIES

happiness

New Search Advanced

730,684 results sorted by relevance

1 Clear Filters

REFINE YOUR SEARCH

Full Text Online

Peer-Review

Open Access

Library Catalog

CONTENT TYPE

Newspaper Article (1,974,870)

Journal Article (730,684) ✓

Book / eBook (674,685)

Magazine Article (161,901)

Book Review (153,971)

More...

PUBLICATION DATE

from to

Last 12 Months

Last 3 years

Last 5 years

1 Saved Items

Clear all

This is a temporary folder, your saved items will be cleared when you leave. You can export, email, or print your saved items at any time.

As shown on search results Export To ... Print Email

ProQuest RefWorks - Collect & organize your research

Create a RefWorks account and store all your saved items permanently, manage documents and references, and collaborate with other researchers.

Sign up (free)

Powered by RefWorks

# Let the Summon Index do the Work

## Step 3

Whenever you add a title in a new reference in RefWorks, the Summon index will be queried

Artículo de revista

Title

Microarray analysis of peripheral blood lymphocytes from ALS patients and the SAFE detection of the KEGG ALS pathway

Tags

Añadir etiqueta

Attachments

Add an attachment...

Authors

Mougeot, Jean-Luc C Li, Zhen Price, Andrea E Wright, Fred A Brooks, Benjamin R Apellido, Nombre

Journal

BMC Medical Genomics

Publish Date

Jan 1, 2011

Volume

4

Issue

1

Pages

74

Abstract

Background: Sporadic amyotrophic lateral sclerosis (sALS) is a motor neuron disease with poorly understood etiology. Results of gene expression profiling studies of whole blood from ALS patients have not been validated and are difficult to relate to ALS pathogenesis because gene expression profiles depend on the relative abundance of the different cell types present in whole blood. We conducted microarray analyses using Agilent Human Whole Genome 4 44k Arrays on a more homogeneous cell population, namely purified peripheral blood lymphocytes (PBLs), from ALS patients and healthy controls to identify molecular signatures possibly relevant to ALS pathogenesis. Methods: Differentially expressed genes were determined by LIMMA (Linear Models for MicroArray) and SAM (Significance Analysis of Microarrays) analyses. The SAFE (Significance Analysis of Function and Expression) procedure was used to identify molecular pathway perturbations. Proteasome inhibition assays were conducted on cultured peripheral blood mononuclear cells (PBMCs) from ALS patients to confirm alteration of the Ubiquitin/Proteasome System (UPS). Results: For the

Activate the auto complete functionality by clicking on the blue ray button



Want the full-text?

We might be able to get the full-text from your institution. You can [get the full-text](#) or [skip the full-text](#).

# Using Summon and RefWorks together

## Step 4

Searching Summon from within RefWorks

The screenshot displays the ProQuest RefWorks interface. The top navigation bar includes 'ProQuest RefWorks', 'ProQuest University', 'Language (en)', 'Todd Vaccaro', and a help icon. The left sidebar contains navigation options: 'All Documents', 'Search Databases', 'Last Imported', 'Sharing' (with a count of 2), 'My Folders', 'Tags', and 'Deleted'. The main content area is titled 'Summon' and shows a search for 'HAPPINESS' with 733,057 results sorted by relevance. The results list includes:

- 1** **HAPPINESS** by Kim Holden. Phi Kappa Phi Forum, 12/2017, Volume 97, Issue 4. ... That small drop, empty and pure, transparent With life: **happiness**. Journal Article: [Full Text Online](#). Preview.
- 2** **HAPPINESS** by Schulman, Grace. The Yale Review, 04/2016, Volume 104, Issue 2. Journal Article: [Full Text Online](#). Preview. Related Articles.
- 3** **HAPPINESS** by Schulman, Grace. The Yale Review, 04/2016, Volume 104, Issue 2. Journal Article: [Full Text Online](#). Preview. Related Articles.
- 4** **HAPPINESS** by Grace Schulman.

The interface also features a 'REFINE YOUR SEARCH' section with filters for 'Full Text Online', 'Peer-Review', 'Open Access', and 'Library Catalog'. A 'CONTENT TYPE' section shows counts for 'Newspaper Article (1,945,717)', 'Journal Article (733,057)', 'Book / eBook (674,711)', 'Magazine Article (161,877)', and 'Book Review (151,704)'. A 'PUBLICATION DATE' section includes a date range selector and preset filters for 'Last 12 Months', 'Last 3 years', and 'Last 5 years'.

A group of diverse students in a library setting. Several students are raising their hands, indicating an interactive session or a quiz. The background is filled with bookshelves. A semi-transparent dark grey box is overlaid on the lower left portion of the image.

# Primo and RefWorks

# Provide a Seamless Workflow For Researchers



## Better Together

- One click actions in RefWorks for searching and saving research
- Get complete references from Primo while staying in RefWorks
- Comprehensive metadata to enrich RefWorks citations



# Using Primo and RefWorks Together

The screenshot illustrates the integration between Primo and RefWorks. On the left, the Primo interface shows search results for 'Machine learning'. The 'RefWorks' button is highlighted in the top toolbar of the search results. On the right, a RefWorks window is open, showing the imported record for 'Machine learning'. The record details include the reference type, publish date, journal title, tags, ISSN, publisher, place of publication, journal abbreviation, and notes. The RefWorks window also shows a list of other references, including 'HAPPINESS'.

**Primo Search Results:**

- Refine My Results**
  - Sort by: Relevance
  - External Search
    - UW WorldCat
    - Google Scholar
  - Availability
    - Available Online (1,058,997)
    - Available in the Lib... (1,410)
    - Peer-reviewed J... (413,202)
  - Resource Type
    - Articles (654,668)
    - Newspaper Articles (436,454)
    - Dissertations & T... (326,163)
    - Conference Proc... (163,448)
    - Reviews (16,098)
  - Publication Date

**Search Results:**

- JOURNAL**  
**Machine learning.**  
1986- Boston/U.S.A. : Kluwer Academic Publishers  
Available at Engineering Library Periodicals-Floor 2 (Q325 .M316 ) and other locations >
- PRINT BOOK**  
**Machine Learning**  
Tom M. (Tom Michael) Mitchell. 1951-

**RefWorks Window:**

- ProQuest University | Language (en) | Todd Vaccaro
- All Documents | Search Databases | Last Imported | Sharing | My Folders | Tags | Deleted
- 3 minutes ago
  - ☐ Machine learning
    - Reference Type: Journal Article
    - Publish Date: 1986
    - Journal: Machine learning.
    - Tags: Machine learning - Periodicals
    - ISSN: 0895-6125
    - Publisher: Boston/U.S.A. : Kluwer Academic Publishers
    - Place of Publication: Boston/U.S.A.
    - Journal Abbrev: Mach.learn.
    - Notes: ID: CP71163885390001451
- 16 minutes ago
  - ☐ HAPPINESS
    - Reference Type: Journal Article
    - Authors: Holden
    - Publish Date: 2017
    - Journal: Phi Kappa Phi Forum
    - Volume: 97
    - Issue: 4

Displaying 1 - 50 of 404 references < > Full View

# Using Primo and RefWorks together

## Searching Primo from within RefWorks

The screenshot displays the ProQuest RefWorks interface. The top navigation bar includes the ProQuest logo, the user's name (Todd Vaccaro), and language settings. The left sidebar contains navigation options: All Documents, Search Databases, Last Imported, Sharing (2), My Folders, Tags, and Deleted. The main content area is titled 'Primo' and features a search bar with a magnifying glass icon. Below the search bar, there are filters for 'Refine My Results' and 'Sort by Relevance'. The 'Refine My Results' section includes checkboxes for 'Availability' (Available Online: 107,634; Available in the Libr...: 130; Peer-reviewed J...: 33,560), 'Resource Type' (Newspaper Artic...: 81,122; Articles: 62,795; Dissertations & T...: 17,192; Conference Proc...: 15,620; Text Resources: 7,589), 'Publication Date' (From 1800 To 2018), and 'Author/Creator'. The search results are displayed on the right, showing a list of items including 'Big data analytics' by Venugopal, Govindaraju, editor.; Vijay, Raghavan, editor.; C. Radhakrishna (Calyampudi Radhakrishna) Rao, 1920- editor.; 2015 Amsterdam : Elsevier Science Ltd. The results are sorted by relevance and show 192,430 results.

## The Researchers Workflow



### Search & Find

- Find, access, and capture research materials from virtually any source
- Integration of content from hundreds of library catalogs, Ex Libris discovery services and researchers personal documents



### Stay Organized

- One central workspace to facilitate storage, reuse, and sharing
- Provides the same experience no matter how users access it



### Share & Collaborate

- Read, annotate and highlight full-text documents individually or in a collaborative environment
- Share folders or references with members of your institution or with any RefWorks user.



### Export, Cite & Write

- Generate bibliographies and authoritative citations automatically
- Create your own institutional citation format
- Utilize today's top writing tools within RefWorks



# Questions?

You can also email me at [todd.vaccaro@proquest.com](mailto:todd.vaccaro@proquest.com)





**THANK YOU**  
The Entire RefWorks Team