The New RefWorks
Frequently Asked Questions

This FAQ document was created to answer your questions about the new ProQuest RefWorks. It is updated frequently, so make sure to check back often.

The document is broken into multiple section with jump links to make it easier to navigate. If you still can’t find the answer you’re looking for; a) we suggest selecting Ctrl F and conduct a keyword search or b) contact refworks.support@proquest.com

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What is the new RefWorks

What is the new RefWorks?
The New RefWorks is the next generation of reference management software empowering both researchers and librarians to do more. It combines powerful citation management functionality including database import, web capture tools and thousands of flexible citation styles, plus a refined user experience, full-text management, collaboration and other features you’d expect from a total reference management solution.

The new RefWorks enables students and faculty to have a more efficient and reliable process, while allowing academic institutions to honor copyright and intellectual property.

Why did we create a new RefWorks?
The world has changed. We expect citation managers to do more and we need to keep up with this change. The new RefWorks lays the foundation of transitioning from Reference Management to Research Management.

What is the difference between the new RefWorks and Flow?
The new RefWorks essentially rebuilds RefWorks functionality on modern, scalable, service-oriented infrastructure. The result is a tool that combines powerful and proven core reference management tools with collaboration and full text management features.

When did the new RefWorks become available?
The Initial release of new RefWorks began on January 18th. However the release does not yet support all legacy RefWorks functionality.

What is the difference between the new RefWorks and legacy RefWorks?
The new RefWorks will ultimately provide a superset of legacy RefWorks functionality. In the process of building the new RefWorks, we have turned many of RefWorks capabilities into services that are accessed via the user interface built on the new platform. By developing the product in this fashion we have ensured there is no data loss or functionality loss as a user moves from the legacy version of RefWorks to the new RefWorks.

Will transitioning to the new RefWorks be difficult?
While the user interface of the new RefWorks is different from the legacy version of RefWorks, the transition from the legacy product will be fairly easy. The new RefWorks features are extensively user-tested as they are being designed and after being implemented. And, the product is consistent in its use of modern UX paradigms.

When should I upgrade to the new RefWorks?
For most current RefWorks institutions, we recommend waiting until later in 2016 to fully transition your users to the new RefWorks. However, end users can start to use and familiarize themselves with the new RefWorks starting in January 2016 without impacting their legacy RefWorks account.

Will current RefWorks users have to create a new account in the new RefWorks?
Yes—but, it’s easy. Legacy and new RefWorks accounts are separate. So, a user can maintain both at the same time. This allows users to gain familiarity with the new service while continuing to work with the legacy product.
What about free Flow account users?
Existing free Flow accounts received a grandfathered individual RefWorks account. They will miss some of the great new capabilities of the institutional version, such as institutional collections, and link resolver configuration. They will continue to be limited to 2GB of storage space in the new RefWorks.

Will ref IDs from the legacy version of RefWorks accounts be migrated across to the new RefWorks ensuring people can continue to work on documents started in the legacy version of RefWorks?
RefWorks RefIDs are migrated to the new RefWorks. But users are not able to continue working on the same word processing document in the new RefWorks.

Can institutions control the migration timing at their institution, so the administrator doesn’t have to support two different products?
Yes. Admins can control the timing of migration at their institution.

How many of the new RefWorks accounts will someone be able to have (do you have to use your institutional email as your username)?
Each email address can only be associated with one RefWorks account. Users can use multiple email addresses if they need to have multiple accounts. In the legacy RefWorks you could have multiple accounts with each email address, but in the new and improved RefWorks this is not the case.

Can administrators customize accounts? That is, can we turn on full text sharing for certain accounts (for example if a researcher indicates that their collaborators' also have access to same journal full text) OR turn on/off for all institutions account only?
Not at this time. The control for full-text sharing is a global setting per academic institution.

Will RefWorks continue work with Alumni?
Yes Alumni will be able to access new RefWorks as long as their institution has a subscription.

Will the data that was in Flow move over to the new RefWorks?
Yes. Flow accounts will automatically become new RefWorks accounts.

What will happen to the data if you currently have multiple RefWorks accounts affiliated with one email? Will these be combined?
The upgrade process will migrate data from one legacy RefWorks account to one new RefWorks account. If you have multiple legacy accounts, you can then use the RefWorks import feature within your new RefWorks account to bring in references from these additional accounts.
Upgrading from legacy RefWorks to new Refworks

When do we have to move from legacy RefWorks to the new RefWorks?
ProQuest has not determined the final date for retirement of the legacy RefWorks. It will not be before January 2018 and may be extended based on customer feedback.

Does the new RefWorks automatically replace the legacy version of RefWorks?
No. Institutions control this process and can choose whether to migrate all of their users or some of their users using our “soft” or “hard” migration tools. Because the legacy version of RefWorks and the new RefWorks are physically different services, customers can “try-out”. To get started with migration contact refworks.support@proquest.com

Can any member of the institution choose to upgrade before the entire campus? Does the institution need to make it available first?
Any institution that subscribes to RefWorks or Flow automatically has rights to the new RefWorks. Institutions can begin migrating patrons by contacting ProQuest and initiating either a “soft migration” or a “hard migration” (described above). If they aren’t ready to start migrating users, any patron can get access to the new RefWorks by creating an account at http://refworks.proquest.com. They can then import their citations from the legacy version of RefWorks.

If we’re interested in migrating to the new version, would our admin simply contact our Refworks rep?
Yes. Also see the user guides in our support center.

Does migration get triggered by the institution? Or by each individual user?
There are 3 flavors of upgrading (migrating) from legacy to new Refworks:

1. **User initiated.** A patron can create a new RefWorks account, select *Import References* and move their references from the old to the new RefWorks. They can maintain both accounts and do this migration multiple times (if they wish).
2. **Soft migration:** When a user logs into the legacy RefWorks, they see a link at the top of the screen that says, “Migrate to new RefWorks… “. Choosing that link will move their account data, user name and password to the new product. Enabling soft migration is a decision made by the institution and implemented on the ProQuest backend by RefWorks Support.
3. **Hard migration:** When a user logs into legacy RefWorks, the migration begins immediately. A patron is walked through the steps of this process by the RefWorks service.

Do you anticipate that new RefWorks support documentation will be revised as needed (I ask this because old RW documentation is pretty much frozen in time)?
Yes. Documentation work is happening, now. See our support center for updated materials for new RefWorks

With a soft migration, does the institution have the option to move to the hard migration at a later date?
Yes. See our support center for all updated user guides
Are you going to be adding a mobile app?
Currently, we plan on making our current service responsive on mobile devices. This means that whenever new features are introduced, they will be available to all platforms at the same time, without compatibility or synchronization issues. We think this is an advantage for users. We may consider a mobile app at some point in the future, but likely not in 2016.

How do we get access to view the new product?
If you currently subscribe to legacy RefWorks, you also have rights to use the new RefWorks. Simply contact ProQuest RefWorks support to get set up. If you don’t have a RefWorks subscription, please contact your ProQuest Sales representative.

If we opt for soft migration, is January 2018 the cut off date when all remaining users will be migrated?
January 2018 is the date we have proposed retiring legacy RefWorks. That date may be extended based on customer input.

Do you have to have an institutional subscription to access Refworks?
Yes.

How do we get Beta access?
To see a preview of many of the new RefWorks features, please contact your sales specialist.

Pricing

Is there an additional cost for the new RefWorks?
No. The new RefWorks is included in your current Flow or RefWorks subscription.

Support & Communication Questions

Will extensive help pages and tutorials be available soon for users and administrators?

What is the best way to stay informed of the timeline and progress of the features that are being released as part of the new RefWorks?
We will post progress on the ProQuest the new RefWorks Customer Resources page.
Access/Authentication/Sharing Questions

What kinds of authentication are supported?
RefWorks support authentication based on email domain, Shibboleth & Athens, group access code, and IP authentication. Group access code and IP authentication make use of a subscriber signup URL.

Specifically, is ez-proxy authentication supported?
In new RefWorks, like the old RefWorks, can do IP-based authentication, using proxy services like EZProxy, and can supply an access code for off-campus login. The institution proxy server URL is set by contacting RefWorks Support who configure the institutional settings, accordingly. Once this is set up, users can create an account 4 different ways:

1. Create an account with an institutional email address
2. Create an account via an institutional unique URL on-campus (or within your Institution’s IP range)
3. Create an account via an institutional unique URL and access code when off-campus (or outside your Institution’s IP range)
4. Receive an email from an institutional administrator with a link to create an account

Once the account has been created, the user will enter their email address and password to access their account (on or off campus).
Proxy services can be implemented for IP authentication purposes. Please contact RefWorks Support for RefWorks Support who configure the institutional settings, accordingly.

How does the new RefWorks authenticate current students?
The new RefWorks will support Shibboleth and Open Athens SSO mechanisms as well as its own username/password authentication. We are considering LDAP support in the future.

Will Shibboleth accounts be supported? If so, will user accounts be migrated seamlessly or will users need to create a new RefWorks account?
Shibboleth will be supported by the new RefWorks. As usual, Shibboleth only controls the login process.

How are members of an institution identified in the new RefWorks?
Users are associated with an institutional subscription when they initially create their account. This association can happen a variety of ways—via IP-authentication, institutional email address or configuration for authentication via single-sign-on (SSO) using Open Athens or Shibboleth.

How are the departments generated for analytics purposes? Can we select these in advance for new users to select from?
The institutional department hierarchy is established by working with our editorial staff. You can coordinate that discussion by working through technical support. That hierarchy is the one that will be presented to new users logging into the system.

What will keep people not from our institution from signing up as our users?
They must have an institutional email or an institutional single sign-on account to be associated with an institution.
Will you be able to access the new RefWorks offline?
Like the legacy version of RefWorks, the new RefWorks is an online service.

Will stable URLs be available to share collections with anyone who has web access, as opposed to having to invite people to see a shared folder?
Public Sharing will be introduced in the first half of 2016

What if the person you're sharing with has an equivalent subscription / valid access to the database full text came from? Would that be detected or would they have to search at their institution?
If a user from one institution shares a collection with a user from a different institution and the administrator has limited full text sharing, that person will not have access to the full text via the collection. They will need to (and will be able to) download it from their institution. Unfortunately, there is no way for RefWorks to detect what their subscriptions allow.

If inviting non-institutional users to a folder, how does the new RefWorks know if full-text should be accessible or not? Is it based on the invitee’s email account?
When a user signs up for a new RefWorks account, an institutional affiliation is established for that user, either based on email address or determined automatically by single-sign-on (SSO). If an administrator limits the sharing of full text to members of their institution, then any user not affiliated with that institution will only be able to see reference metadata. Of course, if their institution has subscription access to that content, they can easily download a copy for themselves.

For private sharing, will it be possible to create groups?
Yes. Collections can be either public (institutional) or private. Private collections can be read-only, annotate, or complete (write) access. When sharing a collection you can specify these roles on a per-person basis. Some users can be read-only while others can have greater access.

For off-campus users, will proxy servers (e.g. EZ proxy or APC proxy) work with the new RefWorks so full text can be accessed from within the new RefWorks?
For references that have already been saved to your new RefWorks account, no proxy is needed to access full text, as a copy of the full text is stored within the RefWorks repository. When capturing new references from off-campus, RefWorks works with your link resolver to access the full text. So, anywhere your link resolver permits access, RefWorks will have access. Depending on the configuration, you may need to save the full text and then manually attach it to the applicable reference. The new RefWorks is designed to work with current versions of Firefox, Safari and Chrome and with Internet Explorer 8+.

Can CAS authentication be added to your plans for single sign on?
If your CAS systems uses LDAP/Active Directory for authentication, it’s likely that it will be supported when we add support for LDAP. That work is currently unscheduled, but is on the product backlog.
Can we create separate libraries for each project that we work on? Our workflow requires separate libraries because of the massive amount of citations we upload. The concept of “separate libraries” is typically found in desktop-based citation management systems. RefWorks is modern and completely cloud-based. We don’t have technical limitations on the number of citations we can handle per user account. And, you can organize those citations into folders and subfolders. If it is more convenient for you, you can create multiple accounts for different project. But, there is no need to have separate library files to save space or speed processing.

Browser Questions

What browsers does the new RefWorks work with? Firefox? Safari? Chrome? IE?
The new RefWorks is designed to work with current versions of Firefox, Safari and Chrome and with Internet Explorer 8+.

We’ve received reports that the new RefWorks does not work well with IE. Are there any plans to address this?
The only substantive IE-related issues that we know about are related to the web capture bookmarklet—which we are currently in the process of addressing. We are in the process aligning our IE support with Microsoft, which recently retired all versions of IE prior to IE 11. Although we have found that IE 10 & 11 work well.

Document Storage Questions

How much document storage will be available in the new RefWorks?
For subscribing institutions, the amount of storage will be unlimited.

Will there be a limit on file size for imports?
There is no set limit on file size for import. However, browsers typically have a “time-out” setting which governs how long they will wait before getting a response. That setting varies per browser and may affect your ability to import massive files.

Any limits to the number of citations you can export?
No.
**Citation/Footnote Style Questions**

Will the new RefWorks fully support short subsequent citations in footnotes styles like MHRA? Will we be able to include personalized citation styles in the institutional styles?
Yes.

Will custom styles from RefWorks transition smoothly into the new RefWorks custom styles?
Yes.

How does this integrate with word processing software: MS Word & Google Docs?
We have an add-on for Google Docs and a plug-in for Word. Both allow insertion and formatting of citations, footnotes and bibliographies.

Is there another opportunity than citing with the new RefWorks if you cannot use Write-N-Cite (for example when you use open office)?
Yes, Quick Cite is a browser based solution that can be used with any authoring system.

What is happening to Write-N-Cite? Will it be updated? Will it be fully functional? Will the new Write-N-Cite be less vulnerable in huge documents that have field codes from MS Word in them as well?
We are in the process of updating the installed version of Write-N-Cite to address install and reliability problems. We are also releasing a new version of Write-N-Cite that leverages MS Words new Windows Store based add-in system and no longer requires users to download and install software. We are committed to making Write-N-Cite a robust, high quality add-in.

Will there be equivalent integration with LibreOffice/OpenOffice to MS Word and Google Docs?
An integrated add-in is not currently planned for OpenOffice, though it is under consideration. Open Office users can use Quick Cite to add references to their documents.

Will we be able to keep our current customized format that was developed as APA 6th edition-CPM?
Yes.

Our campus uses OneDrive, and does not support student use of GoogleDocs. Has there been any discussion of OneDrive application integration similar to what you’re offering for GoogleDoc integration?
Currently, we provide integration with Dropbox. Any full text references saved to a new RefWorks account will be copied into the patron’s Dropbox folder, if it exists. This functionality can be turned off by institution administrators, which is a way of limiting the sharing of full-text documents. We have received requests to extend the Dropbox functionality to OneDrive (Microsoft) and to Google Drive. We are considering adding these cloud storage systems, as well. But, that integration is currently lower priority than many other productivity features.

Is Write N Cite still a part of the new RefWorks?
Yes. In addition to Google docs, Write N Cite is an important component of the new RefWorks. These add-ins will only be available to users who are associated with an institutional RefWorks subscription (i.e. not available to patrons who created their accounts through Summon).
According to your support documentation, Write-n-Cite is not compatible with certain versions of Word, still in use among students and faculty. Will this change any time in the future?
The currently available Write N Cite add-ins are compatible with Office 2007, 2010, 2013 and 2016 on Windows, and Office 2007, 2010 and 2013 on Macintosh. With Office 2016, Microsoft changed its extensibility model and we have prepared a new Write N Cite add-in for Office 2016 for Macintosh. We are currently waiting for Microsoft to update Office for Mac 2016 to test and finalize our new add-in. This update is expected towards the end of Q1-2016.

Will the old Write-N-Cite plug in work with New RefWorks? We are considering a soft migration, and all users at our institution have the same Write-N-Cite plug in, mandated by IT.
Yes.

Saving/Attachments/Annotations/Imports/Exports/Output Style Questions

Will the new RefWorks import audio or movie files?
The initial release will not, but a later release will enable this capability.

Will the new RefWorks allow multiple attachment files to a single reference?
Not currently. This is planned for 2016.

Can images be imported or attached to citations?
Only PDF and Microsoft Office files are currently supported. Support for importing images is being considered as a future enhancement.

How do users save items that are not associated with academic databases, such as websites, New York Times articles from their website, etc.?
The new RefWorks will have a set of browser extension has a bookmarklet that allows users to capture both metadata and full text from web sites.

The legacy version of RefWorks doesn't fully support short subsequent citations. Are there plans to improve support in the new RefWorks?
Our first objective is to support all the current functionality from the legacy RefWorks in the new RefWorks, then to extend that functionality. This will not be part of the initial feature set for the new RefWorks, but we will consider it as an enhancement request.

Flow did not work very well with the direct importation of citations, will the new RefWorks handle this better?
Yes. The new RefWorks will improve on Flow in two key ways: 1) it will have all of the import capabilities of the legacy version of RefWorks and more. So, all of the database formats supported by the current RefWorks will be available as well as web capture. 2) the new RefWorks will use ProQuest Summon to verify and complete metadata that may be faulty or missing.
Does the new RefWorks work with less formal publications (gov’t websites, white papers, websites, etc.)?
Yes, via the web capture extensions.

Are PDFs that are annotated in the new RefWorks printable and still contain the annotations?
Annotations currently are not printable. We are considering adding this capability.

Will you be able to import form Zotero?
Yes, via the RIS format, currently. Later, we will be automating this feature using Zotero’s export translator.

Does the new RefWorks auto-detect and import PDFs?
Yes. PDFs can be imported either by drag-and-drop or by selecting a file from an Open File dialog. Also, browser add-on follows the in-page link to download full text, if available.

Can annotations and highlights be exported?
Not currently.

Is there a simple way to remove data in bulk from the new RefWorks?
The user can Select All from the current list to remove references, or delete a collection altogether.

Will it be necessary for existing RefWorks customers to import their references, or will their references automatically be included in their new RefWorks accounts?
Users will be able to easily migrate references, file attachments, custom output styles and folders into the new RefWorks.

Will user defined fields in the legacy version of RefWorks import into the new RefWorks as distinct user defined fields? Will custom styles using user defined fields transfer into RefWorks and still work?
Yes

Is it possible to transfer institutional output styles from the new RefWorks to the legacy version of RefWorks?
Custom output styles will transfer between the legacy version of RefWorks and the new RefWorks. Administrators will need to respecify the institutional output styles in the new RefWorks admin console. This should just be a few minutes of work.
Reference Questions

Is it possible to see the total number of references in each folder?
In the future yes. This feature is on the roadmap for H1-2016. It will be displayed on the page footer when a folder is selected.

There is no easy way to see the references you have pulled into your RefWorks without multiple clicks - on the old RefWorks you can view the references as they come in, in your chosen style which makes it very easy for students - will this be incorporated?
What you are describing are two different features; Last Import folder and Style based views.
The last imported folder retains the last set of references imported. Style based views, allow a user to view their result list in a selected citation style.

In legacy RefWorks, the user is able to set up the view of their account in a particular style (i.e. APA). This selection will change the view of the references and show only those fields that the style requires in the bibliography.

In the new RefWorks, the last imported folder is on the roadmap for 2016. A citation style view is in our list of features to implement, but has not yet been scheduled.

Can you move things out of the Recently Added folder? How long do things stay in the Recently Added folder? By move things out, I mean delete them from the RA folder)
Currently, the Recently Added folder displays references for 30 days from the date they were imported. You cannot delete references from Recently Added. However, we will be adding a Last Imported folder that has the same functionality as in the legacy RefWorks. Last Imported will display imported references until they are organized into other folders by the end user.

When we import references your legacy RefWorks accounts, what will happen if we have a collection name in the new RefWorks, which is the same as a folder name form legacy RW?
References that are organized into folders in the legacy RefWorks will be imported and organized into folders with the same names in the new RefWorks. If those folders don’t exist, they will be created. If they do exist, references will be moved into those existing folders.

Tags

How are tags created?
Tags are created using subject terms when you import references from databases. You can add your own tags as well.

Can you turn off the tags option?
We are considering functionality that allows users to turn off the conversion of subject terms to tags on import. We will likely add this functionality, but it is currently unscheduled.
PDF Questions

We realized Annotations cannot be done in scanned PDFs. Is this in the roadmap?
Yes. We will be adding that capability this year.

Can you print the pdf with your comments and highlighting?
Currently, comments and notes added in RefWorks are not printed with the document. This is a feature we are considering adding in the future.

When importing from the older RefWorks, will that also import documents that are attached to the records, such as PDFs?
Yes. Importing files from the legacy RefWorks will preserve data like custom fields as well as attachments—such as PDFs. Currently, the new RefWorks only supports a single attachment (full text) per reference. If you have multiple attachments on a legacy RefWorks reference, that single reference will be converted to multiple references (one per attachment) on import. However, we will be adding the capability of supporting multiple attachments per reference in the new RefWorks in H1-2016 (scheduled).

Are you able to drag-and-drop references into the new RefWorks?
Yes. Drag-and-drop is one of the many import mechanisms available to the new RefWorks users.

If I drag a PDF into the Library will it turn the metadata into a citation?
Yes. The new RefWorks will parse the PDF, extract the metadata, check the completeness of the metadata using Summon, and import that reference into the user’s library.

When converting uploaded PDFs, does RefWorks automatically apply OCR to enable highlighting and annotation?
Currently, if you upload “scanned image PDFs”, those documents are simply brought in as images. RefWorks does not try to OCR those documents to extract the full text. This is a feature we are considering in the future.

Would it be possible to introduce autocomplete via DOI entry?
That is an interesting feature suggestion. It would likely be fairly easy to enable with the integration of Summon Discovery into RefWorks.

What about departmental or committee accounts, which would be managed by users who have a separate individual account?
RefWorks support sharing of collection for this purpose. We encourage individuals to create their own accounts, and share data via collection. Alternately, if a single shared account is required, one could be created and shared. There is currently one account per email address, and email address is your login name.
Open Access

If it's an open access resource it will still be limited to user at the institution?
Yes. Currently, Summon does not tell us whether a resource is Open Access. When and if that metadata is added, we will be able to provide access for OA full text.

Full Text

Are there any plans to also pull the full text from non-PQ databases when manually entering/searching a citation (i.e. JSTOR)?
Yes. One of our goals with the new RefWorks is to make it as easy as possible for patrons to attach full text (that they have permissions for) to their references. Our web capture bookmarklet is limited in what it can do because of cross-domain security issues. In other words, it can’t follow your link resolver to capture full text, because the query is actually made from our servers and not from your IP. However, once we recast our bookmarklet as a set of browser add-ins, we expect to be able to use your link resolver to acquire any full text you have permissions for. This is planned for 2016.

Internationalization Questions

What languages will be supported in the new RefWorks?
The new RefWorks will support French, Italian, German, Spanish, Korean, Japanese, traditional and simplified Chinese--the same languages supported in the legacy version of RefWorks.

Search Feature Questions

Will the new RefWorks offer advanced search like the legacy version of RefWorks?
This will be added in the first half of 2016

Will the new RefWorks search databases within RefWorks, such as PubMed?
We plan to implement Summon search that delivers results for resources across many databases including PubMed. We plan to implement Z39.50 protocol searches that are part of the legacy version of RefWorks later in 2016

Linking/Link Resolver Questions

Will the new RefWorks have an easy way to marry full text with text retrieved via link resolver?
Yes. References that do not include associated full-text, display a link that allows a user to find the full text using your library’s link resolver. Once you access the full text, you may have to manually import (drag-and-drop) that full text in order to combine it with the associated reference. We are investigating automatic ways to accomplish this in the future.
Will the new RefWorks use OpenURL linking?
The new RefWorks constructs OpenURL links by default in order to find full text via your library's link resolver, once set up by your institution's administrator. If you are a ProQuest Summon institution, the new RefWorks can also use Summon's "Indexed Enhanced Direct Linking (IEDL)" which provides a more reliable mechanism than OpenURL for accessing full text. The administrator does need to define the link resolver URL for this to work.

Can we enable 2 different link resolvers with the new RefWorks?
Currently, the new RefWorks only supports a single link resolver per institution.

Discovery Questions

How does the new RefWorks look for metadata?
The methodology the new RefWorks uses to look for metadata depends on how the reference is being acquired. PDFs and web capture are notorious for providing incomplete metadata. For PDFs, the new RefWorks parses the file and attempts to extract the appropriate metadata from the contents. For references captured from web pages, the new RefWorks uses a similar mechanism to Zotero, using scripts tailored for thousands of individual sites to reliably extract this information. In the case of both of these mechanisms, the new RefWorks checks and fills-in missing metadata by looking up the reference using ProQuest Summon (in the background) and correcting it if necessary.

Do you need to be a Summon subscriber for this feature?
No.

Our discovery system has a "direct export" to RefWorks. Will this need to be updated to accommodate the new RefWorks, or will the existing one work?
All existing direct export mechanisms will work for the new RefWorks. The export will go to whichever version of RefWorks the user is logged into.

Will Summon customers have access to the new RefWorks?
 Summon customers currently have access to a very limited version of RefWorks that does not include access to Write N Cite, Google docs add-in, has limited storage, no custom styles or administrative functionality. Whether this functionality continues to be offered has not been decided at this time.

Will you be integrating RefWorks with Primo?
We expect to. We recently started those discussions with Ex Libris. As one might expect, there are a lot of product integration opportunities between ProQuest and Ex Libris. RefWorks is in that queue.

How would screen capture differ in something like Google Scholar versus Summon?
We believe you are referring to Save to RefWorks. Both should work equally well.
Other Technical Questions

Are you able to drag-and-drop references into the new RefWorks?
Yes. Drag-and-drop is one of the many import mechanisms available to the new RefWorks users.

If I drag a PDF into the Library will it turn the metadata into a citation?
Yes. The new RefWorks will parse the PDF, extract the metadata, check the completeness of the metadata using Summon, and import that reference into the user’s library.

How many databases will have the web detect functionality?
The RefWorks team is using and contributing to the Open Source project, started by Zotero, related to capturing references and full text from web sites. This project supports thousands of sites via page-specific scripts. In addition to the web capture functionality, however, the new RefWorks also inherits the legacy version of RefWorks’ ability to import files saved from over 2800 different databases (such as PubMed).

How does the new RefWorks handle removing duplicates? Can exact and close duplicates be identified?
Can exact and close duplicates be removed from a collection, but be retained in the library?
The new RefWorks has an explicit command for finding duplicates. When this command is used in the new RefWorks we do a close match to present a list of all duplicates with duplicate items selected—so, they can be easily deleted. However, you certainly have the option of retaining the duplicates and associating them with any collections you wish. We will be adding advanced de-duplication features later in 2016.

Will the number of reference types available remain the same or even increase? For example, different types of unpublished material?
Currently, the reference types available in the new RefWorks is identical to those available in the legacy version of RefWorks. We do plan on expanding those options over time.

Under the list of folders that you could join, do users have a choice whether or not their folders appear as part of the institutions folders?
Folders or collections that are visible in the list of institutionally shared folders are those that have been designated as “public.” In addition to public collections, a user can create private collections and designate on a user-by-user basis who is invited to the collection and whether they have read-only, annotate or full access to it.

Are there any plans to release a list of sites that support the "Save to RefWorks" button (similar to the list that existed for Flow)?
Yes.

Is there also a tool for integration with Microsoft Word?
Yes. Write N Cite is our add-in for MS Word.
Still have Questions? Contact Us
Call: 1. 800-521-0600 ext. 74440 or +1.734-997-4440.
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