

How Resource Management Supports the Research Journey

Survey results reveal RefWorks features valued by students and researchers

In continuation of [“taking the pulse”](#) of our users, the [RefWorks](#) user experience team conducted a survey of over 800 researchers and students who use RefWorks worldwide to gain knowledge about what features they find most valuable or are not aware of at all.

Valuable Insights

The first insight is that many features resulted as being both valuable and not known about, indicating we and RefWorks administrators should invest in exposing and training about these features so more users can benefit from them. That said, not all user workflows make use of all RefWorks features, for example – Bulk Edit would typically be used by people with large collections and Sharing may not be used by individuals working on their own.

Secondly, while advanced features are important and helpful in supporting more complex workflows, the survey shows that we can't forget about the basics – collecting and managing references and writing papers with correctly formatted citations and bibliographies.

We were happy to learn that simply by conducting this survey we have provided exposure to many features and increased awareness. Should we conduct a similar survey in the future, we would expect to see the “valuable” responses to be much higher.

Participant Demographics & Survey Scope

Total of 880 Responders

In this survey we allowed individuals to select all the roles that applied to them. The results show the majority of responders are students and researchers.

“In our follow up conversations with some of the responders, we learned that simply taking the survey increased overall awareness of features. Intrigued, a few responders looked up some of the features mentioned in the survey right away.”

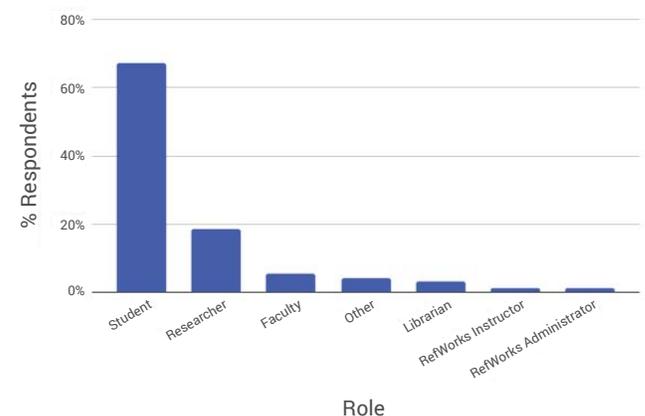
– Gloria Murillo, RefWorks User Experience Sr. Designer

We asked individuals to rank features as very valuable, valuable, not valuable or not aware; in this paper we will use the term “valuable” to refer to combined “very valuable” and “valuable” results. The features fell into one of three categories: Search and Exploration, Staying Organized, and Collaboration. While we refer to these categories below, this in no way dictates a user's workflow. A user might want to organize their folders within RefWorks (for example by topic, subject or class name) before importing references, while others like to jump right in by importing data and organize and collaborate later.

We were happy to see very few of the features were rated as “not valuable” – typically that rating was given by under 10% of responders, and in only a handful of cases, around 10–15%. Therefore, in this paper we focus on the features that are most valuable and those that could use more exposure.

Responders

- Students – 67%
- Researchers – 18%



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How Valuable are These Features?

Search and Exploration

RefWorks enables users to find, collect, import, and save references to folders or projects from virtually any source. Searching and exploring these references in RefWorks is imperative for efficient work.

The three most valuable features in this category, with over 75% of responders selecting the valuable responses, were:

- Search in a specific field
- Search within a folder
- Autocomplete by matching the title

Searching

Using the search box in the main navigation bar users can enter a search term and RefWorks will display references that include the term. By using advanced search, users can search in a specific field or folder. In the future searching in a specific folder will be supported from the basic search box, as well as in RefWorks Citation Manager, the add-on for Word 2016 and above.

Did you know that whether using basic or advanced search, RefWorks will also search PDF attachments and even PDF comments?

Let's go back a step and see how easy it is to add a PDF to RefWorks: one of the simplest methods is to drag and drop the file and let the magic begin. RefWorks extracts and enhances the metadata by searching our discovery database. Whether uploading one or multiple files, you can continue using RefWorks while the upload is processing. Now that you have a PDF attached to a reference, you

can add comments. These comments will be visible to collaborators with whom you shared your references and will also be scanned when you perform a search in RefWorks.

Finding Reference Matches

The autocomplete feature allows users who are manually adding references to enter a partial title or DOI and look for matches in our database of over 4 billion records. While title match was overwhelmingly marked as valuable, DOI match was split between users finding it valuable and users unaware of the feature. We attribute this to the title match option being more prominently displayed in the RefWorks UI, and we plan to change the DOI match representation to be similarly displayed. In addition, we will allow matching additional fields.

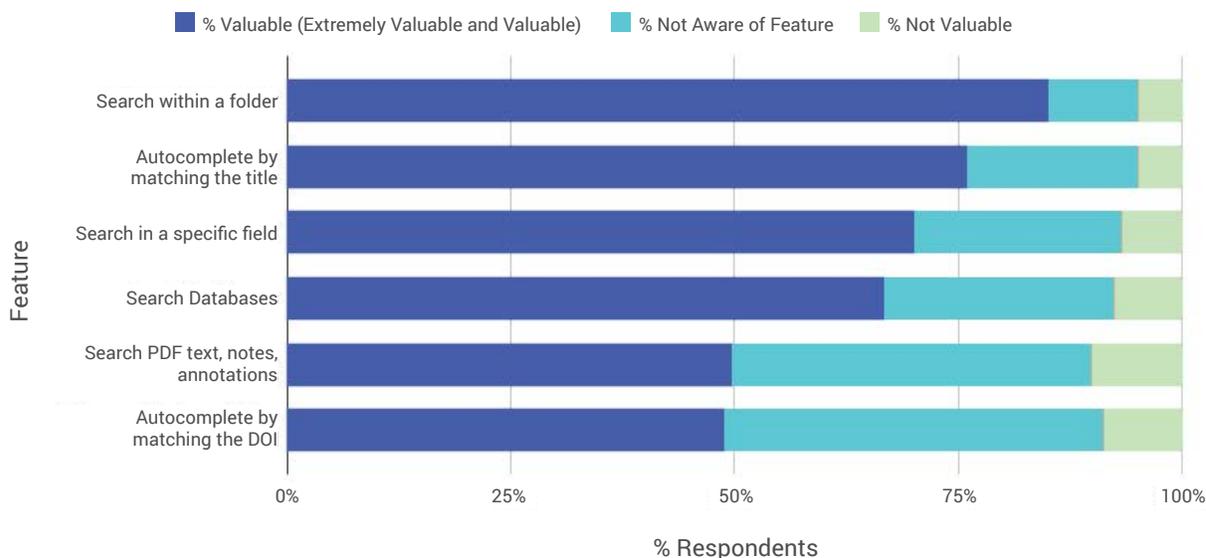
Searching Databases

Another not well-known feature was Searching Databases. This can be explained by the 2020 introduction of a feature which allows RefWorks admins to hide the Search Database option from the interface.

Want to create a new reference?

Do so within RefWorks! By selecting the + icon on the top menu and selecting Create new reference, you can manually add a reference. Type in a full or partial title or DOI and click the lightening-bolt button – ta-da! Watch RefWorks return possible matches from the our database of over four billion records, including journals, books and other reference types. Select the best match and RefWorks will fill in the available metadata fields. You can always edit or change metadata before you save the reference or at any later time. [Learn more here.](#)

Search and Exploration Features



Staying Organized

One of the best things about RefWorks is that it supports reference organization.

RefWorks provides Projects, folders and sub-folders to help users better organize references whether working on their own or sharing and collaborating with others. It wasn't a surprise to see these four features ranked as valuable by over 85% of responders:

- Creating folders
- Last Imported
- Sort references
- Reference views

Organizing References

Creating folders and sub-folders is the most fundamental way to organize collected references. Users can create and name folders by topics, semesters, classes, papers – whatever suits their needs. In addition to user created folders, RefWorks has the following built in views:

1. All References – all references in the Project
2. Last Imported – references imported in the last 30 days
3. Not in Folder – references that were not moved to a user-created folder

Soon RefWorks will provide even more flexibility with folders – for example moving a sub-folder to be a top-level folder – something users have suggested we support.

Viewing References

RefWorks offers four reference view options. Reference views received mixed responses, from 31% of responders unaware of Table View to 80–85% of responders finding Normal, Citation and Table Views valuable. Normal view is the default view and displays reference data on one line; truncated data can be viewed by clicking on a reference.

Citation View displays the reference in the citation style a user has selected. Most importantly it highlights missing metadata, alerting users to update the data before creating their citations or bibliography. Never again lose points on a paper because of missing metadata.

Reference View Options

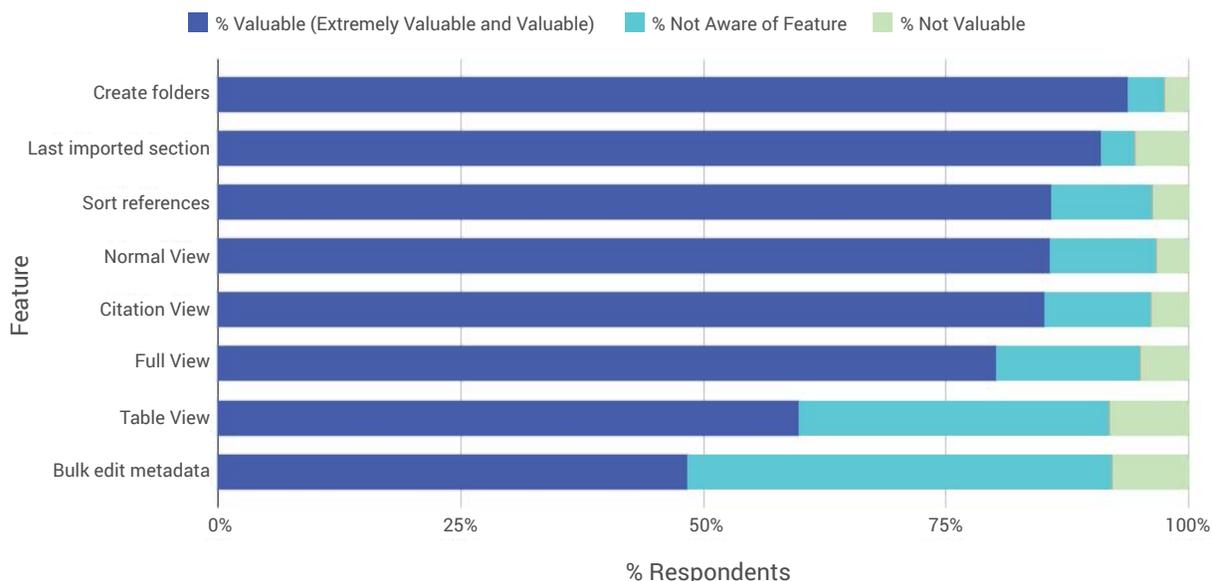
There is no right way to view references, with different views suitable for different workflows. In RefWorks it's easy to move back and forth between views, sorting options and citation styles, and the service will remember your last selected view the next time you open RefWorks. Learn more in these resources to determine which view fits your needs: [YouTube tutorial](#) and [documentation](#).

Did you know you could update any Metadata?

You probably import references from various sources, and you can update the metadata to fit your needs.

38% of responders indicated they were unaware of Bulk Edit. This feature, accessed from the Tools menu, enables users to update the metadata of multiple references at one time. Earlier in 2021 5 fields were added to the Bulk Edit feature: author, DOI, language, reference type, and title.

Organization Features



Collaboration

The final section of the survey was dedicated to collaboration. RefWorks has many sharing options so users can collaborate with peers within the same institution or elsewhere. Worried that others will make changes to your references? No problem! Use public sharing or View Only permission. Want to share the work equally with a colleague? Share an entire Project to allow full access. Interestingly, many collaboration features were called out as equally valuable and not known about. Some users work on their own and have no need for collaborative features, and may not notice they are available.

- Private sharing of folders: 51% valuable vs. 40% unaware
- Public sharing of folders: 44% valuable vs. 42% unaware
- Project sharing: 49% valuable vs. 39% unaware

Let's break this down and uncover what RefWorks offers in the area of collaboration.

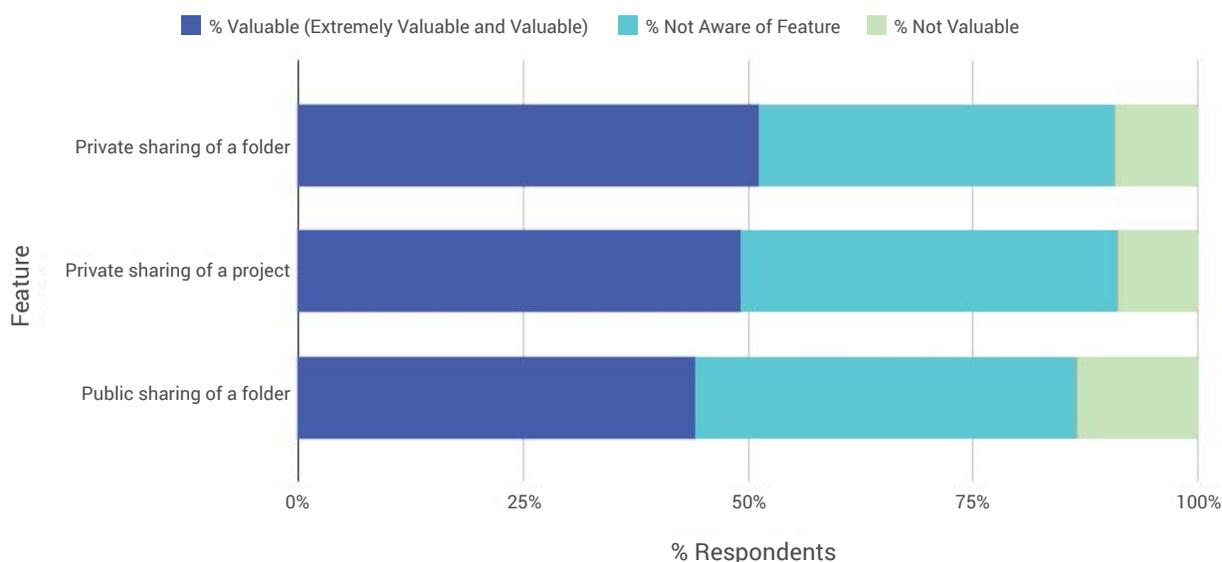
Folders & Projects

Folders allow users to organize references related to their area of interest by assigning them to folders and sub-folders based on topic, date or any other criteria as needed. Users can share folders with the entire institution, with specific RefWorks users and via a public URL with those without RefWorks access. When sharing with specific users, different permissions can be granted – Read, Annotate or Modify. Those viewing a public URL will have limited read access but can export references and create bibliographies from a limited list of available citation styles. Refer [here](#) for more details or watch [this tutorial](#).

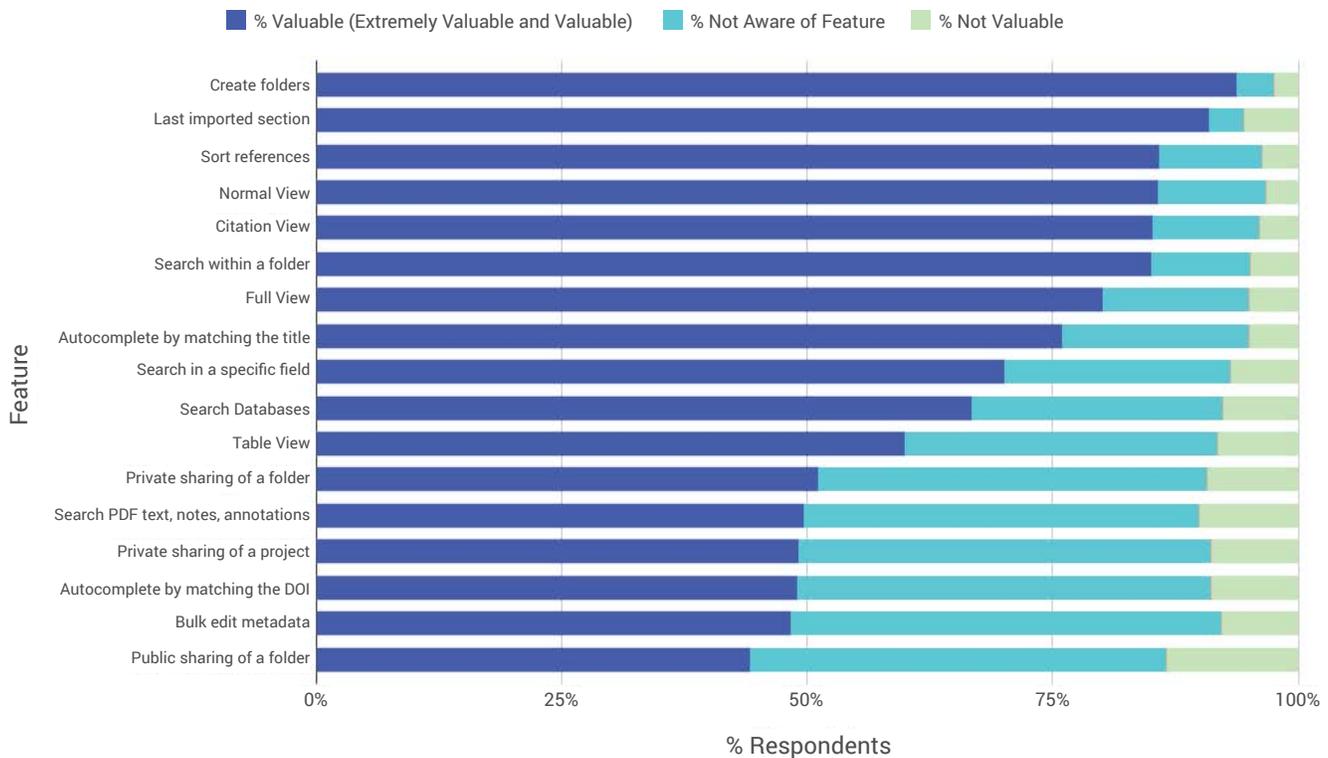
Projects allow users to maintain separate reference collections for different areas of interest. Each Project has distinct folders and sub-folders. Users can share Projects with other RefWorks users, making those users additional Project “owners” and allowing them to add, delete and modify folders and references allowing full team collaboration. Refer [here](#) for more details or watch [this tutorial](#).

Collaboration is key – and with RefWorks it easy to continue your collaborations **in a remote learning or work environment.**

Collaboration Features



Search, Exploration, Organization and Collaboration Features



In conclusion: Results from surveys like this help validate or update our roadmap, identify areas where we should improve RefWorks or better communicate with our users, and let us know what we're doing well. The team is committed to improving and adding [new training videos](#) and [knowledge articles](#) and will continuously take the pulse of our users through surveys like this one.

See What RefWorks Users and Administrators are Saying:

*"The **citation view**, so I don't have to wait to add the bibliography to my text to ensure that they're correct, and I can correct them straight from source."*

– Lizzie Hutchings, Student

*"**WOW factor** – when you Drag & Drop a PDF and have it extract the metadata and create references. **Students love that!**"*

– Prof. Amanda Izenstark, Reference and Instructional Design Librarian, University of Rhode Island

*"One of my favorite things is that improvements to the main platform are immediately active for all of us. Unlike most citation managers, which require installing or downloading the new features, **RefWorks is instantly better**. I feel that nearly every week I notice something that's new or improved."*

– Krista Clement, Reference Librarian, BC Cancer

*"RefWorks is the **least of my worries** when it comes to remote learning, it's made for this situation."*

– Dr. Adam Edwards, Library Liaison Manager, Middlesex University

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