RefWorks Release Notes

- **Product:** New RefWorks

We encourage you to check this page for information and announcements pertaining to RefWorks features and functionality.

Current Release Information

May 1, 2018

The RefWorks team is pleased to share with you the latest features and functionality releases for May. These improvements are in the following categories: Writing Tools, Systematic Review, and Security. We also have network monitoring for you to check if RefWorks is ‘up’ or ‘down.’

May 2018 Release Highlights

**Writing Tools:**

- RefWorks Citation Manager (RCM) underwent a significant update to increase the stability and ease of use, this includes recent customer submitted fixes.
- Translations added to Write-N-Cite (WNC) and RCM
- Fix to sending feedback under the Preferences section of WNC and RCM.

**Systematic Review**

- (Releasing Thursday, May 3rd 2018) We’ve added a much requested new deduplication method based upon legacy RefWorks, "Legacy" Close Match, is phonetic algorithmic method which works best with English surnames and short titles.

- Translations provided for Deduplication options

**Security**

Ex Libris, a ProQuest Company
(Releasing Friday, May 25th, The EU General Data Protection Regulation (GDPR) strengthens the rights that individuals have regarding personal data relating to them and seeks to unify data protection laws across Europe, regardless of where that data is processed. You can count on the fact that RefWorks is committed to GDPR compliance across all of the components of RefWorks including legacy RefWorks.

Consequently, everyone using RefWorks will be prompted to accept or decline the new privacy policy and terms of service. They will see a one-click acceptance policy:

Translations provided for ProQuest’s Privacy Policy, Terms & Cookie Policy

Noteworthy:

Both legacy and new RefWorks are now included in the Ex Libris status monitoring so you can see if connectivity issues affecting users are with RefWorks or with the network connection. You can be find this at status.exlibrisgroup.com.

April 3, 2018:

Admin Tools:

- **Usage Analytics** — This new report provides RefWorks Administrators with their institutional usage stats for page views and visits/session. These reports can be displayed in either a Daily and Monthly view.

  **Explanation of terms:**
  
  - **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.

**Support**:  
- **Support Move**: In late March, RefWorks was added to the Ex Libris Support Portal and [Customer Knowledge Center](#), bringing together documentation, training, product materials, and knowledge articles all in one location.

![Support Page](image)

**API**:  
- **DOI integration**: With the addition of the "lightning bolt in DOI" users can auto-complete the reference using the Summon database information for a more precise reference for journals.
Writing Tools:

- **RefWorks Citation Manager (RCM):** Based on user feedback, improvements are being made to the RefWorks interface to make the process of loading citations more intuitive, in addition to fixes to the process of loading citations.

- **Document Compatibility for WNC and RCM:** Improvements were made for users upgrading from legacy RefWorks to new RefWorks regarding citation formatting. With a new two-click process users will no longer have to reformat citations after moving to new RefWorks.
March 6, 2018:

- **PDF progress bar** – Indicates the status of PDF’s being uploaded into your folders ensure completeness of the information prior to any tags, etc.
- **Systematic review updates** - now allows users to view, organize, and manage thousands of citations collaboratively
- **Password Reset Workflow**- Resetting passwords are the #1 reason why people contact our support team. With the recent improvements, this process will be much easier. In legacy RefWorks you can now request to reset your password by either entering your email address or username (if you have more than one account).
- **Google Docs** – Fixed bugs which corrupted a user’s document
- **RCM** – Fixed a bug that prevented editing the date properly.
- **WNC** – Fixed a field coding conflict with Word Title field that prevented references from being inserted.
- **RefWorks and Summon** – Fixed an integration issue in which the login to RefWorks link on the Summon header did not resolve the login to RefWorks correctly.
- **Display up to 2,000 references** – Prior to the release users could only display up to 200 references. Now users performing Systematic Reviews can now view, organize and manage thousands of citations collaboratively.
• **Improved Syncing Write-N-Cite to RefWorks** – Users of Write-N-Cite now have a faster syncing with RefWorks to quickly create a citation.

• **Progress bar while importing** – Prior to this release when you imported a file there was only an indication of “analyzing” which didn’t really provide a way to know what is happening to the file. Now, when importing PDFs or other files you will see a progress bar indicating the status of the import from uploading to extracting full text to completion. The progress bar is also enabled for attachments as well.

• **Password Reset Workflow Improvements** – In both legacy and new we’ve revised the login screens to be simpler and more consistent with each other and made it much easier to retrieve a password.
We want to hear from you! RefWorks is proud to announce the launch of the new RefWorks Idea Exchange. This unique platform provides all customers the opportunity to post ideas for enhancements and extensions to RefWorks, while offering feedback and voting mechanisms to further support the development and advocacy of these ideas. Beyond this though, it facilitates transparent communication directly between users and the Ex Libris product management teams about what you consider to be development priorities.

August: Write-N-Cite improvements:

The RefWorks team is excited to announce improvements in Write-N-Cite for both Word and Mac.

We have split the Write-N-Cite installers into two versions:

1. IT version for those who use IT to install it on institutional computers, which has no in-app notifications.
2. Personal version for those that have administrative rights to their personal computer. Those that have administrative rights will receive in-app notifications of updates.

What is Write-N-Cite?

Write-N-Cite is a Word Plug-in utility that allows users to run an abbreviated version of RefWorks in their word processor. With Write-N-Cite, you can cite references in a manuscript with the click of a button.

Windows:

1. Word no longer hangs while Syncing data
2. The login text box has been fixed so all Shibboleth users can now login to WNC with their credentials
3. A/B/C Appending is showing for Bibliographies created in RefWorks
4. The "bibliography only" function works with citations that have been previously added to the document
5. Database sync fix for New RefWorks accounts
6. A user can now insert a URL in the footnotes
7. Username is updated on Account Switch
8. Compose Citation fix for re-ordering citations
9. When any field is formatted, Write N Cite will format the entire footnote in rich text
10. Added Custom Output Styles to Write-N-Cite
11. The intended Japanese and Korean characters are now being added correctly
12. Write-N-Cite Accessibility Improvements for Screen Readers
13. Insert Citation Preview Page - Improved scrolling capability
14. No Reference Selected" text is added on pressing enter key on insert Citation screen

**Mac:**
1. A/B/C Appending is showing for Bibliographies created in RefWorks
2. Database sync fix for New RefWorks accounts
3. Fixed truncation of footnotes in Notes Styles
4. While Editing References, the word Null is not displayed while Overriding Pages in the Preview Citation section
5. There is now correct spacing between the List Title (“References” ”Works Cited”) and the first reference when inserting a reference
6. Added Custom Output Styles to Write-N-Cite
7. The intended Japanese and Korean characters are now being added
8. Output style fix for AMA - American Medical Association, 10th Edition

**Past Release Information**

- **Global Edit (Add Delete, Replace):** Global Edit is a simple search-and-replace function that can be applied on multiple references. It is particularly valuable for amending, augmenting, and correcting records that come in from online databases, which may require adjustments. Global Edit users can now update, delete, and replace metadata information.

- **Multiple attachments & Types:** RefWorks now allows users to attach multiple attachments (of any file type) to a references. We have updated the thumbnail view for attachments with a new scrollable carousel view that provides a quick preview of attached files. The RefWorks reader natively support viewing of attachments in Microsoft Word, Microsoft Excel, Microsoft PowerPoint, PDF or open Microsoft office formats. Other file types are downloaded for local viewing.

- **Selection/Review decoupling:** Before the September release, highlighting a reference always selected it, as well. That meant that for many important functions like deduplication, it was impossible to review your selected references without losing the selection. With Selection/Review decoupling, users can review and select references when using RefWorks features.

- **Full view:** Full view displays all populated metadata fields in each record. It is valuable for reviewing complete - reading notes, abstract and scanning for the most promising references. In full View, RefWorks highlights allows you to quickly select, edit and save metadata information.

- **Inspector pane changes:** In the past when reviewing references, a third pane would appear on the right called the “inspector pane”. With the September release this pane is now hidden and displays based on whether a reference is highlighted. Also now the footer makes the number of references selectable.

- **Quick Cite improvements:** Quick Cite now provides support for numbered bibliography styles, allowing users to reorder their bibliography entries to accurately reflect the sequence of their citations.

**Updates and Improvements**

- **RefWorks Citation Manager:** (Microsoft Word adding) is now compatible with legacy version RefWorks using 2016 version for Macintosh. The new RefWorks Citation Manager is available via the Microsoft Store for Microsoft Word 2016 for both Mac and Windows.

- **Z39.50 Advanced Search:** In June we announced the Z39.50 database feature which allows you to search; PubMed, the Library of Congress and hundreds of library catalogs from subscribing RefWorks institutions to find relevant materials. In September we expanded this functionality by adding Advanced Search, Import to folder and performance improvements to Z39.50.

- **Language Selection:** A new language drop down option has been added that allows users to switch the interface to nine different languages.