

Making the transition to new RefWorks

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Overview

- Context
- Planning the migration
- Migration
- Positives
- Issues
- Statistics
- Would like...





Context

- Approaching 6,000 FTE (mostly undergraduate)
- Academic Liaison Librarians (3 F/T & 2 P/T) responsible for referencing and reference management support
- Many forms of support offered – group sessions, one-to-ones, email, phone, online guides
- Moved to RefWorks from EndNote about 5 years ago



Planning the migration

- Decided not to migrate in August 2016
- Early 2017 – started planning for a soft migration to New RefWorks
- Added and checked institutional styles
- Created [10 Days of New RefWorks](#)
- Prepared communication to current RefWorks users



Migration

- Migrated at the beginning of July 2017
- Stopped users creating Legacy accounts
- Changed webpage to direct new users to New RefWorks
- Offered advice to users of Legacy RefWorks thinking of migrating



Positives

- Much better interface/navigation
- Easy to import references from Legacy
- Citation view (make more obvious?)
- PDF reader and annotator
- Save to RefWorks
- Drag and drop



Student feedback

“I think RefWorks seem to be a very useful source. It makes referencing easier and it is easy to navigate”

“good layout”

“I wish I’d known about RefWorks before!”



Issues

- Double login prompt and inability to edit citations when importing from eresources
- Bugs in citation styles
- Write n Cite & footnote styles
- 'Find duplicates' -unreliable
- Some instability e.g. Create bibliography
- Reference Citation Manager



Statistics

- Approx. 550 accounts created so far
- Still about 100 active Legacy accounts
- Publications added by undergraduates - health & psychology
- Publications added by lecturers – education & sport



Would like...

- Reliable 'Find duplicates' function
- Word document compatibility between legacy & new
- Write n Cite compatibility with footnote styles
- ⚡ for additional fields e.g. ISBN
- Something more meaningful than ⋮
- Contextual help

He won't be the only one making a list

Did you know RefWorks can help you keep track of references for books and other resources you're using, as well as compile reference lists and bibliographies?

- RefWorks is available on and off campus. For more information, see your Academic Liaison Librarian, or visit:

www.yorks.ac.uk/ils/refworks