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Review: RefME

Jennifer M. Starkey
Oberlin College

Rosalinda H. Linares
Oberlin College, rosalinda.linares@oberlin.edu

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Reviewed by: **Jennifer M. Starkey**
Oberlin College Library, Oberlin, Ohio

<jstarkey@oberlin.edu>

Rosalinda H. Linares
Oberlin College Library, Oberlin, Ohio

<rlinares@oberlin.edu>

Abstract

RefME is a citation management tool released in 2014 as a mobile app and subsequently as a web-based platform. It is available for free and also with an individual or institutional subscription. It shares some similar features to both free and subscription competitors, including Zotero, Mendeley, Endnote, and RefWorks. The RefME mobile app stands out as a unique asset, as most competitors do not offer a mobile app that can be used to capture and annotate citations. The simplicity of design, ease of use, availability of a free version, and its overall functionality position RefME to become a good solution for institutions looking for a citation manager that is more intuitive than most.

Pricing Options

RefME offers a free version that has the core functions of capturing and saving citations for both the web interface and the mobile app. Individual users have the option of upgrading to a RefME Plus account with premium features for a subscription price of \$32.99/year. Institutional subscriptions through RefME Institute provide affiliated users with RefME Plus features and offers usage analytics for administrators. RefME Institute pricing is based on FTE and although specific price points were not available at the time of publication, representatives of RefME indicated that pricing will be competitive with other citation management products. Because RefME has a free version that has enough functionality to be useful, institutions could potentially adopt and promote RefME without any added costs.

Product Description

RefME, founded in 2014 in the U.K., began as a free citation management app and is now available as a mobile and web-based tool. RefME Plus refers to the additional features for paid individual and institutional subscribers. RefME supports citation capture, citation sharing capabilities, integration with word processing, and compatibility with other citation management tools. The RefME mobile app is cross-platform compatible in both iOS and Android. The web-based version can be used in all major web browsers (Safari, Firefox, Google Chrome, and Internet Explorer), however the WebClipper tool works exclusively with Google Chrome at the time of the publication of this review.

Both RefME and RefME Plus allow users to capture and save citations in five ways: via the web clipper add-on for Google Chrome; by entering identifying information to query a database that fills in the complete citation; by manually adding an item into blank fields; by scanning the barcode of a book from the mobile app; and by importing citations from another tool in the RIS file format. RIS is a

standard format for citation data, allowing easy conversion of data between most citation management platforms.

RefME Plus adds several components beyond the free version including RefME for Word 2016, which is a Word add-on that integrates a “cite while you write” function; and PhotoQuotes, which allows mobile app users to take a photo of text that converts the image to text and stores it with the citation. In addition, RefME Plus stores an unlimited number of projects, while the free RefME tool stores only up to five projects. RefME Plus users can create folders to organize multiple projects. RefME Institute subscriptions include usage statistics and analytics for administrators.

User Interface/Searching

USER INTERFACE

Developed as native mobile app, RefME’s user interface for both desktop and mobile is clean and simple. Navigation buttons are well-placed and the functions and labels are clear and direct. Both the mobile and desktop versions utilize common mobile icons, such as import and export icons, and three dots to prompt the user to hover or click for more options within a project, folder, or individual citation. The simplicity of the platform is one of RefME’s greatest assets; the intuitive and inviting interface makes it easy for people to begin using it without needing instruction.

SEARCHING

One of five different ways to generate an entry for a source is to find a source in RefME’s search engine. The citation search box has tabs for each of the most common types of resources, with Website as the default tab, followed by Book, Journal, and Video, and a drop-down menu labeled More that contains about 40 additional source types. Subscribing institutions can customize the order and type of sources listed in the search tabs. RefME’s search engine queries from over 35 resources, including OCLC, Spotify, YouTube, and Google Books, to aggregate metadata for citations. The search engine does not require perfect syntax or even the full title or author’s name; it looks for the closest matches of the search terms in all fields of the citation records. More precise searches are possible using ISBN, DOI, or website URL. After using the search function to identify a citation, users have the option to edit any of the fields before saving, or select a different source type with alternative fields in addition to the originally searched source.

INTEGRATION

RefME developers can provide support to institutional subscribers to insert a RefME citation widget into both the ILS and discover layers, which have been tested for functionality across major ILS/Discovery

and Institutional Repository vendors. At this time, RefME does not have direct export functionality with major search engine vendors, but it is on the horizon as a possible future development.

Critical Evaluation

CAPTURING CITATIONS

RefME’s most unique feature is a mobile app feature that allows users to scan a book’s ISBN barcode in order to create an automatic citation. Users can create citations by searching for website URLs or by title, author, ISBN or DOI. In addition, users can import citations as RIS files or enter citations manually.

Utilizing RefME WebClipper, users can cite website and PDF sources while browsing with Google Chrome. Beyond citation capture, WebClipper can be used to highlight text and save as a quote linked to the original citation and in a specified or newly created project. WebClipper is not yet available for other common browsers such as Internet Explorer, Safari, or Firefox. RefME is not currently developing the WebClipper for the other major browsers but a representative indicated that if they have feedback from the user community requesting that feature in other browsers, they will prioritize that development. The RefME WebClipper treats every online resource as a web page, however the source type can be changed in the web interface and mobile app.

ORGANIZING PROJECTS

Citations are stored in projects, and the free version of RefME stores up to five projects. RefME Plus has no limit on the number of projects, and multiple projects can be aggregated into folders. Each citation has visible fields displaying quotes and notes.

RefME currently lacks the ability to store and upload files to its software platform, in either mobile or desktop form. It does, however, offer multiple options for citation annotation, including a highlighter to insert quotes via the WebClipper, and PhotoQuotes in the mobile app to capture and translate text from a physical item.

SHARING AND COLLABORATING

For those involved in team projects, RefME’s group work feature supports collaboration. One user must be the owner of the project and that person can invite individuals to participate in a shared project. All participants can add and delete records from the folder, which is synced in real time for all collaborators. In both the free and the paid versions of RefME, the number of collaborators is unlimited. Users do not have to be affiliated with the institutional subscriber in order to receive a sharing invitation from a subscriber.

CITATION STYLES AND BIBLIOGRAPHIES

RefME supports more than 7,500 citation styles, all of which are created and managed in house by RefME staff. With an institutional subscription, RefME will develop custom institution-specific styles. Administrators can customize the styles that appear at the top of the list of choices, including any local styles. Citation styles are applied at the project level, and can be changed at any time. With the Export button users can create bibliographies in various formats, including copy-and-paste, Word, Evernote, and as RIS files for EndNote, Mendeley, RefWorks and Zotero.

RefME for Word 2016, which is available for subscribed users only, is a Microsoft Office Store add-on for Word 2016 for Mac and Win-

dows, and also Word for iPad. On a public computer, users can activate RefME for Word as an add-on within a Word document, with an Office365 account.

SUPPORT AND DOCUMENTATION

For first-time users the buttons and other functions visually pulse, and hovering over them engages a pop-up help feature that provides tips for navigation. This can be easily toggled on and off at any point, by clicking the Turn Hints Off or Turn Hints On text at the bottom of the screen or in the user profile drop-down menu.

RefME support, powered by the cloud-based customer support platform Zendesk, provides articles on Getting Started with RefME, How to use RefME, How to use RefME Plus, and RefME Institute, along with an open comment section for logged-in users, and the ability to submit a request using an e-mail form.

ACCESSIBILITY

RefME is currently compatible with NVDA screen reader, but does not yet work with JAWS or VoiceOver. The web platform is fully ADA compliant. Developers are currently working on making the mobile app fully ADA compliant.

ADMINISTRATION

Currently RefME Institute provides analytics for the number of user sign-ups and citations created at the request of the institution and over a customizable time period (see Figure 1). As of August 2016, there is no administrative login or dashboard on the institution side.

Beginning in September 2016, RefME Institute will provide administrators with self-serve access to basic usage statistics, based on accounts created using institutional e-mail addresses. Data points will be number of users, total number of references for all users, new users per month, average number of references per user, and aggregate numbers of each source type.

Users affiliated with a RefME Institute account have continued access to RefME Plus features for two years post-graduation. Beyond that time, users will have read-only access to their files.

FUTURE DEVELOPMENTS

RefME is prioritizing future developments based on community feedback and ongoing partnerships with institutions. As an independent

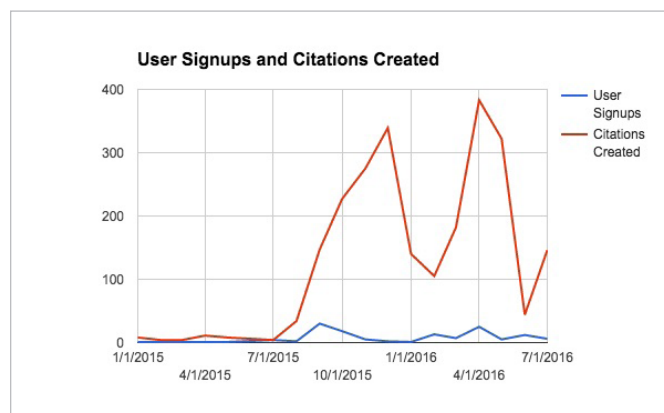


FIGURE 1 RefME Institution Analytics Sample



RefME Review Scores Composite: ★★★★★

The maximum number of stars in each category is 5.

Content: ★★★★★ 1/2

RefME is easy to organize in both the mobile and web platforms, and add notes and quotations, and share with others. There is no document storage available and no direct export from databases, which requires additional steps to export and import RIS files into RefME.

User Interface/Searchability: ★★★★★ 1/2

RefME's intuitive web interface is reflected in its mobile app with well-labeled buttons and uncluttered appearance. The dynamic search engine tabs for citations offer a wide range of source types to choose from, and can be customized for institutional subscribers. Also customizable are the preferred style types by institution for the citation styles search function.

Price: N/A

The only pricing information that the authors were provided is the free RefME product and the RefME Plus individual subscription for \$32.99 per month. No institutional pricing was available.

Contract Options: ★★★★★ 1/2

RefME has some customizations available, including citation styles, interoperability with Discovery and ILS platforms, and analytics for administrators.

company, they are actively pursuing integration with database vendors and discovery platforms. Some future developments include:

Fall 2016: The ability to merge accounts, access to an administrative panel, and direct export button in WorldCat

2017: Document storage and integration with Google Drive and Dropbox

Ongoing: Integration with Canvas LMS

AUDIENCE

The easy learning curve, pleasing design, clearly labeled buttons, and intuitive mobile app make RefME well-suited for undergraduate students. The Turn Hints On support allows users to begin using it right away without the need for mediation by a librarian or a tutorial. However, graduate students, faculty members, and library professionals may find the lack of document storage a deterrent for adoption.

Competitive Products

FREE

Unlike some other free research and citation managers, such as Zotero or Mendeley, RefME's cloud-based free version is available without downloading a desktop app. Mendeley features a mobile app for document storage, but without citation capture. Zotero's Stand-alone desktop application has an interface that is much more complex than RefME and it integrates browser extensions for Chrome, Safari, and Firefox, as opposed to the RefME Clipper, which is only available in Chrome.

SUBSCRIPTION

Of the two major subscription citation managers, EndNote and RefWorks 3, the authors found the most similarities between RefME Plus and the new RefWorks 3, which are both in development. Both have

a browser bookmark to capture online citations, and both offer a Microsoft Word 2016 add-on via Office 365, which allows users on public computers to access this tool. As noted, the RefME WebClipper is only available for the Chrome browser, while the Save to RefWorks browser plug-in works in all common browsers. Save to RefWorks attempts to sense the source type of items accessed in the browser, whereas WebClipper does not. Both have comparable Word add-ons that format citations and bibliographies. In addition, RefWorks 3 offers a Google Docs add-on.

The major distinction between RefME and other subscription and free citation managers is the easy to use mobile app. It is convenient for capturing citations via the barcode scanner, and quoting text quickly with a camera photo via the PhotoQuote Plus feature. The major feature from competitive products that RefME lacks is document storage.

Purchase & Contract Provisions

RefME's Terms of Use (<<https://www.refme.com/terms-of-use/>>) contains language about the legal use of the product for academic and

Contact Information

RefME Ltd.

Mike Tartaglione
 Head of Academic Partnerships, North America
 Unit 1 New North House
 202-208 New North Road
 London N1 7BJ
 United Kingdom
 Phone: (630) 777-7237
 E-mail: <mike.tartaglione@refme.com>
 URL <<https://www.refme.com/>>

Free Text Keywords: Citation Manager | Bibliographic Tool | Mobile App | Reference Organizer | Reference Manager | Citations

Primary category: Other

Type of product being reviewed: App for mobile devices; Bibliographic tool; Library tool; Website

Target audience: Undergraduate

Access: Hybrid (some OA)

non-commercial endeavors. The Copyright and Intellectual Property Policy (<<https://www.refme.com/copyright/>>) follows standard U.K. Intellectual Property laws. A Privacy Policy describes the limits of the use of data with third party entities (<<https://www.refme.com/privacy-and-cookies-policy/>>).

Authentication

RefME and RefME Plus users must authenticate by setting up individual logins and passwords. RefME Institute users can create accounts using institutional e-mail addresses, and can authenticate with: Shibboleth, OAuth protocols, or a whitelist of the domain name.

About the Authors

Jennifer Starkey is a Reference & Instruction Librarian at Oberlin College, where she serves as liaison to the History, Economics, and German departments. She holds an MSI from the University of Michigan and a BA from Kalamazoo College.

Rosalinda Hernandez Linares is a Reference & Instruction Librarian at Oberlin College, as well as a liaison to the French, Italian, Hispanic Studies, and Anthropology departments. She has a MLIS from the University of Pittsburgh and a BA from Wellesley College. ■