



Smart LibrariesTM

Formerly Library Systems NewsletterTM

50 East Huron Street, Chicago, Illinois 60611-2795, USA

Flow: Proquest's New Platform for Citation Management and Research Collaboration

Building on the longstanding success of RefWorks, ProQuest launched Flow in April 2013 as its new generation platform for citation management and facilitating collaboration among researchers with analytics on the use patterns of resources. As a tool that sits between content and the researcher, Flow can be seen as a critical product for libraries and for ProQuest in its role as a content provider. Through RefWorks, ProQuest and its parent company CIG have been involved in citation management for more than a decade. Flow is positioned to move beyond basic citation management, providing an environment to foster engagement among researchers and a new layer of end-user interactions across its product lines. ProQuest announced in January 2014 that it is offering of a free version of Flow to qualified researchers.

The RefWorks Legacy

A mature and well-established reference management tool, RefWorks is used by more than 3 million individual researchers and more than 1,200 research organizations subscribe as institutions, according to ProQuest reports. The majority of users are associated with academic institutions, but the product also finds use in corporate settings and government agencies.

ProQuest's parent company, Cambridge Information Group (CIG), has been involved with RefWorks since its inception. RefWorks was founded in May 2001 through a partnership among founders Matt Dunie, Earl B. Beutler, and a team of experts in database management, with partial financial support from CIG.

Cambridge Scientific Abstracts (CSA), one of the original portfolio companies of CIG, lent assistance with sales and marketing in the early phase of the company. ProQuest, with the backing of CIG, acquired full ownership of RefWorks in January 2008 and in subsequent months combined the company into its COS (Community of Science) unit to form RefWorks-COS. CSA launched Community of Scholars in February 2006.

The introduction of Flow does not spell the demise of RefWorks. In introducing Flow as a new offering in this space, ProQuest remains careful not to disrupt the current RefWorks user base, but to entice them to migrate voluntarily. ProQuest recognizes the long transition cycles in library products. According to Eric VanGordon, Product Manager of RefWorks for ProQuest, RefWorks will be supported and developed for many years to come.

Brief Tour of Flow

Flow builds on the mature citation management functionality of RefWorks to deliver new capabilities, especially through new ways of supporting the workflow of researchers and in delivering analytics on the use of scholarly resources to libraries. The product supports the workflow of the researcher throughout the process of collecting and organizing resources to the logistics of incorporating references in the writing of scholarly papers.

Simplified Capture of References

The functionality of Flow begins with the

ability to easily gather resources. It offers a widget that can be dropped onto the bookmark bar of any major browser to enable one-click capture. At a minimum, Flow will automatically import the metadata describing the resource needed to support citation management. Depending on the resource, the capture can be accomplished from the results list or from the full display of the reference.

For supported content delivery platforms, the full text, including the PDF version of the resource will also be downloaded into the user's account in Flow. The platforms where full text capture has been enabled include ProQuest, JSTOR, PubMed Central, HighWire Press, and Wiley with support for others under development. All documents are fully indexed allowing users to rapidly search for keywords and terms within a document or across their documents stored in Flow through a persistently presented search box. Flow includes an option to connect to the user's Dropbox account, allowing documents to be individually deposited. Taking advantage of the automatic feature to

From the February 2014 issue of *Smart Libraries Newsletter*, published monthly by ALA TechSource, a publishing imprint of the American Library Association. Used with permission. alatechsource.org

Smart Libraries Newsletter, February 2014

Marshall Breeding's expert coverage of the library automation industry.

save to Dropbox allows one to access documents even without a live connection to Flow.

ProQuest emphasizes that Flow does not provide any capabilities to capture content beyond that which the researcher is entitled to access through their library's subscriptions, free resources, or open access repositories. Flow simply acts as an agent on behalf of the user. It gets metadata and full text through parsing Web pages presented to the user and not through APIs that would require cooperation by the content provider.

Flow also allows users to manually enter citation details and to import citations from other reference management applications. Initially Flow includes tools to automatically import from ProQuest's own RefWorks and from Elsevier Mendeley, with support for Zotero and others planned for the near future.

Organizing Resources

Flow provides the ability to organize resources according to collection folders, in which multiple levels of sub-collections can be defined. Users create and populate folders through easy drag and drop actions. Documents, either represented as citations or as full-text, can be organized into virtual folders based on any meaningful structure that will assist the researcher.

Tools for Inserting Citations and Bibliographies

Flow also provides tools to assist in the tedious task of incorporating citations and references into documents. Plug-ins are provided for Microsoft Word for both Windows and Mac OSX to insert and manipulate citations in the document and in a bibliography.

Collaboration

The next layer of functionality centers on collaboration: users can share their collections of resources and access resources shared with them by others. Collections remain private by default, but users can enable sharing for any folder or subfolder that they have defined. The collaborative universe varies depending on whether a researcher is using the free version or if associated with a subscribing institution. For non-institutional users, collections can be shared among others that have set up accounts in Flow. Institutional users can easily interact with departments or groups that may have been configured by the library that administers Flow for the organization. Shared collections can be collaboratively populated with resources.

ProQuest has developed Flow on a new platform with a more modern interface, workflow management capabilities,

and other features that would be difficult to implement on the existing RefWorks Platform.

User Engagement Layer

Flow has been designed to easily integrate into the company's other products, including the ProQuest Platform that delivers access to its databases and content offerings, Pivot, and potentially other product lines. The ProQuest Platform currently includes a user account feature, which will be supplemented and eventually replaced with the user and collaboration tools from the Flow platform. Flow has already been integrated into Pivot, ProQuest's service for connecting researchers with grants and other funding opportunities. Going forward, ProQuest positions Flow as its strategic tool for end user content management.

Free, Premium, and Institutional Options

In January 2014 ProQuest announced the free availability of Flow to researchers even if not affiliated with a subscribing institution. This free version is available only to those affiliated with a university or other educational institution, as validated by the user's institutional e-mail address during the registration process. Flow is not available to the general public not associated with a college or university.

The free version of Flow provides access to up to 2GB for the storage of citations and documents and a limit on sharing collections with only 10 other accounts. Support for the free version will take place through a community site providing documentation and help for most problems. The Premium version increases the storage to 10 GB, offering collection sharing with 25 accounts and support through phone and e-mail. Users associated with an institutional subscription also are allocated 10 GB of storage plus the ability to share with an unlimited number of other researchers within the organization and beyond.

Institutional users gain a suite of additional capabilities, primarily involving the ability to make use of data describing the use patterns by researchers within their organization. The data made available through Flow is designed to help the library shape its collections and service offerings. Providing free access to the researchers reduces the barrier of entry. It should result in broader adoption and increase the body of use data generated to support analytics.

Users of the free version of Flow can upgrade to the Premium version for \$9 per month. Subscription fees for institutions are negotiated based on the size of its user population and other parameters.