WizFolio

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Composite Score:	★★

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Pricing Options

WizFolio is a Web-based, reference management software package that can be used to manage and share journal references, Web pages, and similar kinds of information. The product has a tiered pricing system with a free starter and subscription accounts. The free account includes 1 GB storage and a maximum file upload size of 5 MB; users can store up to 5,000 items and choose from five output styles. The premium and institutional accounts provide 5 GB file storage space along with the ability to upload documents of 25 MB in size and store 20,000 items. Subscribed users have access to 102 output styles. More details on pricing and features are available from <https://wizfolio.com/Pages/Pricing.aspx#clause5>. All versions require users to register and create an account that includes a username and password.

Current institutional pricing for WizFolio is U.S. $70 per FTE with a minimum FTE of 2,000. There is also a onetime setup fee of U.S. $3,000 and an annual maintenance fee of U.S. $1,500 after the first year. According to the developer, Dr. Casey Chan, consortia pricing is the best option since it requires hosting contents of all schools on one server and thus saves costs. Consortia pricing is based on total FTE for all the member institutions.

Product Description

WizFolio is developed by a privately held Singapore company founded by two entrepreneurs. Casey Chan was a cofounder and former CEO of an eLearning company (WizLearn); co-founder Wade Fallin is President of MedicineLodge Inc., the largest orthopaedic R&D company in the United States.

WizFolio is a Web-based reference management program that can be used to manage and share journal and book references, Web pages, pictures, videos, and patents. It works best with Firefox 3.5 and above or Google Chrome 2. It is also compatible with IE 7 and Safari 3, although Internet Explorer 6 and Opera browsers are not supported. Subscription-based reference management programs similar to Wiz-Folio are RefWorks and EndNote Web. Zotero and Mendeley are free citation management tools that have features similar to those of Wiz-Folio. WizFolio offers a free basic account with limited features and a subscription version that includes the complete suite of output styles.

WizFolio can be used to collect references and bibliographic data from over 200 scientific publishers and databases including PubMed, IEEE, Google Scholar, and ScienceDirect among others. It has integrated the capability to search the PubMed database from within its interface. The program comes with two productivity plug-ins—WizAdd and WizCite—that can be used to manage and cite references in the desired output style. WizAdd is a bookmarklet that can be added to the bookmark toolbar in a Web browser and is used to include citation details and metadata from databases and Web pages into WizFolio library. Indirect export of references into the library is also possible by using the Import From RIS option. A complete list of databases and Web sites that support direct export using WizAdd feature is available from this link <https://help.wizfolio.com/Contents/WizAdd.aspx?support=1>.

WizCite is a bookmarklet used to insert and format references in Microsoft Word documents. WizCite is available for OpenOffice (Windows), OpenOffice (Mac), Google Docs, and Zoho Writer. WizCite can be downloaded and installed from WizFolio site <https://help.wizfolio.com/Contents/WizCite.aspx?others=1>.

The search interface of WizFolio library consists of three panels (Figure 1): the Folder panel, the Item panel, and the Bibliography panel.

The Folder panel can be used to organize imported references in folders that can be shared with colleagues. Users can invite colleagues by sending an e-mail from their WizFolio account. Users can access PubMed, Bing, Google Books, YouTube, Amazon, and institutional portals from WizFolio. The option to search these databases and information portals is available in the Folder panel.

The Item panel includes citation details and the contents in this folder can be sorted by author, title, colour-coded flags, and year. It is also possible to get a broad overview of collected references using the View option available in the Bibliography panel. Citations can be edited and PDF documents can be uploaded in this panel. The easiest way to include references in WizFolio is by using the WizAdd feature. There are yet other ways to populate WizFolio with references:

- **Manual Entry**   Users can type citation details in predefined item fields.
- **Upload Files**   Users can upload PDF documents and WizFolio locates the complete citation using PubMed database.
- **Import from Clipboard**   Text files containing some citation details can be pasted into the clipboard in WizFolio, and the metadata is located using PubMed database.
- **Import from RIS**   References from databases and Web sites (e.g., Open WorldCat) can be saved on the hard drive and imported into the library.

The Settings tab in WizFolio allows users to select their institution and locate the full-text of an article using their university's SFX link resolver. Some of the other novel features available in WizFolio are:
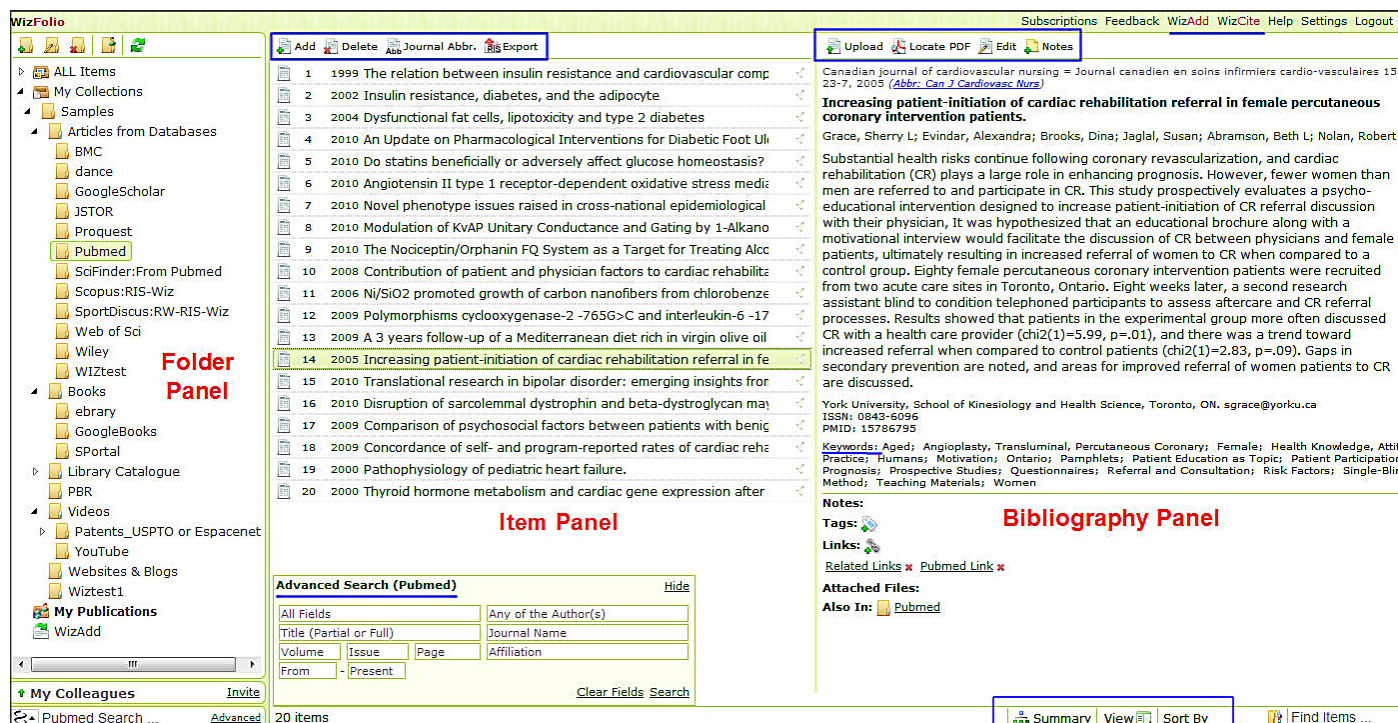
FIGURE 1   The Search panels in WizFolio clearly illustrate the path from folder to individual item to bibliographical information for a specific entry.

- The ability to obtain bibliographic data of an uploaded PDF document. WizFolio can also acquire bibliographic data for a set of references using the Import from Clipboard feature.

- The ability to sort references by year, most prolific authors, most used publications, and item type by using the Summary feature that can be accessed from the Bibliography panel.

- One-click inclusion of videos from YouTube and Web sites.

- Easy import of patents from USP-TO, espacenet, and Google.

- Direct export of references from Zotero and Mendeley.

- The ability to include author-supplied keywords in imported references.

At present WizFolio offers 102 output styles as compared to thousands of bibliographic output styles available through RefWorks, EndNote Web, and Mendeley. Other features of this citation management program as compared to other tools are shown in Table 1.

TABLE 1   The table compares features available in WizFolio and those offered in other reference management programs.

Critical Evaluation

WIZADD

The WizAdd feature is similar to RefGrab and EndNote Capture. Individual records or a set of records, Web sites, or patents can be marked and then included in WizFolio using the WizAdd feature (Figure 2).

Reference Management Program	WizFolio	RefW	EndNote	Mendeley
Amount of space available for subscribed account	5 GB	5 GB	5 GB	500 MB personal space; 500 MB shared Web space
Sharing references	Yes	Yes	Yes	Yes
Output styles	102	Numerous	4,500 at present	1,180
Direct export from indexing and abstracting databases (key databases)	PubMed	Scopus, Worldcat.org, Compendex, and others	Web of Science	PubMed, Web of Science
Retrieval of citation data from PDF documents	Yes (if indexed in PubMed)	No	No	Yes
Bookmarklet for direct inclusion from indexing databases and Web sites	WizAdd	RefGrab	EndNote Web Capture	Yes
Proxy Authentication/SFX	Yes	Yes	Yes	No
Write-n-cite Windows	Yes	Yes	Yes	Yes
Write-n-C	Yes	Yes	Yes	No
Work Offline	No	Yes	No	Yes

FIGURE 2   Users can select and transfer references from Scopus into WizFolio Library using WizAdd.

WizAdd imports citations from Scopus, JSTOR, Google Books, and some other databases; however, this feature does not work with Wiley Science interface although the developers have included Wiley as one of the compatible databases <https://help.wizfolio.com/Contents/WizAdd.aspx?support=1>. The selected citations from Wiley are clumped together and the output created in WizFolio library is missing most of the information.

Users can manually enter citations and WizFolio has provided a few predefined item types including Journal Article, Book, Book Chapter, Theses, and a few others. It would help to provide additional entries like Artwork, Laws/Statutes, Map, Motion Picture, Newspaper Article, Sound Recording, Report, or (alternatively) the ability to create new item types. Prompting users with required fields for different output styles would also be helpful. Collating duplicates and viewing duplicate references at a single location would save additional time.

WIZCITE

WizCite inserts citations from WizFolio library into Word 2003 and Word 2007 and allows on-the-fly customization of citation styles and instant preview. I have analyzed some of the citation output styles created by using WizCite. Output styles generated using other citation management programs are also presented so that users can make a fair assessment of this reference management program. I have created citations in two output styles that include Nature Reviews Neuroscience and APA, Sixth Edition. Nature Reviews Neuroscience output style is available for users who subscribe to the full version. I chose a recent article <http://www.ncbi.nlm.nih.gov/pubmed/20648061> from *Nature Reviews Neuroscience*; selected a cited reference from that article and compared the output style generated by using different reference management programs.

OUTPUT STYLE: NATURE REVIEWS NEUROSCIENCE
Database: PubMed

The cited reference in the original article was exported from PubMed into WizFolio, RefWorks, and EndNote Web. WizCite in WizFolio, Write-n-Cite in RefWorks, and Cite While You Write in EndNote Web were used to create bibliographies.

Original Article in PubMed: GSK3 signalling in neural development.

Hur, E. M. & Zhou, F. Q. GSK3 signalling in neural development. *Nat. Rev. Neurosci.* **11**, 539-551 (2010).

Cited reference in Original Article: Didier, C., Merdes, A., Gairin, J. E. & Jabrane-Ferrat, N. Inhibition of proteasome activity impairs centrosome dependent microtubule nucleation and organization. *Mol. Biol. Cell* **19**, 1220–1229 (2008).

WizFolio: Didier, C., Merdes, A., Gairin, J. E. & Jabrane-Ferrat, N. Inhibition of proteasome activity impairs centrosome-dependent microtubule nucleation and organization. Mol Biol Cell 19, 1220-1229 (2008).

Errors in citations (using WizFolio):
- Journal name is not italicized
- Volume number is not bolded
- No periods (full stop) in the journal abbreviation

RefWorks: Didier, C., Merdes, A., Gairin, J. E. & Jabrane-Ferrat, N. Inhibition of proteasome activity impairs centrosome-dependent microtubule nucleation and organization. *Mol. Biol. Cell* **19**, 1220-1229 (2008).

EndNote Web: Didier, C., Merdes, A., Gairin, J.E. & Jabrane-Ferrat, N. Inhibition of proteasome activity impairs centrosome-dependent microtubule nucleation and organization. *Mol Biol Cell* **19**, 1220-9 (2008).

FIGURE 3   Users can get an overview of the total number of published articles using the Summary feature.

One error was also observed in the bibliography created by using EndNote Web. EndNote Web does not have *Nature Reviews Neuroscience* style and *Nature Reviews* was used instead.

PUBMED AND WIZFOLIO

Pubmed searches were conducted using WizFolio's interface using Boolean search operators AND, OR, and truncation (*). WizFolio scores points compared to other citation management programs for the relative ease in transferring and editing references. The references are imported along with the author supplied keywords. Citation searching is possible using the Advanced PubMed search feature in WizFolio. Users can get an overview of the total number of articles that have been published on a certain topic from their collected references using the summary feature (Figure 3). References can be sorted by keywords, item type, author, and journal. It is not possible to be redirected to the complete citation in WizFolio by clicking on the sorted keywords, although this would be a helpful addition to consider.

Searches conducted using Boolean operators and truncation symbols gave almost similar results in PubMed through WizFolio and the native PubMed interface. By default the search results in WizFolio are sorted by publication date. Results can be limited to specific universities using Affiliation searching. Affiliation searching was precise when I was trying to locate papers from institutions with unambiguous names. The search results for MIT, Harvard, and Stanford retrieved results only from these universities. When I conducted an Affiliation search for York University, I was presented with papers from New York University, York University, and other universities containing the words York and University.

WEB OF KNOWLEDGE AND WIZFOLIO

Web of Knowledge is not listed as one of the compatible databases; nonetheless, I could import references using the WizAdd feature. I exported a few journal references from Web of Knowledge into my

WizFolio and EndNote Web library. I have created the bibliography using MLA Seventh Edition as the output style.

WizFolio
Database: Web of Knowledge
Output Style: MLA Seventh Edition

Bowers, Roger. "CLAUDIO MONTEVERDI AND SACRED MUSIC IN THE HOUSEHOLD OF THE GONZAGA DUKES OF MANTUA, 1590-1612." MUSIC & LETTERS 90.3 (2009): 331-71.

R, Faroux. "The ceiling paintings of Saint-Savin, the Roman "Sistine" Chapel built at the time of Charlemagne." .538 (2002): 84-89.

S, Percario. "Michelangiolo's 'Tondo Doni'." CRITICA D ARTE 66.20 (2003): 54-67.

EndNote Web
Database: Web of Knowledge
Output Style: MLA from EndNote Web

Bowers, R. "Claudio Monteverdi and Sacred Music in the Household of the Gonzaga Dukes of Mantua, 1590-1612." *Music & Letters* 90.3 (2009): 331-71. Print.

Faroux, R. "The Ceiling Paintings of Saint-Savin, the Roman "Sistine" Chapel Built at the Time of Charlemagne." *Oeil-Magazine International D Art*.538 (2002): 84-89. Print.

Percario, S. "Michelangiolo's 'Tondo Doni'." *Critica D Arte* 66.20 (2003): 54-67. Print.

There are many errors in the bibliography created using the WizAdd and WizCite features. In one case the article title was in capitals; in another the journal title was capitalized and in yet another the journal name was not included. Identifying the correct bibliographic information using WizFolio's *Locate Bibliography* feature is not possible since these references are not indexed in the PubMed database.
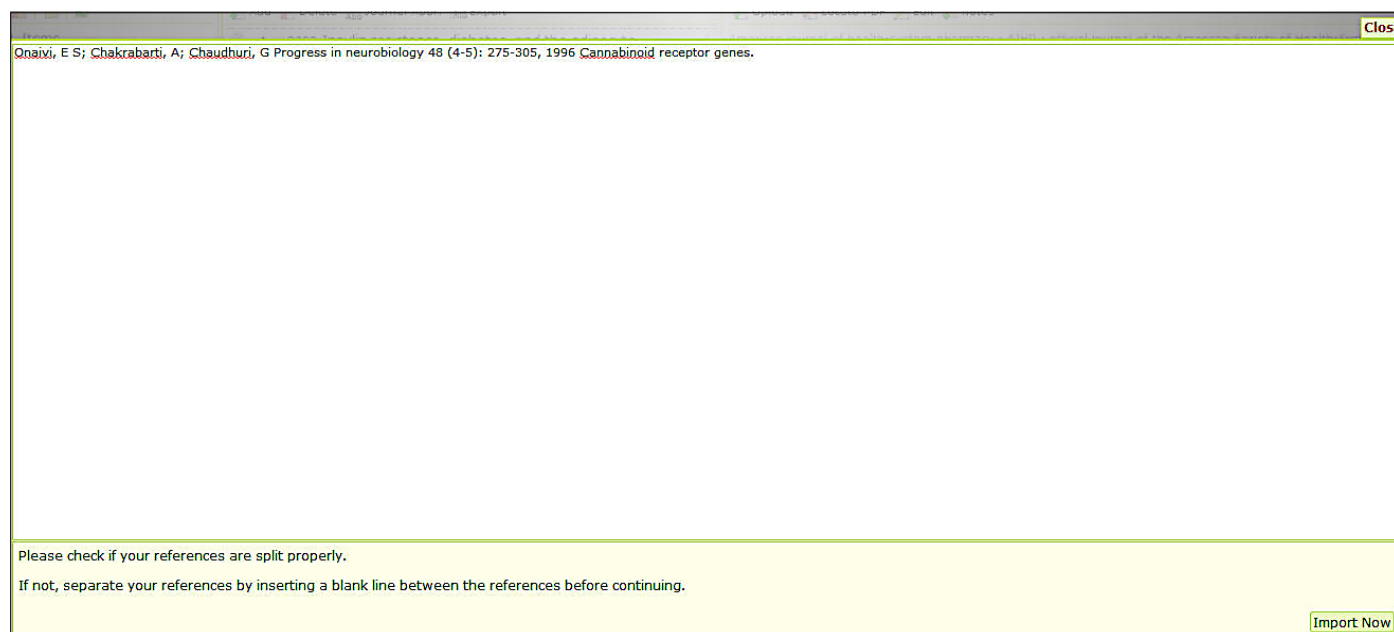
FIGURE 4   Users can copy and paste to locate metadata using Import from Clipboard in WizFolio.

Output Style: APA Sixth Edition
Database: Open WorldCat

Citation details for a book was obtained from Open World Cat and then transferred to WizFolio (RIS format), Refworks (Direct Export) and End Note Web (RIS format).

Citation for the Book in Open WorldCat

Goldstein, G., & Nussbaum, P. D. (1998). *Neuropsychology*. Human brain function. New York: Plenum Press.

Citation Using Wiz Folio

Goldstein, G., & Nussbaum, P. D. (1998). Human brain function. New York: Plenum Press.

Error in output style
- Inserts the name of the series instead of the book title
- Title of the book is not italicized

Citation Using RefWorks

Goldstein, G., & Nussbaum, P. D. (1998). *Neuropsychology*. New York: Plenum Press.

Citation Using EndNote Web

Goldstein, G., & Nussbaum, P. D. (1998). *Neuropsychology*. New York: Plenum Press.
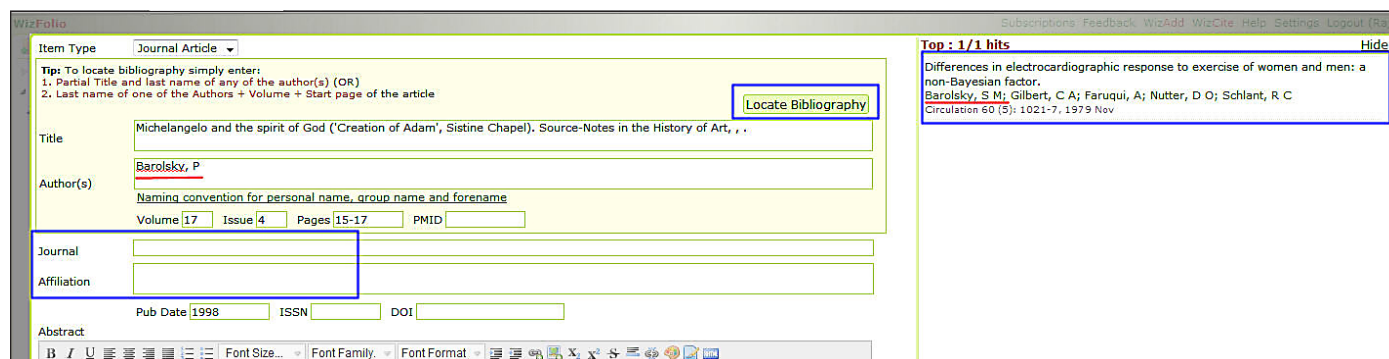
Errors were noted with the output from other reference management programs. The series name was not included in the bibliography created using RefWorks and EndNote Web.

LOCATING BIBLIOGRAPHY USING IMPORT FROM CLIPBOARD

Import from Clipboard is a unique feature available in WizFolio. Users can paste a set of cited references from a PDF, Word, or text document in the clipboard (Figure 4), and the associated metadata can be obtained if the article is indexed in PubMed.

The feature does not work for Arts and Humanities journal articles. I copied a reference indexed in Web of Science and tried to locate bibliographic information using the Import from Clipboard feature. WizFolio fails to locate the correct citation details since the article is not indexed in PubMed (Figure 5).

FIGURE 5   The Import from Clipboard feature fails to find citations from Arts and Humanities articles since they are not indexed in PubMed.
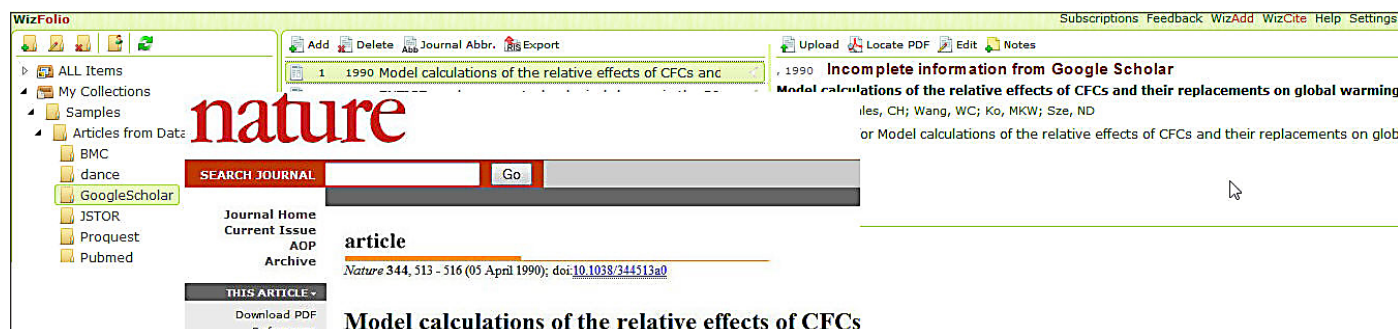
FIGURE 6   The citation imported into WizFolio from Google Scholar was incomplete, lacking details such as journal title and volume and issue numbers.

Users, however, have the ability to manually enter the citation details for articles found in any database in their WizFolio library.

In conclusion, though the product interface is intuitive and clean, the searchability and output styles leave much to be desired. Minor errors in output styles were observed with other citation management programs, but WizFolio has some glaring omissions and errors that need to be fixed if this subscription-based citation management tool is to be promoted as a reference management program.

The Affiliation searching in PubMed database needs to include precise results. Users should be able to navigate to PubMed interface from WizFolio so that they can modify keywords and search strategies. Errors were encountered while trying to include references from Web of Science, Wiley, and Worldcat.org. Errors in bibliography and in-text citations were observed with three output styles selected for the purpose of this paper. WizFolio is limited by its ability to locate bibliographic details only from PubMed database. An updated version of WizFolio will acquire citation details from Google Scholar, although the accuracy of metadata in Google Scholar is questionable.

I used Google Scholar to find an article from the journal *Nature.* The citation detail was saved in RIS format and imported into WizFolio (Figure 6). The citation in my WizFolio library was missing details (like Journal title, Volume and Issue Numbers) and the article was not indexed in PubMed hence making it difficult to acquire the complete citation details. The database creators should make the importing feature (WizCite) compatible with other subscribed databases like Wiley Science, Open WorldCat, and Web of Knowledge.

WizFolio Review Scores Composite: ★★

The maximum number of stars in each category is 5.

User Interface/Searchability: ★★ 1/2

Clean interface though searching of citations can be made more inclusive by incorporating additional databases and item types. There is a seamless integration with library e-resource holdings, and full-text documents can be located using SFX link resolver.

Content: ★ 1/2

Errors in output styles and in-text citations were observed when creating bibliographies. Errors were noted while working with RIS format and files added from Scopus database using WizAdd. The product is targeted for science graduate students and errors of this magnitude will be unacceptable. The product has a limited number of output styles compared to those provided by other citation management programs.

Pricing: ★ 1/2

The pricing will be feasible once WizFolio developers address the errors in the citation management program.

Contract Options: ★★★

Standard contract options with the hosting of content on external servers that is subject to reuse and redistribution by WizFolio.

Authentication

There are two options for authentication: setting up an account with an e-mail and password and registration with a university e-mail address and identification by IP address. Registered users can select their university from the Settings tab, which provides seamless access to e-resources through SFX Open Link resolver.

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Contract Provisions

The basic bibliographic data posted on the WizFolio site allows the Company to make copies of the material to facilitate the posting and storage of the materials on its site. The Company may collect certain data relating to the use of the product for statistical and promotional purposes. This statistical information does not contain any personally identifiable information and is made available only to registered users on an anonymous and aggregated basis. Details of contract agreements can be found on: <https://help.wizfolio.com/Privacy/EULA.aspx>.

About the Author

Rajiv Nariani is the Kinesiology and Health Sciences librarian at the Steacie Science and Engineering Library at York University. He completed a Master's in Information Studies with a specialization in Health Sciences from University of Toronto. He is interested in exploring the role of library technology tools in the research process. ■