



RefWorks Quarterly Update

Claudia Prokopczuk | 2024 Q2

Agenda

Product Roadmap Update

Product Updates Demo

Write-n-Cite End of Support

User Research

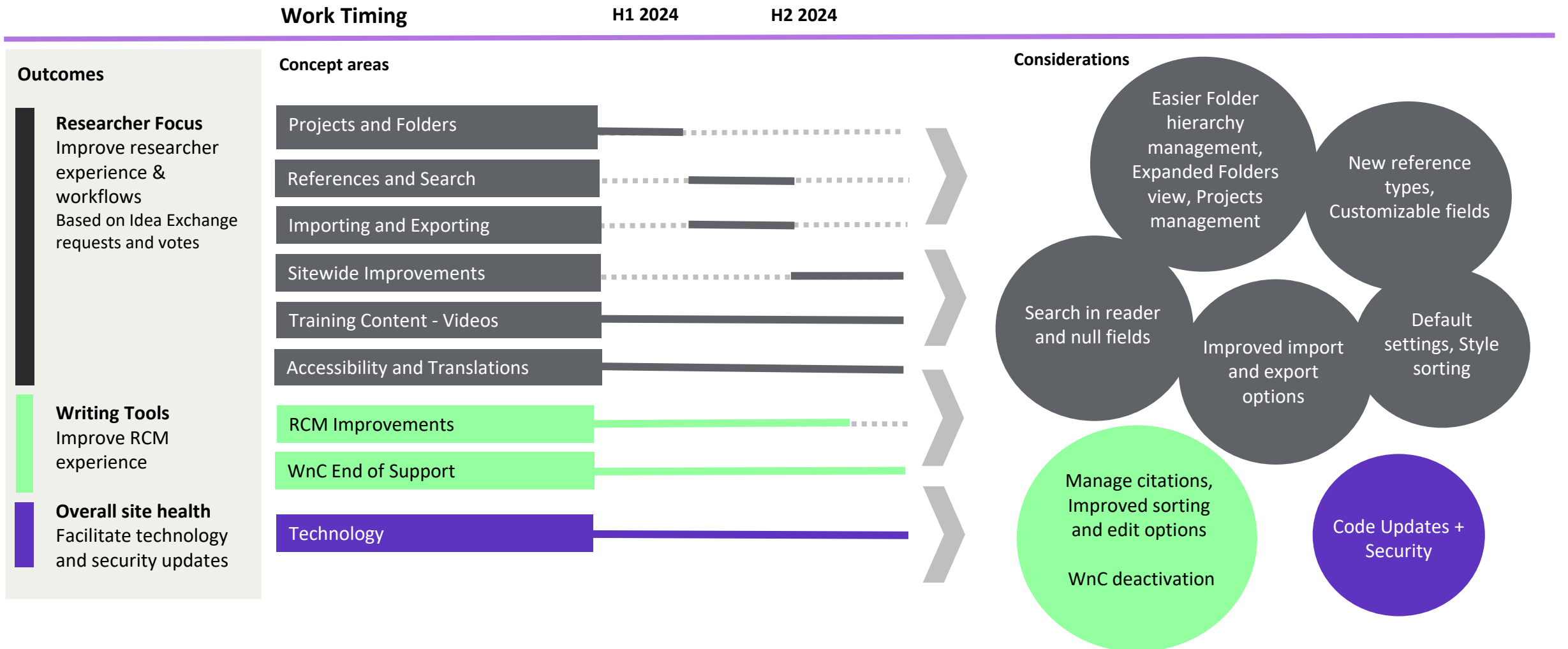
Additional Information



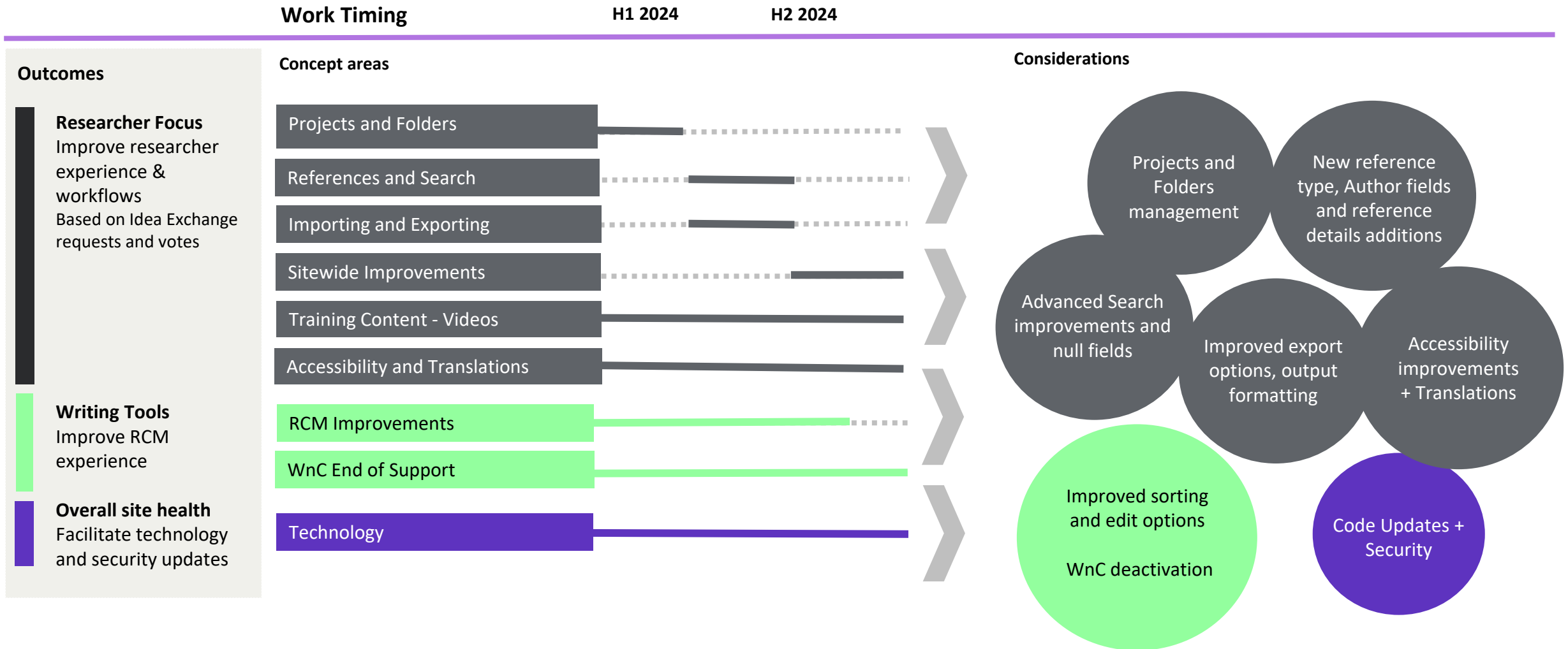
Product Roadmap Update

Planned Roadmap Outcomes

Three Outcomes Focus Areas with Quarterly Releases

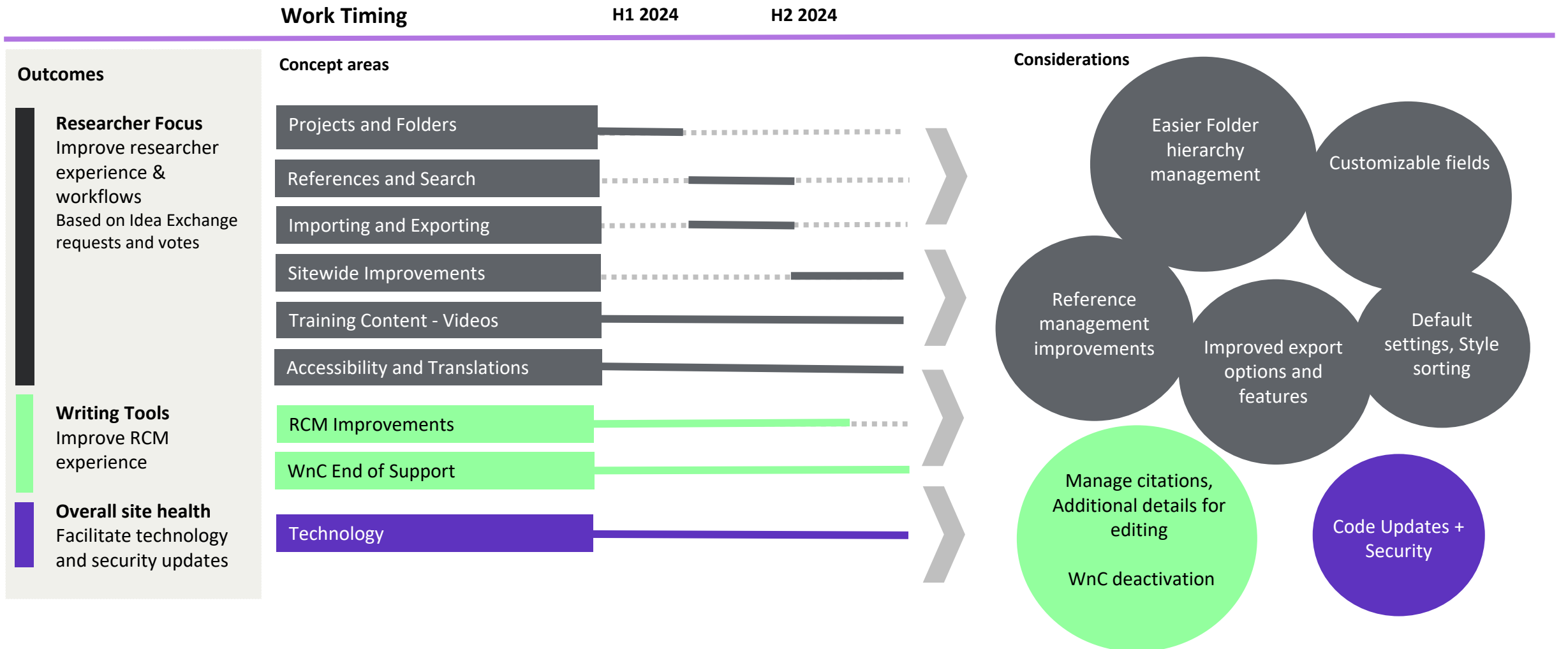


Planned Roadmap Progress



Planned Roadmap Current Development

Three Outcomes Focus Areas with Quarterly Releases





Product Updates Demo

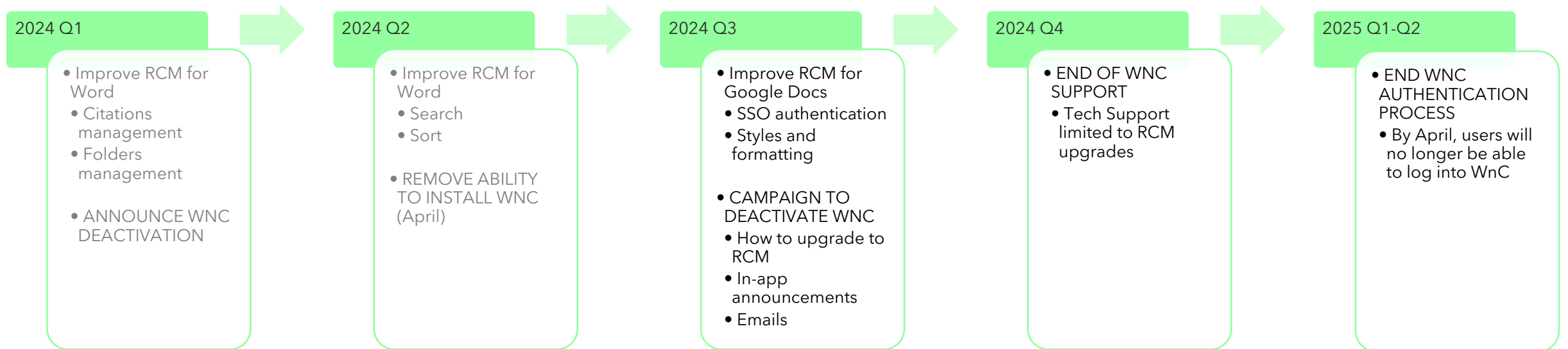
[Release Notes](#)



Write-n-Cite End of Support

Write-n-Cite Deactivation Planning

Timeline and Communications



Write-n-Cite Deactivation Timing

2024 Timeline Highlights

2024 Q1: Announcement email sent to Admins and first in-app announcement posted

2024 Q2

- Mid June: Messaging campaign to Admins (email) and users (in-app announcements) will start
- Document upgrades expected to begin
- WnC install page on [RefWorks site](#) and current WnC information on [Customer Knowledge Center \(CKC\)](#) will be removed
- Article about how to [upgrade to RefWorks Citation Manager \(RCM\)](#) updated

2024 Q3

- Mid September: Messaging campaign to Admins (email) and users (in-app announcements) continues
- Document upgrades expected to continue
- Tech Support only supports upgrades, no troubleshooting of WnC is offered

2024 Q4

- Mid November: Messaging campaign to Admins (email) and users (in-app announcements) continues
- Tech Support only supports upgrades, no troubleshooting of WnC is offered
- Document upgrades expected to continue

Write-n-Cite Deactivation Messaging - Email(s)

Admin Email(s) Content

WHAT:

By the end of 2024, all users should upgrade to RefWorks Citation Manager (RCM) writing add-in. *In April, users will no longer be able to access WnC installer download page on RefWorks.*

HOW:

- Let your users know: Update your internal documentation: how-to pages, LibGuides, and training materials
- Include the upgrade process information - one step upgrade guide
- Ensure users have access to Microsoft Office Store and downloads are allowed
- You are not on your own, we are also posting in-app announcements for all users and providing Tech Support.

WHY:

Why are we making this change? To improve the user experience!

WnC is becoming outdated, and RCM offers seamless experience in both Word desktop and Word Online. This move will also simplify versioning and support.

HELP:

Your Key Resources:

RefWorks Citation Manager (RCM)

Enabling RefWorks Citation Manager

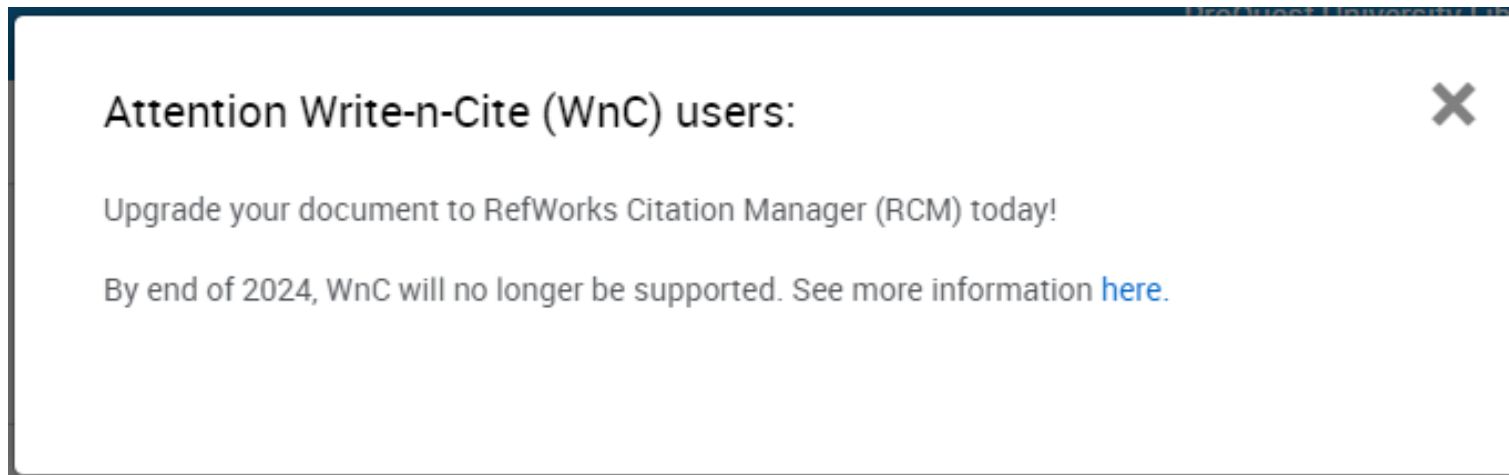
Upgrade process

Tech Support help

Write-n-Cite Deactivation Messaging - in RefWorks

In-app notification for all

Posted at the same time as Admin emails are sent



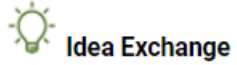
[https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Write-N-Cite \(WnC\) to RefWorks Citation Manager \(RCM\) Migration](https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Write-N-Cite_(WnC)_to_RefWorks_Citation_Manager_(RCM)_Migration)



User Research

User Interviews and Surveys

Current and planned



- Project management - Imports
- Folders management workflows
- Additional export formats

- User feedback surveys results:
 - RCM for Google Docs - May
 - In-app features user poll - June, may repeat in September

Reach out to us anytime if you would like to participate in our user research sessions.



Additional Information

Resources

Can we help by creating any additional resources?

Existing resources:

- In-app notifications are for all or targeted exclusively for Admins: Make sure to log into RefWorks regularly for updates about releases and events.
- Clarivate marketing communications [preferences](#)
- [YouTube channel](#) - how-to videos and tutorials
- [Customer Knowledge Center](#) - knowledge and help articles
- [Idea Exchange](#) - enter or vote for existing ideas
- [eWebinar](#) - Getting Started with RefWorks
- [More resources](#) - datasheets, guides, case studies



Thank you

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