



# RefWorks Quarterly Update

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# Agenda

Product Roadmap Update

2025 Proposed Product  
Roadmap

Product Updates Demo

Write-n-Cite End of Support

User Research

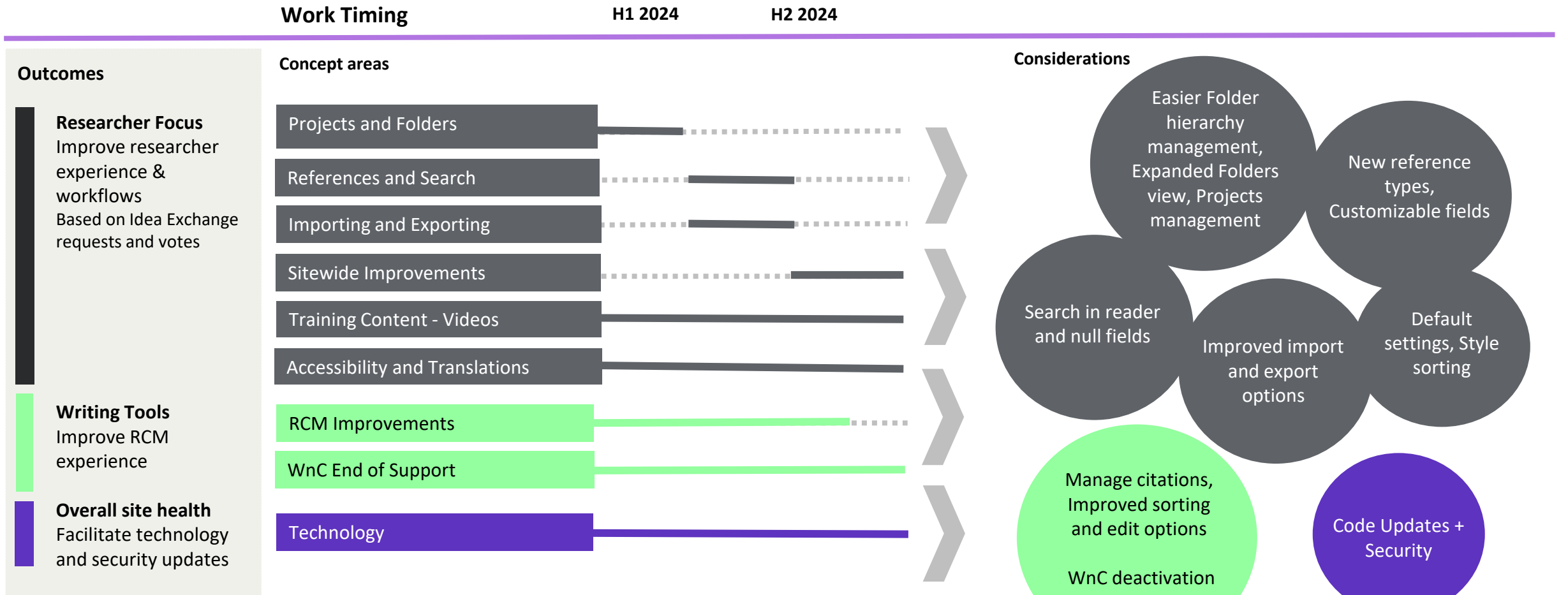
Additional Information



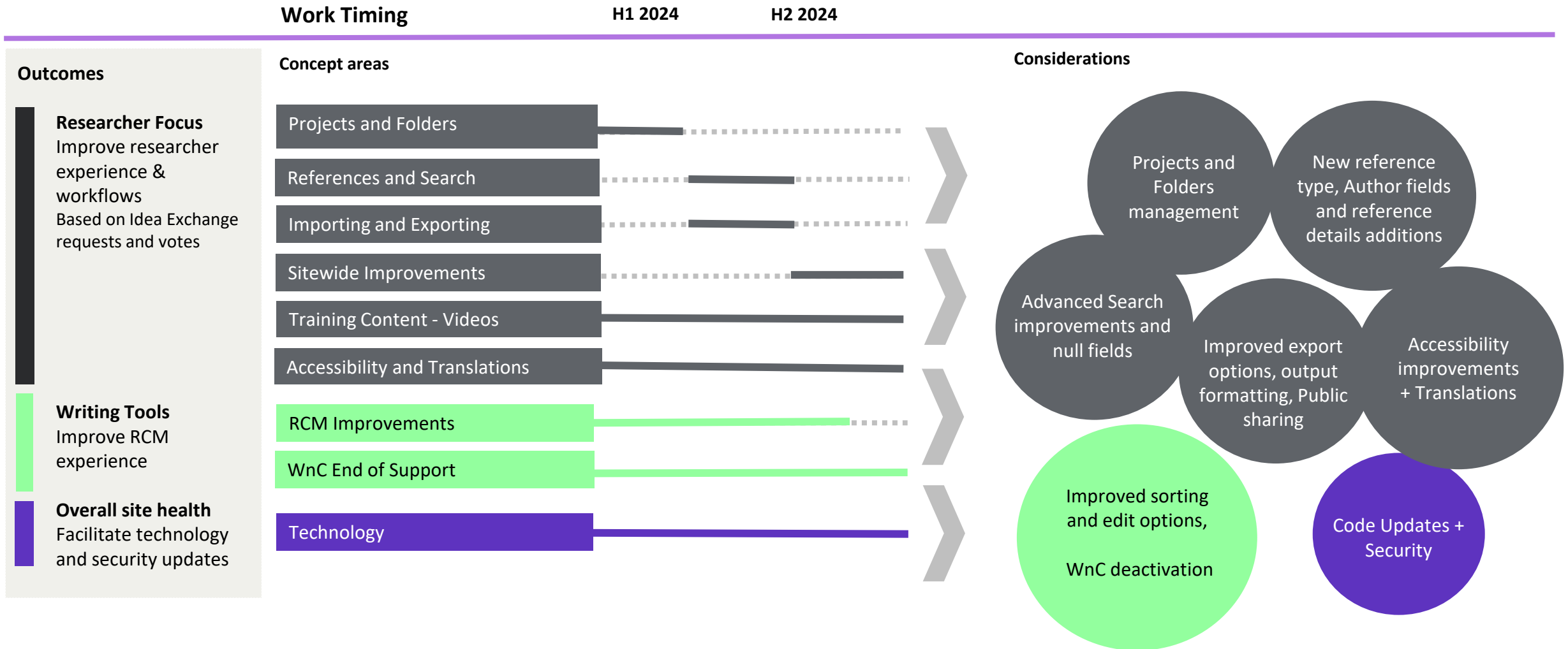
# Product Roadmap Update

# Planned Roadmap Outcomes

Three Outcomes Focus Areas with Quarterly Releases

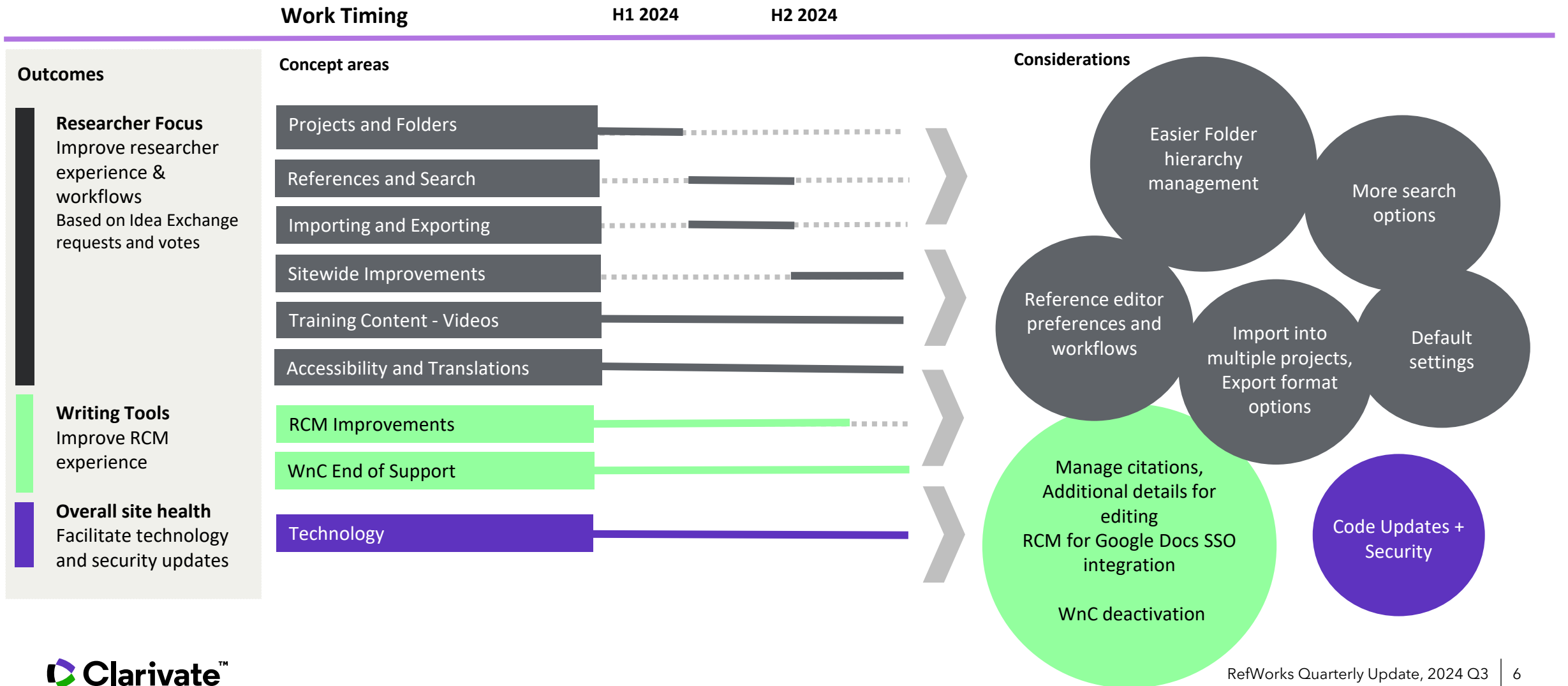


# Planned Roadmap Progress



# Planned Roadmap Current Development

## Three Outcomes Focus Areas with Quarterly Releases





# 2025 Proposed Product Roadmap

# 2025 Planned Roadmap Outcomes

## Three Focus Areas with Quarterly Releases

### Focus areas

### H1 2025

### H2 2025

### 2026 Concepts

#### Researcher Focus

Improve researcher experience & workflows. Based on direct feedback from users via Idea Exchange.



**Authentication Updates** - Password retrieval and settings enhancements

**Reader** - Implementation of a new Reader for easier document annotations

**Recommendations** - Article recommendations based on content

**Reference Types** - Added ref types for easier citation formatting

**Site Improvements** - Workflow improvements

**Accessibility** - Enhancements of keyboard navigation screen reader functionality

**Import Improvements** - Added import options and default settings

**Deduplication Improvements**  
Added search options

**Admin Tools Enhancements** - Added reporting options

- ▶ Responsive/mobile friendly site
- ▶ Retraction Watch integration
- ▶ Save to RefWorks browser extension
- ▶ Regional data centers
- ▶ Accessibility enhancements

#### Writing Tools

Improve RefWorks Citation Manager experience



**RCM for Word Improvements**  
Enhancements based on user feedback

**RCM for Google Docs Improvements**  
Enhancements based on user feedback

- ▣ RCM for Google Docs localization

#### Overall Site Health

Facilitate technology and security updates



**Code & Security Updates**  
Update to latest code versions and ensure security maintenance

- ▣ Ongoing performance and security updates

Release dates are estimates only. Clarivate reserves the right to change its product plans or roadmap based on business priorities and market conditions.



# Product Updates Demo

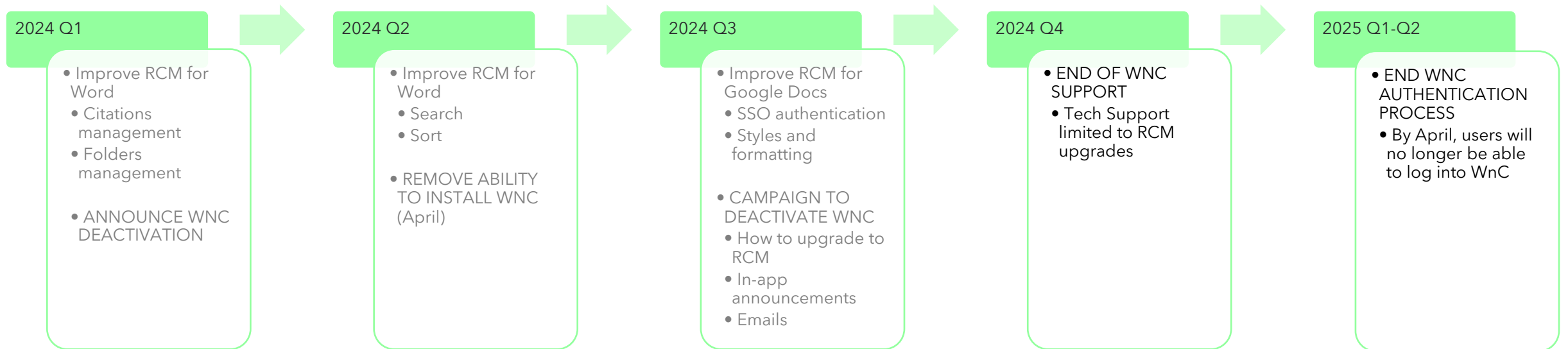
[Release Notes](#)



# 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
- Email notification to users
- 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

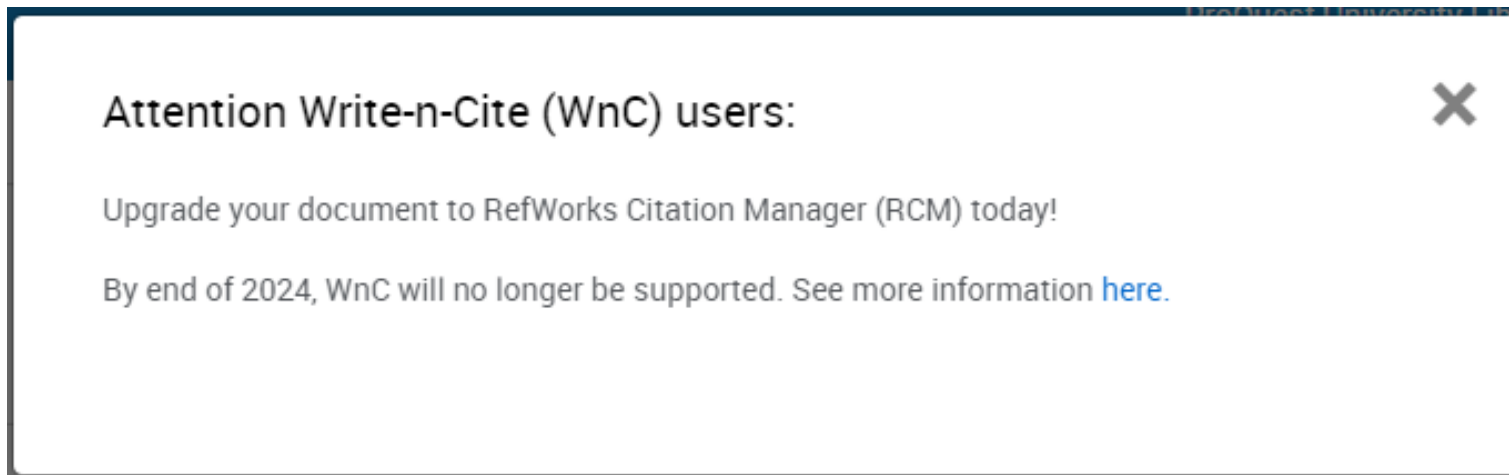
Upgrade process

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



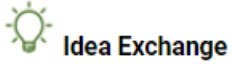
[https://knowledge.exlibrisgroup.com/RefWorks/Knowledge\\_Articles/Write-N-Cite \(WnC\) to RefWorks Citation Manager \(RCM\) Migration](https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Write-N-Cite_(WnC)_to_RefWorks_Citation_Manager_(RCM)_Migration)



# User Research

# User Interviews and Surveys

Current and planned



- References import from list in PDF
- Folder organization and management
- Writing tools workflows + AI

**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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