



RefWorks Quarterly Update

Claudia Prokopczuk | January 2025

Agenda

Product Roadmap Update

Product Updates Demo

2025 Product Roadmap

Write-n-Cite End of Support

User Research

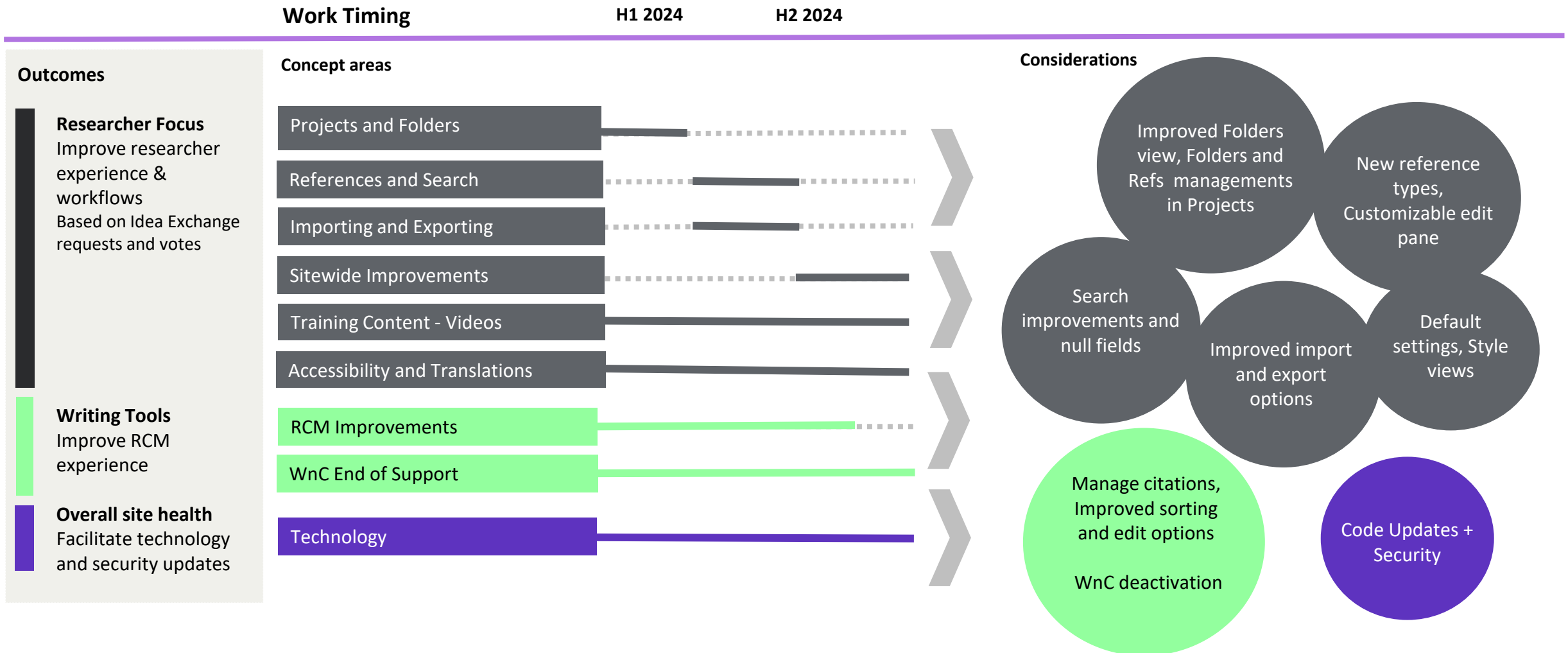
Additional Information



Product Roadmap Update

2024 Roadmap Outcomes

Three Outcomes Focus Areas with Quarterly Releases





Product Updates Demo

[Release Notes](#)



2025 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

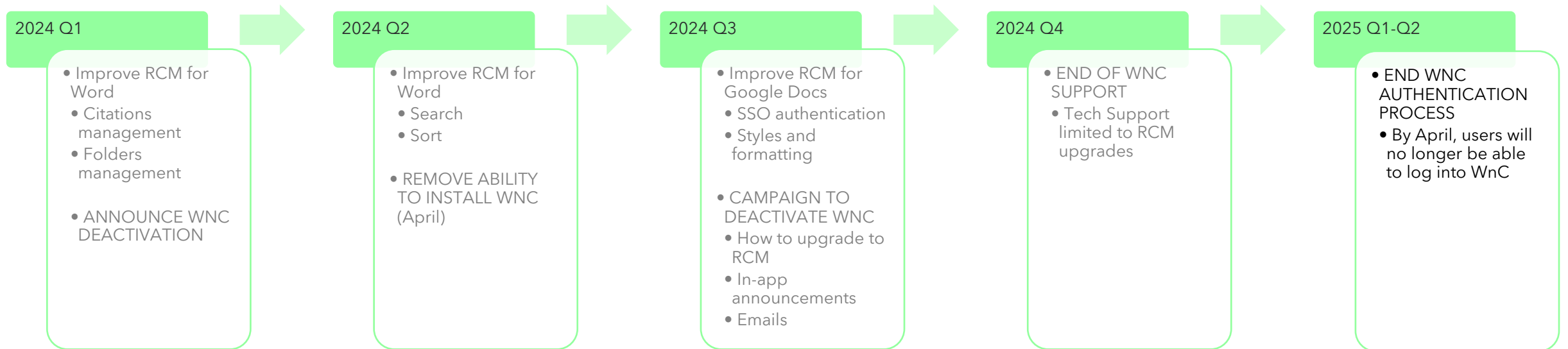
Release dates are estimates only. Clarivate reserves the right to change its product plans or roadmap based on business priorities and market conditions.



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 were 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

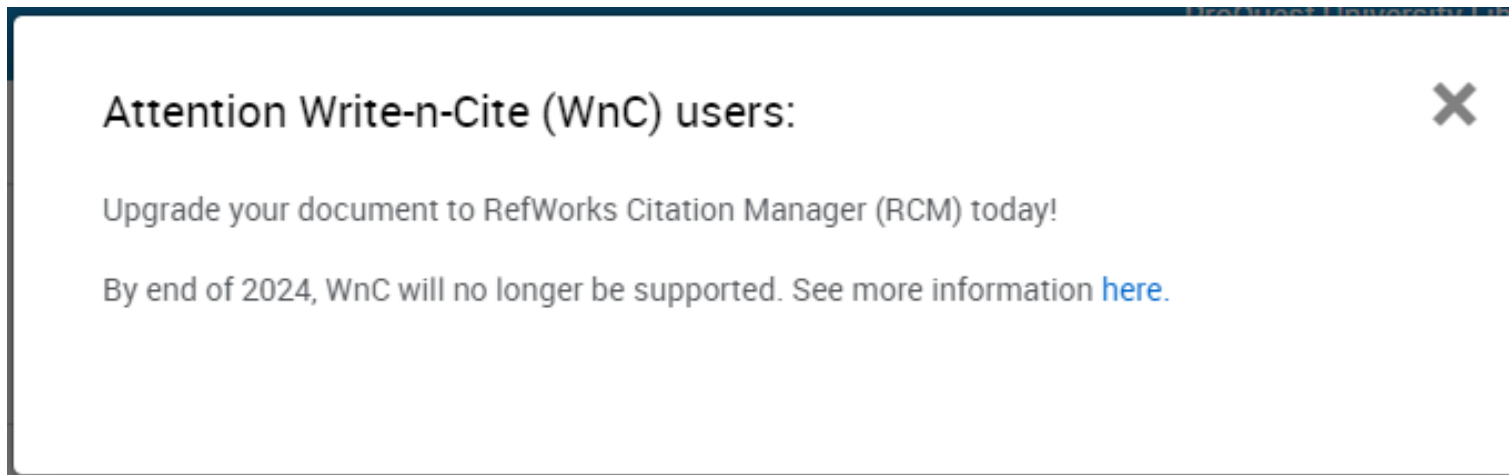
Upgrade process

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



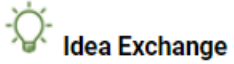
[https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Write-N-Cite \(WnC\) to RefWorks Citation Manager \(RCM\) Migration](https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Write-N-Cite_(WnC)_to_RefWorks_Citation_Manager_(RCM)_Migration)



User Research

User Interviews and Surveys

Current and planned



- Finding the right journal for manuscript publication
- Folder organization and management
- Writing tools workflows + AI
- Features feedback survey

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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