



RefWorks Quarterly Update

Agenda

Product Roadmap

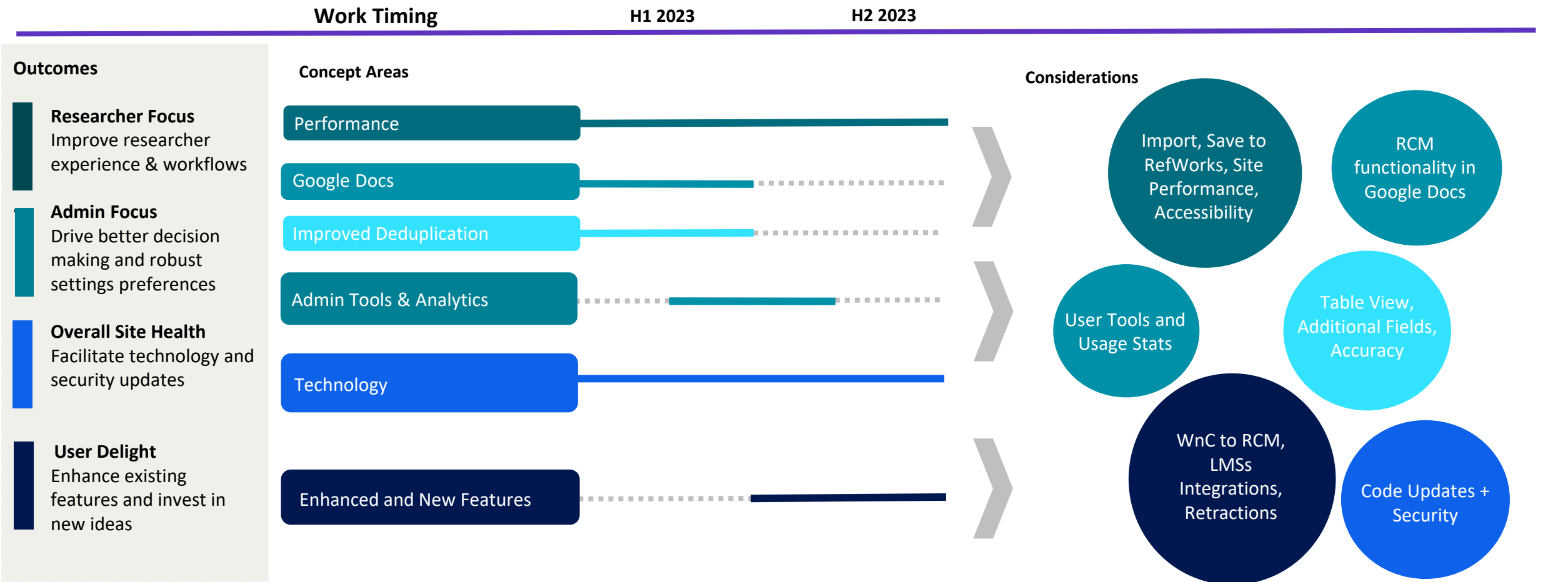
User Collaboration

Legacy RefWorks

Information and Resources

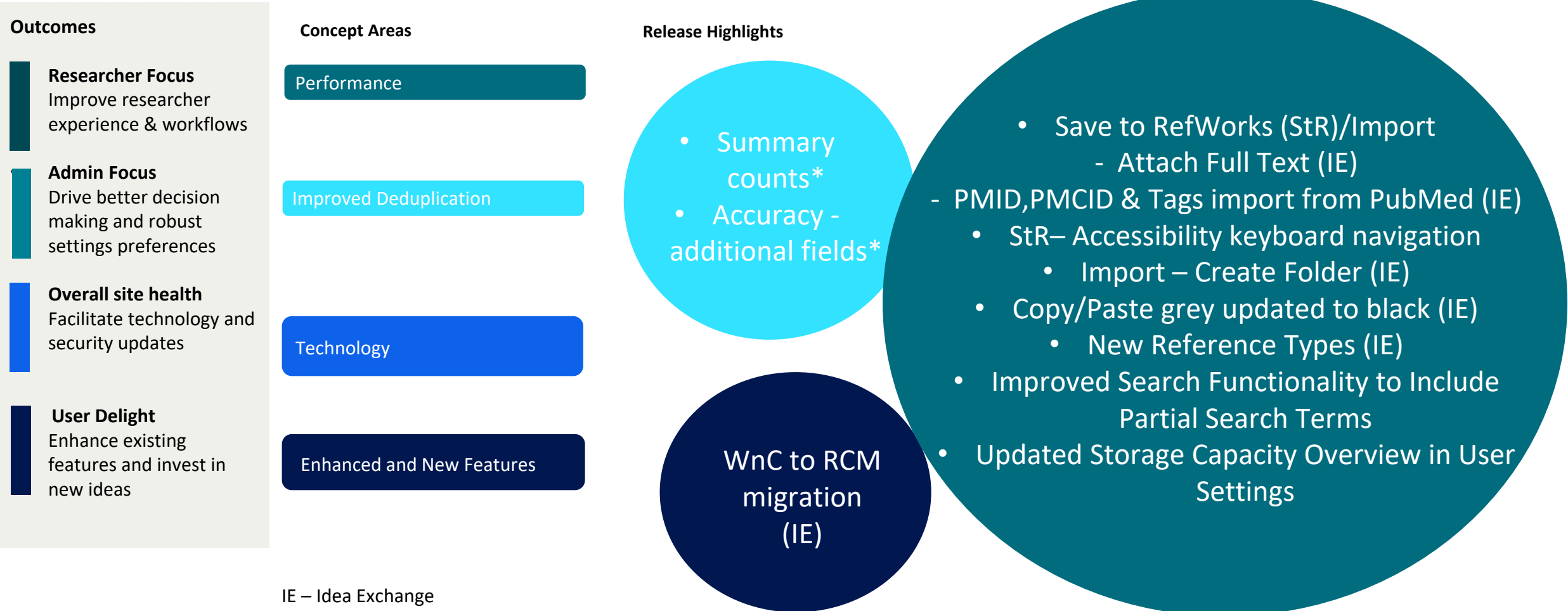
Product Roadmap

Planned Roadmap Outcomes



Roadmap Progress – Highlights of Released Items + Demo

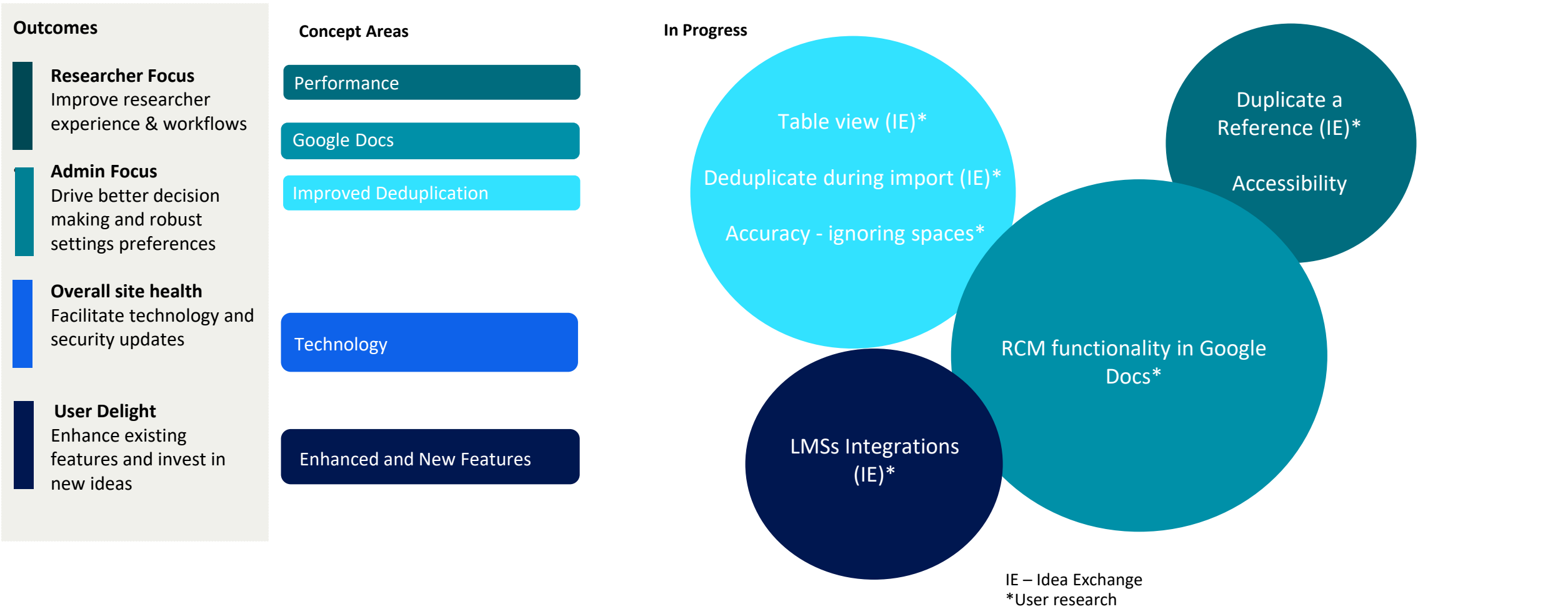
Check the [Release Notes](#) page for more information



IE – Idea Exchange

*User research

Roadmap Progress – Research and Development



User Collaboration

Engagement With Our Users

In-App and Social Media User Survey

Launched January 23

Asked opinion and engagement questions:

- How likely are you to recommend RefWorks to a friend or colleague?
- On a scale of 0-10, how satisfied are you with your overall RefWorks experience?
- What's your current role?
- How would you like to help?



User Responses

Evaluation and Analysis Underway

Follow up with every responder who provided contact information

- Healthy mix of users from undergraduates and graduates to researchers, professionals, librarians and instructors
- 100+ would like to participate in at least one activity
- 30+ expressed interest in all activities
- Will share analysis results



Legacy RefWorks Deactivation



Admin Feedback About Institutional Upgrade

“This process is all very straight forward”

-Beta test institution Admin

“Hello, I just finished using the legacy tool to upgrade my institution's legacy account. it was pretty seamless. Is there anything else on my end to do?”

-Admin at recently upgraded institution



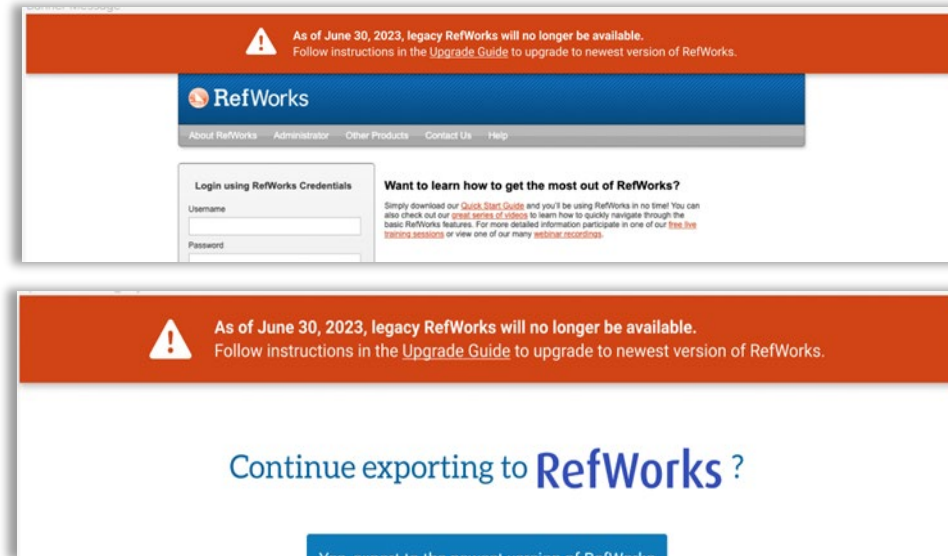
Legacy RefWorks Deactivation – June 30, 2023

Legacy RefWorks deactivation is less than 4 months away

Current in-app message in legacy:

As of June 30, 2023, legacy RefWorks will no longer be available. Follow instructions in the [Upgrade Guide](#) to upgrade to newest version of RefWorks.

Legacy log-in page and Direct Export page banners



For questions, please contact [RefWorks Tech Support](#)



Legacy RefWorks Deactivation – June 30, 2023

Legacy RefWorks deactivation is less than 4 months away

By now, you should have *at least*:

Disabled legacy Account Creation option

Enabled Upgrade link for all your legacy users

Reviewed upgrade materials:

- Everything to know about Upgrading
- RefWorks Admin Guide
- Institutional Upgrade & Admin Checklist & attended or viewed a recording of the Institutional Upgrade training session
- User Guide

For questions, please contact RefWorks Tech Support

Information and Resources

Communication

Meetings and User Interactions

- Quarterly webinar
- Continuous feedback from our user base
- Engagement with Idea Exchange contributors



Resources

Are you looking for any additional articles or videos which we should create?

Existing resources

- 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

Please, fill out our short survey at the end of this webinar.



Q & A





Thank you

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