RefWorks Quarterly Update

May 2023
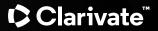
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Agenda

Product Roadmap

User Research

Legacy Deactivation

Additional Information

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Product Roadmap

Planned Roadmap Outcomes

Work Timing H1 2023 H2 2023

Outcomes

Researcher Focus
Improve researcher experience & workflows

Admin Focus
Drive better decision making and robust settings preferences

Overall site health
Facilitate technology and security updates

User Delight
Enhance existing features and invest in new ideas

Concept Areas

Performance

Google Docs

Improved Deduplication

Admin Tools & Analytics

Technology

Enhanced and New Features

Considerations

Import, Save to RefWorks, Site Performance, Accessibility

RCM functionality in Google Docs

User Tools and Usage Stats

Table View, Additional Fields, Accuracy

WnC to RCM, LMSs Integrations, Retractions, CSL Citation Styles

Code Updates + Security

Roadmap Progress

Concept Areas

Performance

Improved Deduplication

Technology

Enhanced and New Features

Release Highlights

Summary Counts* Additional Fields*

WnC to RCM migration

StR/Import – Full Text (IE), StR/Import - PMID, PMCID & Tags import from PubMed (IE), StR – Accessibility keyboard navigation, Import – Create Folder (IE), Copy/Paste grey to black (IE), New Ref Types (IE), BibTeX Style Improvement

Improved Search Functionality in RefWorks Citation Manager (RCM)

New Feature to Duplicate References (IE)

Tags Included in Export (IE)

Proxy Database Permalinks Removed During Import (IE)

New PDF upload messaging

More:
- First and Last Name Requirement Change
- New citation styles, updates citation styles
+ new catalogs available

Cookie Preferences in OneTrust, SaaS data retention policy automation, Nexus repository server updated, Updated automation servers

Legacy upgrades activity

Disable account creation in legacy
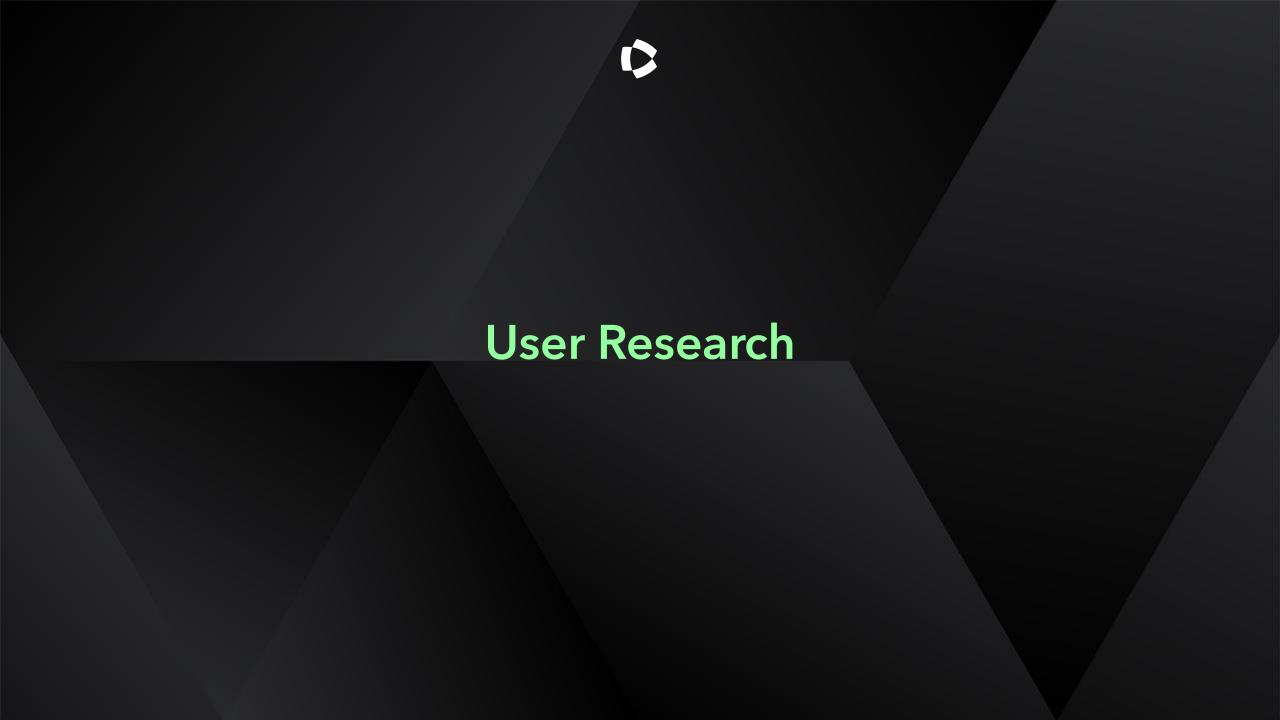
Additional translations

Upgraded entire database to latest version

IE – Idea Exchange

* - User Research

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Release Highlights Demo

User Research

Collaboration With Users
In-App & Social Media User Survey

Launched survey January 23

Followed up with every responder who provided contact information

- We asked: How would you like to help?

  - 51% of responders want to get involved in at least 1 way;

  - Additional 24% of responders would like to participate in multiple ways

Asked opinion and engagement questions:

- How likely are you to recommend RefWorks?

  - 78% responded favorably, 87 provided contact info for further engagement.

  - 22% who were not completely satisfied, 19 provided contact info.

- What's your current role?

  - 27% of responders are post-graduate

  - 22% graduate

  - 21% undergrads and rest are other: librarians, professionals and researchers

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Research With Users
Current & Planned Research

- In-app Admins only + email outreach survey about LMS integration

- Usability testing for referencing in Google Docs design

- Projects Improvements

- Table View Improvements

Legacy Deactivation

Deactivation is on June 30, 2023
Less than 2 months to complete upgrades

There is still time to execute Institutional Upgrade

- Everything to know about Upgrading

  - Admin Upgrade Guide

  - Institutional Upgrade & Admin Checklist & recording of the Institutional Upgrade training session

  - User Upgrade Guide

In accordance with Data Retention Policy, user data will be available for a limited time after deactivation.

For questions, please contact RefWorks Tech Support

98%
Of active users are on RefWorks

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Account Creation
Only allowed on RefWorks

- Users are no longer able to create accounts in legacy

- Link to create an account directs users to RefWorks

Direct Export
Only allowed to RefWorks

- Users are only able to send Direct Export to RefWorks

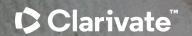- Combined/Choice export page will be deactivated week of May 22

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Thank You

Claudia Prokopczuk, Lead Product Manager
claudia.prokopczuk@clarivate.com

Additional Information

Staying Informed

- In-app notifications are for all or targeted exclusively for Admins

- Newsletter Preferences: Update your preferences <u>here</u> so you don't miss out on any news

Resources

- Clarivate marketing communications <u>preferences</u>

- <u>YouTube channel</u> – how-to videos and tutorials

- <u>Customer Knowledge Center</u> – knowledge and help articles

- <u>Idea Exchange</u> – enter or vote for existing ideas

- <u>eWebinar</u> - Getting Started with RefWorks

- <u>More resources</u> – datasheets, guides, case studies