



# RefWorks Quarterly Update

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# Agenda

Product Roadmap Update &  
Demo

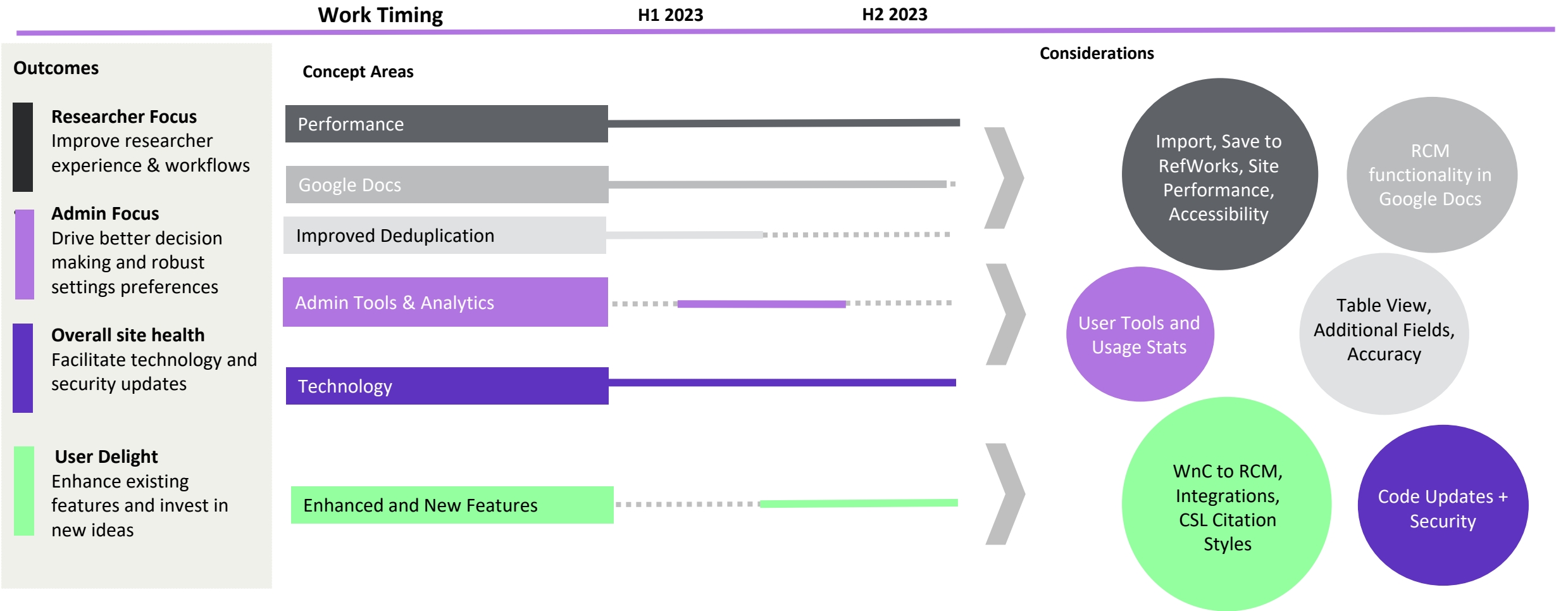
User Research

Additional Information



# Product Roadmap Update

# Planned Roadmap Outcomes



# Roadmap Progress - Released

## Concept Areas

Performance

Improved Deduplication

Technology

Enhanced and New Features

## Release Highlights

Summary Counts\*  
Additional Fields\*

**Ignore Spacing\***  
**Table View (IE)\***

WnC to RCM migration

**Single Sign On (SSO) in  
RefWorks Citation  
Manager (RCM) (IE)**

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), New PDF upload messaging

**Data Export Includes Tags (IE)\***  
**Proxy Database Permalinks Automatically Removed During Import (IE)**

**New Process to Import References From Legacy Unformatted ISSN Field\***

**Display Both PMCID and PMID In a Bibliography\***  
**Increased Records Limit For Imports from Mendeley**

**Sorting and Ordering (IE)\***

## More:

- RIS Export No Longer Duplicates URL Field Data
- References in Shared Folder Appear Correctly in RefWorks Citation Manager (RCM)
- Citations were frozen when inserting first in-text citation in specific Word versions

Cookie Preferences in OneTrust, SaaS data retention policy automation, Nexus repository server updated, Updated automation servers, Legacy upgrades activity, Additional translations. Disable account creation in legacy, Upgraded entire database to latest version

**New RefWorks API for Direct Export ElasticSearch (search engine in RefWorks) upgraded to recent version**

IE – Idea Exchange

\* – User Research



# Product Updates Demo



# User Research

# User Research

## Ongoing

Google Docs redesign (redevelopment) is in progress

- User research
  - Surveys
  - User interviews
- Continuous design learning and implementation





# 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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