Clarivate™
RefWorks Quarterly Update
Claudia Prokopczuk, Lead Product Manager | November 2023

Agenda

Product Roadmap Update & Demo

2024 Releases & Roadmap

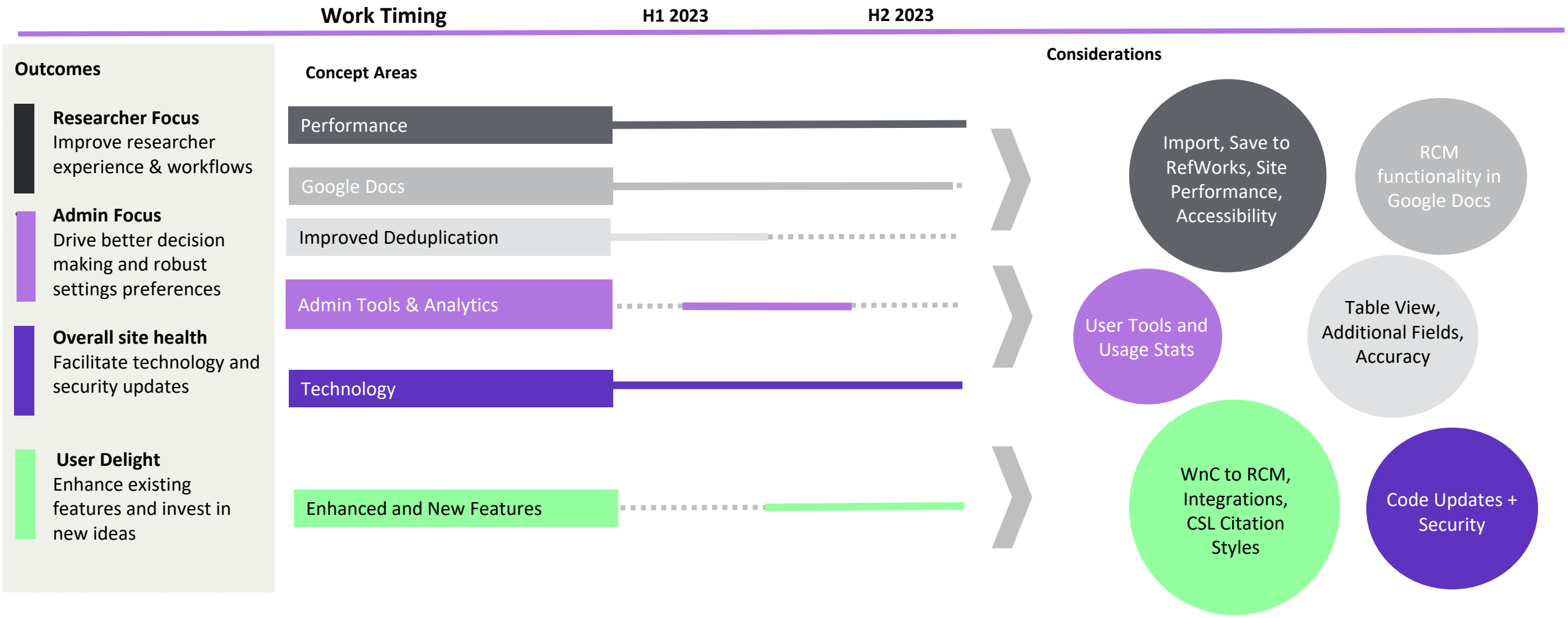
User Research

Additional Information

Clarivate™

Product Roadmap Update

Planned Roadmap Outcomes



Roadmap Progress – Released

Concept Areas

- Performance
- *Google Docs*
- Improved Deduplication
- Admin Tools & Analytics
- Technology
- Enhanced and New Features

Release Highlights

Summary Counts*
Additional Fields*
Ignore Spacing*
Ignore Duplicates During Import (IE)*
Available in Table View (IE)

Summary counts, Projects, Invited users, Improved users search
Users table sorting, Refs added trend, Accounts created trend

WnC to RCM migration
SSO available in 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
Improved Sorting and Ordering Options (IE), Ability to search across shared folders (IE), Search in publicly shared folders (IE)
Unpaywall integration

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
Angular Framework

More:
- Some users' RCM bibliography displayed word Stylefix
- Some users were unable to download attachments

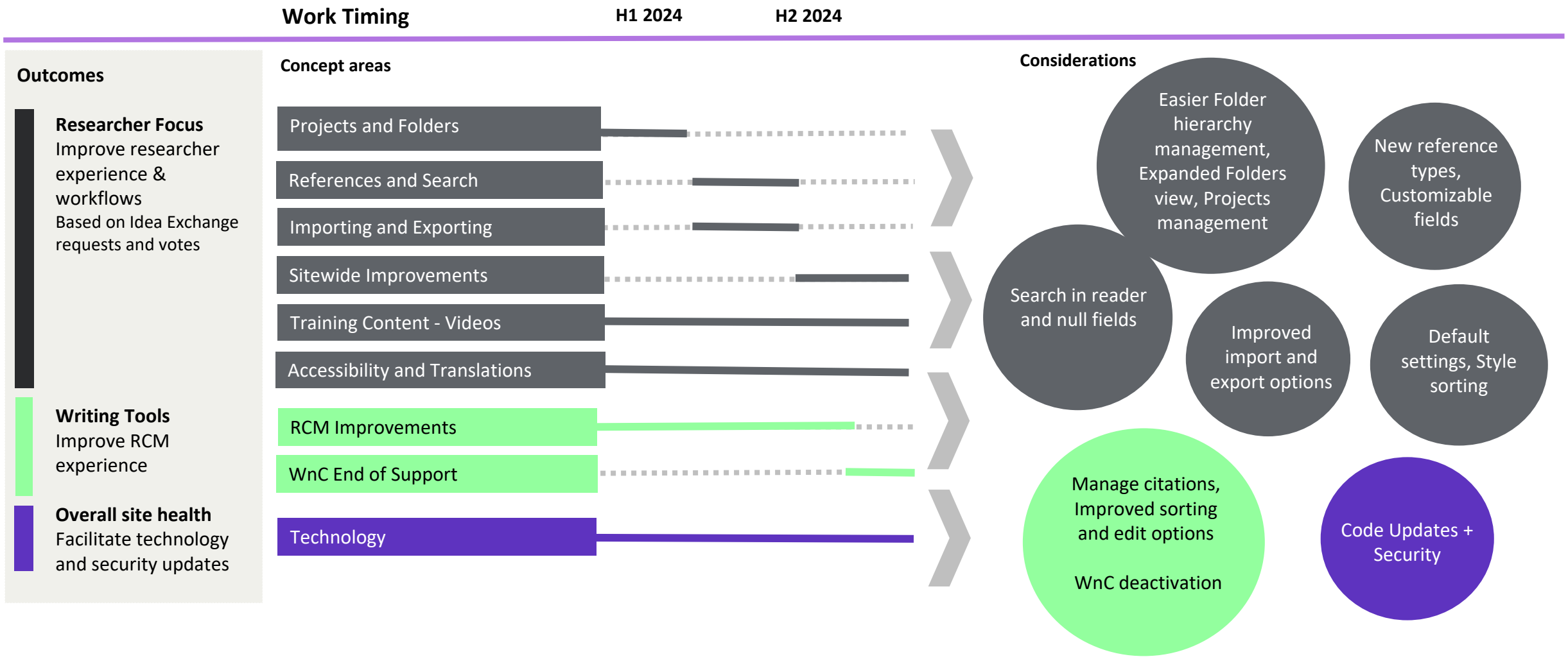
IE – Idea Exchange
* – User Research
Recent Release
Next release

Product Updates Demo

2024 Releases & Roadmap

Planned Roadmap Outcomes

Three Outcomes Focus Areas with Quarterly Releases



Write-n-Cite Deactivation Planning

Timeline and Communications

2024 Q1

- Improve RCM for Word
  - Citations management
  - Folders management
- WNC DEACTIVATION ANNOUNCEMENT

2024 Q2

- Improve RCM for Word
  - Search
  - Sort
- REMOVE ABILITY TO INSTALL WNC (April)

2024 Q3

- Improve RCM for Google Docs
  - SSO authentication
  - Styles and formatting
- CAMPAIGN TO DEACTIVATE WNC
  - How to upgrade to RCM
  - In-app announcements
  - Emails

2024 Q4

- END OF WNC SUPPORT
  - Tech Support limited to RCM upgrades

2025 Q1-Q2

- END WNC AUTHENTICATION PROCESS
  - By April, users will no longer be able to use WnC

User Research

User Research

Ongoing

RCM Writing Tools workflows

- 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

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