

CHOOSING THE RIGHT CITATION MANAGEMENT TOOL FOR YOUR RESEARCH

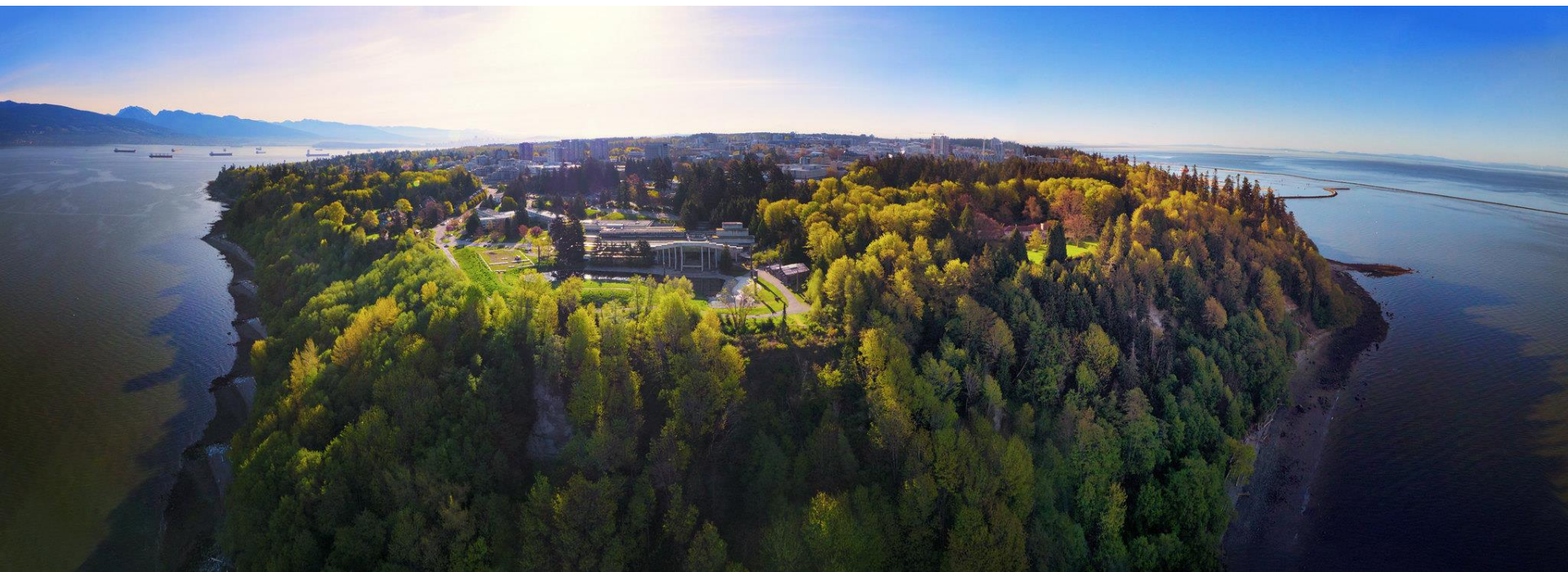
WINTER 2021/22

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UBC Library Research Commons





UBC Vancouver is located on the traditional, ancestral, and unceded territory of the x^wməθk^wəy̓əm (Musqueam) people.

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Photo: Hover Collective / UBC Brand & Marketing



The UBC Okanagan campus is located on the traditional, ancestral, and unceded territory of the Syilx (Okanagan) people.

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AGENDA FOR TODAY'S WORKSHOP

1. Introduction to Instructors
2. What is Citation Management?
3. Zotero, Mendeley, and RefWorks
4. Common problems and some tips
5. Questions and Wrap-up



SERVICES AT THE RESEARCH COMMONS

WORKSHOP

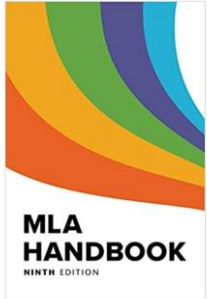
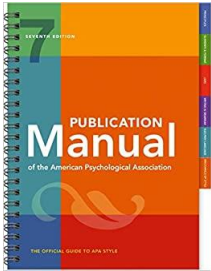
- Citation Management (RefWorks, Mendeley, Zotero)
- Data analysis software support (NVivo, R)
- Digital Core Skills & GIS
- Research data management

ONE-ON-ONE CONSULTATION

(over Zoom or by e-mail)



MAJOR CITATION STYLES



- APA (American Psychological Association) - Social Sciences
- MLA (Modern Language Association) - Humanities (mostly English)
- Chicago or Turabian Style - social sciences, law, humanities
- Vancouver Style - medicine
- ACS (American Chemical Society) - Engineering



ONE SOURCE, MANY WAYS TO CITE

APA

Oyo, B., & Kalema, B. M. (2014). Massive open online courses for Africa by Africa. *International Review of Research in Open & Distance Learning*, 15(6), 1-13. Retrieved from <http://www.irrodl.org/index.php/irrodl>

MLA

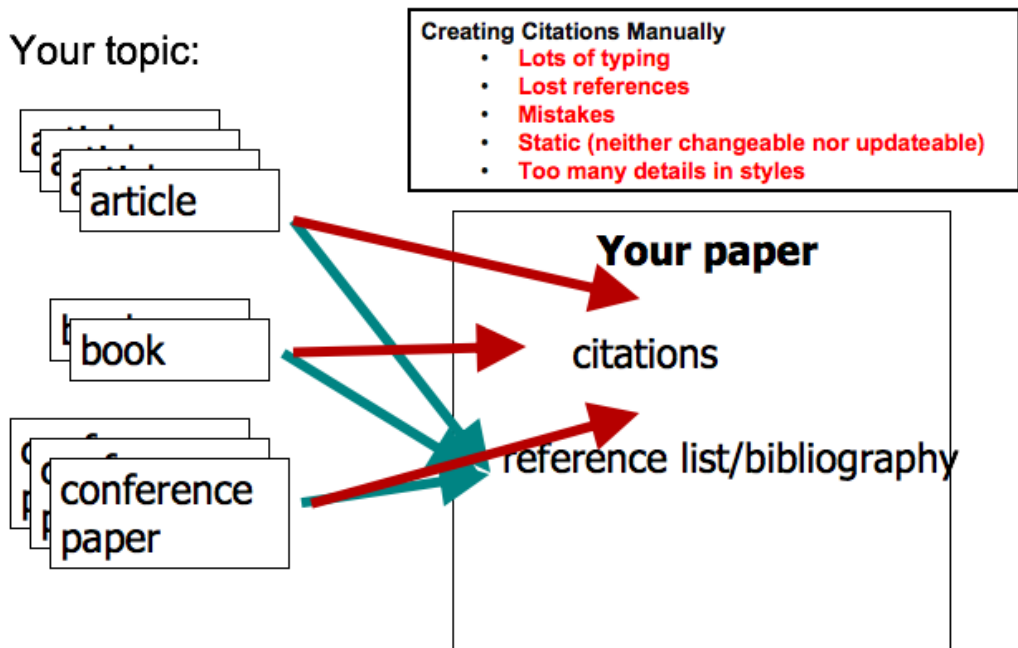
Oyo, Benedict, and Billy Mathias Kalema. "Massive open online courses for Africa by Africa." *International Review of Research in Open & Distance Learning*, vol. 15, no. 6, 2014, pp. 1-13. <http://www.irrodl.org/index.php/irrodl>. Accessed 5 May 2015.

Chicago

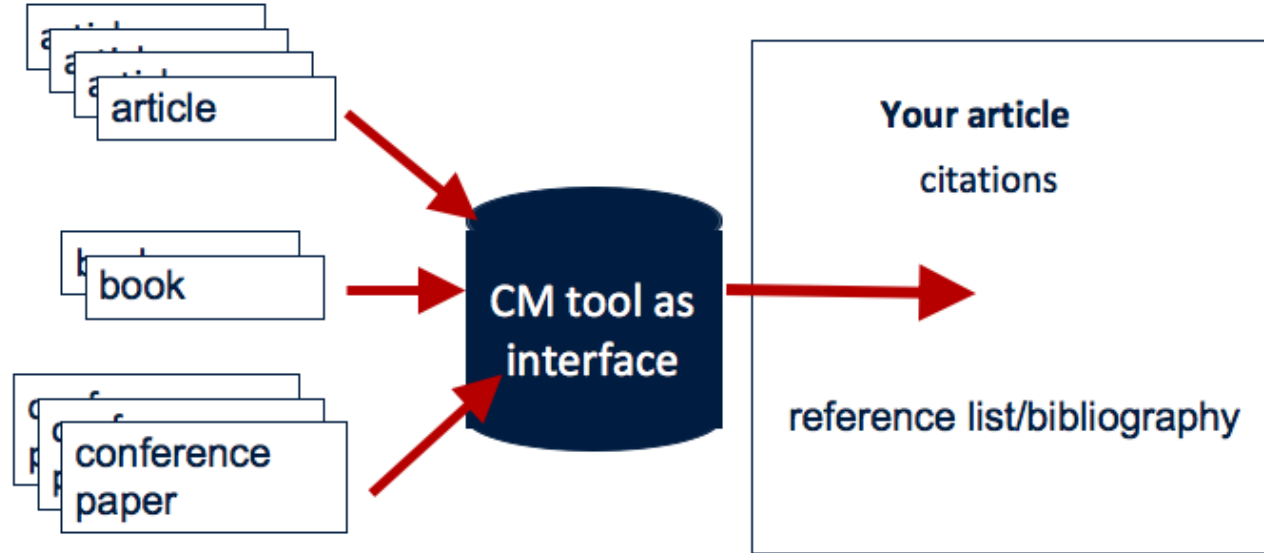
Oyo, Benedict, and Billy Mathias Kalema. Massive open online courses for Africa by Africa. *International Review of Research in Open & Distance Learning* 15, no. 6 (2014): 1-13. Accessed May 5, 2015. <http://www.irrodl.org/index.php/irrodl>



WHAT IS THE PROBLEM?



CITATION MANAGEMENT SOFTWARE AS A SOLUTION



WHAT YOU CAN DO? – 4 IMPORTANT FEATURES



Collect references from different sources



Organize your database (annotate, rate, tag)



Cite and generate bibliographies.



Share references and collaborate with colleagues

CITATION MANAGEMENT TOOLS COMPARISON

Citation Management Tools Comparison: Organizing and Collaborating

RefWorks, Zotero, Mendeley and Endnote all provide four basic functions: capturing, organizing, citing, and sharing references. The major differences between these tools are their organization and collaboration features compared in Table 1 and Table 2 below.

Table 1. Organization Features

	RefWorks	Legacy RefWorks	Zotero	Mendeley	Endnote	EndNote Basic
Download Price <small>As of October 2021</small>	Free (Free for UBC students, faculty, staff, and alumni \$100 otherwise)	Free (Free for UBC students, faculty, staff, and alumni)	Free (Costs for upgraded storage)	Free (Costs for upgraded storage & private groups)	\$279.94 USD (Student version available for \$129.86 USD)	Free (Free for UBC students through Clarivate Analytics/ Web of Science)
Storage Cost <small>As of October 2021</small>	Unlimited	Unlimited	300 MB Free (2 GB ~\$20 USD/year 6 GB ~\$60 USD/year Unlimited ~120 USD/year)	2 GB Free (5GB ~ \$55 USD/year 10GB ~ \$110 USD/year Unlimited ~ \$165 USD/year)	Unlimited	2 GB of documents +50,000 references
Accessibility	Screen reader compatibility	Screen reader compatibility	- Slated screen reader compatibility on desktop. Occasional issues that can be addressed in Zotero forums . - Third party plug-ins exist for custom keyboard commands and more screen reader accessibility	Text magnification and high-contrast settings	- ADA compliant - Screen reader compatibility	Screen reader compatibility
PDF Annotation and Reader	Yes	No	Yes, with third-party plug-ins like Zotfile	Yes	Yes	No
Extract PDF Metadata	Yes	No	Yes	Yes	Yes	No
Full Text PDF Search	No (Except UBC eLinks)	Yes	Yes (Activate in settings)	Yes	Yes	No
Integration with Word Processors	- MSWord - Google Docs	- MSWord	- MSWord - Google Docs - OpenOffice - LibreOffice	- MSWord - OpenOffice - LibreOffice	- MSWord - OpenOffice - LibreOffice	- MSWord
Mobile App	No	No	Yes (third-party apps, \$1.39 CAD)	No	iOS only	iOS only
Unique Features	- Portable: references stored online - Multi-lingual interface	- Advanced screening tools for systematic reviews	- Flags retracted publications. - Save print books to library by scanning barcode - Open-access PDF search - "Snapshot" feature: automatic screenshot with citation	- Access to Mendeley Research Catalogue - Focus on collaboration	- "Manuscript Matcher" feature for journal recommendations	- Portable: references stored online - "Find Your Best Potential Journal" Feature



CITATION MANAGEMENT TOOLS COMPARISON

Citation Management Tools Comparison: Organizing and Collaborating

Table 2. Collaboration Features

	[More Information]	RefWorks	Legacy RefWorks	Zotero	Mendeley	EndNote	EndNote Basic
Personal profile	Your academic background, publications, and your research interests. Search others' profiles and add them to your contact list or send them a message.	No	No	Yes	Yes	Yes	Yes
Private group	Share your references with specific people such as your supervisor and colleagues. References not publicly visible.	Yes	Yes	Yes	Yes (Free accounts: 2GB storage, limits on how many groups free users can make and join)	Yes	Yes
Public group	Share your references with the public.	Yes (within UBC)	Yes	Unlimited	Unlimited	Yes	No
Annotate shared references	Group members can annotate shared references.	Yes	No	Yes	Yes (in private group)	Yes	Yes
Followers	Follow other researchers, be followed, and see posts and updates.	No	No	Yes	Yes	No	No
Collaboration newsfeed	Be informed of updates in public or private groups through email or embedded message.	No	No	Yes	Yes	Yes	No
Group page and discussion forum	An independent webpage and forum for a group where people can discuss and have conversations in the form of posted messages.	No	No	Yes	Yes	No	No

[Link](#) to the PDF copy of the comparison table



INSTALLATION AND SET-UP

1. Create account
2. Download software (Mendeley and Zotero; not for RefWorks)
3. Install browser extension
4. Install Microsoft Word plug-in (Mendeley and RefWorks; not for Zotero)



USING MS WORD PLUG-IN WITH OFFICE 365

- Word options/Trust Center/Trust Centre Settings/Trusted Add-in Catalogs:

<https://ubcca.sharepoint.com/sites/appcatalogue>

- Word/Insert/My add-ins/My organization

Portal.office.com

- Apps/Word/Insert/My add-ins/My organization



STEP 1 – COLLECT AND ADD REFERENCES

To capture and add references, import:

- Directly from Google Scholar
- From the Library search / Summon
- From online article databases

Some citations may need to be manually added

- PDFs can also be added (manually)



STEP 2 – ORGANIZE YOUR LIBRARY

- Create folders and subfolders
- Add notes, tags, and comments
- Add an attachment (PDF or Image)



STEP 3 – CITING AND GENERATING BIBLIOGRAPHIES

- Add in-text citations and bibliography in MS Word
- Add in-text citations and bibliography in Google Doc
- Citation in an email and presentation
- Select preferred citation style



STEP 4 – SHARE REFERENCES AND COLLABORATION

To share and collaborate:

- Create a Group folder and share your documents



COMMON PROBLEMS THAT COME UP

- ❑ Incompatible plugin
- ❑ CM Software toolbar doesn't appear
- ❑ Debugging broken documents
- ❑ Communication error or non-responsive plugin buttons

REMINDER: CM IS NOT PERFECT

- Remember, Citation Management Software is a helpful tool but not perfect. Ultimately it is up to you to make sure all of your citations are formatted correctly.
- Double check your bibliography! Make sure all relevant and correct information about each source has been added and entered properly.

THANK YOU!



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