Mendeley through Certification Program for Librarians: York University Libraries

Rajiv Nariani, Science Librarian
York University
York University

- Founded 1959
- Located in Toronto, ON, Canada
- 2nd largest University
- 53,000 students
- 7000+ faculty & staff
- 40+ Librarians
- 11 Faculties
- 9 Colleges at YU
YUL & Citation Management Programs Scenario

- RefWorks users: 43,000 +
  - 2500 (2014); 4500 (2013)
- Exit RefWorks: 2015
- Enter Mendeley & Zotero
- Opportunities for Teaching
- Promotion
- Feedback
- Can this be integrated with the Mendeley Certification Program for Librarians?
Mendeley @ YUL

• Faculty had asked about Mendeley in 2012-2013
  – Even prior to exit of RW

• Kinesiology foundation course: 800+ students Jan-Feb
  – Easier to promote. Undergrads love it!

• Survey in Jan-Feb 2015: Faculty & Graduate students
  – Teaching & learning opportunities

• Mendeley team members at York University: 2015
  – Faculty and graduate students in higher attendance
Mendeley is so much better than reworks!
1/8/2015 2:29 PM   View respondent's answers   Categorize as... ▼

I like Mendeley because it has many different citation and bibliography styles, and you can match them with specific journals. I also like that you can just put in the PMID of an article and it will automatically import all of the articles information. However, sometimes Mendeley does not read the PDF's well, for example, NIH articles.
1/8/2015 2:20 PM   View respondent's answers   Categorize as... ▼

Mendeley by far isn't perfect, but has a better sync option than zotero and endnote. It is also the most aesthetically pleasing out of the three.
1/12/2015 10:56 AM   View respondent's answers   Categorize as... ▼

I like Mendeley because it has many different citation and bibliography styles, and you can match them with specific journals. I also like that you can just put in the PMID of an article and it will automatically import all of the articles information. However, sometimes Mendeley does not read the PDF's well, for example, NIH articles.

There are tricky issues in BibTex, it would be great if a library resource person was knowledgeable about it for occasional support. For journal submissions it generally works without problems, but textbook chapters sometimes require special formats that it won't do easily. Sometimes free help from the web exists, sometimes not.
1/16/2015 1:37 PM   View respondent's answers   Categorize as... ▼

Being able to easily import the reference from online databases is key, and Mendeley has a pretty good feature where it can automatically scrape information from an imported pdf file.
1/15/2015 3:36 PM   View respondent's answers   Categorize as... ▼

If you do migrate to another system, please choose one where it will be straightforward to transfer our lab's 1000's of references (with subfolders) over to the new system. Thanks!
1/8/2015 2:23 PM   View respondent's answers   Categorize as... ▼

RefWorks was also supported by my old institution and changing over to a new one just seems like too much of a hassle.
1/12/2015 9:57 AM   View respondent's answers   Categorize as... ▼
Mendeley Certification Program: Why now?

• Developing Expertise
  – Lot of teaching and promotion being done

• Certification Benefits
  – Mendeley certification has helped in assuaging faculty and students concerns
  – Promotion activities get a further boost

• Certification & Professional Development
  – Provides impetus for learning, presenting & writing
# Mendeley Certification Program: What helped?

<table>
<thead>
<tr>
<th>#</th>
<th>Date</th>
<th>Time</th>
<th>Duration</th>
<th>Activity Name</th>
<th>Activity Location</th>
<th>Category</th>
<th>Users Influenced</th>
<th>Librarian Responsible</th>
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<tbody>
<tr>
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<td>15-01-13</td>
<td>10:00 AM</td>
<td>1 hour</td>
<td>Undergard library workshop for Kine1000 assignment which includes Mendeley session, setting up an account and transferring PDFs, installing Word plugin and citing in a Word document</td>
<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
<td>20</td>
<td>Rajiv Nariani</td>
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<td>021 Steacie teaching Lab</td>
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<td>15-01-16</td>
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<td>Undergard library workshop for Kine1000 assignment which includes Mendeley session, setting up an account and transferring PDFs, installing Word plugin and citing in a Word document</td>
<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
<td>23</td>
<td>Rajiv Nariani</td>
</tr>
<tr>
<td>4</td>
<td>15-01-16</td>
<td>2:00 PM</td>
<td>1 hour</td>
<td>ReWorks Migratlon Team: Deciding on the best course of transition from RW to Mendeley &amp; Zotero</td>
<td>503 meeting room</td>
<td>Citation Management Tools users</td>
<td>SQ, WD, RN</td>
<td>SQ, WD, RN</td>
</tr>
<tr>
<td>5</td>
<td>15-01-18</td>
<td>NA</td>
<td></td>
<td>Mendeley - Zotero Migration chart: <a href="http://www.library.yorku.ca/web/research-learn/refworks/zotero-vs-mendeley-comparison/">http://www.library.yorku.ca/web/research-learn/refworks/zotero-vs-mendeley-comparison/</a> ... provided feedback on Mendeley aspects and features</td>
<td>NA</td>
<td>Users of Citation Management Program</td>
<td>SQ, WD, RN</td>
<td>SQ, WD, RN</td>
</tr>
<tr>
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<td>2:00 PM</td>
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<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
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<td>Rajiv Nariani</td>
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<td>021 Steacie teaching Lab</td>
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<td>8</td>
<td>15-01-21</td>
<td>3:30 pm</td>
<td>1 hr</td>
<td>Mendeley session, setting up an account and transferring PDFs, installing Word plugin and citing in a Word document</td>
<td>203 Bethune College</td>
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<td>5</td>
<td>Jacqueline</td>
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<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
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<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
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<td>Rajiv Nariani</td>
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<td>12:00 PM</td>
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<td>Undergard library workshop for Kine1000 assignment which includes Mendeley session, setting up an account and transferring PDFs, installing Word plugin and citing in a Word document</td>
<td>021 Steacie teaching Lab</td>
<td>Structured In-person</td>
<td>30</td>
<td>Rajiv Nariani</td>
</tr>
<tr>
<td>12</td>
<td>15-01-26</td>
<td>1:30 pm</td>
<td>1 hr</td>
<td>Literature search and Mendeley session</td>
<td>102L Steacie Library- Librarian office</td>
<td>Structured In-person</td>
<td>2</td>
<td>Rajiv Nariani</td>
</tr>
</tbody>
</table>

**Additional Information:**

- **January 2015:**
  - Mendeley Certification Program
  - Created Web page with information about citation options
  - Designed online survey of what citation management program(s) are used by graduate students and Science & Health Sci. faculty at York University
  - 102L Steacie Library
  - Structured On-line Feedback
  - Faculty & Students in Science & Health Sciences
  - SQ, RN, WD, HF
LibGuide: Mendeley @ YUL
Mendeley Promotion & Uptake

RefWorks' days are numbered!

York University Libraries is phasing out RefWorks on June 30, 2015 & asking users to switch to Zotero or Mendeley

Attend a Migration Bootcamp

<table>
<thead>
<tr>
<th></th>
<th>zotero</th>
<th>Mendeley</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>May 11, 12:30-2pm OR May 26, 10-11:30am</td>
<td>May 8, 10-11am OR May 19, 2-3pm</td>
</tr>
</tbody>
</table>

- Campus Posters: **Transfer citations** to Mendeley
- Can you teach Mendeley with PubMed, Scopus other databases?
  - Please show group/collaboration feature

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### Zotero vs Mendeley Comparison

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>Mendeley</th>
<th>Zotero</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of Use &amp; Basic Product Offerings</td>
<td>Easy to use</td>
<td>Easy to use</td>
</tr>
<tr>
<td>Includes a Desktop version and a web version compatible with all major web browsers</td>
<td></td>
<td>Work as a Firefox extension or as a standalone version with a connector to Chrome, Safari, Firefox and Opera</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Installation Information</th>
<th>Includes clear instructions &amp; video tutorials for installing and using Mendeley.</th>
<th>Includes a comprehensive guide on how to install and use Zotero</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Installation process:</td>
<td>Create an account.</td>
<td>Create your account.</td>
</tr>
<tr>
<td></td>
<td>Downloaded desktop client for your OS (Mac, Windows, Linux).</td>
<td>Downloaded either Zotero for Firefox or Zotero Standalone.</td>
</tr>
<tr>
<td></td>
<td>Install web importer</td>
<td></td>
</tr>
<tr>
<td>Cost</td>
<td>Basic software is free.</td>
<td>Basic software is free.</td>
</tr>
<tr>
<td></td>
<td>Charges for adding additional cloud storage space</td>
<td>Charges for adding additional storage space</td>
</tr>
<tr>
<td>Storage capabilities of free version</td>
<td>250GB of cloud storage. You have to use Mendeley's cloud storage in order to have a fully functioning account. However, 250GB should provide you with significant space for your collection.</td>
<td>300GB of cloud storage. By not syncing your Zotero account, you can maintain your library of citations and documents on one computer without having to use Zotero's cloud storage. However, once you sync your account with Zotero's servers, the cloud storage limitations will activate.</td>
</tr>
<tr>
<td>How many citation styles does it support?</td>
<td>Both Mendeley and Zotero use Citation Style Language, which offers over 7,000 styles.</td>
<td>Both Mendeley and Zotero use Citation Style Language, which offers over 7,000 styles.</td>
</tr>
</tbody>
</table>
Frequently Asked Questions

• How do we get the Find it at York Link Resolver
• Can I get the call numbers from the library catalogue into Mendeley
• How do I create/show up certain fields in Mendeley record
• Help transfer all my/our lab’s citations from xyz into Mendeley
• Can I use Mendeley Tags to segregate articles for my systematic review
  – Show me the search feature for tags
  – Show me the Group feature in Mendeley
• Is my most often used citation style available?
  – For more tips I also refer to: Mendeley Advisor Program and their Question databank
Premium Account & Faculty Appreciation

• BIG thanks! I was paying X.xx/month to collaborate with the lab. Much appreciated!

• Rajiv - many thanks for all your help. I followed your steps and all is well. Make sure someone in your office knows what excellent support you provided (or tell me who to write to and I will).
  − Thanks Rajiv - so far I really like Mendeley.

• Thank you for the Mendeley workshop. Please reserve a spot for Mendeley Premium Account for me.

• Thanks for sharing this Rajiv. I've taken advantage of this :-)

• Thanks Rajiv. I have installed the premium version.
Mendeley at YUL: Future Plans

• Sharing Research: Using Mendeley Groups to find similar researchers
  – Explore other features in Mendeley

• Act on feedback received from faculty and students and help with smooth transition
  – Presentation & Paper

• Plan to participate in outreach programs across the campus
  – Targeted promotion to undergraduates and graduate students in Sciences & Health Sciences