The Changing Landscape of Citation Management Tools: York University Faculty & Students Survey Results

Rajiv Nariani, Science Librarian

OLA SC 2016

York University
York University

- Founded 1959
- Located in Toronto, ON, Canada
- 3rd largest University
- 53,000 students
- 7000+ faculty & staff
- 40+ Librarians
- 11 Faculties
- 9 Colleges at YU
Discussing today....

• Citation Management Programs at YU
• Mendeley: The Certification Process
• What was done during the Certification
  – Citation Management Survey
• Post-Certification & developments in 2016
Prior to the Certification

- RefWorks @ YUL: 2004 - 2014
- OCUL coming out of subscribed citation management programs: fall 2013
  - Citation Management Team: fall 2014
  - WizFolio, Mendeley, Zotero
- Faculty had asked about Mendeley: 2012-2013
  - Prior to exit of RefWorks
- Mendeley in 20 minutes: Bring your own Computer
  - Mendeley workshops requested
- Scopus & Mendeley (March 2015): Lunch-n-Learn
- Kinesiology foundation course: 800+ students Jan-Feb
YUL & Citation Management Programs Scenario

- RefWorks users: 43,000 +
  - 2500 (2014); 4500 (2013)
- Exit RefWorks: 2015
- Enter Mendeley & Zotero
  - Teaching
  - Promotion
  - Feedback
- Integrate YUL survey into the Mendeley Certification Program
Deadline looming: Libraries will phase out RefWorks access as of June 30

York University Libraries have provided access to RefWorks, a web-based bibliographic tool used to keep track of citations, for many years. Over the past decade citation management software has evolved considerably and today there are a number of sophisticated software options that provide users with comprehensive free accounts.

The libraries have opted to discontinue its license with RefWorks as of June 30 and will instead be supporting two free alternative products: Zotero and Mendeley. York users with pre-existing accounts should have received an email notification about the discontinuation of the Libraries’ RefWorks license in early March 2015.

Free alternatives to RefWorks

Zotero and Mendeley are well-developed and popular citation management products. To learn more about Zotero and Mendeley and determine which citation manager is best suited for your research needs, please check out the Libraries’ comparison chart.
Migration to the new 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

**zotero**
May 11, 12:30-2pm
OR
May 26, 10-11:30am
Register
http://goo.gl/9ltcyw

**MENDELEY**
May 8, 10-11am
OR
May 19, 2-3pm
Register
http://goo.gl/Z1qro7

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

• Mendeley Certification Program: March-July 2015
• 3 Stages of Assessment: Quiz, Features, & Promotion
• Citation Management Survey: Sciences & Health Sciences - Faculty & Graduate Students: Jan Feb 2015 – Oct 2015 – Jan 2016
  • Faculty – LA & PS – AMP & D: Jan 2016
Mendeley Certification Program for Librarians

Become a Certified Mendeley Librarian and secure a Mendeley Premium Upgrade for 500 users at your institution – at no cost.

Mendeley is a free reference manager and academic social network that helps researchers to organize their research, share and discover papers and collaborate with others. Mendeley is used by over 3.8 million researchers worldwide.

Do you often receive questions about Mendeley from your patrons and would like to know more about it? Please read on...

Sign up today!

I love any development programme that is aimed at enhancing Librarians. I am hoping that enthusiastic shelvers like myself who are willing to learn more will be given a chance.

— Librarian from South Africa

This program is for YOU if you’d like to:

- Learn as much as possible about Mendeley so you can confidently train others;
- Be recognized for your efforts by becoming certified & receiving valuable benefits (including material and an account upgrade);
- Receive additional support from the Mendeley team;
- Be able to do all this – at no additional cost to your institution!

Thanks for offering this wonderful opportunity to Librarians! Just what I need!

— Librarian from South Africa

IN A NUTSHELL, the certification program is:

- An opportunity to deep-dive into Mendeley while following a structured, self-paced, self-study program that will take you approximately 15-20 hours to complete;
- Divided into three levels, each level offers a valuable benefit for your library and user community (see chart below);
- Renewable: Each year, upon successful completion of our upgrading requirements, you get to continue your premium Mendeley access at no additional cost.

<table>
<thead>
<tr>
<th>Level</th>
<th>Topic</th>
<th>Benefit</th>
<th>Approx. Time Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Get to know Mendeley</td>
<td>Join &quot;Certified Librarians&quot; Mendeley group with premium-access upgrade, early previews upcoming product releases</td>
<td>2-6 hours</td>
</tr>
<tr>
<td>2</td>
<td>Dive Deeper into Mendeley</td>
<td>Mendeley promotional material (value $250)*</td>
<td>4-8 hours</td>
</tr>
<tr>
<td>3</td>
<td>Promote Mendeley</td>
<td>1 year Mendeley upgrade for 500 users**</td>
<td>2-6 hours</td>
</tr>
<tr>
<td></td>
<td>Annual Refresher</td>
<td>New Mendeley features and various library sciences topics such as altmetrics, open access, collaboration, etc.</td>
<td>4 hours (attendance at 3 sessions, each 60-90 minutes)</td>
</tr>
</tbody>
</table>

*Limited to three Level 2 rewards per institution per year
**Limited to two Level 3 rewards per institution per year

What we provide:

- All the learning materials you need to complete your certification program (includes technical/functional product information, user adoption strategies and planning, teaching guidance and information about other common library sciences topics);
# 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>
<td>1</td>
<td>15-01-13</td>
<td>10:00 AM</td>
<td>1 hour</td>
<td>Undergrad 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 Narani</td>
</tr>
<tr>
<td>2</td>
<td>15-01-14</td>
<td>3:00 PM</td>
<td>1 hour</td>
<td>Undergrad 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>25</td>
<td>Rajiv Narani</td>
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<td>3</td>
<td>15-01-16</td>
<td>11:00 AM</td>
<td>1 hour</td>
<td>Undergrad 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 Narani</td>
</tr>
<tr>
<td>4</td>
<td>15-01-16</td>
<td>2:00 PM</td>
<td>1 hour</td>
<td>RefWorks Migration 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, MR, HF, TN</td>
<td></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></td>
</tr>
<tr>
<td>6</td>
<td>15-01-19</td>
<td>2:00 PM</td>
<td>1 hour</td>
<td>Undergrad 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>22</td>
<td>Rajiv Narani</td>
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<td>7</td>
<td>15-01-20</td>
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<td>Undergrad 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>19</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>
<td>Structured in-person</td>
<td>5</td>
<td>Jacqueline</td>
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<tr>
<td>9</td>
<td>15-01-22</td>
<td>1:00 PM</td>
<td>1 hr</td>
<td>Undergrad 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 Narani</td>
</tr>
<tr>
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<td>15-01-23</td>
<td>10:00 AM</td>
<td>1 hr</td>
<td>Undergrad 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>25</td>
<td>Rajiv Narani</td>
</tr>
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<td>11</td>
<td>15-01-26</td>
<td>12:00 PM</td>
<td>1 hr</td>
<td>Undergrad 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 Narani</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 Narani</td>
</tr>
<tr>
<td>13</td>
<td>January</td>
<td>Jan-15</td>
<td>5 hrs</td>
<td>Designed online survey of what citation management program(s) are used by graduate students and Science &amp; Health Sci. faculty at York University</td>
<td>102L Steacie Library</td>
<td>Structured On-line, Feedback</td>
<td>Faculty &amp; Students in Science &amp; Health Sciences</td>
<td>RN</td>
</tr>
</tbody>
</table>

Created Web page with: Information about migration options
Citation Management Survey

- Survey Monkey
- E-mails sent
- Survey respondents
  - 139 Faculty members
  - 125 Graduate students
York Faculty: Online survey: 2015-16 (Arts, Humanities, Sciences)
125 Science Students

Where from?

61 Science Faculty
Faculty: Primary Citation Management Program used?

- EndNote, 31
- Zotero, 20
- RefWorks, 11
- Papers, 1
- Mendeley, 11
- BibTeX, 9
- Don't use any software, 32
- Other (please specify), 10
Comparing CMPs used by faculty

60 Science Faculty (Jan Feb 2015)

65: Liberal Arts & Prof. Studies Dance (2106)
Most often used?

126 Science Students (118)

60 Science Faculty
Important features: Citation Management Program
LA & PS, Arts, Media, Per. & Design

Science Faculty

Important features?
Important features?

Science Faculty

Science Students
Offer info sessions/tutorials, pls.? 
1/20/2016 2:09 PM  View respondent's answers  Categorize as... ▼

These two work well for me. 
1/18/2016 10:21 PM  View respondent's answers  Categorize as... ▼

Please support endnote there's nothing like it. 
1/18/2016 6:27 PM  View respondent's answers  Categorize as... ▼

I used Refworks before but it was discontinued by York Library. 
1/18/2016 10:56 AM  View respondent's answers  Categorize as... ▼

York should stop shifting the citation system that they support. It is a lot of work to move citations from one system to another. 
1/17/2016 6:25 PM  View respondent's answers  Categorize as... ▼

I would like training on how to use citation programs. 
1/16/2016 6:33 PM  View

One thing I don't like about Zotero (compared to Endnote, which I used before) is that I have not been able to define my own bibliography style. It's fine to use existing templates, but some publishers have other requirements for which there is no template, and in Endnote it was very easy to simply define a new style (e.g. based on modifications to an existing one). 
1/16/2016 12:50 PM  View respondent's answers  Categorize as... ▼

Just that I went from RefWorks and then had to switch to Zotero, which I have hardly used. I preferred RefWorks. 
1/15/2016 5:44 PM  View respondent's answers  Categorize as... ▼

I have used Endnote for over a decade and have a love hate relationship. For all of my personal work I will likely never abandon it but I use Zotero for collaborative work and I have downloaded Mendely to give it a try. It seems nicer on mobile devices and if we can get a free upgrade it might be worth it for future collaborative work. 
1/15/2016 5:32 PM  View respondent's answers  Categorize as... ▼

I used to use endnotes but stopped when york stopped supporting it. 
1/15/2016 5:25 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... ▼

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... ▼

I love Zotero! It meets all of my needs for bibliographic software. I love that is free and created by scholars in the Humanities.

1/18/2016 10:29 AM  View respondent's answers  Categorize as... ▼
LibGuide: Mendeley @ YUL
Bibliographic Citation Management with Mendeley & Zotero (English Version) at Frost Library

Feb 8, 2016, 12pm-1pm

In this workshop, you will learn how to create a personal reference database with Zotero and Mendeley, and how to organize your references and instantly create a bibliography in the citation style of your choice.

Location: 207D Frost Library, Glendon campus
Sponsor: Leslie Frost Library
Email: frostre@yorku.ca
Phone: 416-487-6729
URL: http://www.library.yorku.ca/web/ask-serv

Bibliographic Citation Management with Mendeley & Zotero at Frost Library

Feb 10, 2016, 12pm-1pm

Dans cet atelier vous découvrirez : Comment créer des bases de données bibliographiques personnelles en utilisant les logiciels Zotero et Mendeley, et créer une bibliographie en un ou deux clics dans un style choisi (ex. APA, MLA, Chicago).

Location: Bibliothèque Frost (campus Glendon), salle 207D
Sponsor: Bibliothèque Leslie Frost
Email: frostre@yorku.ca
Phone: 416-487-6729
URL: http://www.library.yorku.ca/web/ask-services/instructional-workshops/
Appreciation for Mendeley (after workshops)

I use Mendeley and I find that it is very easy to use. I really appreciate that York offers workshops on how to use it as well. Another great feature is that it uses the document pdfs so I can highlight directly on Mendeley.

10/15/2015 4:54 PM  View respondent's answers  Categorize as... ▼

My favourite parts of Mendeley is the ability to add notes, highlights, and folders, as well as create a bibliography automatically on Microsoft Word.

10/15/2015 1:51 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... ▼

Mendeley is so much better than refworks!

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... ▼

A pure citation manager makes as much work as it saves, because then notes on the book or article have to be stored somewhere else. So I mainly use AskSam, which is less adept with the bibliographic side but keeps notes and citation together.

1/15/2016 4:43 PM  View respondent's answers  Categorize as... ▼
Frequently Asked Questions

• Help with citation management programs?
• Find it at York Link Resolver
• Books from the library catalogue into CMP?
• Show up certain fields in Mendeley record?
• Help transfer lab’s collected citations into Mendeley
• Mendeley Tags & systematic review study
• Is my most often used citation style available?
• BibTeX and Mendeley
• How do I transfer all my PDFs in various private groups from EndNote to another CMP?
Post Certification

• Librarians conducting more classes

• Promotion during Graduate Students Orientation

• Distributing Mendeley Premium Accounts
  – F.H. & F.Sc. and now across faculties

• Professional Development
  – BrightTALK, Charleston, OLA, workshops
Students: Free stuff!!
Post-Certification: Premium Account

• 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.
  - 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.
Correlating Mendeley LibGuide Statistics

Mendeley (view/edit)

23 pages, 5060 views

Views

Promotion: social media & Mendeley visit

Mendeley-Scopus Lunch-n-learn

Fac.Health e-mail

Glendon Class

FSc e-mail

Dear Faculty of Health members,

As you may recall, we no longer subscribe to the RefWorks bibliographic management software, and are now using Mendeley in health, engineering and the sciences and Zotero in the humanities and social sciences. These are freely available for anyone to use.

At Steacie Library, Rajiv and I have completed the Mendeley Advisor Program, and that has made our institution eligible for 1000 upgraded accounts. We felt that Health, Science and Engineering Faculty, Researchers and Graduate students who are involved in research should have the first opportunity to upgrade their accounts before the end of this year.

Please forward this e-mail to your students and co-researchers as well so they can set up their Mendeley accounts. Please follow the Quick Steps to set up a Mendeley Web account with your York University e-mail, and download Mendeley Desktop. The guide to follow is at: http://researchguides.library.yorku.ca/mendeley. Once that is complete, please click this Upgrade link to obtain the Mendeley Premium account: www.mendeley.com/promo/yrku-15. It is only valid for 1,000 users for the remainder of 2015. Anyone wishing to use this Upgrade Link must have a Mendeley account registered with their institutional email address.

An existing user can easily update their sign-in e-mail address by going to My Account and updating the profile information on Mendeley Web.

A Mendeley Premium account includes the following benefits:

- Increase in personal library size for each user, from 2 GB to 5 GB
- Increase in group storage, from 100 MB to 20 GB
- Increase in private group size, from 3 to 25 members
- Increase in number of private groups, from one to unlimited

All the best,
Llo

Ilo
Kathryn Maimets, Science Librarian
Head, Steacie Science and Engineering Library
York University, Toronto, ON
ilo@yorku.ca

----- Forwarded by Lavina Sadhwani/YorkU on 09/28/2015 10:52 AM -----
BrightTALK, Charleston 2015, OLA 2016

Learning Mendeley through Certification Program for Librarians

Mendeley Certification Program for Librarians was launched in February 2016 and has received enthusiastic support from over 800 participants worldwide. The Certification Program offers an flexible, 100% online, self-paced learning structure in a 3-level program for librarians to learn about Mendeley functionally, technically, as well as the optimal user roll-out method at their institutions. The program is designed to not only bring updated information about the product to new users but also best practices to seasoned librarians. This webinar will feature librarians from both Helsinki University and York University and their experiences and learning through the program as well as applying Mendeley in their own environments and library strategies.

Recorded Aug 19 2015 56 mins

Presented by
Tuula Kortehon and Katja Kunttu of Helsinki University and Rajiv Narani, York University

Presentation preview:

Mendeley Institutional Edition: Customer Roadmap Update
Mendeley Institutional Edition @ Massachusetts Institute of Technology
Librarians deploying Mendeley – the new generation researcher workflow tool
Mendeley at ETH Zürich – looking back and ahead

Thursday, November 5 2:25pm - 3:10pm

Mendeley launched a Certification Program for Librarians earlier this year and it has received enthusiastic support from over 800 participants worldwide. The Mendeley Certification Program for librarians offers a flexible, 100% online, self-paced learning structure in a 3-level program for librarians to learn about Mendeley functionally, technically, as well as the optimal user roll-out strategy at their institutions.

Rajiv Narani, Science Librarian, from York University will share his feedback and experience as a participant in the Certification Program. He will discuss the results of the citation management survey completed at York and how the knowledge gained by participating in the program enabled the librarians to fit Mendeley within their overall strategy and objectives. Eventually, participating in the certification program helped in strengthening relations with science faculty and students.

Speakers
Yath Ithayakumar
Mendeley Market Development Manager, Elsevier

Rajiv Narani
Science Librarian, York University
Rajiv is a Science Librarian at the Steacie Science & Engineering Library, York University. His subject areas include Biology, Kinesiology & Neuroscience. He is currently working on projects related to e-books, mobile devices, citation management programs & open access publishing.

Thursday, November 5, 2015 2:25pm - 3:10pm
Ashley Room, Courtyard Marriott (125 Colhoun Street, Charleston, SC 29401)
Concurrent, PD: Professional Development
Mendeley at YUL: Future Plans

• Similar research & researchers, Altmetrics
  – Usage at York University

• Uptake after distributing Mendeley Premium Account
  – Gathering more faculty and student responses

• Selective outreach
  – Promoting to graduate students & faculty in LA & PS
Mendeley Certification Program: Need for it?

• Refresher
  – Maintaining Premium Accounts
  – Relevance of material covered

• Why continue or have similar programs?
  – Developing a relationship
  – Today’s environment
  – New ways of using this program