

# INTRODUCTION TO CITATION MANAGEMENT



WINTER

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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

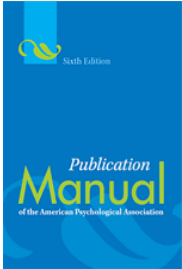
## WORKSHOP

- Citation Management (RefWorks, Mendeley, RefWorks)
- Dissertation Thesis Formatting
- Data analysis software support (NVivo, SPSS)
- Digital Core Skills & GIS

## ONE-ON-ONE CONSULTATION

(over Zoom or by e-mail)

# WHAT YOU CAN DO? – 4 IMPORTANT FEATURES



- 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

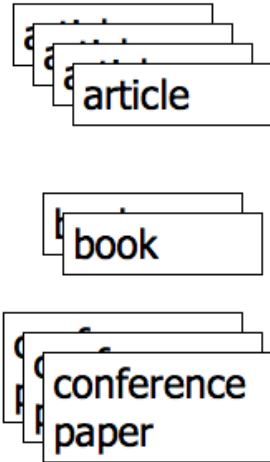
Oyo, Benedict, and Billy Mathias Kalema. "Massive open online courses for Africa by Africa." *International Review of Research in Open & Distance Learning*, vol. 15, no. 6, 2014, pp. 1-13. <http://www.irrodl.org/index.php/irrodl>. Accessed 5 May 2015.

## 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>

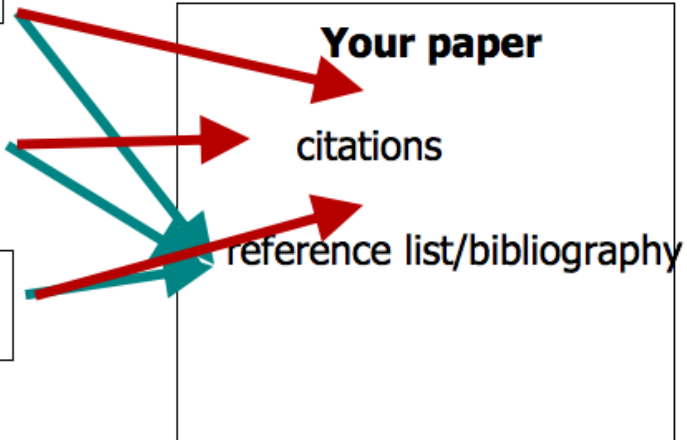
# WHAT IS THE PROBLEM?

Your topic:

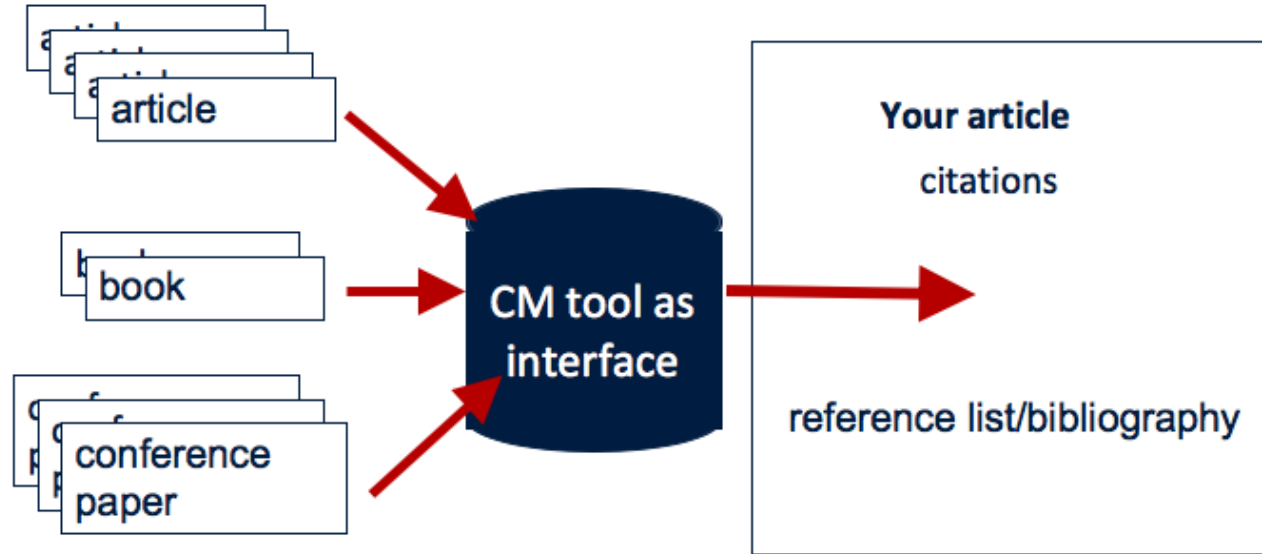


## Creating Citations Manually

- Lots of typing
- Lost references
- Mistakes
- Static (neither changeable nor updateable)
- Too many details in styles



# 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

	Zotero	Mendeley	Endnote	RefWorks
Price	Free	Free	\$250 USD (Student version available for \$150 USD)	Free for UBC students/faculty/ alumni; \$100 otherwise
Free space (as of Oct. 2019)	300 MB (2GB ~ \$1.67/month)	2 GB (5 GB ~ \$4.99 /month)	Unlimited	Unlimited
PDF annotation and reader	No (use plug-ins like Zotfile)	Yes	Yes	Yes
Snapshot	Yes	No	Yes	No
Retrieve PDF citation data	Yes	Yes	Yes	Yes
Full Text PDF search	Yes (activate in settings)	Yes	Yes	No
Mobile	Yes (with 3 <sup>rd</sup> party apps)	Yes	iOS only	No (Mobile interface)



# CITATION MANAGEMENT TOOLS COMPARISON

	Zotero	Mendeley	EndNote	RefWorks
Personal Profile	Yes	Yes	Yes	No
Private group	Unlimited (groups & members)	Yes (Free accounts: 2GB storage, <a href="#">limits</a> on how many groups free users can make and join)	Yes	Yes
Public group	Unlimited	Unlimited	Yes	Yes (within UBC)
Social network (follower & following lists)	Yes	Yes (has a like button)	No	No
Collaboration newsfeed	Yes	Yes	Yes	No
Group page and discussion forum	Yes	Yes	No	No



# INSTALLATION AND SET-UP

## Download and install RefWorks:

- ☐ Download and install MS world plugin
- ☐ Add the browser extension (for standalone version)

## Set up your RefWorks account:

- ☐ Set your RefWorks account



# 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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