

WolfWorks : Reference Management Software Transcript

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Introduction 00:00-00:36

This presentation is going to cover some of the main points about why you might want to use reference management software, what the different types of software are, what the main things that it can do, and then in a series of other videos we've covered how to actually go about installing the software, downloading references into it managing your library and then also citing things that are in your library and building a bibliography automatically in Word.

What is it? 00:42-01:56

So what is reference management software quite simply it's a single searchable database for you to organize references and this might be things that you've read, things that you're planning to read, it's a way of organizing your notes as well and you can keep those notes alongside your references or as separate documents and you can download other documents as well to that database. So something like a series of photographs if you've taken photographs in an archive or out in the field you can organize them in that way as well and everything is in a single place and you can search any full text that you put into there. You can use it as little or as much as you like so you might just want to use it as a storage facility but one of the main things is being able to generate citations and bibliographies in Word documents as well that's one of the main reasons that people use it but you don't have to so you can have use it in a light touch way or be far more engaged with it. I suppose finally the thing to stress is it really doesn't matter which bit of software you use. In this presentation and our other documentation we refer to two free bits of software: Zotero and Mendeley, but there are lots of others out there as well such as Endnote.

How do I use it? 01:58 – 04:55

A big question maybe you'll have then is how do I use it how do I get things into my library? So the first thing is about downloading information. This is the bibliographic information: the author, the title, the date of publication, which edition it is if it's a book or which page numbers if it's a journal article. And there are lots and lots of different ways to download things. So first of all if you've got

lots of pdfs on your desktop you can start by organizing those you can simply drag and drop them into the software then it'll automatically go online and find that bibliographic data for you. You can install a bookmarklet which will then download things from the web. So if you're in a catalogue, something like iDiscover, you can download records from there or from a journal database, if you're reading a text, an ebook, you can download information that way but also from lots of other websites as well so if you're on BBC online and you find something that's useful for your research if you're on YouTube and watching a video this little bookmarklet will take information for whatever you're looking at and if there is full text available it'll download that as well. Failing that you can always automatically generate a reference as well so if you're looking at something archival and there just isn't a bibliographic reference for it that's online then you can create that, you can build your own references as well. The next thing, as I mentioned before, is that you can take notes. Now this is totally optional but there are note taking functions in both Zotero and in Mendeley. So you can take notes alongside actually reading something and the nice thing that is then it's all stored together: your reference is there your notes are there their full text searchable, you can add tags and things into your notes and to references as well so you can find things again quickly.

Alternatively if you like to take your notes on a Word document you can attach that to a reference in your library as well so you can easily find the notes you know you have to have things in lots of different folders in lots of different places on your computer. The really big thing for me though is the way it integrates with Word. So this means that when you're writing an essay or a dissertation or your thesis you can cite things that are in your library it will automatically insert a citation in your preferred style into your text and then you can generate a bibliography from everything that you cited or you can add additional items as well if you haven't actually cited them but you've used them in creating your text. And this will save you so much time because you don't have to worry about formatting there are literally thousands of referencing styles that you can download and make sure that your references fit the one that is accepted by your department. It'll save you time looking for references. If you delete a bit of text from your essay or your thesis and there are several references in it simply refresh your document and your bibliography is updated to reflect what is in your text at that time. So it saves you a lot of effort at the very end when you're writing up and then you don't find that you're going to have to set aside time to go out there and find references and think about how you're going to format them.

Similarities and differences 04:59-08:35

So what are the similarities and differences in the main they're really really similar. It really doesn't matter which one you actually decide to use but it's perhaps worth covering a few different points so in terms of access they're both free to use they both have a web and desktop version um which means that you can be working on it anywhere doesn't matter which computer you're working on, you know if you're working in a library somewhere, if you're working at home, you're working on different devices then you can just sync your library and it will be updated automatically. Likewise if you can't always be online the desktop version is really really useful and then you can just update it next time you go online. Probably worth noting that Zotero doesn't have a mobile phone app although because it is open source software there are lots of different apps out there that you can use to to make the use of your Zotero data. Also that Zotero was designed for Firefox but actually it works on all different browsers as does Mendeley in terms of web storage: Mendeley does have more storage so it has about two gigabytes versus Zotero's 300 megabytes but both of them have a premium service that you can buy more storage from. However you know if you're thinking about

uploading a lot of high quality images to your database then you might want to think about using Mendeley. The interface is almost identical and they both look quite like email clients in that you have storage on the left hand side, in the central pane you have the main information and the list of documents that you've got in there and then on the right hand side you can edit that information. So you've got the bibliographic data, you've got your notes function, any tags that you want to add there so that's where you kind of interact with each individual item. It is worth noting though that Zotero has lots more reference types than Mendeley so if you are working in the Arts and Humanities, if you're working in the Social Sciences and you want to have a lot more distinction between say not just books and journal articles but also things like letters, web recordings, blogs, podcasts, newspaper articles, letters, photographs then possibly Zotero is the one to consider. Both if they allow you to share libraries and create a shared library that lots of people can contribute to, which is really important if you're working in a research group. If there's a particular topic that you're working on you can all add entries. Mendeley was designed to be more collaborative so it has few more features such as social media elements, you can network with others, you can see what citations they're compiling and there's a crowd-sourced catalogue as well that you can search in Mendeley. In terms of ownership there is quite a difference. I've already mentioned that Zotero is open source so it's been created by a very wide community of software developers who are continually trying to update it and fix bugs in it and add new functionality. Mendeley is owned by Elsevier, which is a large journal publisher and so it's probably worth considering the fact that that's a for-profit company although there's no suggestion that the free version will be taken away in the short term. And finally pdf functionality, I suppose is one big difference. In Mendeley you can interact with each pdf within the Mendeley screen. So you get tabs across the top, you can then switch between different pdfs while still within Mendeley, you can add notes to them, you can highlight them and all those changes will be saved in Mendeley rather than having a series of separate pdfs that are scattered all over your compute. So depending on how much you work with pdfs you might want to experiment with that functionality before committing to one piece of software or the other.

Contact 08:35-09:10

Thank you very much for listening uh if you've got any particular questions then please do make sure that you get back in touch with us you can either do that with my email academic-skills@wolfson.cam.ac.uk or you can contact me on [Microsoft] Teams.