Learning Mendeley through Certification Program for Librarians

Rajiv Nariani, Science Librarian
York University
Charleston 2015

Yath Ithayakumar, Mendeley
What is Mendeley?

Mendeley is a reference manager allowing you to manage, read, share, annotate and cite your data and research papers...

... and an academic collaboration network with 4 Million users to connect like-minded researchers & discover research trends and statistics.

... forming a crowdsourced database with a unique layer of social research information and an Open API.
Mendeley’s Three Key Values

“Drives Researcher Productivity”
Reference manager

“Enables Collaboration and Knowledge Sharing”
Research Network & Groups

“Creates Additional Insights & Build Apps”
Research Data & API
Multi-platform & multi-browser accessibility

Desktop

Web
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

York University is helping to shape the global thinkers and thinking that will define tomorrow. York is Canada’s third largest university, with a commitment to excellence which reflects a rich diversity of perspectives and a strong sense of social responsibility that sets us apart.

York U At A Glance

About York U

York U is the 2nd largest university in Ontario, 3rd largest in Canada
280+ university partnerships across the globe
$1 billion operating budget

Our Community

47,000 undergraduates
6,000 graduates

Our campuses

Keefe Campus
Located 30 minutes from downtown Toronto, the Keefe campus offers a rigorous academic foundation balanced by real-world experiential education. Our 53,000 students, from across the world, are enrolled in 160+ undergraduate and 99 graduate programs.

Glendon Campus
Set on the historic Wood family estate, the Glendon campus is a lush parkland in the heart of Toronto offering an intimate learning community. Home to 2,700 students, Glendon specializes exclusively in the liberal arts, and is the only campus in Canada to do so in more than one language.

Academic Excellence

11 Faculties
5,000 courses, 260+ undergraduate and graduate degree programs
12,043 degrees granted in 2014
The Schulich School of Business ranked first among Canadian schools in The Economist
Home to Canada’s largest business law program

Osgoode Hall Law School internationally renowned as one of Canada’s largest and most distinguished law schools
Home to Canada’s only Space Engineering program
Largest psychology program in North America
The Disaster & Emergency Management program is the leading program of its kind in

98% of professors have the highest educational qualification in their field
Discussing today….

• Prior to the Certification
• During the Certification
• Post-Certification
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
- Tried to integrate activities 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/9ltycw

**Mendeley**
May 8, 10-11am
OR
May 19, 2-3pm
Register
http://goo.gl/Zlqro7

- 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
• Teaching and promotion
• Professional Development: SLA 2015
## 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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<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 Nariani</td>
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<td>021 Steacie teaching Lab</td>
<td>Structured in-person</td>
<td>23</td>
<td>Rajiv Nariani</td>
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<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>Meeting with Librarians, Tech team and AUL (Library &amp; Information Services)</td>
<td>Citation Management Tools users</td>
<td>SQ, WD, RN, MR, HF, TN</td>
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<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>Structured On-line</td>
<td>Users of Citation Management Program</td>
<td>SQ, WD, RN</td>
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<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>
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</table>
Frequently Asked Questions

• Find it at York Link Resolver
• Can I get books from the library catalogue into Mendeley?
• How do I create/show up certain fields in Mendeley record?
• Help transfer lab’s collected citations into Mendeley
• Can I use Mendeley Tags to sort articles for my 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 Mendeley?
Citation Management Survey

- Jan-Feb 2015
- Survey Monkey
- E-mails sent
- Survey respondents
  - 61 Faculty members
  - 126 Graduate Students
126 Students

Where from?

61 Faculty
126 Students (118)

61 Faculty

Most often used?
What’s Important?

126 Students

61 Faculty
Citation Management Survey: What did they tell us?

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... ▼
Appreciation continues....

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... ▼
Post Certification

• Librarians conducting more classes
  – Two and spreading
• Promotion during Graduate Students Orientation
  – Biology & Kinesiology
• Distributing Mendeley Premium Accounts
  – F.H. & F.Sc.
• Professional Development
  – BrightTALK, Charleston, OLA 2016
Mendeley: Citation Management Workshop

Sep 25, 2015, 11am-12pm

- Experience the power of Mendeley and see how it can help with your citation management needs.
- Create in-text and final bibliography in APA, MLA, The American Journal of Clinical Nutrition or any other output style with one click.
- Create and manage private groups to share your work with lab members.
- Use Mendeley to find other researchers in your field.

Location: 021 Steacie Teaching Lab
Sponsor: Steacie Science & Engineering Library
Posted by: Rajiv Nariani
Web Site: http://www.library.yorku.ca/web/steacie

Bibliographic Citation Management with Mendeley & Zotero

Oct 27, 2015, 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 (e.g. APA, MLA, Chicago).

Location: 207D Frost Library, Glendon campus
Sponsor: Leslie Frost Library
Posted by: Dany Savard

Post Certification: English to the French Campus!
Students: Free stuff!!
Correlating Mendeley LibGuide Statistics

Mendeley (view/edit) Mendeley
23 pages, 5060 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/yorku-15/ It is now 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 email 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,
Ilo

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

----- Forwarded by Lavina Sachwani/YorkU on 09/28/2015 10:52 AM -----
Learning Mendeley through Certification Program for Librarians

Mendeley Certification Program for Librarians was launched in February 2015 and has received enthusiastic support from over 800 participants world-wide. The Certification Program offers an flexible, 100% on-line, self-paced learning structure in a 3-leveled structure 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 learnings through the program as well as applying Mendeley in their own environments and library strategies. …less

Recorded Aug 19 2015 | 58 mins

Presented by
Tuija Korhonen and Katja Kunttu of Helsinki University and Rajiv Nariani, York University

Presentation preview:

[Logo of Mendeley and Elsevier]

[Logo of York University]
Mendeley at YUL: Future Plans

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

• Uptake after distributing Mendeley Premium Account
  - Gathering more faculty responses

• Selective outreach
  - Promoting to graduate students & faculty in Humanities & Social Sciences
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
  – Uptake in the Sciences & Health Sciences