

NACADA Module Transcript

Using Mendeley and Zotero – Live Demo

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Hey everyone! My name is Keith Proctor. I am the Associate Director of the University Advisement Center here at Brigham Young University. I am also a member of the NACADA research committee and recently I was able to record a module that described using both Mendeley and Zotero as tools to facilitate collaborative research and writing. And we thought it would be a good idea to record this module so that I could do a live walkthrough of using these tools most effectively. So what I would like to do is show you both the web-based version and the desktop versions because I feel like the desktop versions offer some things that are a little easier than dealing with the web-based version.

So to get started, what I would like to show you is the Mendeley web interface. So mendeley.com is the main website and if you don't have an account yet you can create an account here or you can click sign-in once you have created an account which I have. So I'll just go ahead and sign in, and when you do sign in, the main page it takes you to is your feed page and the feed page is where you see updates for all of the groups that you're in or anybody else that you follow and all the things that they're doing. For purposes of this tutorial, I want to go to "Groups" because I want to show you how to create a writing and research group here in Mendeley.

You can see I already have a couple of groups set up, but in order to create a new group you can click on "Create a new group." And let's say that this group is going to facilitate research about college student learning failures. That happens to be my personal area of research. So I'll just call this group "Learning Failure" and then where it says "Describe your group," you want to add maybe a little tagline that's a little bit more descriptive than just your title so "Focus on college student learning failure experiences" and then for "Choose a discipline," depending on your methods that you're using in your writing and research or your main body of literature you can select one of these different areas.

I'm going to go with Social Sciences that's where a lot of the education research, psychology research, academic advisement research tends to be located and then down here I am going to make this group an invite only group so that it's not all open to the public and we can have some time to gather our research together and to start writing drafts back and forth to each other. So with that I'll go ahead and click on "Create." That will get the group created and as soon as it's made then you can click on "Invite members" over here and you can do... CAPTCHA, which I really don't like doing... But it is what it is... and yes there's lots of cars (especially in that bottom corner picture). And we're good.

So go ahead and enter the email addresses and then click invite. Once you do that, then an email is sent off to your collaborators and once they accept the invite, it prompts them to create a log-in and password with Mendeley and once they go ahead and log in they are automatically added to your new group. So once you have other members in your group, you can click on members and see them here, and then "documents" is what I want to focus on next.

So how do we get documents into our collaborative group?

We want it to be able to share all of the research resources that we have amongst our entire group and so the way this is done is you will go into your library here. I've been using Mendeley for while so I have quite a few documents here and I have them organized by folders. So you can create folders and drag and drop references in and whatnot, but I will click on this "academic failure" research folder that I've been working with and I can just select individual documents, or I can select all of my documents and then I'll go ahead and click "add to" and I just click on "groups" and select my new "learning failure" group. Share.

And so now all of these documents get added to a group folder so that everybody in that group can see these resources. This is super helpful. Instead of everybody working from their own kind of research base, we can all be on the same page. Now if I go down here to where it says "groups," I can click on my "learning failure" group and there are all those files. I can also go back to "groups" and then click on my "learning failure" group (and the computer's a little slow today, but that's ok). Once it opens up, I can go to "documents" and now I can see those are all added in here, which is super helpful.

And I can also view group documents in my library in the exact same view that I showed you, in that folder right there. Now there are also limits to how many documents you can share in Mendeley with other Mendeley users. That's where the Zotero tool becomes very import. SO, if you click, if you go to www.zotero.org – now, I recommend downloading the desktop version of Zotero. I just, for like moving resources back and forth between Zotero and Mendeley, the desktop version just really excels. So, I'm going to show you the desktop version of this. You can also use the web-based version of this, which I do when I'm collecting resources.

Zotero is a fantastic bibliographic manager. It just handles volume really well. It also has some really nice browser add-ins that allow you to automatically just grab academic references on a page and pull them right in your bibliographic manager and if document links are there on the page, you can also just import those as well. It's a really neat tool and its open source and free. But in terms of like moving things between Zotero and Mendeley, I just found that the Zotero desktop version works better. After you click on the download link here, you'll download Zotero to your desktop, and install it. That's all pretty straight forward. So I'm gonna go ahead and switch over my sharing screen and I'm going to go to Zotera in just a second.

So once you set up Zotero Desktop, this is what it looks like. You can see it's very similar to the Mendeley interface where you have your folders and kind of your organizational structure for your articles on your left, main viewer in the middle, and then some details on individual articles on the right. So I actually do have the Learning Failure Research folder here, and there's not very many articles in here but some of these are different articles than what I already have in Mendeley so what I'm going to do is click here and do a Control A where I select all of these. I'm going to go to "File," "Export Library," and this has pre-selected the RIS format, which is a great format. I'm also going to select the "Export Files" checkbox there so that any of my PDFs that are linked to these references also get exported.

I'll go ahead and click on "OK," it opens up a new window. And I'm just going to call this "Export." And I like to save things to my desktop because it makes it easy to find unless your desktop is really cluttered in which case, I highly recommend that you organize it. So I'll go ahead and click "save,"

exporting items, and it's done. It doesn't take a whole lot of time for just a few files, if you want to do export of your entire library, it might take a few minutes. But it's still, Zotero is capable of doing that.

So now I'm going to go and switch back with my share back to Mendeley on the desktop and show you how to import those. So I'm in Mendeley now and I want to go to my Academic Failure folder. I could add it here or I could just add it straight to my group. So I go here to my Learning Failure group I'll go ahead and click here, I can see "Add Folder," "Group Details" so you can't add it there. But I can go to "Add" to and you can see now "Import RIS." That's the format that we exported from Zotero. So I'll go ahead and click there and there's my export folder. Now it's going to show up as a folder, not as a file because remember, I exported the attached files as well.

So inside the "Export" folder, you'll see my RIS file, which is what I need, and then those exported files separately. So I click on my RIS file, click "Open" and then it says it will go to all documents so that's fine. So you can see up here, it's importing, it's importing: successfully imported 132 documents. So I can go and sort by "Added (newest)" and scroll down, and I can just get all of these, and I can actually drag and drop them into my Learning Failure group as well which is pretty slick. And then I'll go to the next page here and I can see that date stamp here, that's what I'm going off of. And then we've got that into Learning Failure, as well. And then we should be pretty close to the end, yeah. So those are some of the other ones. So, we don't need those two, so I'll move those ones into "Learning Failure." And now if I go into my "Learning Failure," I now have 165 documents in this shared folder whereas before, I probably could have only, I would have been limited in terms of how many I could share.

So this is a really great way to move a lot of resources into Mendeley, overcoming some of those sharing limits that exist and Zotero's a great way to keep your bibliographies up-to-date. It also has a new built-in citation generator so that it's really easy to cite and to create reference pages as well at the end of your article. This is a great way to share all the resources, get it together, everybody's on the same page, everybody in the group is seeing the same body of research, and then it becomes a lot easier to kind of divvy up work if you're going to do an annotated bibliography approach or just some kind of review process for the literature. And then once you've got the writings and you start writing drafts, you can share those as documents within your group as well; send those back and forth for comments.

So Mendeley and Zotero are really powerful tools for facilitating this collaborative research and, as we mentioned in the other module, there's going to be some great resources coming out on the NACADA research channel, the website, that will help facilitate your research further, give you more information about different methodologies and approaches to doing research on academic advising and it's just a really exciting time to start collaborating with people within your university, across multiple universities, and even across the entire world, so I challenge you to find people that you can collaborate with to begin researching a topic of interest or writing a piece for one of the NACADA publications. Good luck with that! Thank you.