

Citation Management Tools: EndNote, Zotero & Mendeley

SIL Training

Comparison of Basic Features and Functions

Basics	EndNote/EndNote Web	Zotero	Mendeley
Cost	SI has institutional license, so free to SI staff & affiliates	Free basic account (fee to upgrade)	Free basic account (fee to upgrade)
Storage	"Unlimited" local storage (stored on your computer drives). Limited to 50,000 citations/2 GB in EndNote Web	Free account = 300 MB of Web storage (\$20/year for 2 GB, \$60/year for 6 GB, etc.)	Free account = 2 GB of Web storage (\$55/year for 5 GB, \$110/year for 10 GB, \$165/year for unlimited)
Mobile Apps for iPad, iPhone, Android, smart phones	No, but you can access EndNote Web on devices via browser	Yes, created by 3 rd parties. See http://www.zotero.org/support/mobile for info	Yes, Mendeley created its own iPad/iPhone app; Android apps (Scholarley, Droidley) created by 3 rd parties
Citation/bibliography plug-ins for word processing programs	Yes – for MS Word, OpenOffice, Apple Pages	Yes – for MS Word, OpenOffice	Yes – for MS Word, OpenOffice, LaTeX
Types of items that can be saved	Book/article citations, PDFs, webpages (URLs only)	Book/article citations, PDFs, webpages (URLs + snapshots), video, images	Book/article citations, PDFs, webpages (URLs + snapshots), video, images
Tools to help capture online items	Yes, in EndNote Web – download the Capture button	Yes – icons shown in Internet browser bar	Yes – download the Web Importer bookmarklet
Accessible from more than one computer	Yes, for EndNote Web.	Yes – Web-based and can download Zotero Standalone on multiple computers	Yes – Web-based and can download Mendeley Desktop on multiple computers
Share your library with others	Yes, in EndNote Web (citations only, not full-text documents)	Yes	Yes
Pros	<ul style="list-style-type: none"> - Basically no limits on storage space with Desktop version. - Many research databases offer Export options specifically for EndNote. 	<ul style="list-style-type: none"> - User-friendly, esp for saving online info. Can auto-detect items to save in Firefox. - Unlimited # of private or public groups. 	<ul style="list-style-type: none"> - User-friendly. - Free searchable online library of papers & citations. - Good tools for adding annotations to PDFs.
Cons	<ul style="list-style-type: none"> - Not as user-friendly, kind of "old school." - Not able to save webpage snapshots. - Limited sharing options. 	<ul style="list-style-type: none"> - Very limited storage space w/free account. - More functional on Firefox than other browsers. 	<ul style="list-style-type: none"> - Only 1 private group (3 members) w/free acct. - Still mainly popular in scientific communities.
Good choice if you want to:	Focus just on your own library of research resources.	<ul style="list-style-type: none"> - Work in multiple groups and freely share resources. - Easily save webpages + snapshots. 	<ul style="list-style-type: none"> - Communicate online with colleagues. - Work in a small group w/ good collaboration tools.

Useful Links

EndNote video tutorials: <http://www.youtube.com/user/EndNoteTraining>

EndNote X6 Online User Guide: <http://endnote.com/if/online-user-manual>

Zotero video tutorials: https://www.zotero.org/support/screencast_tutorials

Zotero Quick Start Guide: http://www.zotero.org/support/quick_start_guide

Mendeley video tutorials: <http://www.mendeley.com/videos-tutorials/>

Mendeley Get Started Guide: <http://www.mendeley.com/getting-started/>

My 3 blog posts on Zotero and Mendeley: <http://blog.library.si.edu/category/library-hacks/>

Other helpful comparison charts, compiled by university libraries:

MIT: <http://libguides.mit.edu/content.php?pid=55486&sid=427307>

Penn State: http://www.libraries.psu.edu/psul/lls/choose_citation_mgr.html

UW-Madison: <http://www.library.wisc.edu/citation-managers/comparison.html>

More Detailed Descriptions

All three programs listed below help you to create/maintain a personal library of research resources and to add footnotes/citations/bibliographies to your own papers. Other features vary by program.

EndNote

Version X6 is available for free download via OCIO. Find it by going to Prism and entering EndNote in the search box in the upper right corner, or go directly to <http://prism.si.edu/software.html>.

- After downloading EndNote to your computer, you can create a corresponding account in **EndNote Web**, which is accessible via any Internet-connected computer/device. Click the Sync button (blue circle with 2 white arrows) on the toolbar in EndNote, click Sign up, then follow the prompts. To access your EndNote Web account online, go to www.myendnoteweb.com.

Saving items into your EndNote library

- Many research databases offer an **Export function** giving EndNote as a specified destination choice. This kind of export function should capture pertinent details about the item (title, author, journal, etc.) and save directly to your EndNote library.
- **If the available PDF does not export along with the saved citation**, manually save the PDF on your computer, then drag and drop the PDF in the citation record. Or double-click the citation record to open it in EndNote, then click the paperclip icon to find and attach the saved PDF.
- **To import a single PDF** or a folder of PDFs already saved on your computer, you can drag and drop the PDF file or the folder, or highlight and drag multiple files, into EndNote Desktop.
- **To manually add a citation**: In EndNote Desktop, click on the New Reference icon (green plus sign on top of a page), or under References, click on New Reference. In EndNote Web, aim your mouse at Collect, then click New Reference. Be sure to choose the appropriate Reference Type.
- **To save a webpage**, you will need to install the Capture button for EndNote Web (found under Options → Download Installers), which will then appear in your browser's bookmark bar. When on a webpage you wish to save, click the Capture button to create a record in your Web library.
- **To sync your libraries** in EndNote Desktop and EndNote Web, click the Sync button (blue circle with 2 white arrows) on the toolbar in EndNote Desktop. Your libraries should automatically sync when you exit EndNote as well.
- **Create groups** to organize your saved items (similar to folders on your computer). You can share these groups with colleagues by email via EndNote Web → Organize → Manage My Groups. However, others will not have access to attachments like PDF files.

Adding citations/bibliographies to your own papers with EndNote's *Cite While You Write*

- The **MS Word plug-in** should download automatically on the computer where you have downloaded EndNote Desktop. You also can install it via EndNote Web – under the Format tab, you will find the Cite While You Write plug-in, or under the Options tab, Download Installers.
- Versions of Cite While You Write are also available for **OpenOffice** and **Apple Pages**.
- After download, you will find a **tab titled EndNote X6** in the bar at the top of your MS Word screen, with all the tools for creating citations and bibliographies.
- Place your cursor in your Word document where you want to add a citation and click the **Insert Citation icon**. This will open a window connecting to your EndNote library, letting you search for the correct item. Click on the correct item, and the citation will be added in your paper, and an entry will be added for the bibliography at the end of your paper.
- You can choose from **thousands of citation styles** using the dropdown menu under Style in the Bibliography box.

Zotero

Create a free account at [Zotero.org](https://www.zotero.org). If you use Firefox as your Internet browser, download Zotero for Firefox. Or you can download Zotero Standalone to use with any browser.

- You also can access your Zotero library via the Internet by logging in at [Zotero.org](https://www.zotero.org).
- If you use Zotero for Firefox, open it by clicking the Zotero link in bottom right corner of your browser window. It opens up as an adjustable pane in the lower half of your browser window.

Saving items into your Zotero library

- **Drag and drop a file** or folder from your computer into the Zotero for Firefox pane, or into Zotero Standalone (does not work on Zotero.org). Always double-check the citation to be sure it captured all pertinent details like title, author, journal, etc.
- If a newly added citation fails to capture all the details, try right-clicking on the citation entry, then click on **Retrieve metadata for PDF**. If that doesn't work, right-click on the citation entry, then click on **Create Parent Item from Selected Item**, and fill in the pertinent details manually.
- With Zotero for Firefox, Zotero is able to "sense" when you have found an item it can save, and a **small icon will appear in the browser bar** – a book icon when it senses a book to cite, a folder icon for a list of items (like in a database), a camera icon for a video, etc. Click on the icon to save the item directly into Zotero. Alternately, when using the Zotero pane in Firefox, you can click on the **Create New Item from Current Page button** (icon of a page with a green plus sign).
- When saving a webpage, Zotero saves both a URL link to the page as well as a **snapshot** of how the page looks as you see it right then – handy to have if the page changes later.
- In a research database, you can **export citations to RIS**, a format that works with Zotero. To ensure that you capture PDFs from databases, go to Settings (gear icon) → Preferences → check the box by **Automatically Attach Associated PDFs**.
- **Add an item manually** by clicking the New Item button (green plus sign). Be sure to choose the appropriate material type, which determines which fields are available to fill in.

Public and Private Groups for collaboration/communication

- **Create a public group** to share citations, webpages, videos, etc. (but not full-text documents unless they are open access) with members or anyone who views your group's library.
- **Create a private group** to share items, including full-text documents, with only those members you invite to join the group. Your private group's library will not be visible to non-members.
- Zotero lets you create as many public or private groups as you wish, with no restrictions. Both public and private groups can have online discussions on their group Zotero page.

Adding citations/bibliographies to your own papers using Zotero

- **Install the plug-in for MS Word or OpenOffice** from Zotero.org. Click on Documentation tab → Generating Bibliographies → Word Processor Integration.
- In MS Word 2007, Zotero citing tools appear under the **Add-ins tab**, including icons for functions like Insert Citation, Insert Bibliography, Document Preferences, etc.
- Place your cursor in your Word document where you want to add a citation and click the **Insert Citation icon**. First you will see the Document Preferences window, which allows you to choose the citation style you wish to use. Then you will see a Zotero search bar appear. You can enter keywords, author names, etc. to find an item in your Zotero library. Choose the item, hit enter, and a properly formatted citation will be added to your paper.
- If you need to **add page numbers or Multiple Sources** to your citation, click the arrow by the Z in the Zotero search bar and choose Classic View. This will open a window displaying your Zotero library, including a box to fill in the page number(s) or a button to add more than one source.
- Click the **Insert Bibliography button** to create a properly formatted bibliography for all your citations at the end of your paper. It will automatically update as you add more citations.

Mendeley

Create a free Web account at Mendeley.com. You will be prompted to download the Desktop version of Mendeley as you are creating your Web account.

Saving items into your Mendeley library

- Mendeley has its own **free searchable library of papers and citations**, created from items added by its users. It is found under the Papers tab at Mendeley.com and is available even to non-members. You will find links in these records to save items directly to your own library.
- To easily save items online and from databases, download the **Web Importer bookmarklet** by going to the Dashboard tab when logged into your Web account. It will then show up as an Import to Mendeley button on your browser's bookmark bar. Click this button whenever you wish to save the webpage or database item(s) you are currently viewing. But Mendeley is not always able to save complete details, so be sure to double-check the citation for accuracy.
- **If a PDF opens in a new window** (say, when using JSTOR) and the Import to Mendeley button does not appear, save the PDF by dragging and dropping the little icon next to the URL directly into Mendeley Desktop. Or alternately, click on Bookmarks at the top of the new browser window, then aim at Bookmarks Toolbar, and click on Import to Mendeley.
- **To print PDFs** from Mendeley, right-click on the item in Desktop, choose Open File Externally.
- By setting up **watched folders** (found in Desktop under File), documents saved in those folders will automatically be added to your Mendeley library. This is another work-around for problems with the Import to Mendeley button.
- **Mendeley Suggest**, found on Web Dashboard or under My Library in Desktop, will suggest other documents based on what is already saved in your own library. By accepting or removing suggested items, it will learn more about your interests to make better suggestions.
- You can **add notes/highlighting to saved PDFs** right in Mendeley Desktop. Double-click on an entry in your library that has an attached PDF; the PDF will open in a new tab which offers annotation tools along the top. To print the PDF with your annotations, click on File → Export PDF with Annotations. You can then save the annotated PDF file and print it.

Public and Private Groups for collaboration/communication

- **Public group members** are not able to provide full-text access to documents in their shared library (unless they are open access documents), so the library is more like a reading list.
- **Private group members** can provide full-text access and add collaborative notes/highlighting to PDF documents in their shared library, with each member's notes appearing in a different color.
- Both public and private groups can communicate Facebook-style on each group's page.

Adding citations/bibliographies to your own papers using Mendeley

- Download the **MS Word or OpenOffice plug-in**, found in Mendeley Desktop under Tools.
- After downloading the MS Word plug-in, you will find the **Mendeley Cite-O-Matic box** in MS Word under References. This contains the Mendeley citing tools like Insert Citation, Insert Bibliography, and a dropdown menu to choose from hundreds of citation styles.
- Place your cursor in your Word document where you want to add a citation and click on **Insert Citation**. This will open a small window that will let you search by author, title or year to find the correct item in your Mendeley library to create the citation.
- Place your cursor at the end of your paper and click on **Insert Bibliography** to add a properly formatted bibliography of all cited items. If you add more citations, they will be automatically added as entries in the bibliography.

Questions? Contact Trina Brown, Instructional Librarian, by email at brownkm@si.edu. You also can ask to receive a digital copy of this handout by email.