

RefWorks, Zotero and EndNote Web: A Brief Overview

General

Features	EndNote	Refworks	Zotero	Mendeley	EndNote Web
Cost	\$76.99 *	No charge	No charge	No charge	No charge
Auto-download PDFs	Yes	No	No	Yes/No **	No
File linking	Yes	Yes	Yes	Yes	No
Links to ejournal holdings	Yes	Yes	Yes	No	Yes
Web-based	No (but can sync to EndNote Web)	Yes	Yes	Yes	Yes
Duplicate detection	Yes	Yes	No	Yes ***	Yes
Metadata retrieval for PDFs	No	No	Yes w/ plugin	Yes	No
PDF markup/annotation	No	No	No	Yes	No
Web "scraping" ability	N/A	Fair	Excellent	Fair ****	Poor (slow)
Bibliography generator	Yes (customizable)	Yes	Yes	Yes	Yes
Compatibility issues	None	None	FireFox plugin	None	None
Notes		w/ file attachments, limit is 100 mb but can be increased by SU RefWorks admin.	100 mb free storage	500 mb free storage.	10,000 records max. No attachments

* <https://www.stanford.edu/group/bookstore/SUprices/software.html> Contact Glen Jones w/ questions: 650 329-1217 ext 371

** Mendeley auto-download for free, publically accessible journals, not yet for proxied institutional subscriptions

*** Mendeley duplicate detection works if metadata for reference is consistent: variations in a reference can throw it off

**** Mendeley FireFox plug-in could import from Google Scholar but NOT the IE plugin

NOTES:

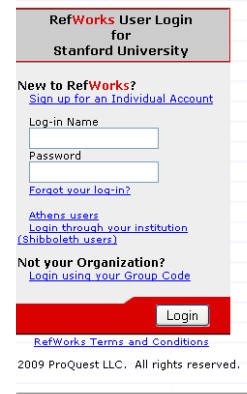
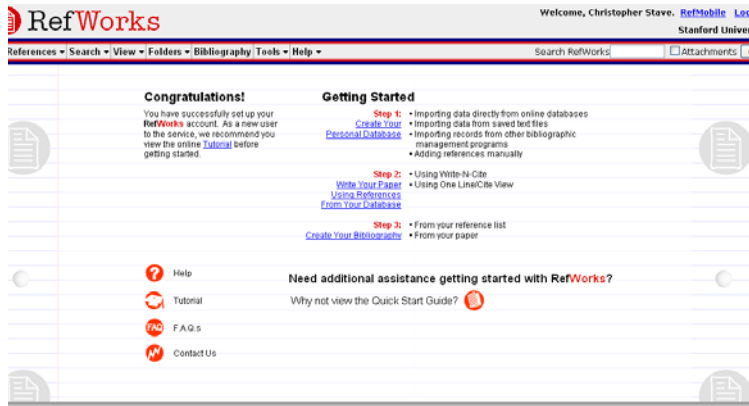
- "Rose" colored boxes indicate notable features for a particular application
- *Google Scholar* <http://scholar.google.com>, can be configured using *Scholar Preferences* to display links for several reference management programs, e.g., RefWorks, EndNote Web. For *Zotero*, use the "folder" icon in the address bar of your browser to add references.

RefWorks

About Refworks:

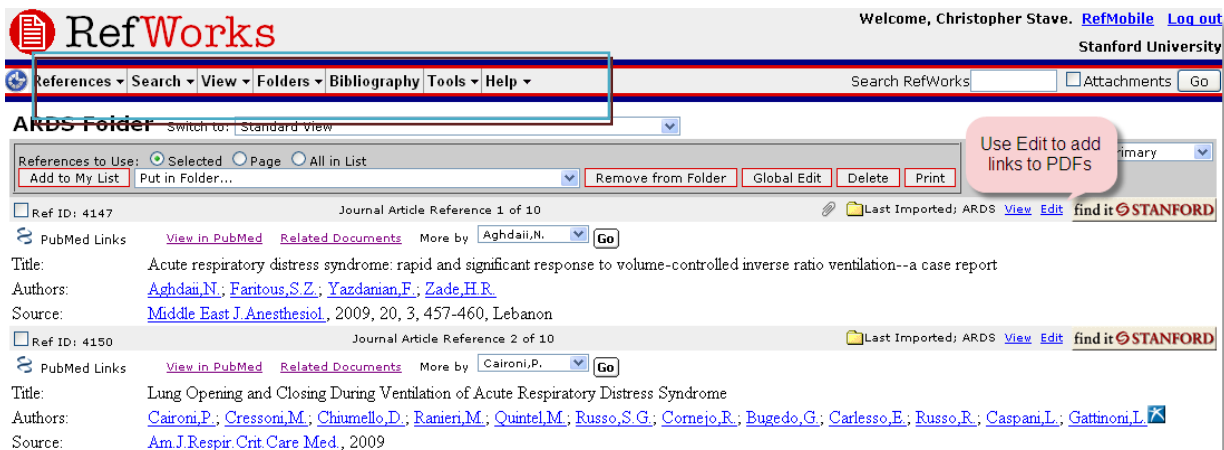
- Web-based reference management tool
- Provides tools for creating bibliographies and capturing references and webpages
- Uses "folders" to organize references.

- Allows you to link files (e.g., PDFs, Word documents, Excel spreadsheets) to references
- Add references by direct searching, importing, or manual entry.
- Logging in On-campus: Connect to: www.refworks.com – Click on “Sign up for an individual account.” From now on, you can use your username/password to login while on campus.
- Logging in Off-campus: Connect to www.refworks.com – Click on “Login,” then click on “Login using your group code” This is emailed to you after you register on a Stanford University networked machine. Then, login with your username/password



Interface Overview

- “References”—Add references here
- “Search” – Search your reference collections
- “View” – View your Folders
- “Folders” – View, edit or delete Folders
- “Bibliographies”—create bibliographies
- “Tools” – download plugins (e.g., Cite-While-You-Write, RefGrabIt)



Creating and organizing folders:

- Select “Folders” and choose “Create...”
- Give your folder a name, e.g., AccessEyeCare
- You can rename/delete your folders

Importing References:

- Connect to <http://lane.stanford.edu> and click on PubMed
- Run a search and select some references
- Choose “Send to” and select “File” Select “MEDLINE” as your Format

- Save file as "pubmed_result.txt" You MAY have to release your pop-up blocker and use the "Send to" "File" option once more
- Go back to Refworks and click on "References" and then "Import"
- From the "Import Filter/Data Source" pull-down menu, choose "NLM Pubmed." The "Database" field should then show "PubMed." The "Folder" you want to add references to is the folder you created earlier, e.g., "TravelMedicine." Click "browse" to locate the pubmed-result.txt file. Select it, then click on "Import"
- You can use "View" then the name of your folder to see the citations it contains
- You can also use RefGrab-It to capture webpage content. Interested? Download the plugin within RefWorks under "Tools"

Searching Your Reference Collections:

- Your references are all searchable. Choose "Search" then, "Advanced. Ignore "Search Name"
- Change your search field from "Descriptors" to "Anywhere" and then choose the folder you want to search
- Type, a keyword into the search box and click on "Search." You don't need a special symbol (e.g., the asterisk "X") to search for term variants.

Annotating references and adding PDFs and other files:

- Click on "Edit" to add comments, keywords, or attachments to a reference
- Note the "Attachment" option. Note the "User" fields

Creating Bibliographies

- Download the Write-N-Cite client

Zotero

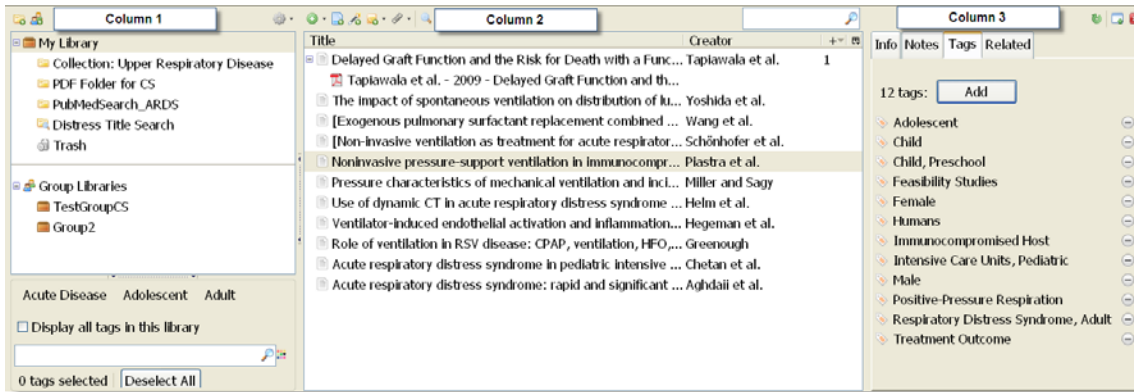
About Zotero:

- Firefox plugin that captures webpages, references
- To install the Zotero Firefox plugin, connect to: <http://www.zotero.org>
- Create *Collections* to store *Items* (e.g., database references, webpages, etc.)
- Create *Groups* to share *Items* with others
- *Items* often contain metadata.
- To open Zotero, click on the icon in the lower right corner of Firefox.
- "Preferences" allows you to install plugins that will let you search the full text of PDFs, and locate and add identifying information for PDFs with cryptic names, e.g., 234089iasdofijq3.pdf



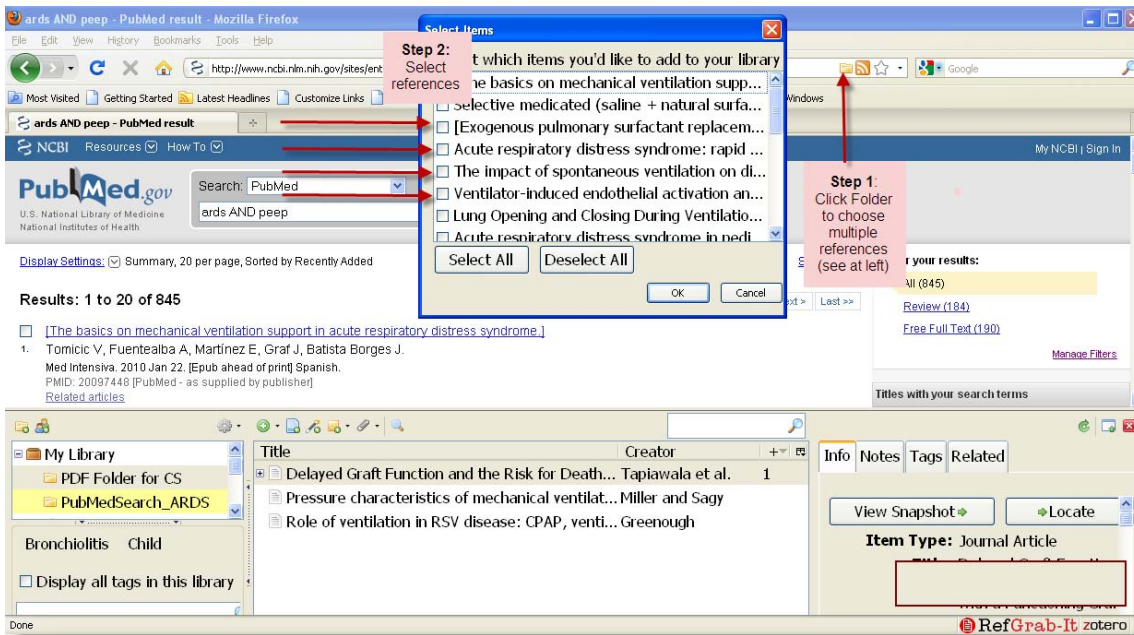
Interface Overview:

- The Zotero "pane" is located at the bottom of the browser. Collections and Groups are listed in the left column; titles of items are in center column; metadata is listed in the right column.
- "My Library" in the left column contains ALL your items
- You can add *Notes* and *Tags* to individual items



Adding Items to Zotero:

- Click the icon in the browser address field. For example, the “folder” icon (see figure below) denotes a list of items, e.g., citations within Pubmed. You can then choose which references to add.
- Websites such as library catalogs and commercial book vendors will often display a “book” icon, indicating that Zotero recognizes the items on the page and will be able to add them to your collections.
- You can also add items manually by clicking on the green “New Item” icon



Searching Zotero:

- Use the basic search box or the advanced search available via the magnifying glass icon in the Zotero toolbar to search metadata text, tags, terms in the items, etc.
- Searches can be saved by clicking the magnifying glass icon, entering search terms, and clicking on “Save Search”

Adding Attachments

- Example: Highlight an item in the middle column, right click, choose “Add Attachment/Attach Stored Copy of File.”

Accessing Fulltext

- Choose “Preferences/Advanced” and add <http://sfx.stanford.edu/local> to the “Resolver” box. The next time you highlight a reference and click on the “Info” tab, clicking on “Locate” should activate a library lookup of Lane journal holdings. You can then download and link the article to its reference.

Bibliographies

- You can download a Zotero word processing plug-in to add references to a manuscript as you write. Visit the Zotero “Support” site for more information: <http://www.zotero.org/support/>
- To create a stand-alone bibliography from your references: highlight the references you want to include; right click; choose “Generate Bibliography from Selected Items;” and select the bibliography style you want to use, e.g., Nature journal. Choose “Copy to Clipboard” and can then paste the bibliography into a document.

Syncing Your Library

- You can save/back-up the items, notes and metadata of your collections and groups to a Zotero server (register for a Zotero account first), and then access them from other computers (home, lab, etc.). To save any attached files, such as PDFs, you need to have Zotero 2.0b7 and are limited to 100 mb of space. More space will be made available for a fee.

Sharing

- You can use “Group Settings” in your Zotero online account to add members to groups you want to share. Be sure to register with Zotero to access these options.

MENDELEY

About Mendeley

- Desktop client that syncs with the Web
- Download from <http://www.mendeley.com/>
- Create *Collections* to store documents and citations.
- *Collections* can be shared
- Drag and drop PDFs into Mendeley – references can be generated from metadata
- Plugins for creating bibliographies and scrapping webpages



e-mail: password: [Sign in](#)
 Remember me [Forgot your password?](#)

[Get Mendeley](#)
[How it works](#)
[Blog](#)



Organize, share and discover research papers

Like EndNote™, but free and network-enabled. Mendeley is a research management tool for desktop & web.

Share papers
cite & create bibliographies

in Word & OpenOffice
collaborate

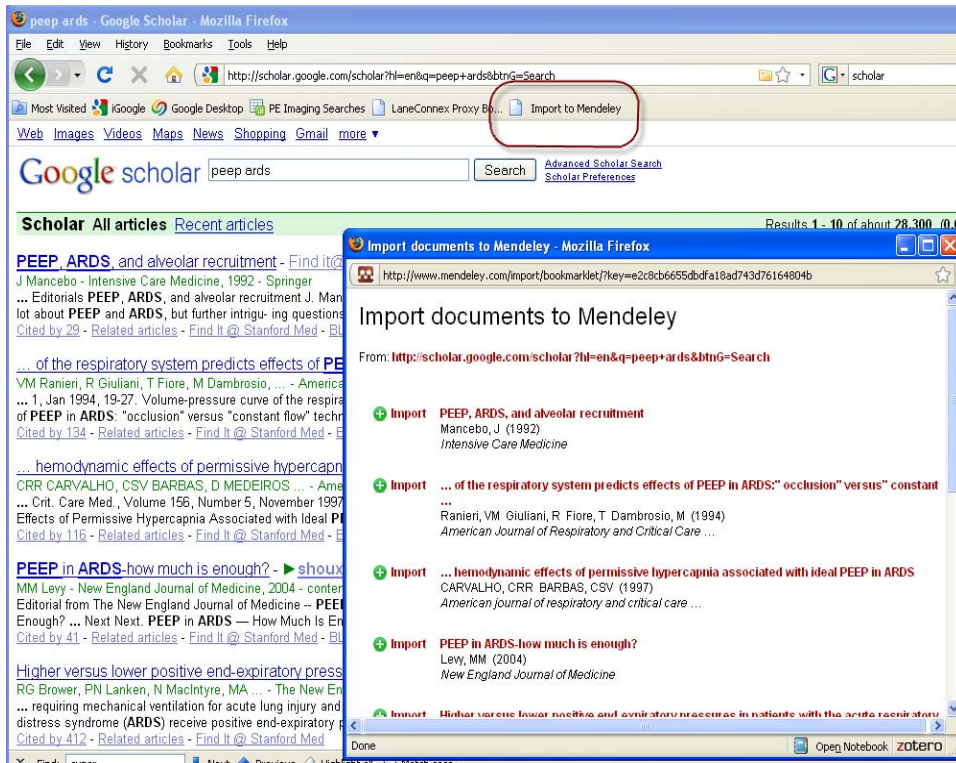
search & annotate PDFs
sync across PCs

Get Mendeley
FREE DOWNLOAD

Available for **Windows, Mac OSX** and **Linux**

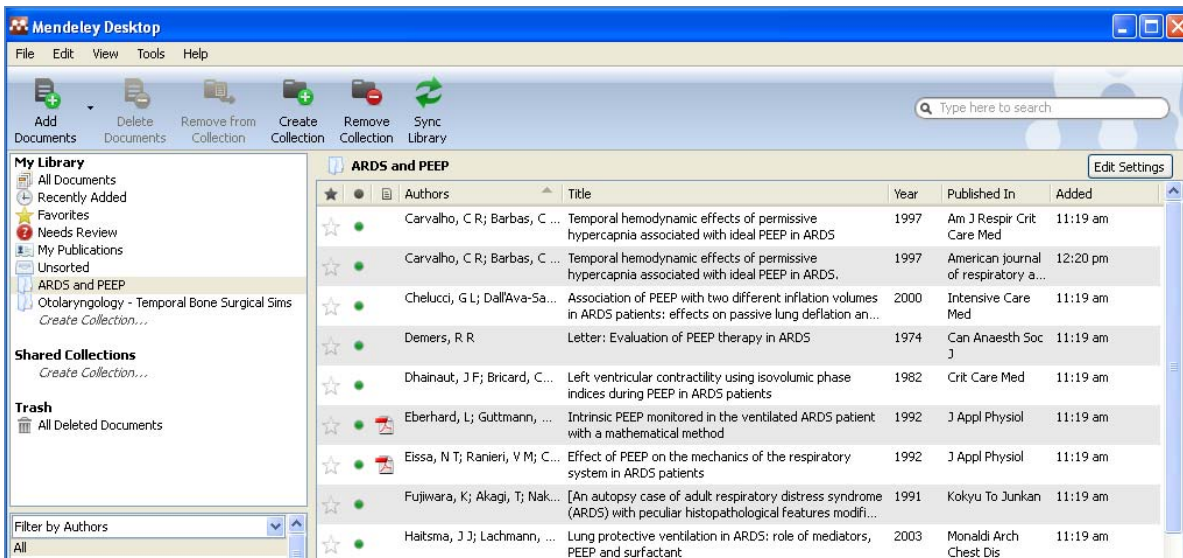
Importing

- Use the “Import to Mendeley” plugin



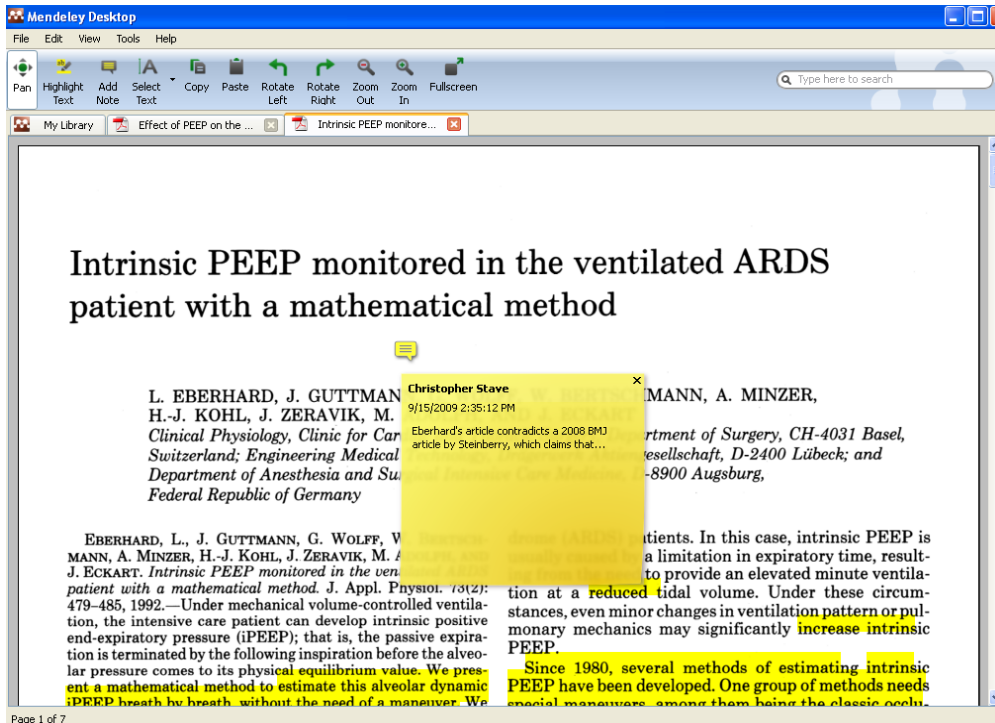
Desktop View

- Manage your citations and PDFs using “collections”



PDF "Markup"

- Use digital highlighters and add notes



Bibliography plugin

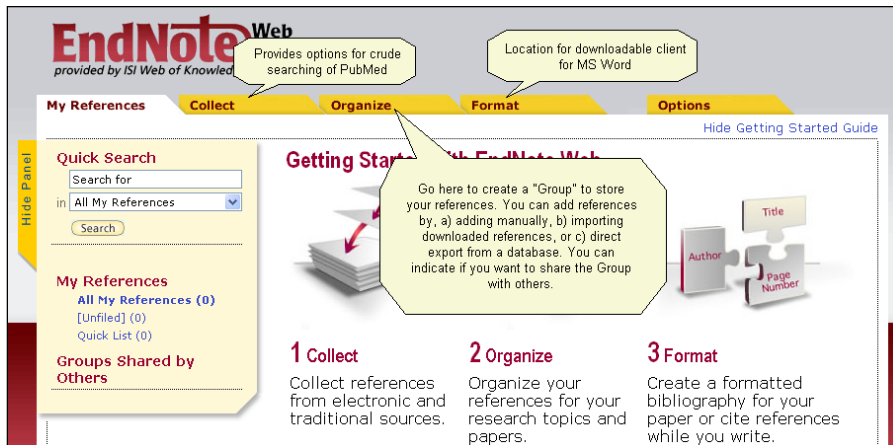
- Has been buggy for MS Office 2007



EndNote Web

About EndNote Web

- Web-based reference management tool
- Free to Stanford affiliates. Doesn't allow linking to PDFs
- Uses "groups" to organize references.
- Add references by direct search/importing/manual entry.
- **Logging in:** Connect to: <http://myendnoteweb.com>



Creating and organizing Groups:

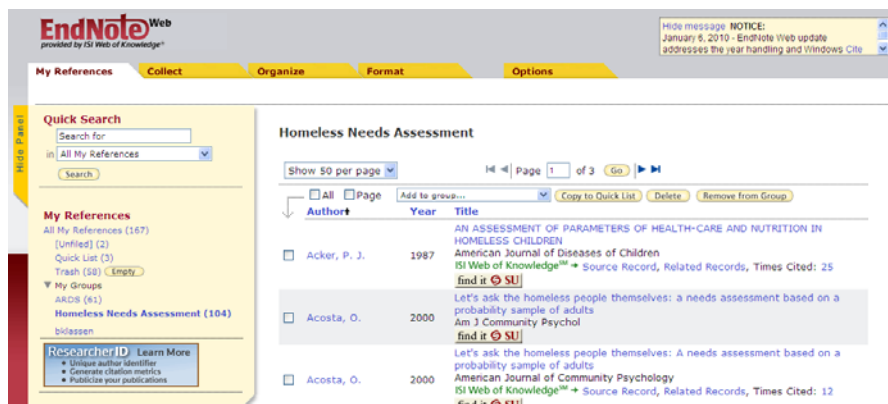
- Click the "Organize" tab and "New Group."
- Give your folder a name, e.g., AccessEyeCare
- You can rename/delete or share your groups

Importing References:

- Connect to <http://lane.stanford.edu> and click on PubMed
- Run a search and select some references
- Choose "Send to" and select "File" Select "MEDLINE" as your Format
- Save file as "pubmed_result.txt" You MAY have to release your pop-up blocker and use the "Send to" "File" option once more
- Go back to EndNote Web and click on "Collect" and then "Import References"
- Select "Pubmed" as the import "Filter" then select a Group to import the references into
- You can also download a webpage/webcontent grabber under the "Options" tab. Click on "Download installers," then select "Firefox Extension" to access this tool.

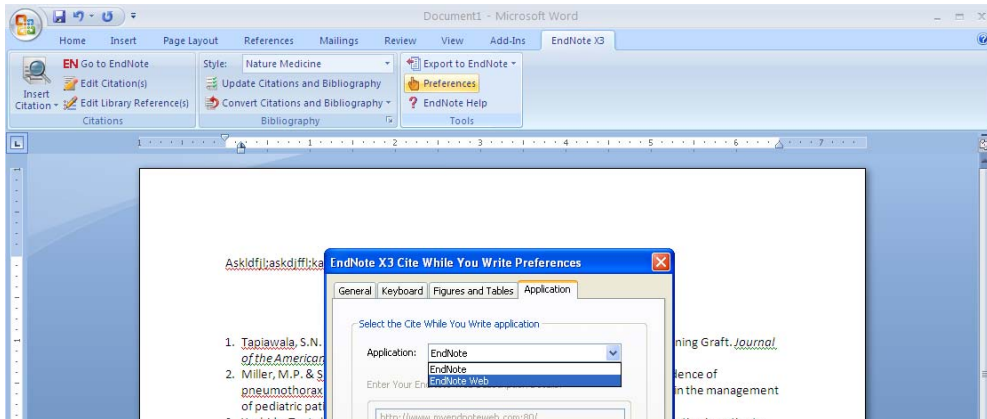
Searching Your Reference Collections:

- Your references are all searchable. Choose "My References" then, "Quick Search"

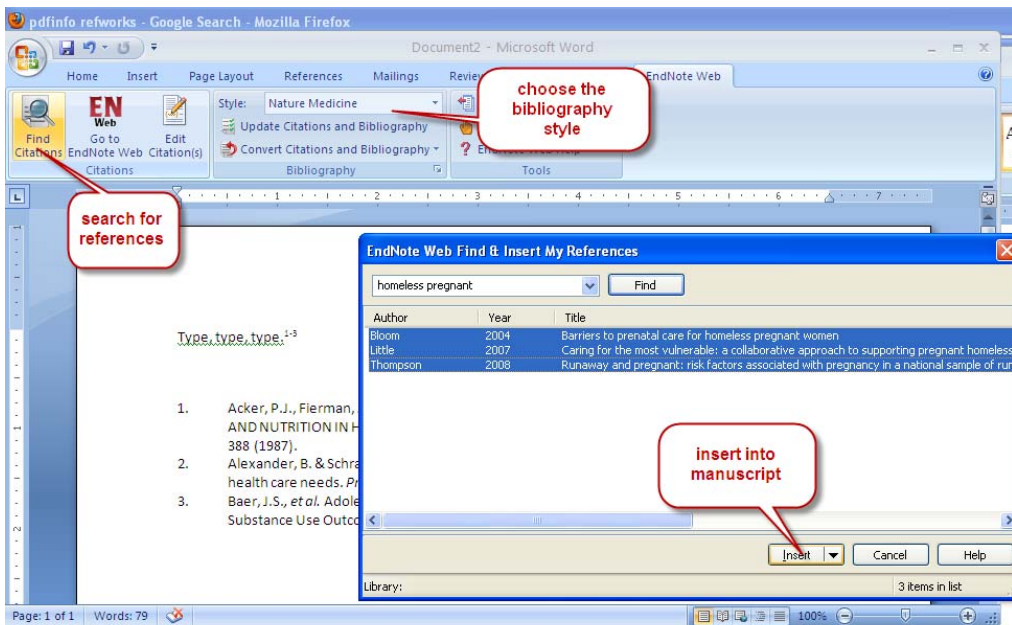


Creating Bibliographies

- Download the Cite-While-You-Write client
- You may need to switch between stand-alone EndNote and EndNote Web using the “Cite While You Write Preferences” on the EndNote X3 ribbon.



- Choose a bibliography style under “Style.” Run a search of your EndNote Web collections using “Find Citation.” Insert the citations into your manuscript.



CONTACT INFORMATION

Christopher Stave

Librarian for Outreach, Instruction and Electronic Resources

Email: cstave@stanford.edu

Phone: 650-725-4580