

A Five-Star Citing Experience: Creating Variations on a Master Class

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NUTRITION INFORMATION

This recipe describes a method for applying a master class outline to various workshops on citation management tools. The librarians at Florida International University (FIU) have historically provided a workshop series on RefWorks. In response to demands from the university community for other tools, we have adapted the master class outline into a template for teaching End-Note, Mendeley, and Zotero. By using this recipe, readers will have a simple template for their own citation management tool workshop series.

LEARNING OUTCOMES/PROJECT OUTCOMES

By following this recipe, readers can expect to acquire the following:

1. A standard approach toward teaching any type of citation management tool
2. An outline for organizing a workshop series on these tools
3. A set of expectations on how much to cover in a citation management workshop

4. A strategy to develop an interactive and interchangeable team of instructors

Attendees, in turn, can expect to:

1. Learn how to use the citation management tool presented in each workshop
2. Understand how a citation manager fits into their research process
3. Leave each session with the confidence to start using the tool(s) in their own research

NUMBER SERVED

Depending on classroom seating capacity, these workshops serve approximately 30 attendees in person. The workshops may be simulcast online for synchronous viewing, and the recordings may be posted later for asynchronous viewers to serve a potentially limitless number of remote attendees.

COOKING TIME

The preparation time depends on your mastery of the tool(s) you plan to teach. We recommend that you perfect one workshop

before adapting the template to another tool. Prior to each semester, the workshop schedule should be compiled and, if you have a team, the presenters should sign up to co-teach the sessions. In addition, set aside several hours for room and Zoom reservations, preparation of marketing materials for each session, and correspondence with university partners.

DIETARY GUIDELINES

This recipe was deliberately crafted to present citation management software as a useful tool to incorporate into the research process. As a result, the workshop is designed to be presented within the context of hands-on, “on-the-go” database searches and exports. The methods described in the workshop are universally applicable to all citation managers, despite the small differences in terminology used or features provided by the different applications.

The workshops incorporate several values from the Association of College and Research Libraries (ACRL) *Framework for Information Literacy for Higher Education*, including

Information Has Value and Scholarship as Conversation. Every researcher who attends our workshop should understand that correct citation management acknowledges the intellectual property of others by providing proper attribution and citation (ACRL, 2016). As scholars themselves, the attendees will learn to use citation management software to organize the other voices that contribute to the discussion in their area of interest (ACRL, 2016). The software also facilitates appropriate formatting specific to particular journals, reducing barriers to publication. While the workshops provide a starting point, it will take practice for attendees to develop proficiency with their tool of choice.

INGREDIENTS & EQUIPMENT

- Forms and feedback
 - Printed or digital forms for attendee sign in
 - Printed or digital forms to gather attendee feedback
- Classroom setup
 - One computer per attendee with the required software. If participants plan to bring their own device, ask them to install the software ahead of time.
 - Workstations equipped with the citation management tools
 - Laptop space for attendees who bring their own devices
- Personnel
 - Two co-presenters (preferred) per class to alternately present and assist
 - Moderator for online attendees' technical questions and chat
- Sample demonstration materials

- A pre-established instructor account for each citation manager
- Predetermined databases for direct and indirect export demonstrations
- Predetermined websites for web capture demonstrations
- Sample PDF document for full-text upload demonstrations
- Word document for in-text citation and bibliography demonstrations
- Teleconferencing and video
 - Live teleconferencing session for synchronous viewing
 - Video recording for asynchronous viewing
 - Hosting platform for video upload

PREPARATION

Immediately before the session, prepare the classroom and/or virtual space about 10–15 minutes early. The sessions run between 60–90 minutes. Leave time for questions during and after each session.

COOKING METHOD

The following list of steps matches the original master recipe:

- 1. Introduction.** Welcome attendees and introduce presenters. Explain a citation manager houses a database of references and show how to create an account. (5 minutes)
- 2. Advantages of citation managers.** Present advantages of the tool being discussed, such as free or discounted options, and cloud features versus client-focused software. Briefly highlight unique

features, including working with PDFs and how the citation manager interfaces with writing software. (5 minutes)

3. Multiple methods for importing records. (20 minutes)

- Select a topic of interest for the sample searches (for example, “graduate students” AND happiness).
 - Demonstrate methods for exporting from databases, including the library catalog and a selection of relevant subject databases. Show both direct and indirect exports.
 - Show the web capture tool. This provides an opportunity to illustrate how different types of references can be accommodated by the citation manager and how to correct incomplete record metadata.
 - Discuss the varied methods of uploading PDFs, whether from the databases, the web, or the user’s desktop.
- 4. Organization.** Discuss the various methods for organization, including folders, groups, and libraries. Be precise about the terminology the specific citation manager utilizes. (10 minutes)
 - 5. Sharing.** Explain the available sharing options and pros and cons for differing levels of collaboration (for example, read-only versus editing privileges between users). (5 minutes)
 - 6. Miscellaneous features.** If it has not been discussed already, include the following before proceeding to steps 7 and 8. (10 minutes)
 - Adjusting software interface views and layout

- Correcting citation metadata
- Removing duplicates
- Attaching the full-text to references
- Other helpful features, such as leaving notes and annotating or tagging references

7. Create basic bibliography. Use the citation manager to create a one-time quick bibliography. Take this opportunity to point out metadata issues, inconsistencies in citation format, omitted fields, and duplicate records. Underscore the importance of making permanent changes to the records in the citation manager (rather than the Word document) if the attendee plans to use the citations again in the future. Emphasize that the produced text is static and can only be edited manually thereafter. (5 minutes)

8. Cite in Word/cite in Google Docs. End with an impressive demonstration of writing and inserting citations live with automatic bibliography generation using the sample Word Document. (15 minutes)

- Demonstrate a variety of situational in-text citations (for example, repeat authors, multiple sources in a single parenthetical reference).
- Show how to change citation styles with the click of a button.
- Remind users to refresh the connection between the citation tool and their document if changes/additions were made to record(s) in their database of references.
- Explain how and why breaking the active connection between the citation tool and their document is

essential while recommending ways to preserve a master copy that maintains the connection for future use.

ALLERGY WARNING

Broadly speaking, RefWorks is relatively simple to learn and use whereas the other three desktop applications (EndNote, Mendeley, and Zotero) have steeper learning curves and may require specialized computer configurations. Thus, people “allergic” to installing and configuring a new application on their computer, or people wanting to avoid such a learning curve, are forewarned that desktop reference managers might not be for them.

A hiccup may occur when a computer has multiple citation managers installed, resulting in competition between the tools to import references. This issue revealed itself publicly during an EndNote workshop when an .RIS file opened in Zotero by default. Ideally, the operating system (OS) should be configured to always ask the user which application should be used to open the .RIS file. Consult your OS help documentation or your local IT department for configuration instructions. If you offer hands-on experience in your computer labs, ensure those systems are similarly configured.

CLEAN-UP

Students with sophisticated tastes may need follow-up with specific questions pertaining to one of the tools. We encourage patrons from particular disciplines to work with their subject librarians, but not all subject librarians

are equally adept at these four citation management software options. For this reason, members of the citation management team often work in tandem with subject librarians when citation management questions go beyond basic knowledge. The librarians teaching these workshops continue to cross-train on the tools that they do not regularly use themselves and continue recruiting new presenters to join the team.

Following each semester, in preparation for the next one, the team meets to reflect on the workshops and evaluate if they need tweaking for the future. We review the user feedback forms and take the responses into account. Attendees are consistently happy to learn about the tools. Often, constructive feedback comes from librarians who observe the audience’s questions and consider how the recipe could be adjusted to prevent unnecessary confusion. In addition, we adapt to changing circumstances, whether they are software updates or sudden switches to remote learning. As any librarian knows, teaching online resources requires agility and flexibility, since you can be sure there will always be something new on the horizon.

CHEF’S NOTE

Our librarian-chefs underwent a rigorous in-house cooking school, each specializing in two or more citation managers. We experimented with the recipes to match each citation manager’s flavor profile, adapting the master recipe to create variations that best suit the unique features of each citation man-

ager. Using our collective expertise, the team now offers a menu of workshop options each semester based on diner appetite for citation managers.

In addition, this year we introduced an initial tasting menu workshop that is taught at the beginning of the semester. Called Cite Your Sources Auto-Magically, it introduces bite-sized portions of each citation manager and provides a list of advantages and disadvantages to help researchers decide which tool they want to explore in depth later that semester. Upon identifying preferences, researchers return to feast on the individual citation manager workshop(s) of their choice.

The master recipe outline was developed to teach RefWorks. In this original recipe, users would set up an account, possibly import a reference or two, and leave the class ready to

access the account the next time they worked on their research. For the other reference managers, which we chose to teach using their desktop versions (EndNote, Mendeley, and Zotero), users could only follow along and create a temporary library on the computer lab workstations. The electronic files that constituted their library would disappear after the computers rebooted each night. Thus, the biggest difference in the end-user experience when adding the other three tools to the repertoire was that after the workshop, attendees would have to replicate for themselves the process of downloading the software, establishing an account, and then configuring it.

We originally decided to teach the desktop client for all of the new citation management tools because we wanted the most robust version of each tool. However, we are recon-

sidering the merits of the web versions of the tools for potential incorporation into the workshop series. We are still trying to decide which version (desktop, web, or both) we should teach or recommend, and which tool features we should highlight in each session.

ADDITIONAL RESOURCES

Brenenson, S. (2020). *Graduate studies*. Retrieved from <https://library.fiu.edu/gradstudies>

Roth, R. (2020). *Citation managers comparison*. Retrieved from <https://libguides.medlib.fiu.edu/citation>

References

Association of College and Research Libraries. (2016). *Framework for information literacy for higher education*. Retrieved from <http://www.ala.org/acrl/standards/ilframework>