Online Reference Management

Connotea

For academics, some of the more interesting new online applications are “online reference management services” that allow users to save and organize references they have found online. Connotea is an online reference management service primarily intended for scientists and clinicians, although its use now has extended to the entire academic community.¹ Connotea has the additional advantage of promoting social networking, because references found by members of the Connotea community are shared with each other.

Connotea and Zotero: A Comparison

We have prepared instructions for two reference management services – Connotea and Zotero. I have used both services and have outlined their strengths and weaknesses below:

- **Connotea**
  - Strength: online database
    - Can easily be used on multiple computers
  - Strength: social networking
    - References are shared with other members of the Connotea community
    - Users can take advantage of what others with similar interests have found
  - Strength: collaboration
    - Groups of people can share references with each other
  - Weakness: bibliography creation
    - Stores only limited bibliographic information
  - Weakness: organizing information
    - Only uses tags

- **Zotero**
  - Strength: bibliography creation
    - Stores detailed bibliographic information
    - Creates bibliographies in a variety of styles
  - Strength: works well with the Library catalog and research databases
    - Extracts bibliographic information from JSTOR and others
  - Strength: organizing information
    - Uses both collections and tags
  - Weakness: database on local computer
    - If you use multiple computers your references will be stored on more than one computer
    - Can use a portable browser on a USB drive
    - Next version will allow sharing among computers

Signing Up for Connotea

The first time you use Connotea, you will need to set up an account. Instructions for this are in Appendix A to this lesson.

Setting Up Your Browser Button

Connotea works best if your browser is set up to use it. Instructions for setting up the Internet Explorer, FireFox, and Safari browsers can be found in Appendices B, C, and D to this lesson. When the browser has been set up, you should see an Add to Connotea button in one of the toolbars.

Adding Articles Using the Browser Button

The easiest way to add an article to your Connotea library is with the Add to Connotea browser button.

Suppose that you are doing research on the effect of nitrogen on climate change and have found an interesting article published online in Science magazine. To add the article to your Connotea library, click on Add to Connotea.

If you currently are not logged on to Connotea, you will be asked to log on.
NOTE: If a window like that shown below does not pop up, it may be because your browser is set to block pop-ups. If this is the case, hold down the CTRL key while clicking on the Add to Connotea button.

You should see a page in which you can add the article to your library. Connotea recognizes several scientific web sites, such as Science, and automatically fills in information about the article: title, authors, etc.²

Add keywords (called “tags”) to help you find the article later. For this article I added the tags “climate change” and nitrogen. Multi-word tags are enclosed in quotes. Tags are separated with spaces or commas.

You may add a short description or make a comment about an article if you like³.

Click on Add to my library when you are ready.

² See Appendix E for a list of sources that automatically are filled in by Connotea.
³ See Appendix F for an explanation of the difference between a description and a comment.

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Adding a Printed Article

Suppose that you are reading a printed article that you would like to add to your Connotea library.

Somewhere on the printed page, you may see a Digital Object Identifier (DOI) for the article.

In your browser, log on to Connotea and then click on Add a bookmark in the menu on the right side of the Connotea window.

Enter the DOI information and tags. Add them to your library when you are ready.
Note that the full information about the article, not just the DOI, is saved in your Connotea library.

As you can see from the picture at the right, Connotea also will save ordinary web page information.

Adding a Reference from Amazon

Suppose that you are looking through Amazon and have found a book that you would like to add to your Connotea library.

Click on Add to Connotea.

You should see the information about the book. Add tags and click on Add to my library.
Adding a Reference Manually

You may find a reference for which Connotea cannot automatically collect all the information you need.

For example, if you try to add the article at the right to your Connotea library, you will find that no title is supplied.

You will need to enter the title yourself along with the tags.

Keeping a Reference Private

Because Connotea is a “social citations” site, its default is for users’ lists of references to be available to other members of the Connotea community. Part of the value added by Connotea is the ability to see references that other “related users,” who have interests similar to you, have found. It is possible, though, to limit access to references so that they only are visible to you.

Suppose, for example, that you are doing research on the economics of pornography – certainly a legitimate field of academic study, but one that you might be hesitant to make publically available on a social citation web site.

When you add an article that you want to keep private, select **Keep this bookmark private to me** before you add it to your library.

If you choose to keep a reference private, the tags you associate with it also will not be visible to others.
Creating Collaborative Groups

It is possible to create a group, so that members of the group can see each other’s lists of references. Suppose, for example, that several members of my family are interested in collaborating on a Whisnant family tree. I want to create a group so that we can collaborate on the project.

To specify the members of a group, click on **Create a new group** in the Toolbox

I designate the name of the group, Whisnants and include a short description. I decide to keep the group private.

The Member Roster is a list of Connotea user names. The other members also must have a Connotea account.

When I add a reference to my library, I now will see an additional option to **Share with members of group**.

I choose the **Whisnants** group from the drop-down menu and select this option.
If I look at my library, I find this reference. Note that it is labeled as “private to Whisnants” group.

If my distant cousin, Bubba Whisnant, who I designated as a member of the “Whisnants” group, checks his Connotea library, he will find himself included in this group.

If Bubba clicks on the group name, he will see my library added to his. He can limit what he sees by clicking on the “Whisnant” tag.

Similarly, if I click on the group name, I see Bubba’s references added to mine.

The only limitation of groups is that only the creator of a group can add new members. As far as I know, people cannot join a group themselves.
Finding Articles With a Particular Tag

After you have logged on to Connotea, click on **My Library** to reach your library.

You will see a list of the **tags** in your library. If you click on one of your tags in the list, for example “climate change,” you will see only those references labeled with this tag.

Clicking on the title of a reference will send you to the corresponding web site.

If you use Connotea a lot, you may accumulate a long list of tags. You can sort the list either by usage or alphabetically.

You also can enter the first letter of a tag to find it quickly.
Checking Out What Other Users Have Found

You may notice that, when you select a tag, Connotea displays a list of other users who have chosen this tag. If you click on the name of a user, you will see his or her references with this tag.

You also will see a list of other tags this person has used. Trying some of these tags potentially is a good way to expand your search even more.
Searching Libraries

Another way of finding references in a library is the search for them. For example, if I want to locate references relating to both the climate and nitrogen, I use the Search bar at the top to find them.

Entering more than one word in the search bar is equivalent to an AND search – all of the words must be present in a reference for it to be found. The search is not limited to tags, though. The Search function looks at tags, titles, authors’ names, descriptions, and source names.

For example a search on two words, “arrow” and “politics,” will find the reference shown below.

![Search result](image)

This reference has an author named “Arrow,” and the word “Politics” in the name of the journal.

The search for “arrow” and “politics” would NOT find the reference shown below, though.

![Search result](image)

Although the reference contains the word “politics” in both the title of the article and the tags, the word “arrow” is not there. Both words must be present.

A useful aspect of the Search function is that you can search all Connotea libraries. For example, the search shown here will search for the words “climate” and “nitrogen” in the libraries of all Connotea members.
Appendix A: Signing Up to Create a Connotea Account

Point your browser to www.connotea.org.

Click on the sign up now button.

Enter your information as required on the “Sign up for Connotea” screen. Click on register when you are ready.

You will receive a notification message in your email mailbox.

Click on the link in this message.

This will send you to Connotea’s “Getting Started” page.
Appendix B: Setting Up Internet Explorer

You need to do two things to set up Internet Explorer to use Connotea – make sure the Links Toolbar is visible and add an “Add to Connotea” button to this toolbar.

1. The Links Toolbar

If you do not see a Links Toolbar in Internet Explorer, do the following steps.

Click on the Tools button. The “Lock the Toolbars” item should NOT be checked.

The following two items should be checked:

- The Menu Bar
- The Links Toolbar

If they are not, check them.

Drag the Links button either up or down. This will create a links toolbar similar to the one shown above.
2. The “Add to Connotea” Button

If you are not already logged on to Connotea, do so. Go to the Connotea “Getting Started” page. You will be sent to this page when you click on the link in the Connotea registration email message. You also can go to this page by clicking on **Getting Started** in the menu at the bottom of any Connotea page.

Scroll down the screen until you see the **Add to Connotea** button.

**Right-click** on the **Add to Connotea** button. In the menu that appears, click on **Add to Favorites** . . .

If you see a message like this, click on **Yes**.

In the “Add a Favorite” window that appears, click on the **Create in: ** menu and select **Links** from this menu.
When you have selected “Links,” click on the **Add** button.

You now should see an **Add to Connotea** button in the Links toolbar.
Appendix C: Setting Up Firefox

You need to do two things to set up Firefox to use Connotea – make sure the Bookmarks Toolbar is visible and add an “Add to Connotea” button to this toolbar.

1. The Bookmarks Toolbar

If you do not see a Bookmarks Toolbar in Firefox, do the following steps.

Select the View menu and then Toolbars in this menu. The Bookmarks Toolbar should be checked. If it is not, check it.

2. The “Add to Connotea” Button

If you are not already logged on to Connotea, do so. Go to the Connotea “Getting Started” page. You will be sent to this page when you click on the link in the Connotea registration email message. You also can go to this page by clicking on Getting Started in the menu at the bottom of any Connotea page.

Scroll down the screen until you see the Add to Connotea button. Right-click on this button.

In the menu that appears, click on Bookmark This Link.

You should see an Add to Connotea button in the Bookmarks toolbar.
Appendix D: Setting Up in Safari

You need to do two things to set up Safari to use Connotea – make sure the Bookmarks Toolbar is visible and add an “Add to Connotea” button to this toolbar.

1. The Bookmarks Bar

If you do not see a Bookmarks Bar in Safari, do the following steps.

Select the View menu and then Show Bookmarks Bar in this menu.

2. The “Add to Connotea” Button

If you are not already logged on to Connotea, do so. Go to the Connotea “Getting Started” page. You will be sent to this page when you click on the link in the Connotea registration email message. You also can go to this page by clicking on Getting Started in the menu at the bottom of any Connotea page.

Scroll down the screen until you see the Add to Connotea button. Drag this button and drop it on the Bookmark Bar.
You will see a window asking you to confirm the name of the bookmark you are adding to the bar.

You should see an **Add to Connotea** button in the Bookmarks Bar.
Appendix E: Automatic Collection of Bibliographic Information

Connotea will automatically fetch additional bibliographic information for pages saved from several sources. The sources currently (9/8/2008) on the list include the following:

- Nature.com
- PubMed
- PubMed Central
- Science
- PloS
- BioMed Central
- Supported EPrints repositories
- Supported Highwire Press publications
- Blackwell Synergy
- Wiley Interscience
- Scitation
- arXiv.org
- Smithsonian/NASA Astrophysics Data System
- Amazon
- HubMed
- D-Lib Magazine
Appendix F: Descriptions and Comments

You can add both a description and a comment to a reference you are saving in Connotea.

The description is posted as part of the reference. This is useful later to help remember what a particular reference deals with. Sometimes a title is not enough.

A comment is not displayed with the reference, but can be seen if you click on the comment link. Comments can be added at any time.