

# Reference Management Tools

## An Overview



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# Outline

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- Introduction
- Generations of RM Tools
- Broad Features & Functions
- Selected RM Tools
- Other RM Tools
- Comparisons
- Tutorials
- Summing up

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*"If I have seen farther, it is by standing on  
the shoulders of giants"*



Sir Isaac Newton

# Introduction

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- ❑ Citations, references, bib. - fundamental to a good research
- ❑ They serve as foundation of scholarship
- ❑ Collecting, organizing, using references is a tedious job
- ❑ Producing bibliography a time consuming process
- ❑ Effective managing of references is very important
- ❑ It is most complicated aspect of being a researcher

# Introduction...

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- ❑ RM Tools are essential for effective managing references
- ❑ Good number of reference management software exists
- ❑ Which one to use & how to select
- ❑ Some are widely used among S&T community
- ❑ RM resemble managing personal digital library
- ❑ Number of citation styles also exist

# Generations of RM Tools

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- ❑ Hand written notes on index cards, organizing, sorting
- ❑ Use of word processing software
- ❑ RMs came up in 1980s- online database searching era
- ❑ PCs- stand-alone desktops versions were introduced
- ❑ Networked versions in 1990s
- ❑ Web versions 2000

# Generations of RM Tools...

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- ❑ Web 2.0- social element- sharing facility 2004 & onwards
- ❑ Changing workflow in doing research
- ❑ RMs are evolving to meet expectations & needs
- ❑ Integrating with e-learning/ course management systems
- ❑ Have it all kind of RMs have appeared now

# Broad Features & Functions of RMs

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- ❑ Importing/exporting of citations from databases & websites
- ❑ Gather metadata from PDF files/websites
- ❑ Offer data storage options
- ❑ Adhere to standard formats- RIS & BibTex
- ❑ Organization of citations within the RM database
- ❑ Adding notes & annotations to citations
- ❑ Searching & sorting within the database



# Broad Features & Functions of RMs...

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- ❑ Sharing of RM database in full or part
- ❑ Data interchange/migration with other RMs
- ❑ Producing formatted citations/bibliographies
- ❑ Integration with Word Proc. software for in-text-citations
- ❑ Linking with full text- using link resolver technology
- ❑ Available- Open source/free/ fee based
- ❑ Different levels-Individual/institutions/web 2.0 versions

# Selected RM Tools

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- EndNote
  - [www.endnote.com](http://www.endnote.com)
- RefWorks
  - [www.refworks.com](http://www.refworks.com)
- Zotero
  - [www.zotero.org](http://www.zotero.org)
- Mendeley
  - [www.mendeley.com](http://www.mendeley.com)
- CiteULike
  - [www.citeulike.org](http://www.citeulike.org)
- Connotea
  - [www.connotea.org](http://www.connotea.org)

# EndNote

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- ❑ Oldest (1988) one & most popular for desktop
- ❑ By Thomson Reuters now
- ❑ License includes desktop & web edition
- ❑ Heavily used by S&T community
- ❑ Compatible with Win & Mac
- ❑ Has all major features & functionalities
- ❑ Extracts metadata from PDF files
- ❑ Search across PDF
- ❑ Has cite as you write feature
- ❑ Link resolver integrated



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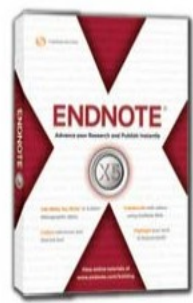
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## Thomson Reuters EndNote Information

Millions of researchers, scholarly writers, students, and librarians use EndNote to search online bibliographic databases, organize their references, images and PDFs in any language, and create bibliographies and figure lists instantly. Instead of spending hours typing bibliographies, or using index cards to organize their references, they do it the easy way—by using EndNote! And EndNote Web is included with EndNote so you can collaborate with others easily. EndNote for Windows and Macintosh is a valuable all-in-one tool that integrates the following tasks into one program:

- [Search bibliographic databases on the Internet](#)
- [Organize references, images, PDFs and other files](#)
- [Watch the bibliography and figure list appear as you write!](#)
- [Collaborate using EndNote Web, the Web-based research and writing component of EndNote](#)

[See what's new in EndNote X5!](#)

### Search bibliographic databases on the Internet:

- Using EndNote's *Connect...* and *Search...* commands, you can search Internet databases just as easily as you can search your EndNote library on your computer.
- Simply open any of more than 4,300 predefined connection files and you're online and searching.
- Access hundreds of remote bibliographic databases, including Web of Science, Ovid, PubMed, the Library of Congress, and university card catalogs from EndNote.
- Connect to data sources worldwide—EndNote provides MARC formats that support native language libraries around the world.
- Search remote bibliographic databases using EndNote's simple search window—great for locating specific

# RefWorks

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- ❑ Came in 2001 by ProQuest
- ❑ Available Desktop/Web based versions
- ❑ Available on all platforms
- ❑ Compatible with other RM
- ❑ Has
  - Bookmarklet, RefShare, File attachment, Write-N-Cite, link resolver
- ❑ Subscription based - individual & institutions
- ❑ Institution accounts provide more feature & options
- ❑ Powerful and widely used
- ❑ Most popular among RMs



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“ I have used reference database software for many years. RefWorks is the most intuitive and least problematic of any software that I have used. It permits me to capture the reference information for the online resources more effectively than other tools. I am also impressed by the responsiveness of the RefWorks development team. Personally, I have found RefWorks invaluable!”

- **Jeff Olsen Associate Vice President of Online Learning & Services Director of Library and Information Sciences St John's University USA**

RefWorks -- an online research management, writing and collaboration tool -- is designed to help researchers easily gather, manage, store and share all types of information, as well as generate citations and bibliographies.

If you need to manage information for any reason -- whether it be for writing, research or collaboration -- RefWorks is the perfect tool. Use the tutorials and information resources on this site to work smarter with RefWorks!

**NEWS**

- ▶ Press Announcement: RefWorks-COS Plans to Launch RefWorks 2.0
  - ▶ Press Announcement: RefWorks Users Now Have Lifelong Access
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- Logging Into RefWorks (1:26 min.) [Print version](#)
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- Getting Your References into RefWorks (:12 sec.) [Print version](#)
  - [Direct Import from an Online Database Service \(3:19 min.\)](#) [Print version](#)
  - Importing Text Files (6:25 min.) [Print version](#)
  - Entering References Manually (6:49 min.) [Print version](#)
- Searching Online Information Within RefWorks (2:31 min.) [Print version](#)
- Searching Your RefWorks Database (1:05 min.) [Print version](#)
- Organizing Your References (3:00 min.) [Print version](#)
- Creating a Custom Output Style List (4:25 min.) [Print version](#)
- Building Your Bibliography (:51 sec.) [Print version](#)
  - Quick Bibliography (3:44 min.) [Print version](#)
  - Using Write-N-Cite v.2 for Windows and Mac (5:53 min.) [Print version](#)
  - Using Write-N-Cite III for Windows (10:52 min.) [Print version](#)
  - Using One Line/Cite View (7:37 min.) [Print version](#)
- Test Drive RefWorks (2:04 min.)





RefWorks  
Your online research management,  
writing and collaboration tool

**See It For Yourself** ▶  
Get a feel for the power  
of RefWorks.

## RefWorks

RefWorks allows users to create personal databases and use them for a variety of research activities. References are quickly and easily imported from text files or online databases. The databases can then be used to manage, store, and share the information. Users can automatically insert references from their database into their papers and generate formatted bibliographies and manuscripts in seconds.

RefWorks allows you to...

- Organize and create a personal database online – no more index cards to write out and organize. Everything is done automatically as you import the reference into RefWorks.
- Format bibliographies and manuscripts in seconds – this saves hours of typing time and decreases the number of errors in creating tedious bibliographies. Easily make changes to your paper and reformat in seconds.
- Import references from a variety of databases using the already created Import Filters.
- Manage Alerts – RefWorks has incorporated a RSS feed reader to allow you to establish links to your favorite RSS feeds and import data from those feeds directly into RefWorks.
- Searching your RefWorks database is fast and easy –

### Optional Modules

- ◀ [RefShare](#)
- ◀ [RefWorks: Scopus Edition](#)
- ◀ [RefAware](#)
- ◀ [RefGrab-It](#)
- ◀ [RefMobile](#)
- ◀ [Alumni Program](#)
- ◀ [Attachment Feature](#)

### Tools and Resources

- ◀ [RefWorks Brochure](#)
- ◀ [RefWorks Fact Sheet](#)
- ◀ [List of Features](#)
- ◀ [RefWorks Tutorial](#)
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- ◀ [Quick-Start Guide](#)
- ◀ [Direct Export Partners](#)
- ◀ [Import Filter List](#)
- ◀ [Output Style List](#)

# Zotero

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- ❑ By Librarians from Centre for History & New Media, George Mason University, in 2006
- ❑ Free (Open Source), charges for data storage
- ❑ Plug in for Firefox browser
- ❑ Drag & drop facility
- ❑ Best for extracting metadata from websites
- ❑ Extracts metadata from PDF files
- ❑ Sharing, link resolving, cite as you write etc.
- ❑ Also has standalone, works on desktop- Win, Mac and Linux
- ❑ New-Zotero Everywhere planned

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Zotero [zoh-TAIR-oh] is a free, easy-to-use tool to help you **collect, organize, cite, and share** your research sources. It lives right where you do your work—in the **web browser** itself.

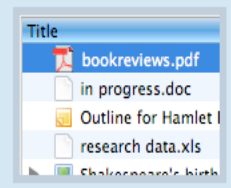
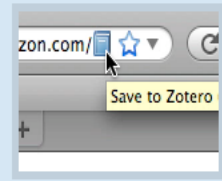
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- Collect
- Organize
- Cite
- Sync
- Collaborate

## Grab your research with a single click.

### A personal research assistant.

Zotero is the only research tool that automatically senses content, allowing you to add it to your personal library with a single click. Whether you're searching for a preprint on arXiv.org, a journal article from JSTOR, a news story from the *New York Times*, or a book from your university library catalog, Zotero has you covered with support for thousands of sites.



### Store anything.

Zotero collects all your research in a single, searchable interface. You can add PDFs, images, audio and video files, snapshots of web pages, and really anything else. Zotero automatically indexes the full-text content of your library, enabling you to find exactly what you're looking for with just a few keystrokes.

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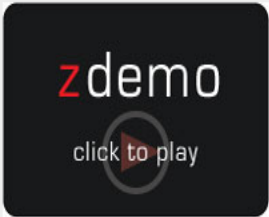

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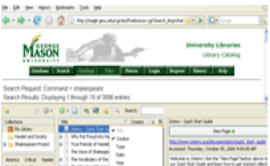
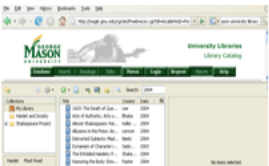
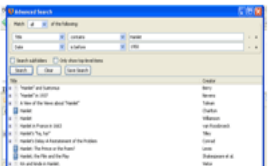
In an effort to make Zotero as user friendly as possible we have developed these screencasts demonstrating many of the basic functions of Zotero. Click on any of the images to watch screencasts detailing the features named below. Special thanks to Steve Bailey from CU-Boulder for preparing the introductory demo.

[Old revisions](#)

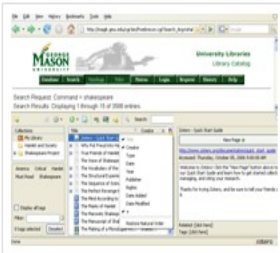
## Getting Started

<p><b>Tour of Zotero</b></p> 	<p><b>Quick Bibliographic Demo</b></p> 	<p><b>Getting Stuff Into Zotero</b></p> 
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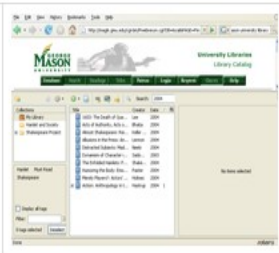
## Finding Items

		
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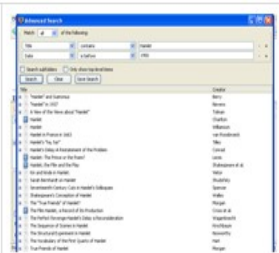
### Finding Items



Part One: Sorting

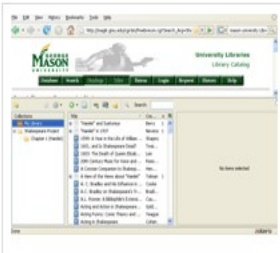


Part Two: Basic Search

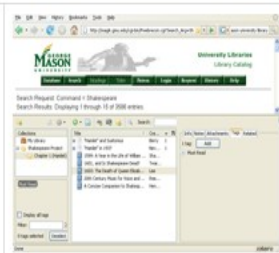


Part Three: Advanced Search

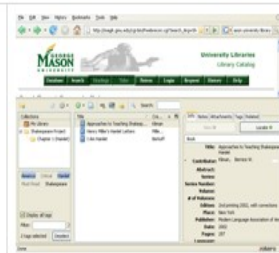
### Managing Your Library



Part One: Collections

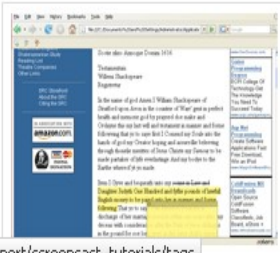


Part Two: Tags

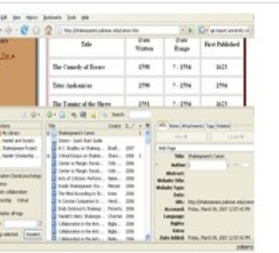
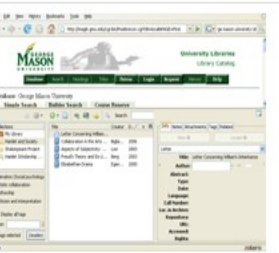


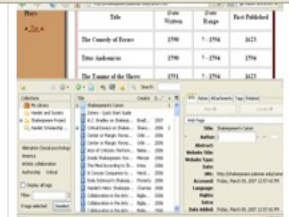
Part Three: Tag Selector Box

### Other Features



[http://www.zotero.org/support/scrcast\\_tutorials/tags](http://www.zotero.org/support/scrcast_tutorials/tags)





Highlighting And Annotation

Manually Creating Items

Creating Items From Webpages

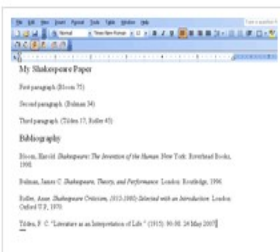


Notes

Timeline

Retrieve PDF Metadata

### Zotero and Other Tools



Zotero And Microsoft Word

Zotero And Google Products

Zotero And Flock

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Uri Alon in *Molecular Cell* (2009)  
Choosing good problems is essential for being a good scientist. But what is a good problem, and how do you choose one? The subject is not usually discussed explicitly within our profession. Scientists are expected to be smart enough to figure it out...  
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**Error bars in experimental biology.**  
Geoff Cumming, Fiona Fidler, David L Vaux in *The Journal of Cell Biology* (2007)  
Error bars commonly appear in figures in publications, but experimental biologists are often unsure how they should be used and interpreted. In this article we illustrate some basic features of error bars and explain how they can help communicate...  
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**Whitesides' Group: Writing a Paper**  
Whitesides in *Advanced Materials* (2004)

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# CiteULike

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- ❑ Created in 2004 by Springer Science & Business Media
- ❑ Free and web based
- ❑ Acts as social networking tool
- ❑ Open to any users
- ❑ Searches across
- ❑ Connects users of same interest



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by [Anna M. Borghi](#), [Diane Pecher](#)  
posted to [cognition](#) [neuromotor](#) [theoretical issues](#) by [haralanovsvet](#) on 2012-03-30 11:39:48 ★★

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*Frontiers in psychology*, Vol. 2 (2011), [doi:10.3389/fpsyg.2011.00259](https://doi.org/10.3389/fpsyg.2011.00259)  
by [Stephanie A. Gagnon](#), [Tad T. Brunyé](#), [Cynthia Robin](#), [Caroline R. Mahoney](#), [Holly A. Taylor](#)  
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**Protocols to detect senescence-associated beta-galactosidase (SA-betaGal) activity, a biomarker of senescent cells in culture and in vivo.**

*Nature protocols*, Vol. 4, No. 12. (2009), pp. 1798-1806, [doi:10.1038/nprot.2009.191](https://doi.org/10.1038/nprot.2009.191)  
by [Florence Debacq-Chainiaux](#), [Jorge D. Erusalimsky](#), [Judith Campisi](#), [Olivier Toussaint](#)  
posted to [assay](#) [beta-galactosidase](#) [methods](#) [senescence](#) by [amueller](#) on 2012-03-30 11:32:29 ★★ [along with 1 person](#)

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**The long-range non-additive three-body dispersion interactions for the rare gases, alkali, and alkaline-earth atoms**

*The Journal of Chemical Physics*, Vol. 136, No. 10. (2012), 104104, [doi:10.1063/1.3691891](https://doi.org/10.1063/1.3691891)  
by [Li Y. Tang](#), [Zong C. Yan](#), [Ting Y. Shi](#), [James F. Babb](#), [J. Mitrov](#)  
posted to [dispersion](#) [nonadditivity](#) by [marktoakley](#) on 2012-03-30 11:32:20 ★★

■ [Abstract](#)

**Ice-sheet collapse and sea-level rise at the Bolling warming 14,600[thinsp]years ago**

*Nature*, Vol. 483, No. 7391. (29 March 2012), pp. 559-564, [doi:10.1038/nature10902](https://doi.org/10.1038/nature10902)  
by [Pierre Deschamps](#), [Nicolas Durand](#), [Edouard Bard](#), et al.  
posted to [ice](#) [ice sheets](#) [sea-level](#) by [Sophie Bassett](#) on 2012-03-30 11:30:41 ✓

**Structures, energetics and vibrational spectra of CO2 clusters through molecular tailoring and cluster building algorithm**

*Phys. Chem. Chem. Phys.* (2012), [doi:10.1039/C2CP23761j](https://doi.org/10.1039/C2CP23761j)  
by [Sachin D. Yeole](#), [Nityananda Sahu](#), [Shridhar R. Gadre](#)  
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<http://www.citeulike.org/user/haralanovsvet/article/10512698>



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- ❑ Developed in 2004 by Nature Pub. Group
- ❑ Free
- ❑ Web based online citation management tool
- ❑ Started as bookmarking tool
- ❑ Offers facilities- collecting, organizing & sharing online resources
- ❑ Does not support creation of bib. & cite references, including in-text cite





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- Setting up your browser for one-click use of Connotea
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  - Step 2 of 3
  - Step 3 of 3

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- Internet Explorer
- Safari
- Other browsers

# Other RM Tools

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- Papers
  - <http://www.mekentosj.com/papers/>
- QUOSA
  - <http://www.quosa.com/>
- JabRef- Reference Manager
  - <http://jabref.sourceforge.net/>
- CiteLine
  - <http://citeline.mit.edu/>
- WebNotes
  - <http://www.webnotes.net/>
- Delicious
  - <http://delicious.com/>
- Son of Citation Machine
  - <http://citationmachine.net/index2.php>

# Comparisons - Features & Functions

	CiteULike	Mendeley	RefWorks	Zotero
Import from bibliographic databases	2	3	4	5
Gather metadata from PDFs	N/A	5	N/A	2
Organize citations in RM	4	5	5	5
Annotate citations	4	5	4	4
Share library	4	4	1	3
Exchange data with other RMs	5	5	4	5
Format citations in multiple styles	1	3	5	3
Integrate with word processors	N/A	5	2	5
<b>Sum</b>	<b>20</b>	<b>35</b>	<b>25</b>	<b>32</b>

# Comparisons - Importing Data

	<b>Direct</b>	<b>Indirect</b>	<b>Impossible</b>
<b>CiteULike</b>	arXiv, BMC, PLoS	EBSCO, Ovid, ScienceDirect	PubMed
<b>Mendeley</b>	arXiv, BMC, PLoS, PubMed	Ovid, ScienceDirect, EBSCO	none
<b>RefWorks</b>	BMC, EBSCO, Ovid, ScienceDirect	arXiv, PLoS, PubMed	none
<b>Zotero</b>	arXiv, BMC, EBSCO, PLoS, PubMed, ScienceDirect	Ovid	none

# Comparisons – Some more sources

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- ❑ Overview of Citation Software at MIT: Managing Your References
  - <http://libguides.mit.edu/content.php?pid=55486&sid=427307>
  
- ❑ Comparison of reference management software
  - [http://en.wikipedia.org/wiki/Comparison\\_of\\_reference\\_management\\_software](http://en.wikipedia.org/wiki/Comparison_of_reference_management_software)
  
- ❑ Comparison of Reference Management Software
  - [http://www.gen.cam.ac.uk/department/library/handouts/RMS\\_comparison](http://www.gen.cam.ac.uk/department/library/handouts/RMS_comparison)
  
- ❑ Reference management software comparison
  - [https://workspace.imperial.ac.uk/library/Public/Reference\\_management\\_software\\_comparison](https://workspace.imperial.ac.uk/library/Public/Reference_management_software_comparison)

# Comparisons – Some more sources...

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- RefWorks/EndNote/Zotero Features Comparison
  - <http://www.library.wisc.edu/citation-managers/comparison.html>
  
- EndNote, RefWorks, Zotero, Mendeley Help
  - <http://library.berkeley.edu/PUBL/endnote.html>
  
- Comparison of Citation Management Software (2011)
  - <https://confluence.cornell.edu/display/cmwg/Comparison+of+Citation+>
  
- Citation Management Tools: Comparison Chart
  - <http://www.library.yale.edu/cite/comparison.html>

# RM's - Tutorials / Getting Started

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- EndNote

<http://www.endnote.com/training/>

- RefWorks Tutorial

<http://www.refworks.com/tutorial/>

- Zotero

[http://www.zotero.org/static/videos/tour/zotero\\_tour.htm](http://www.zotero.org/static/videos/tour/zotero_tour.htm)

[http://www.zotero.org/support/screencast\\_tutorials](http://www.zotero.org/support/screencast_tutorials)



# RM's - Tutorials / Getting Started...

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- Mendeley

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

  - <http://www.mendeley.com/getting-started/>

- CiteULike

  - <http://www.citeulike.org/>

- Connotea

  - <http://www.connotea.org/guide>

  - [http://www.connotea.org/getting\\_started\\_firefox](http://www.connotea.org/getting_started_firefox)

## To sum up...

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- ❑ Citation management is important
- ❑ Gateway to incorporating expertise in a larger research process
- ❑ Consider using RMs
- ❑ Many RMs available in market & on web
- ❑ These tools will save time & effort
- ❑ Which one to select- depends on your needs & workflow
- ❑ Depends on what you want to do with data
- ❑ Each have strength & weakness
- ❑ RMs continue to evolve
- ❑ Keep abreast of changes
- ❑ [Enjoy the process of experimenting & using](#)

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Questions?

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Thank You!