

Reference Management At A Glance

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What is a Reference Manager?

Reference managers, or **reference management applications**, are designed to help you save, use, and share the bibliographic information of the dozens if not hundreds of sources you will encounter during your research.

Your reference manager should serve **four core functions**:

- 1. Helping you **collect** references
- 2. Helping you organise references
- 3. Helping you cite references
- 4. Helping you share references

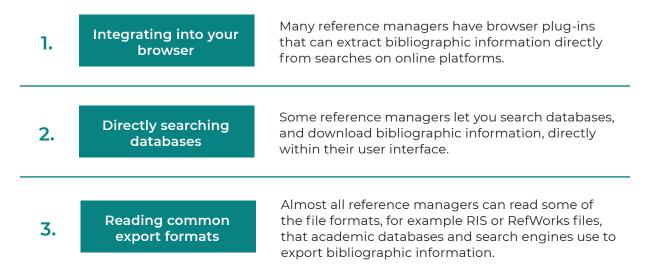
Note: These functions are adapted from the University of York's <u>Subject Guide on Reference</u> <u>Management</u>, which is provided under a <u>CC BY-NC-SA</u> license.





Collecting References

Reference management software should help you **collect** references by easily creating searchable libraries of bibliographic information. They do this by:



Organising References

Reference management software help you **organise** references. Typically, this means that they have tools that can help with:

1.	Categorising your references	Reference managers let you sort your references into folders by theme, research project, and other useful categories.
2.	Collating your references	Reference managers have built-in tools to check your library for duplicate records and combine them if they are found.
3.	Correcting your references	Reference managers allow you to manually edit references so that you can correct any errors or fill out any missing information in the references pulled from databases and search engines.
4.	Attaching documents to your references	Many reference managers allow you to attach full-text PDFs to references in your library. Some also let you add comments, highlights, and other annotations that make it easier to draw information from your sources.



Citing References

Once your sources are organised in your reference manager's library, the software helps you **use, present, and cite** these references providing features to:

1.	Automatically manage references	Reference managers often provides tools for word processors that can insert in-text citations as you type and automatically create reference lists. Usually, these auto-update if the source references in your library chang
2.	Manually manage references if needed	Reference managers allows you to copy references from your library as text so that you can manually paste the in citations and reference lists if there is no automatic tool for your word processor.
3.	Format references to specific styles	Reference managers usually comes with a library of in-built referencing styles for different fields and journals that it can apply automatically, consistently, and accurately.

Popular Reference Managers

There are hundreds of references managers available, each with different prices, features, and compatibilities. Most should be able to carry out the core functions described earlier in this lesson.

However, there are **3 major reference managers** you are likely to encounter in your research career, wherever you are based. These are:

- 1. Mendeley
- 2. Endnote
- 3. Zotero





Comparing Reference Managers

Once your sources are organised in your reference manager's library, the software helps you **use, present, and cite** these references providing features to:

	EndNote	EndNote Basic	Mendeley	Zotero
Pricing	Available for one- time purchase	2GB free	2GB free, extra storage for an annual fee	300MB free, extra storage for an annual fee
Available platforms	Desktop, web	Web	Desktop, web	Desktop, web
Browser plug-ins to import references	Yes	Yes	Yes	Yes
PDF attachment and annotation	Attachment, no annotation	Attachment, no annotation	Attachment, no annotation	Attachment, no annotation
Available referencing styles	Thousands, additions possible	Thousands, additions possible	Thousands, additions possible	Thousands, additions possible
Word processor integration	MS Word, Open Office	MS Word, Open Office	MS Word, LibreOffice	MS Word, LibreOffice Google Docs
Collaboration tools	Entire library can be shared with up to 100 other EndNote users	Entire library can be shared with up to 100 other EndNote users	Up to 5 groups with 25 collaborators each can be shared, with attachments	Unlimited groups can be shared with unlimited Zotero users

Using Your Reference Manager

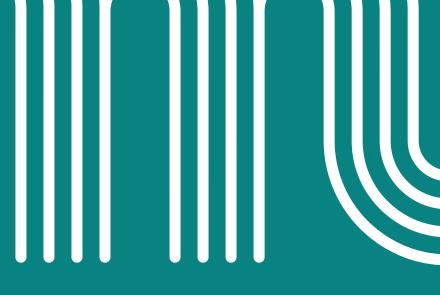
The University of York library's **Practical Guide to Reference Management** explains how to use your chosen reference manager for each of the core functions described above.

You can also find accessible guides to each platform by following the links below:

Reference Manager	Guide	
Endnote	Lancaster University's video playlists on <u>EndNote</u> <u>Desktop</u> and <u>EndNote Basic</u>	
Mendeley	The University of Essex library's <u>Interactive Mendeley</u> <u>tutorial</u>	
Zotero	McGill University's video playlist on Zotero	







These training materials are provided as part of the Mawazo Learning Exchange, a professional development platform for African researchers. The Mawazo Learning Exchange is a programme of the Mawazo Institute, a non-profit research organisation based in Nairobi, Kenya. Mawazo's mission is to support the next generation of female thought leaders and scholars in Africa, and get policymakers and the public engaged with their research.



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