



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 [Subject Guide on Reference Management](#), which is provided under a [CC BY-NC-SA](#) license.



Collecting References

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

1.

Integrating into your browser

Many reference managers have browser plug-ins that can extract bibliographic information directly from searches on online platforms.

2.

Directly searching databases

Some reference managers let you search databases, and download bibliographic information, directly within their user interface.

3.

Reading common export formats

Almost all reference managers can read some of the file formats, for example RIS or RefWorks files, that academic databases and search engines use to export bibliographic information.

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 EndNote Desktop and EndNote Basic
Mendeley	The University of Essex library's Interactive Mendeley tutorial
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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