

Selecting a reference management tool

1. Introduction

While at work, study or in everyday life you may find information from a wide variety of sources. Keeping a record of interesting sources you find will ensure you can access the material at a later date and provide references to sources you may use in your own work.

There are several, freely available, online reference management tools which enable you to store, manage, share and cite your references.

In this activity we will look at features of reference management tools and the questions you need to ask when selecting one. You will also be given an opportunity to assess some referencing tools.

Learning outcomes

By the end of this activity you should:

- be familiar with the features of reference management tools
- be able to choose a tool appropriate to your needs.

2. Features

Have a look at each of the features below for some of the options and questions which you may need to consider.

Access

Access can be from a desktop application, a web browser or mobile devices - such as smartphone or tablet.

Questions to ask:

- do you need to download software on to your desktop?
- is the tool compatible with the operating system you use, for example, Windows, Mac, Linux, or smartphone OS like Android or iOS?
- is the tool compatible with the browsers you use?
- can you access the tool from a mobile device?
- does the tool synchronise your references? - for example, will your library of references be the same if accessed from any device?

Content

What level of detail do you wish to store and manage using a reference management tool?

Options include:

- bookmarks or web links only
- bibliographic information (reference details) of a source, such as author, journal name, article title, date and so on.
- a range of material including full text of journal articles, pdfs, images, audio files, snapshots of web pages as well as references.

What type of material do you wish to manage?

- A tool may be more appropriate for a specific type of material e.g. only academic or peer-reviewed material, or a specific subject area.

Adding references

What options are available for adding new references to the software management tool?

Options include:

- enter and record the information about each reference manually
- automatically export referencing details from Library databases and Google Scholar
- import files of references, which may have been exported from databases or other referencing software
- a downloadable browser button, bookmarklet, or webimporter is available with some tools, which can be used to capture details from a web page
- some tools have a catalogue which you can use to discover articles and then add to your library of references.

Check whether your chosen tool will easily import references from the databases you need to use.

Storage

Your references may be stored on your PC desktop, centrally hosted website, or a cloud server.

Questions:

- where are your references stored?
- are your references automatically backed up or do you need to do a manual back up?
- how much storage space do you need? - storing full text, for example, will require more space.

If you wish to access an up-to-date library of references from any device, then your references will be stored on a server.

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Questions:

- how much free storage space is offered on a server?
- can you pay for extra storage and how much does this cost?
- how does storage space and cost apply to groups which share references?

Organising references

References can be organised:

- by adding to collections/ folders or subcollections/ subfolders
- by assigning keyword tags to each reference.

Some tools can store documents, webpages and references, and there may be the option to add annotations and notes to full text documents stored in your reference library.

Information, references or sources stored in your reference library may be retrieved by:

- navigating the folder management system
- filtering by tags
- searching across the full text of sources and notes.

Sharing

Sharing references and sources can be useful if working on a research project in small groups, to discover people with similar interests, and to help discover literature on a particular topic.

Options may be available to:

- create a private group
- join a public group
- share references using social media, for example, Facebook.

Consider whether sharing requires extra storage space.

If you do share sources you will need to consider copyright. For example, the OU Library's licences to subscription databases do not allow sharing of PDFs, whereas it may be within copyright to share open access sources. If you are in doubt share references and links rather than full text or PDFs.

Output

Some reference management tools provide word processor citation plugins which help to create in-text citations and generate a list of references in your text. There may also be options to drag and drop a citation and export a list of references to your text.

Questions:

- do you need a citation plugin, for example will it save you time?

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- will a citation plugin work with your word processor, for example Microsoft Office (Windows and Mac) or Libre Office?
- will the tool automatically generate a reference list?
- do you need a specific referencing style and is it provided?
- if the precise style you require is not available, can you customise a style? - if a tool cannot output in a required style you could output in an available style, then tweak the references to match your requirements.

Ease of use

- How quickly can you learn how to use the tool?
- Is the tool's help section clear and comprehensive?

Check the forum and discussion areas, if there are any, and make a judgment about the level of problems users encounter and how quickly they are resolved.

Are you happy with the functionality and with how long it may take you to learn how to use the tool?

Sustainability

There is no guarantee a free software tool will always be available. However, you will normally have some notice and time to move your references to another reference management tool.

To transfer your references to a different tool you will usually need to export first and then import your references in a .ris format. RIS files can be read by most reference management tools.

Questions:

- is the format in which references are stored compatible with other referencing tools?
- is it possible to import from and export to other tools?

3. Which tool?

Most tools offer an overview of their functionality and features on their home page. This helps you to make an initial judgement fairly quickly about tools which can meet your needs.

On this section are listed some free reference management tools, as well as a link to information about how to use Microsoft Word to add citations, if that is something you are interested in exploring. Open the links to get a feel of what they offer.

[EndNote basic](#)

[Mendeley](#)

[Zotero](#)

[Adding citations with Microsoft Word](#)

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4. Summary

Summary

In this activity we have looked at some features of reference management tools and the questions to ask when selecting a tool. These include how you will access and use the tool, as well as the sort of material you wish to store and manage.

Think carefully about the features you require then select a tool which matches your requirements, while also considering ease of use and sustainability.

Next Steps

You might find it useful to adapt and use a checklist when evaluating a tool against your needs. You could draw up a shortlist of two or three then spend ten minutes looking at each in more detail. We have provided a downloadable checklist.

[Reference management tools features checklist \(word\)](#)

[Reference management tools features checklist \(pdf\)](#)

Library Services' [Bibliographic management page](#) contains more details and tips about some of the tools mentioned in this activity.

