Choosing and Using Software for Referencing

Learning Outcomes



Understand how reference managers work



Know what software is available.



Be aware of things to think about when choosing a reference manager.



Know where to get more help

How do reference managers help you?

1

Stay **organised**

Collect information about everything you've read in one place.

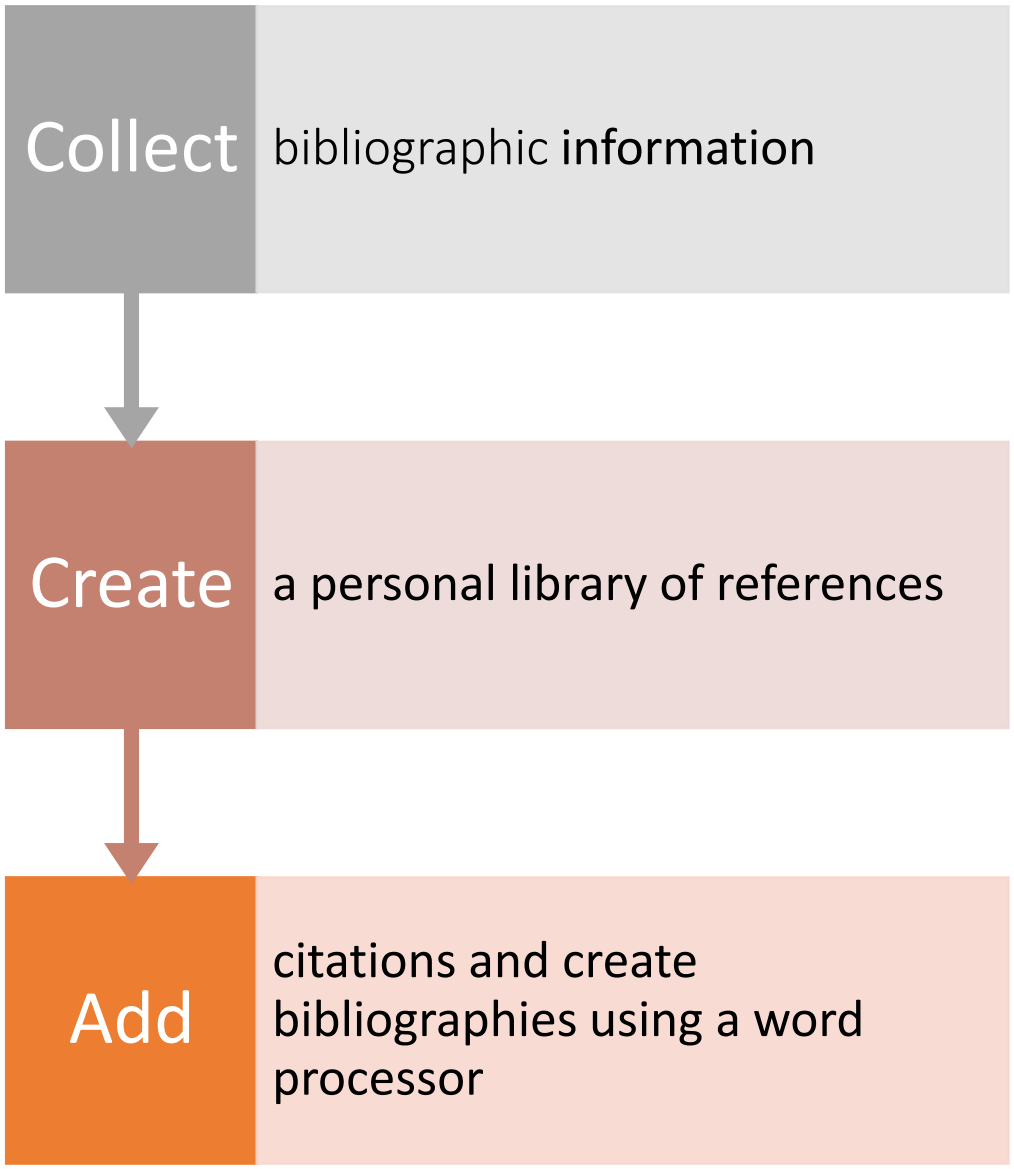
2

Save **time**

Speed up adding citations and creating bibliographies in documents.



How reference managers work

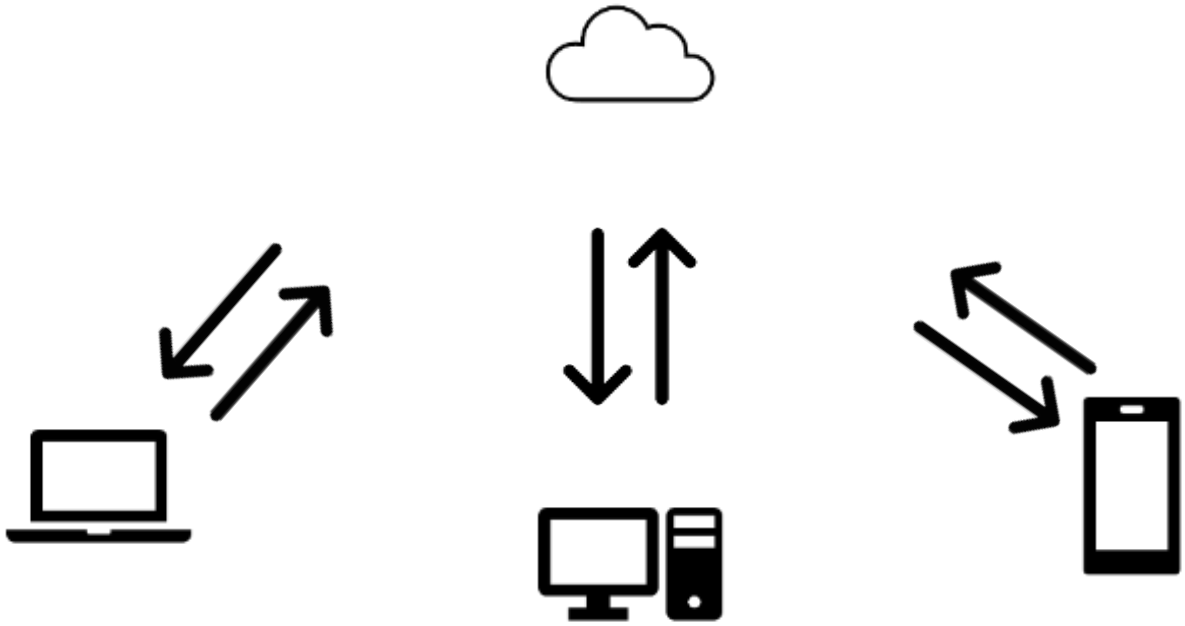


Different methods for adding a reference

1. Add manually
2. Direct export from database
3. Upload text file
4. Grab website information

Where your references are stored

Most reference managers allow you to sync your library to the cloud.



The limits

- It won’t tell you where to put citations.
- Can’t extract references from reference lists in existing publications.
- Garbage in – garbage out.
- Sometimes it goes wrong.

Advice

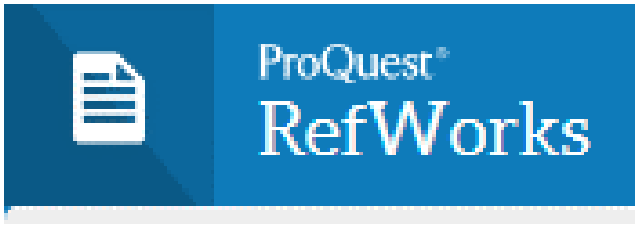
- Take time to learn the software.
- Test the software on the computer you will be using.
- Keep backups of your reference library.
- Ask for help.

Software available

Many different packages are available.

The principles are the same but the details are different.

Variations in price and features.







The impossible question

What is the best reference manager?



Online working

Access a web-based version of your reference library:

- Easy access from any computer
- Minimal software to install
- Often more limited functionality
- Need to have a web connection





Offline working

Locally downloaded copy of your references:

- Work on the move
- Improved speed and functionality
- Keeping items synced can be problematic

Cost



Some packages are free for you to use

We have a university subscription for RefWorks.

University members can download a free personal copy of EndNote.

Download EndNote from the IT Services website.



Some are free for a basic account

You pay more with Zotero for increased storage space.

Will it always be free?

Platform compatibility

	Mac	Windows	Linux
EndNote	Yes	Yes	No
RefWorks	Yes	Yes	No
Zotero	Yes	Yes	Yes

Word processor compatibility

	MS Word	LibreOffice	Pages	Google Docs
EndNote	Yes	Yes	Yes	No
RefWorks	Yes	No	No	Yes
Zotero	Yes	Yes	No	Yes

Collaboration



Do you want to collaborate with other people to build bibliographies?



Can you share libraries easily with others?



Databases

- No package works with every database.
- Make a list of databases you often use.
- Look out for direct export options that can make life easier.
- Explore alternative ways to collect your references:
  - Text files.
  - Searching from within the reference manager.

Citing and bibliographies



Can you collect all the data fields you need?

EndNote and RefWorks give you custom fields.



Which journals do you often write for?



Does your department demand a particular style?

There can be issues with footnote type citation styles.



Can you edit or create styles?

Often time consuming and complicated!

Things to check

- Does the software support the citation style(s) I need? Can I edit styles?
- Does the software allow me to edit all the data fields I want?
- Will I have enough space (or am I willing to pay)?
- Can I install this software on the computers I use?
- Which word processors does the software support?
- Can I work on and off-line?
- What sort of files can I import? (.ris, .bib etc.)
- Can I easily export references from my favourite databases?

Getting help

Other iSkills and IT Services courses

Reference management guide:

- Quick summaries of different packages.
- Contact details for staff who can help.
- Guides and instructions for different software.
- libguides.bodleian.ox.ac.uk/reference-management

Ask us!

- reference-management@bodleian.ox.ac.uk

The practical

3 packages to try.

Try out all the software or just a few.

We've tried to highlight key features of the packages.

Work through the task sheets for each package.

https://www.bodleian.ox.ac.uk/ask/workshops/reference-management-workshop-handouts