

Bibliographic Managers – a few options and comparisons

Program	EndNote (Desktop)	EndNote (Online)	Mendeley	RefWorks	Zotero
Cost	Approx. £100 educational rate. Licence covers UoE computer labs & some schools	Free Basic account; additional features when you register via Web of Science	Free, up to 2GB pdf storage (fees for Premium accounts) Available in UoE computer labs	Individual sub: \$100.00/year Freely available for NHS Scotland via Knowledge Network	Free, up to 300MB pdf storage (fees for Premium accounts)
Owned by	Clarivate analytics	Clarivate analytics	Elsevier	ProQuest	Open source George Mason Uni
Operating system	Windows, Macintosh	Windows, Macintosh	Windows, Macintosh, Linux	Win (IE, Firefox, Chrome) Mac (Firefox, Safari) Linux (Firefox)	Windows, Macintosh, Linux
Supported browsers	Web capture tool works best with Firefox or Internet Explorer	Chrome, Firefox, Internet Explorer, Safari	Chrome, Firefox, Internet Explorer, Safari	Chrome, Firefox, Internet Explorer, Safari	Chrome, Firefox, Opera, Safari
Purchase/info link	www.bilaney-consultants.co.uk/endnote-chest/ / www.endnote.com	Register via Web of Science / endnote.com/product-details/basic	www.mendeley.com	www.refworks.com	www.zotero.org
Word processor plug-ins	Microsoft Word; OpenOffice; Mathematica; Pages	Microsoft Word	Microsoft Word; LibreOffice	Microsoft Word	Microsoft Word; LibreOffice; partial functionality in GoogleDocs
Web-based or computer installation	Computer installation; can be synched with online account	Web-based Computer install of add-ons for Word & web browsers	Both web-based & computer install	Web-based Computer install of CiteNWrite for Word	Computer install of standalone app; add-ons for web browsers & word processors
Ways to add records	Manually; online databases export/connect; From pdfs; web importer; RIS & other standard record formats	Manually; web browser capture tool; online databases export/connect; RIS & other standard record formats	Manually; web browser capture tool; From pdfs; RIS & other standard record formats	Manually; Database export/connect; RIS & other standard record formats	Manually; web browser capture tool; From pdfs; RIS & other standard record formats
Tutorials & support	http://clarivate.libguides.com/endnote_training/home	http://endnote.com/sites/en/files/m/pdf/en-online-grc.pdf	www.mendeley.com/guides	www.refworks.com/refworks2/help/Quick_Start_Guide.htm	www.zotero.org/support/
Attachments (PDFs etc)	Any file type. PDFs & annotations fully searchable; annotations visible when opened outside EndNote. Great "Find fulltext" feature.	Any file type. Attachments & embedded annotations are not searchable	Any file type. Searchable within desktop app. PDF annotations not searchable, not retained when opened outside app	Not available to individual subscriptions. Many file types, incl images.	Any file type. Searchable within desktop app. PDF annotations not searchable, but are retained when opened outside app
Researcher tools	Useful automated tasks: Find full text, Find reference updates	Manuscript matcher to find relevant journals to submit to	See what other researchers in your field are adding to their collection		
Synchronise across computers / web	Records & attachments can be synchronised between web and desktop	Records & attachments can be synchronised between web and desktop (recent versions)	Records and attachments	Records & attachments synced on web; records only in offline CiteNWrite	Records and attachments
Optimised mobile access	iPad app	Optimised website; iPad app; iPhone DOI scan app	iOS and Android apps with good record adding/editing abilities.	RefMobile allows viewing, searching, adding, editing	Website optimised for tablets & mobiles. 3rd-party apps available
Sharing of collections	Libraries can be shared http://endnote.com/product-details/library-sharing	Read/write sharing of reference groups – restricted to subscribers	Public or private read/write sharing	Public or private read/write sharing	Public or private read/write sharing
Comments	Well established; allows full customisation of filters and styles	Internet access required while inserting references; limited customisation	Syncing data is very easy. Client install allows offline citing; some customisation	Well-recognised by online databases; limited customisation	Allows offline citing & writing. Records can be categorised with tags as well as in groups.

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The comparison table is limited; here are other sources for comparisons:

- **UC Berkeley** – compares many practical issues <http://www.lib.berkeley.edu/BIOS/refman-compare.html>
- **University of Wisconsin** – useful comparisons of features <http://library.wisc.edu/citation-managers/comparison.html>
- **Wikipedia** – detailed comparison tables – a bit scary at first but keep looking <http://tinyurl.com/2rom4l>

Which bibliographic manager is the one for you?

Do you just want to get your references correctly formatted, and do not wish to keep records for future use? In this case, you may prefer not to spend time learning about bibliographic management software. For guidance on how to format different types of sources for your writing, see Cite Them Right at www.citethemrightonline.com.ezproxy.is.ed.ac.uk/Basics

Do you need to be able to write and insert citations offline? = EndNote Desktop, Mendeley or Zotero allow you to insert references into your word processor while not connected to the internet.

Are you doing a systematic review? EndNote Desktop would be ideal because: you can create a separate database for each systematic review project; you customise the find duplicates search to more completely identify and separate out duplicate records; you can use the Find Full text tool to save time for the full text screening stage.

Do you prefer non-commercial or open source software? = Zotero is the one for you <https://www.zotero.org/about/>

Optional set-up notes:

OpenURL for University of Edinburgh: <http://openurl.ac.uk/athens:edu/>

Library proxy server prefix for University of Edinburgh: <http://ezproxy.is.ed.ac.uk/login?url=>

In EndNote desktop, you can add these to the Find Full Text preferences. However, please note that when we have tested these preferences, adding the OpenURL and proxy information appeared to make no difference to the number of full text papers found; what appears to make the most significant impact is whether your computer is recognised as being on the UoE network. So, if you are working from off-campus, we recommend setting up the Virtual Private Network to increase the success rate for finding full text (<https://www.ed.ac.uk/information-services/computing/desktop-personal/vpn>)