



Choosing a Reference Manager

Reference Guide

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Table of contents

Introduction	2
Mendeley	4
Zotero.....	5
EndNote	7
Citavi	10
Frequently Asked Questions	11

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Introduction

Welcome to the Choosing a Reference Manager reference guide. This guide has been produced by [Information Services' Digital Skills and Training team](#) to support our popular ["Introduction to Reference Managers" classroom course](#). The aim of the guide is to help you learn more about the different reference managers available and choose the one that is right for you.



Image by Shahid Abdullah from Pixabay

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Why use a reference manager?

Using a reference manager has a lot of advantages compared to writing your reference lists manually:

- It saves you a lot of time
- Reduces instances of human error in your reference list
- Helps organise and track all your resources during the writing process
- Guards against unintentional plagiarism
- Makes it easier to share resources and collaborate with others



Image by Pete Linforth from Pixabay

Although this guide covers four different reference managers, all four of them have excellent features to help you with all of the above. Choosing the right reference manager for you comes down to deciding which software interface you are most comfortable with, which one has additional features that are helpful to you, and what is the free space allowance for each software and how much would you need for your project?

Basic features

Although the main features of these four programmes serve similar purposes, here is some basic information about what makes them different. More detailed comparisons are provided in later chapters.

Mendeley

Mendeley is owned by Elsevier and is available on all open-access computers on campus, however it is not supported by Information Services and so they will not be able to provide detailed or support if you face problems while working with it. Mendeley is free to download and provides free access for up to 2GB. If you do require more space, you can buy access to more space for £4.99 for 5GB, £9.99 for 10 GB, or £14.99 for access to unlimited space.

Zotero

Zotero is an open-source programme which means that sometimes bugs and problems are more quickly discovered and fixed. You may also be able to find and download add-ons for very specific features which may not be available in other programmes. Zotero is free for up to 300MB. If you do require more space, you would be able to buy a subscription for \$20 for 2GB per year, \$60 for 6GB, or \$120 for unlimited space. Zotero is developed by the George Mason University. Zotero is free to download on your personal computer, but is not available on computers on campus nor is it supported by Information Services.

EndNote

EndNote is the reference manager fully supported by the University, which means that it is available for free on all open-access computers on campus and it is supported by Information Services in case you run into any problems while working with it. The online version of the software, EndNote Web, is free for up to 2GB of space. If you do require more space, or if you would like your own personal copy to work offline, these can be bought for £100.80. EndNote is owned by Clarivate.

Citavi

Citavi is a little different to the programmes above, as it has additional features that allow for task management and knowledge management which might make it more suitable for more extensive projects. Citavi is not available on computers on campus, nor is it supported by Information services, but it is available for download on your personal computer for free and provides free access for up to 100 references. If you do require more space, unlimited space can be bought for £94.80. Citavi is owned by Swiss Academic Software.

Wikipedia comparison of different software

This Wikipedia page provides a general look at various reference manager software and makes it easy to compare them on some general features in a glance.

https://en.wikipedia.org/wiki/Comparison_of_reference_management_software

Comparing different reference managers (PDF)

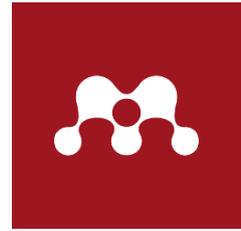
This table has been compiled by one of the University's [Academic Support Librarians](#). It provides a direct comparison of four bibliographic managers - EndNote Desktop, EndNote Online, Mendeley, RefWorks and Zotero.

<http://www.docs.is.ed.ac.uk/mvm/BiblioManagersTable.pdf>

Mendeley

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The software can be downloaded from [Mendeley's website](#).

Getting started with Mendeley

https://youtu.be/Gv6_HuCYExM (5m 37s YouTube video)

Importing documents into your library

<https://youtu.be/qRiAlagdAOg> (2m 4s YouTube video)

Organising your library

<https://youtu.be/VD1z0boSpQY> (3m 9s YouTube video)

Using search features

<https://youtu.be/XKAcQTea7E8> (3m 23s YouTube video)

Using the citation plug-in and generating citations in MS Word

https://youtu.be/zkrVbBSrK_w (2m 10s YouTube video)

Create and use groups

<https://youtu.be/47NOI5HQ5m4> (2m 56s YouTube video)

Zotero



Introduction

Zotero is an open-source program which means that sometimes bugs and problems are more quickly discovered and fixed. You may also be able to find and download add-ons for very specific features which may not be available in other program. Zotero is free for up to 300MB. If you do require more space, you would be able to buy a subscription for \$20 for 2GB per year, \$60 for 6GB, or \$120 for unlimited space. Zotero is developed by the George Mason University. Zotero is free to download on your personal computer, but is not available on computers on campus nor is it supported by Information Services.

The software can be downloaded from [Zotero's website](#).

Installing Zotero and plug-ins

<https://youtu.be/Gm2MbYB3k4o> (5m 19s YouTube video)

Importing files

Capturing from databases

<https://youtu.be/Tk-rm3gjLbE> (10m 5s YouTube video)

Capturing websites

<https://youtu.be/bMHnO68luqc> (9m 7sec YouTube video)

Adding sources manually

<https://youtu.be/ANhU9beCuzY> (8m 24s YouTube video)

Organising your library

Using tags and categories

<https://youtu.be/-LQCXmgtA> (8m 58s YouTube video)

Using folders

<https://youtu.be/gl4Lck3Ubjg> (8m 52s YouTube video)

Taking notes and annotations

<https://youtu.be/b8nkhAXjRRc> (10m 59s YouTube video)

Extracting annotations and working with PDFs

<https://youtu.be/4aDvAPLZwCY> (11m 57s YouTube video)

Inserting and creating citations

Quick citations

<https://youtu.be/udkFGvD67Cw> (6m 14s YouTube video)

Inserting in-text citations and reference lists in the document

<https://youtu.be/jf75uzS20bY> (12m 14s YouTube video)

Syncing and backing up our library

<https://youtu.be/5UV6Ce3evUY> (10m 39s YouTube video)

EndNote

Introduction to EndNote

EndNote is the reference manager fully supported by the University, which means that it is available for free on all [open-access computers](#) on campus and it is supported by [Information Services](#) in case you run into any problems while working with it. EndNote is owned by [Clarivate Analytics](#).



EndNote Desktop vs EndNote Online

There are two versions of EndNote – EndNote desktop (latest version is X9) and EndNote Online. If you are an undergraduate or masters student EndNote Online will probably meet your needs. If you are a PhD student or staff you may be better using EndNote desktop, or both.

Advantages of EndNote Online:

- Free
- Online, so can be accessed from any computer with an internet connection

Advantages of EndNote desktop:

- Installed on your computer so does not rely on an internet connection to work
- Faster, more responsive interface
- Extra features including unlimited reference and attachment storage, automatic reference updating, smart groups, one click to find full text, annotate and highlight PDFs, create references from full-text PDFs, search PDFs, and create your own formatting styles
- Can be synchronised with EndNote Online so the same references are available in both

EndNote Learning Resources

There are many learning resources that students at the University of Edinburgh can access to learn how to use EndNote. Here is a summary so you can choose what suits you best. All links open in a new tab.

Classroom courses

Information Services' Digital Skills & Training Team runs Managing Bibliographies with EndNote classroom courses. These are free for any University of Edinburgh staff or student to attend. Booking is via the [Event Booking system](#).

[Managing Bibliographies with EndNote classroom course](#)

Webinars

The Digital Skills & Training team also runs a Using EndNote Online to Manage Your References webinar. This 1 hour session aims to get University staff and students started using EndNote Online.

[Using EndNote Online to Manage Your References webinar](#)

The EndNote supplier, Clarivate Analytics, runs a range of EndNote webinars that any EndNote user may sign up for:

[Clarivate Analytics EndNote Training Calendar](#)

Online videos

[EndNote Essential Training Lynda.com course](#) (Edinburgh University staff and students can create a free Lynda.com account: [Lynda.com account creation and access](#))

[EndNote training videos and other online resources from Clarivate Analytics](#)

Workbooks

[Managing a Bibliography with EndNote X7 workbook PDF](#)

[Using EndNote Online to Manage your References workbook PDF](#)

How to get a copy of EndNote

EndNote Online

You can register for an EndNote Online account on the [EndNote Online login page](#).

You need to register for an EndNote Online account while connected to the University network (since the IP address of the computer is checked to confirmation authorization). If you are outside the University you can use the [Virtual Private Network \(VPN\) service](#) to connect to the University network. This will ensure that your account is recognised as belonging to the University of Edinburgh and give you access to extra bibliographic styles and search tools. Once registered you don't need to be on the University network to use it, but you should login to EndNote Online while connected to the University network at least once a year to renew your subscription.

EndNote desktop

The University has a [site licence for EndNote desktop](#) which means that it can be installed on any University-owned computer. It is installed on all [open-access computers](#).

If you want to buy a copy for your personal computer, this page has details:

[EndNote personal copies for staff and students](#)

Please note that under a new site licence agreement staff and students at the University should soon be able to install EndNote desktop on their personal computer for free, while they are a member of the University. We hope that this will be available in summer 2019.

Citavi



Introduction

Citavi is a little different from the other programmes on this course, as it has additional features that allow for task management and knowledge management which might make it more suitable for more extensive projects. Citavi is not available on computers on campus, nor is it supported by Information services, but it is available for download on your personal computer for free and provides free access for up to 100 references. If you do require more space, unlimited space can be bought for £94.80. Citavi is owned by Swiss Academic Software.

The software can be downloaded from [Citavi's website](#).

General Introduction

<https://youtu.be/X3vbWlcljDQ> (4m 18s YouTube video)

Getting started with a new project

<https://youtu.be/LlkQ3Fvlhns> (3m 22s YouTube video)

Adding references

https://youtu.be/FMD4_UTtmk8 (3m 15s YouTube video)

Finding new sources

https://youtu.be/mQW_IJws83o (2m 5s YouTube video)

Adding online sources

<https://youtu.be/pvW0DjtyaaE> (2m 28s YouTube video)

Reading and analysing sources

<https://youtu.be/f2-WkGGeScs> (3m 36s YouTube video)

Task planning

<https://youtu.be/eno3FSsqogc> (1m 51s YouTube video)

Outlining and connecting ideas

<https://youtu.be/flldCmLzOdU> (2m 13s YouTube video)

Writing and citations

<https://youtu.be/xXNDWXg677s> (4m 48s YouTube video)

Frequently Asked Questions

What will happen to my library if I decide to switch reference managers?

Zotero, Mendeley, Endnote, and Citavi all have import and export features where you can import your library from another software. However, it is not advisable to actively use two (or more) reference managers at the same time, as they sometimes interfere with each other.



Image by Arek Socha from Pixabay

Will the word plug-in automatically install when I install the software?

It depends on the software, so make sure you check that. For example, when you download Zotero, the plug-ins download automatically in the same package, whereas for Mendeley you have to download them separately.

What will happen to my previous documents after I install a reference manager?

Nothing. The new software will not affect anything you have already saved, including any manually-written reference lists.

How do I know how much space I will need? Will I lose my library if I upgrade my software midway through the project?

The answer to this question will differ depending on if you are saving a lot of pdf texts, or if you are only saving the reference itself. However, you will not lose your already existing library if you upgrade your account in any of the reference managers covered in this course. It is probably a good idea to start with the free version of the software and upgrade when you know you will need more space.

Which of these reference managers are supported by Edinburgh University?

You have access to Endnote Desktop and Mendeley on all open-access computers on campus. However, only Endnote is supported by [Information Services' Helpline](#).

I have a manually written reference list. Can I add those to my library?

Yes. If you copy your list into [AnyStyle](#), the website will give you a list that you can then open in your reference manager. However, make sure to look through the list for any potential mistakes before you export it to your reference manager.

Please note the current version of AnyStyle is not compatible with EndNote. To import the list from AnyStyle to EndNote, we recommend downloading Zotero and importing your references there first. You can then export the Zotero library to your EndNote. Zotero is free and does not require logging in.