

## Bibliographic Managers – a few options and comparisons

Program	EndNote (Desktop) 20	EndNote (Online)	Mendeley Reference Manager	RefWorks	Zotero 6
<b>Cost</b>	Free under UoE education licence for current staff and matriculated students.	Free Basic account; additional features when you register via <a href="#">Web of Science</a> and link your online account to a Desktop version library.	Free, up to 2GB pdf storage (fees for <a href="#">Premium accounts</a> )	Individual sub: <a href="#">\$100.00/year</a> Freely available for NHS Scotland via <a href="#">Knowledge Network</a>	Free, up to 300MB pdf storage (fees for <a href="#">Premium accounts</a> )
<b>Owned by</b>	<a href="#">Clarivate analytics</a>	<a href="#">Clarivate analytics</a>	<a href="#">Elsevier</a>	<a href="#">ProQuest</a>	Open source <a href="#">George Mason Uni</a>
<b>Operating system</b>	Windows, Macintosh	Windows, Macintosh	Windows, Linux, Mac OS* (*see comments below)	Win (IE, Firefox, Chrome) Mac (Firefox, Safari) Linux (Firefox)	Windows, Macintosh, Linux
<b>Supported browsers</b>	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
<b>Purchase/info link</b>	<a href="https://www.ed.ac.uk/information-services/computing/desktop-personal/software/main-software-deals/endnote">https://www.ed.ac.uk/information-services/computing/desktop-personal/software/main-software-deals/endnote</a>	Register via <a href="#">myendnoteweb.com</a> & use VPN if off-campus/ <a href="#">endnote.com/product-details/basic</a>	<a href="#">www.mendeley.com</a>	<a href="#">www.refworks.com</a>	<a href="#">www.zotero.org</a>
<b>Word processor plug-ins</b>	Microsoft Word; OpenOffice; Mathematica; Pages	Microsoft Word	Microsoft Word	Microsoft Word	Microsoft Word; LibreOffice; good functionality GoogleDocs
<b>Web-based or computer installation</b>	Computer installation; can be synced 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
<b>Ways to add records</b>	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
<b>Tutorials &amp; support</b>	<a href="http://clarivate.libguides.com/endnote_training/home">http://clarivate.libguides.com/endnote_training/home</a>	<a href="http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf">http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf</a>	<a href="#">www.mendeley.com/guides</a>	<a href="#">www.refworks.com/refworks2/help/Quick_Start_Guide.htm</a>	<a href="#">www.zotero.org/support/</a>
<b>Attachments (PDFs etc)</b>	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
<b>Researcher tools</b>	Find full text, Find reference updates, Manuscript matcher to find relevant journals to submit to	Manuscript matcher to find relevant journals to submit to	See what other researchers in your field are adding to their collection		
<b>Sync across computers / web</b>	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
<b>Mobile access</b>	iPad app	Optimised website; iPad app; iPhone DOI scan app	No full apps	RefMobile allows viewing, searching, adding, editing	Website optimised for tablets & mobiles. <a href="#">3rd-party apps</a> available
<b>Sharing &amp; collaboration</b>	Libraries can be shared <a href="http://endnote.com/product-details/library-sharing">http://endnote.com/product-details/library-sharing</a>	Read/write sharing of reference groups – restricted to subscribers	Private read/write sharing in groups (free account allows 5 groups with 25 members)	Public or private read/write sharing with groups	Public or private read/write sharing of groups; collaborative writing & citing via Google Docs
<b>Comments</b>	Well established; allows full customisation of filters and styles. To have access to records after graduating, sync to Online EndNote or export to another bib manager.	Internet access required while inserting references; limited customisation	Mendeley Reference Manager has replaced Mendeley Desktop	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** – feature comparison and practical advice on EndNote, RefWorks, Zotero, Mendeley and other tools <https://guides.lib.berkeley.edu/publichealth/citations>
- **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](http://www.citethemrightonline.com.ezproxy.is.ed.ac.uk/Basics)
- Try ZoteroBib: this web-based tool from Zotero is really handy for generating nicely formatted references: <https://zbib.org/>

*Do you need to be able to write and insert citations offline?*

- If yes, then EndNote Desktop 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 can use the Find Full text tool to save time for the full text screening stage. You can also customise the find duplicates search to more completely identify and separate out duplicate records, but other deduplication tools may have better results and save time (e.g. SR-Accelerator's Deduplicator <https://sr-accelerator.com/#/deduplicator>)
- If you want to use Mendeley or Zotero, consider creating a new account with a separate email for the systematic review project. It can be confusing/annoying to manage a systematic review collection alongside references for other projects.
- Mendeley automatically attempts to merge duplicate records upon import, so if you wish to be careful about counting duplicates, be sure to record result numbers at the point of exporting from literature databases.

*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: <https://libkey.io/libraries/665/openurl>

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>)