

## Transcript: Choosing and Using Software for Referencing

Welcome to this presentation on Choosing and Using Software for Referencing.

Moving onto the learning outcomes of this presentation, by the end of the video, you will understand how reference managers work and what they can do; know the range of software that is available; understand the considerations to take account of when choosing a reference manager that will work best for you; and know where to go to find further help if you want to learn more about reference management or a particular reference manager.

How do reference managers help you? They can help you in two ways: to stay organised and save time. Let's look more closely at how reference managers can help you to stay organised.

As you begin a research project, essay or article, you'll probably start by finding and reading papers, books and reports on the topic you are writing about. When you write up your work, it is also likely that you will want to cite many of these sources. When you are reading and collecting a lot of material, it can be difficult to keep track of everything you have read. A reference manager allows you to build up a personal library of references to the sources you are using as you collect them. The references are stored all together in one place electronically. It is then easy to refer back to your reference manager to review what you have read and get all the information you need to create accurate citations and bibliographies in your own written documents. Hence, reference managers can help you stay organised during your research.

Let's look now at how reference managers can save you time.

Reference managers can help you save time by automatically creating properly formatted in text citations, footnotes and bibliographies in your word processed documents. As you are writing a document, you can add citations quickly and easily from your reference manager at the appropriate point in your text. The reference manager can create bibliographies and citations for you in hundreds of different citation styles, ranging from standards like Harvard or Chicago to styles associated with a particular journal. It is also very easy to switch between citation styles if you

need to change for some reason. The reference manager can reformat your in text citations and bibliographies for you in seconds.

We have looked at how reference managers can help you, but how do they work?

Firstly, they collect bibliographic information. Usually you will begin by collecting references and you will do this by searching an online bibliographic database, such as Web of Science or ProQuest, or library catalogues such as Oxford's own resource discovery tool SOLO for books and papers of interest. Reference managers offer various means of importing the bibliographic information from online catalogues and databases and I'll summarise these in a moment.

Secondly, the reference manager creates and builds up a personal library of the references that you are adding. Think of it like an online library and each reference is stored, much like a book is placed on a shelf. Each reference in your library can be used to create citations and bibliographies. You can also edit the records to correct any mistakes or add further details. Most reference managers also allow you to share records in your library with others. You can also manage your references by using folders, tags and finding and deleting duplicate references.

Finally, the reference manager enables you to add citations and create bibliographies using a word processor. As you begin to write a document in, for example, Microsoft Word, you can use your reference manager to add citations at appropriate points and then place a fully formatted bibliography at the end of the document. Most reference managers will install a plugin, which is some software that adds some new buttons into the toolbar in your word processor. These new buttons allow you to add citations and bibliographies into your documents and does all of the formatting for you. You can also choose which citation style you want to use and you can change citation style easily too.

There are numerous ways to add items to your reference manager. One, you can add entries manually by typing in all the bibliographic information about your source. Although this is time consuming, it can be useful for adding details of unpublished material where a suitable online record does not exist. Two, direct export options are available for many databases. These allow you to quickly send all of the bibliographic information you want from the database to your reference manager at the push of a button. Three, many databases and catalogues can import and export

bibliographic information as text files. These are usually in standard formats for exchanging bibliographic information, such as .ris or .bib. Most reference managers can read these file formats. Text files are useful for exporting information from databases and catalogues that do not have a direct export option. They can also be used to move references from one reference package to another if you decide you want to change the software you are using.

Four, most reference managers include a tool that integrates with a web browser and which allows you to create bibliographic records from websites. The reference manager will automatically collect the date on which the web page was accessed and the full URL of the site. This is often essential information for creating accurate bibliography entries for websites.

When you use a reference manager, it's important to understand where your reference library is being stored. Most modern reference managers allow you to save your reference library to the cloud, that is on a remote server on the web. Some also allow you to save a local copy of your reference library to your computer's hard drive. The advantage of having your references stored in the cloud is that you can access the same data from any location or device. This means you can add records to your reference library using the computer in your office during the day, add citations to a paper in the evening from your laptop at home and also view the contents of your library while you are travelling using a smartphone or tablet.

Although reference management software can be very helpful, there are some important limitations that you should be aware of.

Firstly, the software will not tell you where you need to place citations in your text or remind you if you have forgotten to include a citation. Secondly, in general, reference managers cannot extract bibliographic information from existing documents. For example, if you have previously stored reference information in a Word document, PDF or spreadsheet, you cannot turn these into bibliographic records that can be fed into your reference manager. Thirdly, when using reference managers, the rule of garbage in garbage out applies. When you take bibliographic information about a document from an online database or catalogue, it can be incomplete or contain errors. For example, the author's name may be misspelt or the publication date missing. If you do not correct these errors in the record in your reference manager,

they will simply be reproduced in any citations or bibliographies that the software produces. It is therefore important to review bibliographic records carefully to ensure that they are accurate. The good news is that it is easy to edit records within the reference manager and the corrections only need to be made once.

Finally, like any other piece of software, reference managers can go wrong. Sometimes, there are software bugs or crashes.

Moving on for some advice on using reference managers.

It is a good idea to take some time to learn how to use the software correctly as this can prevent problems occurring later. There is a variety of help available online and you can also attend more in-depth courses on using reference managers with the Bodleian Libraries or IT Services.

You should also check that the software you wish to adopt is fully compatible with the computers you use. Some reference managers allow you to create offline backups of your library on a hard drive or network drive. These can be used to restore your reference library should the worst happen. You can also ask staff at the libraries or IT services for help if you encounter problems.

There are many different reference management software packages available. The basic functionality of the software is the same, but all the packages work slightly differently and have extra features which differentiate them from competitors.

Popular packages in use around the University of Oxford and supported by the Bodleian Libraries are EndNote, RefWorks and Zotero.

We often get asked 'what is the best reference manager?', which is very difficult to answer. The most suitable reference manager for an individual will depend on many factors. It is therefore not possible to say what the best reference manager is. There is no one size fits all. What we can suggest, however, are various questions you may wish to consider when choosing a reference manager, so that you find a piece of software which is best suited to your needs.

One thing to consider when choosing a reference manager to use is if it allows you to work both online and offline. Some software such as RefWorks, is almost entirely web based. Storing references online means you can access your references easily from any computer connected to the internet. There is minimal software to install.

However, you may find the functionality is limited and the downside is you need to have a web connection. If you are likely to be working somewhere without a reliable internet connection, this software may not be the best choice.

Moving on to offline working, EndNote and Zotero are primarily desktop based and work offline, storing your references in a folder on your computer. But you can store your references online too. Storing your references on your computer can be useful if you want to restrict your data to a single computer or network for privacy or security reasons. It also means you can work on the move, accessing the references on your machine without being connected to the internet. Speed and functionality can be improved as you are not working online. However, if you are accessing your references across multiple computers, it can be problematic syncing across those multiple computers.

Most reference management software packages now work both online and offline, allowing you to get the best of both worlds.

One area where reference managers differ is cost. The University of Oxford has an institutional subscription to RefWorks, which means that it is available to use free of charge for all University of Oxford members, and that includes alumni. If you wish to use EndNote on your own computer, you can download it for free from the University's IT Services website. Many departments around the University also licence the software for departmental computers. The Bodleian Libraries also make EndNote available on library reading room PCs. Note that if you install EndNote on a personal computer, you should uninstall it once you leave the University.

Zotero is free for a basic account, but if you want additional online storage space or extra features, you must pay a monthly or annual subscription.

Let's look at platform compatibility. Your choice of reference manager may be guided by the type of computer you use.

Do check the operating system compatibility for the software you plan to use to confirm that it is suitable. As shown on the slide EndNote, RefWorks and Zotero all work with Mac and Windows computers, but only Zotero works with Linux.

There are many different word processing packages available and the compatibility with reference managers varies. The table on the slide summarises the compatibility with a number of packages. EndNote, RefWorks and Zotero are compatible with

Microsoft Word. LibreOffice is compatible with EndNote and Zotero but not RefWorks. Only EndNote is compatible with Pages, but EndNote is not compatible with Google Docs, whilst RefWorks and Zotero is.

If you want to be able to share references in your library with others, check to see what sharing options are available for the software you would like to use. If you are working with other colleagues either inside or outside Oxford, you may want to consider adopting the same reference manager. EndNote, RefWorks and Zotero all allow sharing, but it's good to check the specific details.

Many bibliographic databases have direct export options, which allow you to easily send bibliographic information to reference managers. However, no reference manager is compatible with every database and catalogue. We suggest making a list of the databases you use frequently for your research and then test these with the reference manager you would like to use. If there is no direct export option, you may be able to create text files in .ris or .bib formats and upload these to your reference manager. Some reference managers, such as EndNote, allow you to search many databases from within the reference manager itself.

Looking at citing and bibliographies, make sure that you can collect all the bibliographic information about the sources that you need. All reference managers can handle basic document types such as books and journal articles, but if you need to cite interviews or other more specialised materials, you will need to make sure that your reference manager allows you to create records that include any extra information. EndNote and RefWorks allow you to create custom field to store additional information but this is not true of all reference managers.

Think about which citation styles you will need to use. Different reference managers support different citation styles. Consider which journals you often write for and check that suitable styles for these journals are supported. If you are writing a thesis or dissertation for submission to your Oxford Department, check if the department requires you to use a specific citation style and confirm that this is available. With many reference managers, it is possible to edit existing citation styles or even create new ones. However, this is a complex and time consuming task and is best avoided if possible.

This slide provides a summary of questions you can ask yourself when choosing a reference management package that will suit your needs.

- Does the software support the citation styles I need and can I edit those styles?
- Does the software allow me to edit all the data fields that I want?
- Will I have enough storage space for my library? 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 offline?
- What sort of files can I import? And can I easily export references from my favourite databases?

It is worth noting that you can switch reference managers if you wish. You can export all your references and then import them into another reference manager, so you are not necessarily stuck with the reference manager you initially chose to use.

Moving on to the final slide and where to get help. There are various sources of further help, and you can attend more in-depth courses on a range of reference management software here at the University of Oxford.

Many of the software maker's websites provide FAQs, quick help guides, manuals and video tutorials, which you can use to learn more about a particular reference manager.

Our Reference Management Guide includes summaries of different packages, along with links to further information and feature comparisons for different pieces of software. You can use the web address on the slide to access the guide:

[libguides.bodleian.ox.ac.uk/reference-management](http://libguides.bodleian.ox.ac.uk/reference-management).

And you can always ask us for help using the email address [reference-management@bodleian.ox.ac.uk](mailto:reference-management@bodleian.ox.ac.uk).

Thank you for watching this presentation.