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Reference management : trends and tricks

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Outline

- What do you use?
- An overview of developments in reference management software
- Integration with other research tools
- Smart use of reference management software

What RM software do you use?

With your mobile device, go to:

www.menti.com

Enter the code 59 17 18 and vote



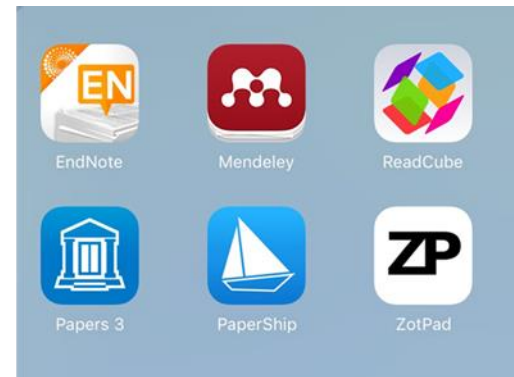
Why use reference management software?

- Save and organize references in one place
- Import references and PDFs from e-sources
- Store and annotate PDFs
- Search and update references
- Insert citations into text
- Automatically create a reference list in document
- Reformat referencing style for alternative outputs
- Share references with colleagues and peers



Reference management options

- Lots of choice!
- Web and/or desktop
- Browser based
- Licensing:
 - Individual or site subscription
 - Open source / freemium



Reference management
apps for mobile devices

More than just reference management

- PDF annotation
- Manuscript preparation / submission
- Shared libraries
- Systematic reviews

Reference management tools in context



Source: <http://dashboard101innovations.silk.co/page/Research-activities>

All change!

- **BibTeX** – succeeded by BibLaTeX
- **Citavi** – group options and Citavi 6 beta released
- **Colwiz** – purchased by Taylor & Francis
- EndNote X7 updated to **EndNote X8**
- **Mendeley** – diversifying content, single Elsevier sign-in
- **ReadCube** – ReadCube Papers app in development
- **RefME** – acquired (then decommissioned) by Cite This For Me (CtFM)
- **New RefWorks** replaced Flow and Legacy RefWorks

Recent new / improved features in RM tools have included:
annotation of PDFs, recommendations, improved sharing of
references, and managing research data

New kids on the block

- **PaperHive** (browser extension for Firefox and Chrome). Researchers and students collect the articles relevant for them in their own *Hives* and receive personalized notifications for updates and new comments.
- **PaperPile** (built for Chrome and Google Apps). Particular emphasis on integration with Google Docs and Google Scholar, plus subject repositories.



New kids on the block



- **CanaryHaz** launched, then became **Kopernio**
 - finds *best available PDF* of academic articles while you browse
 - stores your saved PDFs in a *locker*
- “Where possible, Kopernio retrieves the final published version of an article”. If article is not OA or subscription access, Kopernio will try find an alternative version (pre-prints and author manuscripts deposited in institutional repositories)
- Requires access to, and storage of, your library log-in credentials

- Alternative plug-ins to find academic articles:
Open Access Button and **UnPayWall**



Word processor integration

- Where there is a site license to a product, most IT support will turn on the options in **Word** so that these products are available in the Toolbar
- For use on personal devices, check for a **plug-in** or **cite (while or as) you write** option in the documentation
- The default Referencing tool in Word is also available; this can subsequently be imported into most RM software
- **LaTeX** – incorporates basic bibliography tool. BibTeX / LaTeX offers more flexible and powerful options.
- See:
https://en.wikipedia.org/wiki/Comparison_of_reference_management_software#Word_processor_integration

Collaborative writing

- Shared “libraries”
 - Citavi
 - EndNote
 - Mendeley
 - PaperPile
 - ReadCube
 - RefWorks
 - Zotero
- [Authorea](#)
- [Fidus Writer](#)
- [IEEE Collabratec](#)
- [Overleaf](#)

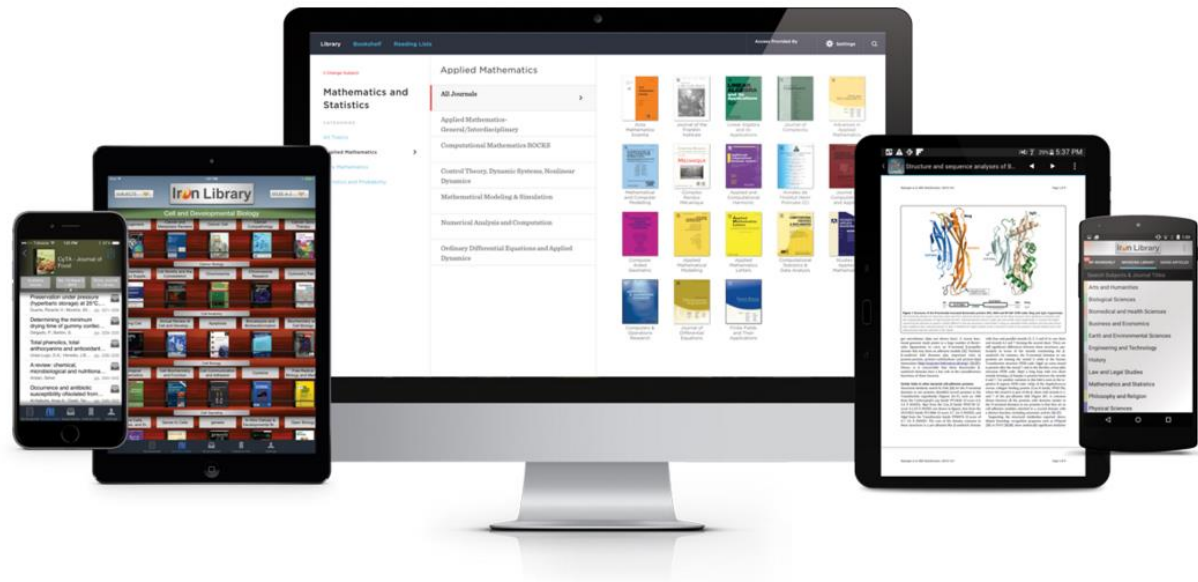


Integration with BrowZine

<https://browzine.com>

Save references to

- EndNote
- Mendeley
- Zotero
- or another PDF-accepting app



Integration with BrowZine

The screenshot shows a mobile interface for an article titled "Establishing the Role and Impact of Academic Librarians in Supporting Open Research: A Case Study at Leeds Beckett University, UK". The article is from the "New Review of Academic Librarianship", Vol. 23, Issue 1, 2017. The page includes a cover image of the journal, the article title, authors (Kirsty Bower, Nick Sheppard, Jennifer B. B. B.), and a DOI link. A red circle highlights a small icon in the top right corner of the article header. Another red circle highlights a section titled "Bibliographic Management" which contains three icons: Zotero (a red 'Z'), Mendeley (a red network icon), and EndNote (an orange circular icon). A red arrow points from the first circle to the text "Once you have found an article of interest, open the PDF and select this icon." Another red arrow points from the second circle to the text "You are then offered a range of options including the opportunity to save to EndNote, Mendeley, RefWorks or Zotero."

Establishing the Role and Impact of Academic Librarians in Supporting Open Research: A Case Study at Leeds Beckett University, UK

New Review of Academic Librarianship: Vol. 23, Issue 1, 2017

Document Management

Email Article Save to My Devices Open PDF

Bibliographic Management

Zotero Mendeley EndNote

Social

Facebook Twitter

Open in Safari Report a Problem

Once you have found an article of interest, open the PDF and select this icon.

You are then offered a range of options including the opportunity to save to EndNote, Mendeley, RefWorks or Zotero.

Reference management and NVivo

- Improving Your Literature Review with NVivo
<https://youtu.be/cKToOQ64les>
- NVivo and Mendeley
<https://youtu.be/ddZf3V7EbZ8>
- Many more video tutorials at
<https://www.youtube.com/user/QSRInternational/>



Systematic reviews

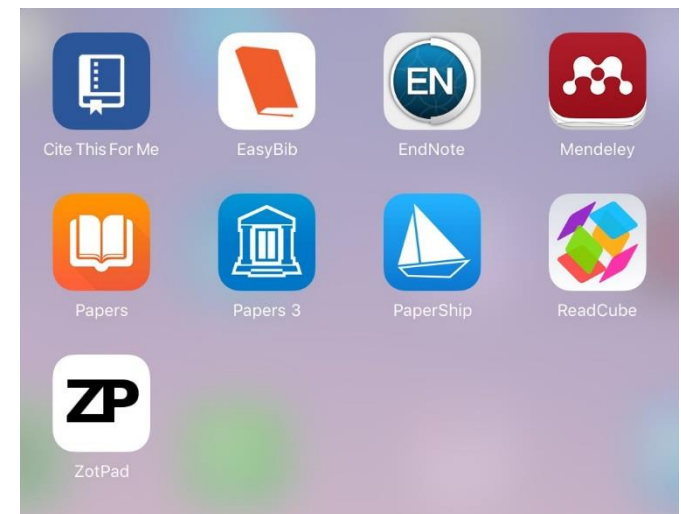
Most major RM tools can be used for systematic reviews

- Specialist import filters
- Take care with deduplication
- Take care with shared libraries

When using *Rayyan* (web / mobile application to assist systematic review authors) it is recommended to edit references in RM software first <https://rayyan.qcri.org/>

Reference management on your mobile device

- Adding references when they are mentioned at an event (if you locate the PDF you can import it)
- Useful for reading and/or annotating PDFs and editing your Library
- Not designed to support writing although you can usually email and copy citations



Which software should I choose?

- Where will you be searching for information?
 - Library, lab or home?
- Where will you do your reflection and writing?
 - Library, lab, home, fieldwork?
- Will you be based in one place or moving round?
- Will your searching and writing be carried out from desktop PC/Mac or laptop configured for RM software?

Desktop or Web?

- Desktop options
 - EndNote
 - Mendeley
 - ReadCube
 - Zotero
- Desktop can be synchronised with Web and mobile versions
- Issues using desktop applications over a virtual network

Troubleshooting and training

- Backup, backup, backup!
- Know what you are looking for....
- VPN / proxy access to RM software and “library”
- Use the publisher’s support materials
 - LibGuides
 - YouTube channels
 - Citation styles
 - Webinars
- Try flipped classroom approach



Any questions?