iSkills: Choosing and Using Software for Referencing

Learning Outcomes

Understand how reference managers work

Know what software is available

Be aware of things to think about when choosing a reference manager

Know where to get more help

How do reference managers help you?

1

Stay organised

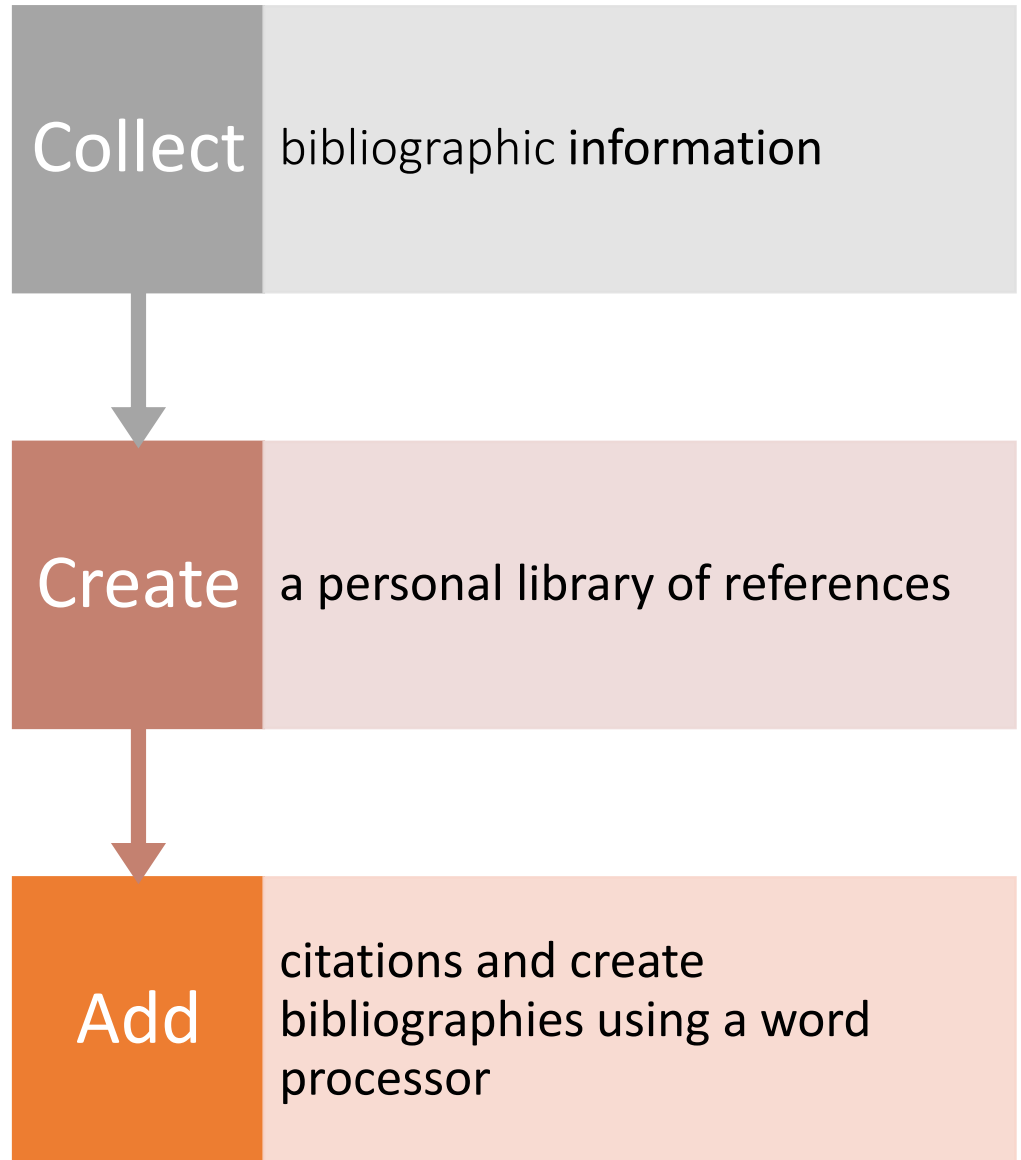*Collect information about everything you've read in one place.*

2

Save time

Speed up adding citations and creating bibliographies in documents.

How reference managers work?

Collect bibliographic **information**

Create a personal library of references

Add citations and create bibliographies using a word processor

Different methods for adding a reference

1 Add manually

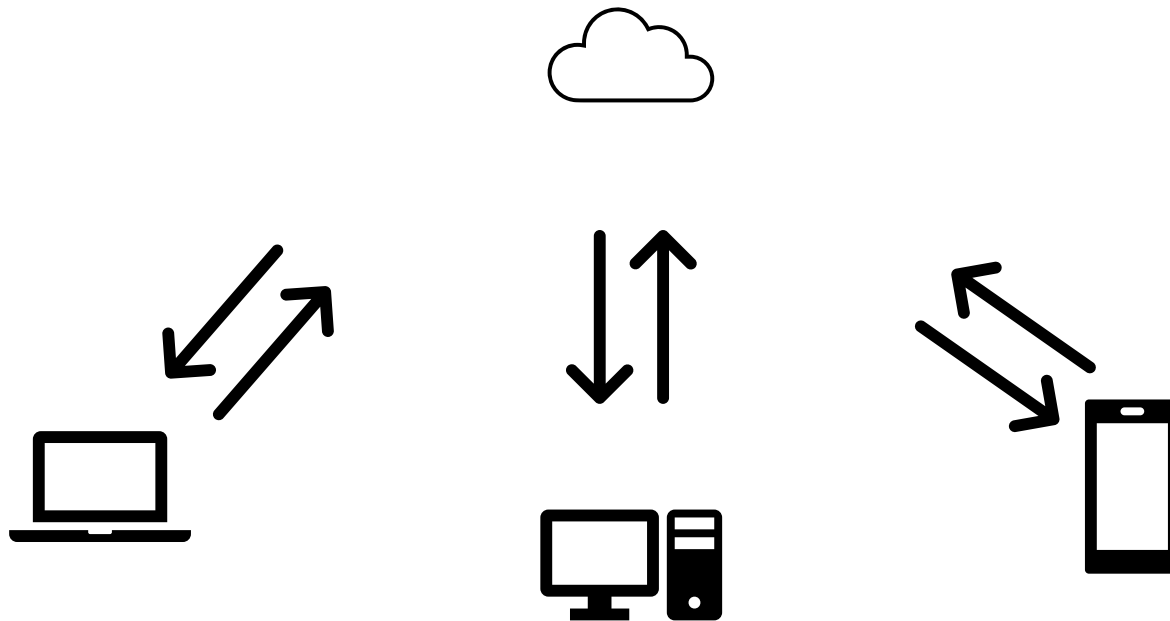**2** Direct export from database

3 Upload text file

4 Grab website information

Where your references are stored

Most reference managers allow you to sync your library to the cloud.

The limits

It won't tell you where to put citations.

Limited ability to extract references from reference lists in existing publications..

Garbage in – garbage out.

Sometimes it goes wrong.

Advice

- ✓ Take time to learn the software.
- ✓ Test the software on the computer you will be using.
- ✓ Keep backups of your reference library.
- ✓ Ask for help.

Adding records from existing reference lists

- CrossRef and Citation Finder tools can help identify and add existing reference list entries to your reference manager.
- RefWorks – Import from Word file or PDF.

1. Works best with journal articles.
2. Not all references will be picked up.
3. No warning about items missed.
4. Requires manually checking for accuracy.

Citation Finder - https://citation-finder.vercel.app/
Using CrossRef - https://uhcl.libanswers.com/faq/220308
RefWorks -
https://knowledge.exlibrisgroup.com/RefWorks/Knowledge_Articles/Importing_References_from_Word_or_PDF_Files_into_RefWorks
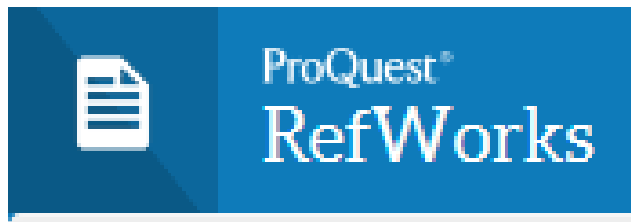
Software available

Many different packages are available.

The principles are the same but the details are different.

Variations in price and features.

The impossible question

What is the best reference manager?

Online working

Access a web-based version of your reference library:

- Easy access from any computer

- Minimal software to install

- Often more limited functionality

- Need to have a web connection

Offline working

Locally downloaded copy of your references:

- Work on the move

- Improved speed and functionality

- Keeping items synced can be problematic

Cost

Some packages are free for you to use

We have a university subscription for RefWorks.

University members can download a free personal copy of EndNote.

Download EndNote from the IT Services website.

Some are free for a basic account

You pay more with Zotero for increased storage space.
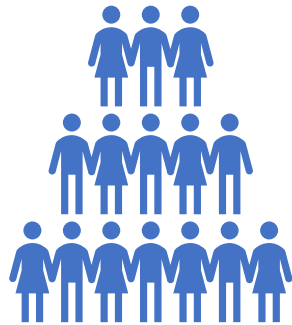
Will it always be free?

Platform compatibility

	Mac	Windows	Linux
EndNote	Yes	Yes	No
RefWorks	Yes	Yes	No
Zotero	Yes	Yes	Yes
Mendeley	Yes	Yes	Yes

Word processor compatibility

	MS Word	LibreOffice	Pages	Google Docs
EndNote	Yes	Yes	Yes	Yes
RefWorks	Yes	No	No	Yes
Zotero	Yes	Yes	No	Yes
Mendeley	Yes	Yes	No	No

Collaboration

Do you want to collaborate with other people to build bibliographies?
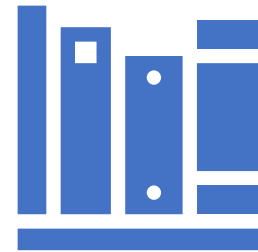
Can you share libraries easily with others?

Databases

- No package works with every database.

- Make a list of databases you often use.

- Look out for direct export options that can make life easier.

- Explore alternative ways to collect your references:
  - Text files.
  - Searching from within the reference manager.

Citing and bibliographies

Can you collect all the data fields you need?

EndNote and RefWorks give you custom fields.

Which journals do you often write for?

Does your department demand a particular style?

There can be issues with footnote type citation styles.

Can you edit or create styles?

Often time consuming and complicated!

Things to check

- Does the software support the citation style(s) I need? Can I edit styles?

- Does the software allow me to edit all the data fields I want?

- Will I have enough space (or 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 off-line?

- What sort of files can I import? (.ris, .bib etc.)

- Can I easily export references from my favourite databases?

What is AI (Artificial Intelligence)?

AI tools can generate text, images, sounds etc. based on prompts provided by users.

Can also help with other aspects of academic work such as summarising texts, paraphrasing and locating published research.

It is important to acknowledge the use of AI tools by referencing them.

In-text citation
The AI-generated flower (Shutterstock AI, 2023) …

Reference list
Shutterstock AI (2023) *Photo of pond with lotus flower* [Digital art]. Available at: https://www.shutterstock.com/image-generated/photo-pond-lotus-flower-2252080005 (Accessed: 31 March 2023).

Guidelines on Using AI

- Carefully check University and departmental guidelines on using AI in assessed work.

- You will need to declare the use of permitted AI in your assessments. Check with your department for the format you must use for this.

- Students must reference AI-generated content in their work as they would a book, journal article, website etc.

- **Guidelines and policies on using AI:**

- https://www.ox.ac.uk/gen-ai

- **Guide to using AI to support academic work:**

- https://libguides.bodleian.ox.ac.uk/using-ai-to-support-academic-work
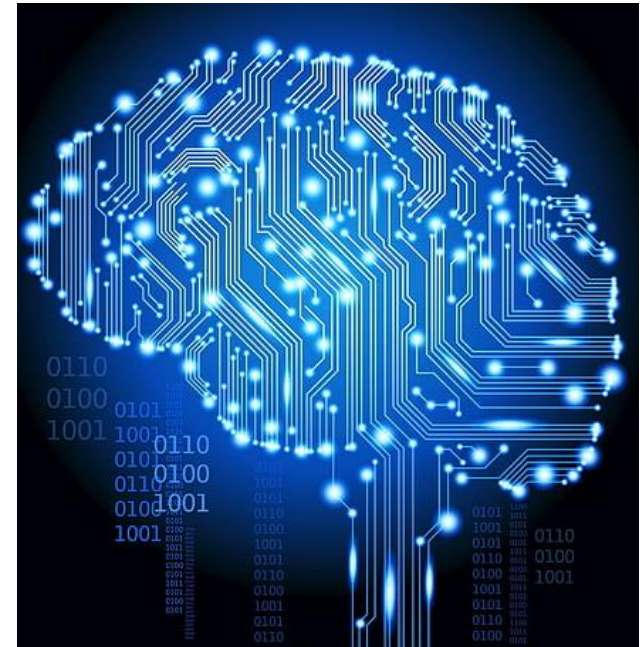
AI Capabilities in Reference Managers

- Reference managers don't have a specific resource type for GenAI content. It's necessary to match the closest pre-existing resource type (e.g. artwork, dataset, video recording) when creating citations for GenAI content.
- This ensures consistency while we wait for resource categories to be potentially updated to include AI-specific options.

Reference Manager	AI tools built in?	Integration with other AI tools?	Template or Resource type for referencing AI tools	Template or Resource type for referencing AI generated content
EndNote	Key Takeaways	• ResearchRabbit	Computer Program	• Use closest matching content type. • Use 'Generic'
RefWorks	None	• ResearchRabbit	Computer Program	• Use closest matching content type. • Use 'Generic'
Zotero	None	• Aria [paid only] • Scite [paid only] • ResearchRabbit	Software	• Use closest matching content type. • Use 'Document'
Mendeley	None	• None	Computer Program	• Use closest matching content type. • Use 'Unspecified'

Getting help

Other Bodleian iSkills and IT Services courses

Reference management guide:

- Quick summaries of different packages.
- Contact details for staff who can help.
- Guides and instructions for different software.
- libguides.bodleian.ox.ac.uk/reference-management

Ask us!

- reference-management@bodleian.ox.ac.uk

The practical

4 packages to try.

Try as many as you like.

We've tried to highlight key features of the packages.

Work through the task sheets for each package.

https://www.bodleian.ox.ac.uk/ask/workshops/reference-management-workshop-handouts