Research Methodology: Reference Management

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Why use Reference Management Software?

- Helps you to keep track of your reading and references and makes it easier to find referencing information to cite material in your work.
- Save you time compiling and locating your references.
- Improves consistency and accuracy.
- However, it isn't a replacement for checking the accuracy of the references you use or for knowing how your references need to be written to comply with guidelines.

What can reference managers do?

- collect references and store them in a library on your desktop or a web account.
- organise references with folders and tags, to sort them by topic/project/author etc.
- add notes to your references - for example, in order to remind yourself of particular quotes to use.
- store full text PDFs and links to material with references
- cite your references and create bibliographies in your chosen citation style (e.g. Harvard, APA, Vancouver)
- share your references with others and create collaborative libraries of references.

How does reference management software work?

- collects bibliographic information from other sources and stores it as part of a library shown in the software.
- You can then use the program to manage these references, including organising them into folders and attaching/viewing PDFs.
- These references can then be cited in written work, whether through a plugin that works directly from the reference management program to a text processing application or through a copy and pasting method.

The reference management process

- Four stages of the reference management process: collect, manage, cite, and share.
- Reference management is best to get on top of at the start of reading, so you can ensure you keep track of material you read or discover.

Collecting References

- Firstly, set up your reference manager of choice and install any browser plugins.
- Next, collect some references. Use the databases and catalogues.
- Use a browser extension to try and gather references straight from the page into your tool.
- **What are you collecting?** Bibliographic information usually includes the title, author, date, and other publication details. If you are collecting a reference to a journal you will often be able to collect the abstract and, with some reference managers, the full text PDF (if it is available)
- **Where do you find references?** References can be collected electronically from a range of different platforms such as Google Scholar, bibliographic databases like Scopus and Web of Science, and library catalogues. Basically, the usual places where you search for information.
- **When do you collect references?** The best time to collect references to sources is when you are doing your searching. Collect the reference for anything potentially useful - you can always return to it later and decide if it's relevant.

Steps to collect Reference

- When we are collecting references what we are trying to do is copy the selected reference into our reference manager. To do this we first have to select the reference, then extract the bibliographic information and send it to our reference manager.

- Some systems can transfer references in one step within your browser, but others will require you to save a small reference file and then import this into the reference management software.

- Things to look for:
  - Does your reference manager have a plug in for your browser that you can use to collect the reference?
  - Is there a way to select references, for example with a check box, on your chosen search tool?
  - If you have selected references, is there an option to either send the reference to your reference manager or export a file to import into your reference manager?

Collecting References Demonstration

- **Single or multiple references** On most databases and catalogues, you can pick up multiple references at a time. This can be a much quicker way of getting lots of references into you reference manager rather than sending individual records.

- To do this, you'll have to find how that database allows you to select multiple records (usually a check box) and then export the whole list either directly to your reference manager or into a file to import in

Organizing References

- make sure you have some references in your library.

- Create some relevant groupings for your references (may be Folders, Groups, Labels, etc) and add references to these. If there are multiple options for your reference manager, try setting up different types and seeing how they might be useful for you.

- Check your library for duplicates.

- **Organizing with EndNote Demonstration**

Citing References

- Firstly, make sure you have some references in your library (if not, see the Collect page that you can cite.

- Make sure you've installed the citation plugin for your text processor.

- Open a blank document in your text processor, write some text, and then insert a citation using the plugin. If it doesn't done automatically, insert a bibliography at the end of your document. Then add more text to the body of your document, then add a second citation using the plugin. See how the bibliography updates (you may need to hit a 'refresh' button)

- Check your references match how you expect your referencing style to look. At this stage, you might want to try adding more referencing using the method you'll be likely to use in the future, or try working out how to export a plain text version of your document (if you used a plugin).

Sharing References

- Working collaboratively with others requires a lot of different skills and tools. It is important to be able to manage and organise the information you find in a way that all the collaborators can access.

- Choosing the right reference management tool for shared libraries and collaborative working may depend on the functionality needed and which software people are already using.

- Typically, most reference managers have tools to share either selected references or a whole library with other users of that software.

Demonstrations

- Exporting/Importing Reference in EndNote Online.
- Inserting Reference in Word and Google Docs.
- De-duplicating.
- Exporting references from one reference manager to other.

Next lecture Systematic Review.