

Considerations for Choosing Appropriate Reference Management Software

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Reference management software supports writers, editors, and researchers in their responsibility to provide accurate citations. These platforms support researchers and writers in performing three basic research steps: searching, storing, and writing. A robust reference manager helps researchers find relevant literature, add chosen citations to a reference library, store papers and their bibliographic metadata in a cloud-based storage database for later retrieval, and directly insert citations and references in a chosen citation style when creating manuscripts and reference lists. Use these platforms for one-time writing projects or as a secure repository for long-term projects.

Vetting Reference Management Software

The most robust reference managers allow direct importing from bibliographic databases through direct access from the reference manager and/or bookmarklets that import content from the web browser. Alternatively, import references from other platforms with the help of import tools. The citations can then be used to generate citation lists and bibliographies.

The library needs to be searchable and have the ability to index and label references. A top-notch reference manager should also offer tools for organizing the references into folders and subfolders. You may also want to include full-text papers in PDF format that you can annotate and search; the tool should then be able to extract metadata from the PDF to create a citation.

You should be able to share references via the internet and organize each reference library into workgroups. This allows all members to use the same reference database. Sync your entire library including notes, lists, annotations, and highlights across all of your devices and operating systems. The most sophisticated reference managers offer cloud storage and tools for exporting citations and references into word processing software such as Word and Google Docs simply by selecting relevant items from the citation library. Users should be able to select a citation style from a readily accessible tool that contains styles for a wide array of journals and scholarly publishers. A key feature for a reference manager is the ability to save customized styles and formats for projects that fall outside the purview of standard journal publishers.

Citation Styles

The use of formatted referencing in scientific manuscripts first became a priority in 1978 when a small group of editors of general medical journals met informally in Vancouver, British Columbia, to establish guidelines for the format of manuscripts submitted to their journals. The group became known as the Vancouver Group. Its requirements for manuscript submissions, including formats for bibliographic references developed by the US National Library of Medicine (NLM), were first published in 1979.

Citation formats within the life sciences are typically based on one of several styles:

Vancouver/National Library of Medicine

References are consecutively numbered throughout the text. If the source is referred to again, the same number is used. The numbered citations are then used to create a citation list. In the broad sense, the Vancouver system refers to any author-number system regardless of the formatting details.

Harvard

The author and year are cited in text (Pears and Shields, 2019), and an alphabetical citation list is generated. This system is the basis for the American Psychological Association (APA) style, which is used in many social science and nursing journals.

American Medical Association (AMA)

The AMA reference style is Vancouver style, and its formatting differs in some minor details from the NLM/PubMed style.

Although many science and medical journals have small, tweaked individual differences in their citation formats (i.e., brackets vs. parentheses, number of authors cited, etc.), most are based on Vancouver.

Try Before You Buy

The increase in scientific literature has led to the development of several reference managers. The best way to choose a reference manager is to document the needs of your stakeholders regarding the features they deem imperative. If you're considering changing from an existing system to something new, you'll want to ensure that all of the current citations can be exported to the new platform. You'll also want to think about the future—will your user base be growing? Will you need more collaborative features? Then ask vendors for a trial of the software so your teams can put each of them through their paces.

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