

# **Introduction to Citation Management Software**

### **Basil Marti**

Thüringer Universitäts- und Landesbibliothek Jena

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### Content



- 1. Why citation management?
- 2. Program selection
- 3. Market overview / Introduction to EndNote





Writing scientific documents requires literature search, organization and reading.

### **Problems:**

- Collection and creation of bibliographic data, electronic full texts and notes by hand?
  - Time-consuming
  - Danger of incorrect data
  - Overview can easily get lost -> chaos, duplicate work



# Citation management programs offer

- Central database for bibliographic data, full texts and notes
- Help with search in different types of resources (catalogues, databases) with import options
- Different options to organize your literature (keywords, groups)
- Functions to collect notes, comments etc.
- Offer support for most task while writing documents / reviewing literature



# When writing a document, the used literature has to be cited correctly

Day I Guy O7 . III. FRYSICAL NEVIEW D 3/.I. S. 377-004.

Weber, Werner (1987). "Electron-phonon interaction in the new superconductors La<sub>2-x</sub>(Ba,Sr)<sub>x</sub>CuO<sub>4</sub>". In: Physical Review Letters 58.13. S. 1371–1374. DOI: 10.1103/PhysRevLett.58.1371.

Wheatley, J. M., T. C. Hsu und P. W. Anderson (1988). "Interlayer pair hopping: Superconductivity from the resonating-valence-bond state". In: Physical Review B 37. S. 5897–5900.

Wolf Ctuart A und Ivacam Vladimir Ha (1007) International Warlahan

- Creation of citations and bibliographies
  - Takes a lot of work
  - Formatting is often complex and time-demanding
  - Danger of erroneous citations



## Citation management programs offer

- Automatic insertion of citation, footnotes and bibliographies based on your local database
- Automatic formatting based on different citation styles



### **Additional functions**

- Collaborative work: Sharing references between different people
- Online reference management: Save your references in the cloud



# Software requirements

- Create references
- Import references from different sources
- Link references with full texts
- Search in different online resources
- Enter notes, thoughts, comments
- Classification, groups and keywords
- Import/export function between different programs
- Automatic insertion of citations and bibliographies
- Automatic formatting





### Lots of different programs are available, they differ in

- Functions
- Price / license
- Operating system compatibility
- Desktop / online

### Detailed comparisons:

- Wikipedia: <a href="http://en.wikipedia.org/wiki/Comparison\_of\_reference\_manageme">http://en.wikipedia.org/wiki/Comparison\_of\_reference\_manageme</a> <a href="http://en.wikipedia.org/wiki/Comparison\_of\_reference\_manageme">http://en.wikipedia.org/wiki/Comparison\_of\_reference\_manageme</a>
   nt\_software
- Software comparison TU München
- OpenOffice.org wiki
   http://wiki.services.openoffice.org/wiki/Bibliographic\_Software\_an\_d\_Standards\_Information



### Decision criteria

- Which operating systems are compatible with the program?
- Which word processors are compatible with the program?
- What is the price? Can I continue to use the program after leaving my institution?
- Which functions does the program offer?
- How user-friendly is it?
- Is there an online version?



### List of programs:

- EndNote
- Citavi
- Zotero
- Mendeley
- BibTeX/JabRef
- Papers

### 3. Market overview: EndNote



- http://endnote.com/
- For Windows and Mac
- Commercial program
- € 180 / €110 for students
- Campus license for FSU students and employees
- User interface only in English
- Integration with Word, OpenOffice, Apple Pages

# **ENDNOTE**°

The most powerful tool for managing your research.

### 3. Market overview: EndNote



- Installation
- Download <a href="http://www.tu-ilmenau.de/unirz/EndNote-X6-X7.4952.0.html">http://www.tu-ilmenau.de/unirz/EndNote-X6-X7.4952.0.html</a> (only possible inside the IP range of the university)
- Unpack zip file and install

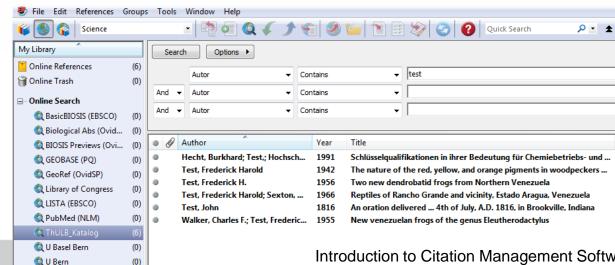


### 3. Market overview: EndNote



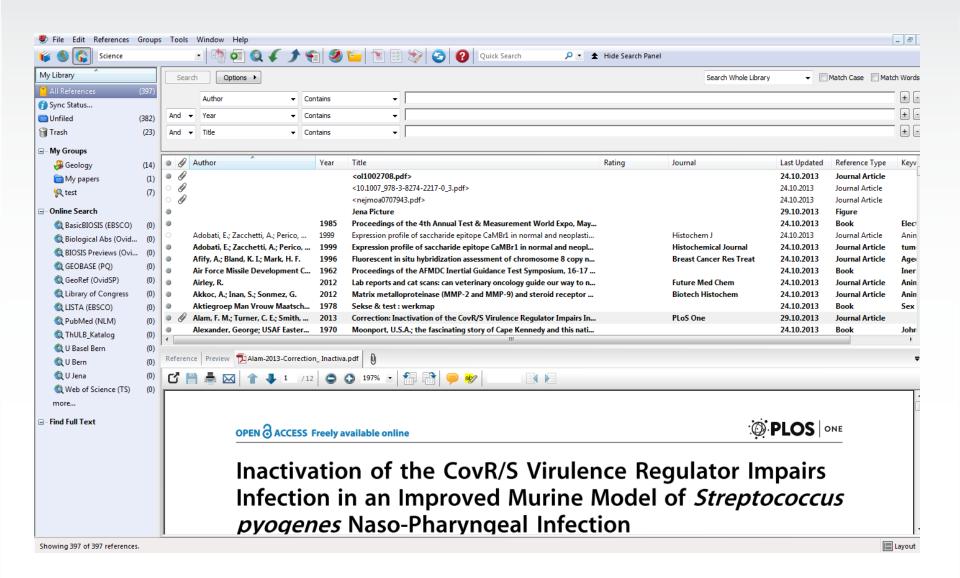
### Special features:

- Well suited for the work with PDF files (annotations, search for full texts)
- Large amount of citation stiles, good integration with word processors
- Platform independent web version (free), which can be used for sharing references



### 3. EndNote: Interface

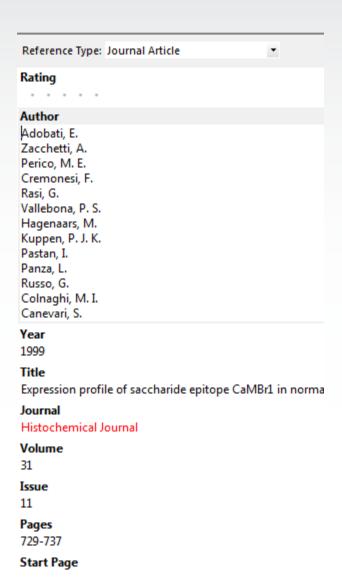




### 3. EndNote – Create references



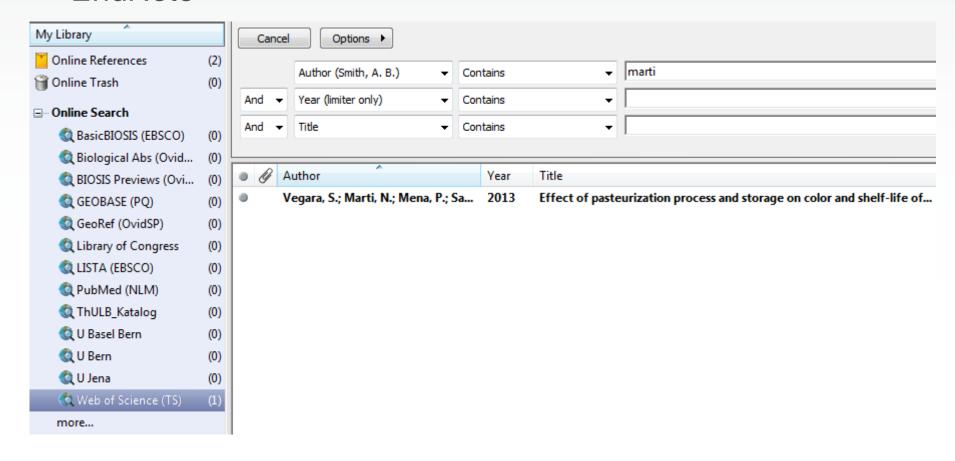
- Manual entry
- Import from databases/catalogues



### 3. EndNote – Create references



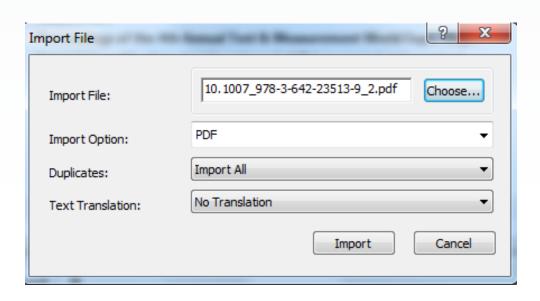
 Online search in databases/catalogues inside EndNote



# 3. EndNote – Full text organization



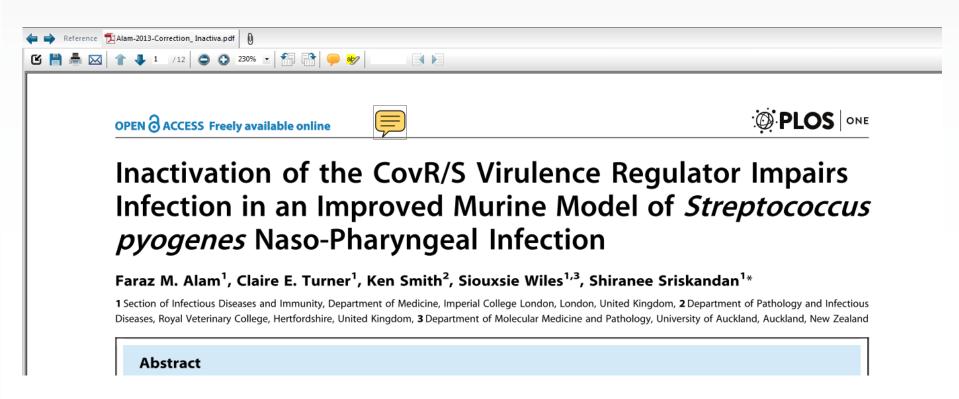
- Import function for PDF files: EndNote automatically extracts the metadata (requires DOI number)
- Well suited for importing a large amount of PDF files



# 3. EndNote – Full text organization



- PDF files can be linked to references
- PDF viewer inside EndNote with comment function and highlighting

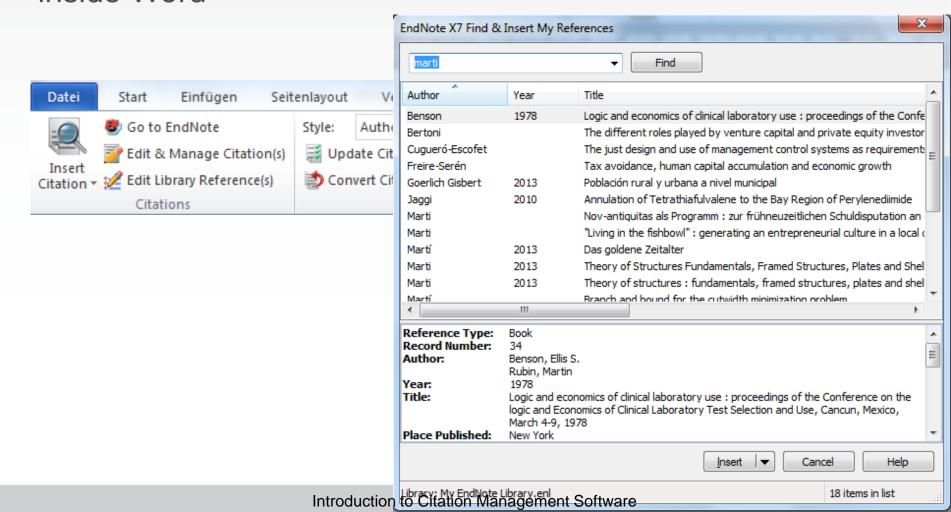




- Windows
  - •Microsoft Word 2007, 2010, 2013
  - Microsoft Power Point 2013
  - Open Office 3.X
  - RTF files
- Mac
  - Microsoft Word 2008, 2011
  - Apple Pages 09



# Cite while you write: Select an EndNote reference inside Word





# Citation and bibliography entry are created automatically

Für einen Überblick über dieses Thema siehe Liston and Koehler (1996) und Martineau, Lemberger et al. (2002).

### Literaturverzeichnis

Liston, T. E. and J. E. Koehler (1996). "Granulomatous hepatitis and necrotizing splenitis due to Bartonella henselae in a patient with cancer: case report and review of hepatosplenic manifestations of bartonella infection." Clin Infect Dis 22(6): 951-957.

Martineau, D., K. Lemberger, A. Dallaire, P. Labelle, T. P. Lipscomb, P. Michel and I. Mikaelian (2002). "Cancer in wildlife, a case study: Beluga from the St. Lawrence estuary, Quebec, Canada." Environmental Health Perspectives 110(3): 285-292.



## Citation and bibliographies are dynamic

Für einen Überblick über dieses Thema siehe Liston and Koehler (1996) und Martineau, Lemberger et al. (2002).

#### Literaturverzeichnis

Liston, T. E. and J. E. Koehler (1996). "Granulomatous hepatitis and necrotizing splenitis due to Bartonella henselae in a patient with cancer: case report and review of hepatosplenic manifestations of bartonella infection." Clin Infect Dis 22(6): 951-957.

Martineau, D., K. Lemberger, A. Dallaire, P. Labelle, T. P. Lipscomb, P. Michel and I. Mikaelian (2002). "Cancer in wildlife, a case study: Beluga from the St. Lawrence estuary, Quebec, Canada." Environmental Health Perspectives 110(3): 285-292.

Für einen Überblick über dieses Thema siehe Liston and Koehler (1) und Martineau et al. (2).

#### Literaturverzeichnis

- Liston, T.E. and Koehler, J.E. (1996) Granulomatous hepatitis and necrotizing splenitis due to Bartonella henselae in a patient with cancer: case report and review of hepatosplenic manifestations of bartonella infection. Clinical infectious diseases: an official publication of the Infectious Diseases Society of America, 22, 951-957.
- Martineau, D., Lemberger, K., Dallaire, A., Labelle, P., Lipscomb, T.P., Michel, P. and Mikaelian, I. (2002) Cancer in wildlife, a case study: Beluga from the St. Lawrence estuary, Quebec, Canada.

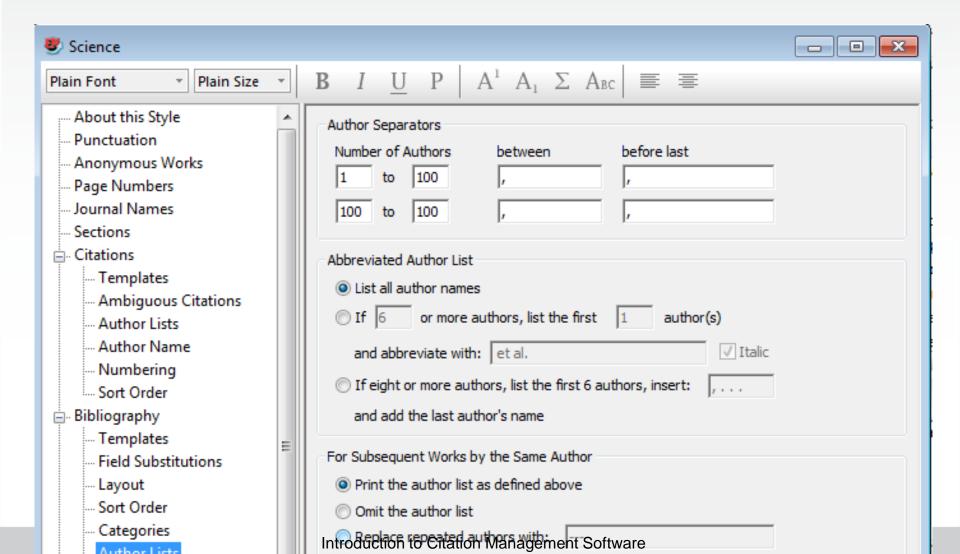


Large amount of citation styles (more than 5000 styles)

ENDNOTE OUTPUT STYLES							
ENDNOTE OFFERS MORE THAN 5,000 BIBLIOGRAPHIC STYLES							
Download an archive of all a	ıvailable	styles.					
SUBMIT A REQUEST FOR THE CR	REATION	OF A NEW OUTPUT STYL	E 👂				
Click the column heads in the tab	ole below	to sort all styles by style	name, ci	tation sty	/le, discipline,	or date.	
USE THE STYLE FINDER BELOW TO SEARCH FOR A STYLE NAME AND/OR CITATION STYLE AND/OR PUBLISHER.							
tyle or Journal Name Citation Style			Publisher				
Contains	Is on	e of		Contai	contains		
	- Any	-	lacksquare				
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Style or Journal Name		Citation Style	Discipline		Datev		
International Journal of Food Science and Technology		Author-Year	Nutrition		2013-10-28	DOWNLOAD	
Journal of Tropical Medicine Introduction to Citation Mahagement Software					2013-10-28	DOWNLOAD	



# Styles can be manually customized



### 3. EndNote Web

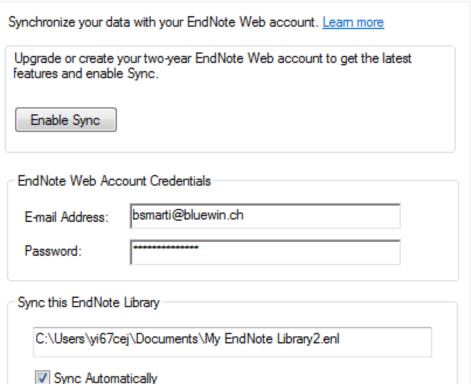


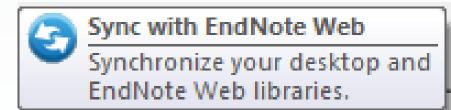
- https://www.myendnoteweb.com
- Online version of EndNote
- Limited functionality compared to the desktop version
- Access with browser: independent of location/computer

### 3. EndNote Web



- Synchronization with EndNote Desktop
- References and attachments are synchronized automatically





### 3. EndNote Web



Collaborative work: Groups can be shared with other people (only references are shared, no full texts)

### Von anderen Benutzern freigegebene Gruppen

Geology (14) 🌠

#### Freigabe für 'Fremde Gruppe' verwalten

1 E-Mail-Adresse



### 3. Market overview - Citavi



- http://www.citavi.com/
- Only for Windows (Vista, 7, 8)



- Campus license for FSU students and employees
- Multi-lingual user interface
- Integration with Word, OpenOffice, LaTeX
- Three variants
- Citavi Free (gratis), up to 100 references per project
- Citavi Pro (€119, campus license), unlimited number of references
- Citavi Team, collaborative projects (on the local network)

### 3. Market overview - Citavi



Citavi License of the FSU

Cttavi
Wissen organisieren.

- Procedure:
  - Download and install Citavi Free
  - License key request (with FSU mail address):
     <a href="http://www.citavi.com/uni-jena">http://www.citavi.com/uni-jena</a>
  - License key can be used to upgrade the free Citavi variant
  - Key is valid for two computers (installation on a USB stick is also possible)

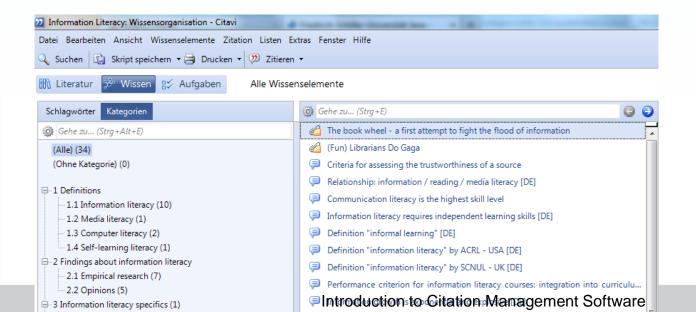
### 3. Market overview - Citavi



### Special features:



- Intuitive user interface, good help functions
- Knowledge management functions: Create and organize citations, thoughts; work scheduling
- Collaborative work using the team variant



## 3. Market overview: Zotero & Mendeley



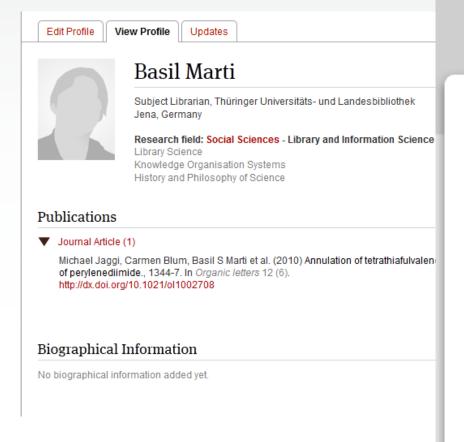
- Zotero: <a href="http://www.zotero.org/">http://www.zotero.org/</a>
- Mendeley: <a href="http://www.mendeley.com/">http://www.mendeley.com/</a>
- Web-based citation management programs
  - Bibliographic data and full texts are stored in the web: access from everywhere
  - Additional local installed version (with automatic synchronization): Mendeley Desktop, Zotero Standalone.
    - For Windows, Mac and Linux
- Usage is free (premium accounts offer more storage space and bigger groups for a fee)





# 3. Zotero & Mendeley - Profile





# zotero

Home

**My Library** 

Groups

People

Documentation

Home > People > Basil Marti

### **Basil Marti**

Library · Edit Profile

### Location

Jena

### **Disciplines**

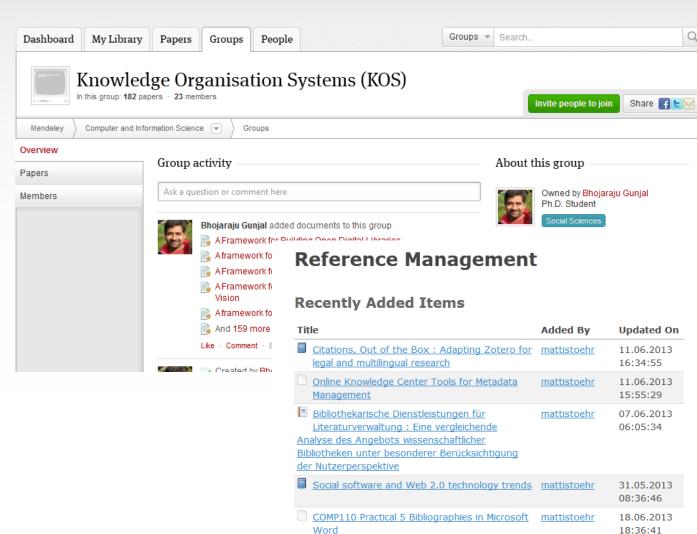
- . History of Science and Medicine
- Library and Museum Studies

#### Affiliation

Thüringer Universitäts- und Landesbibliothek

# 3. Zotero & Mendeley - Groups







The group and collection for (almost) all publications about Reference Management, mostly in the field of Library and Information Science. Part of the webservice "Literaturverwaltung. Aktuelles – Analysen – Austausch zu Software und Services für die persönliche Literatur- und Wissensorganisation".

#### http://literaturverwaltung.wordpress.com

Owner: Matti Stöhr
Registered: 2013-04-11
Type: Public
Membership: Open

Leave Group

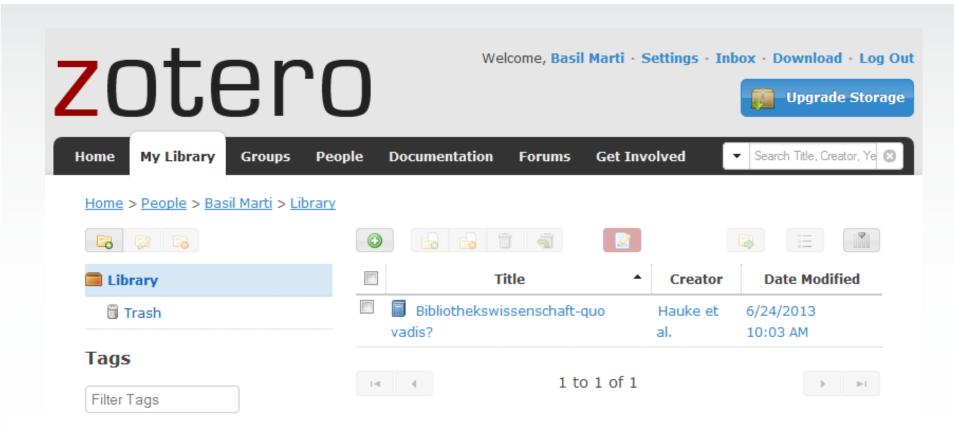
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18.06.2013

Defrosting the Digital Library: Bibliographic

### 3. Zotero & Mendeley: References





# 3. Zotero & Mendeley: Data entry

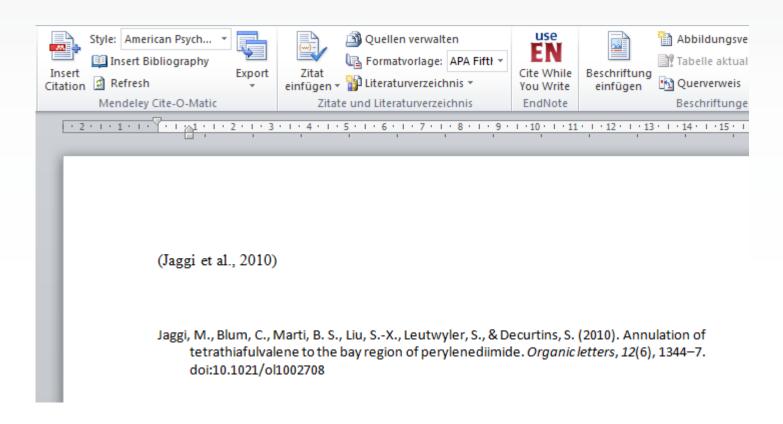


Save Cancel		
Item Type	Thesis ▼	
Title	.::	
Author ▼		
Abstract	.f.	
Туре		

# 3. Zotero & Mendeley: Word processor



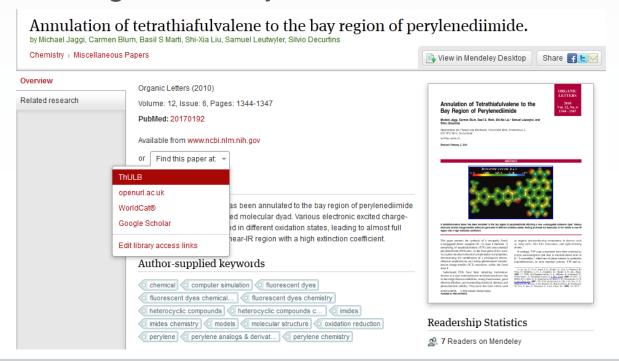
- Mendeley und Zotero offer integration with
  - Word / Open Office / BibTeX



# 3. Zotero & Mendeley: Differences



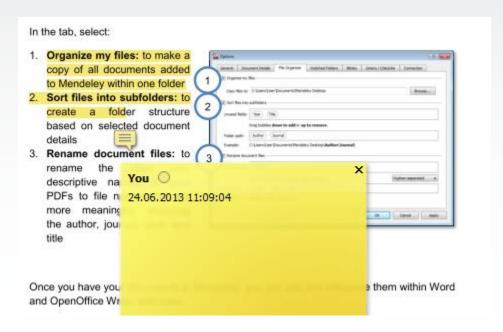
- License: Mendeley is closed-source, bought by Elsevier last year. Citavi is open-source (-> can be modified with add-ons)
- Additional functions of Mendeley:
- Knowledge base of journal articles:



# 3. Zotero & Mendeley: Differences



PDF editor with annotations

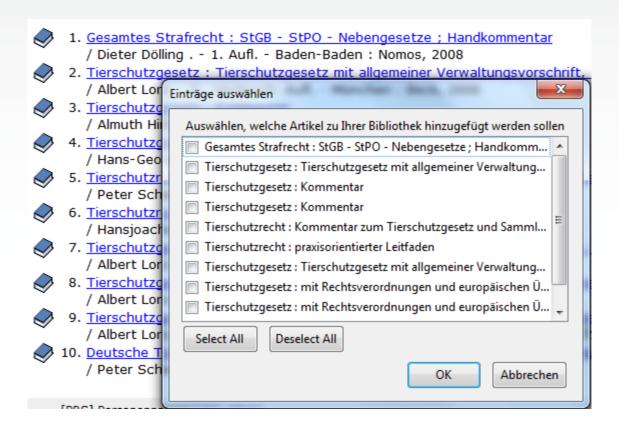


Mendeleys social functions are more developed, more members

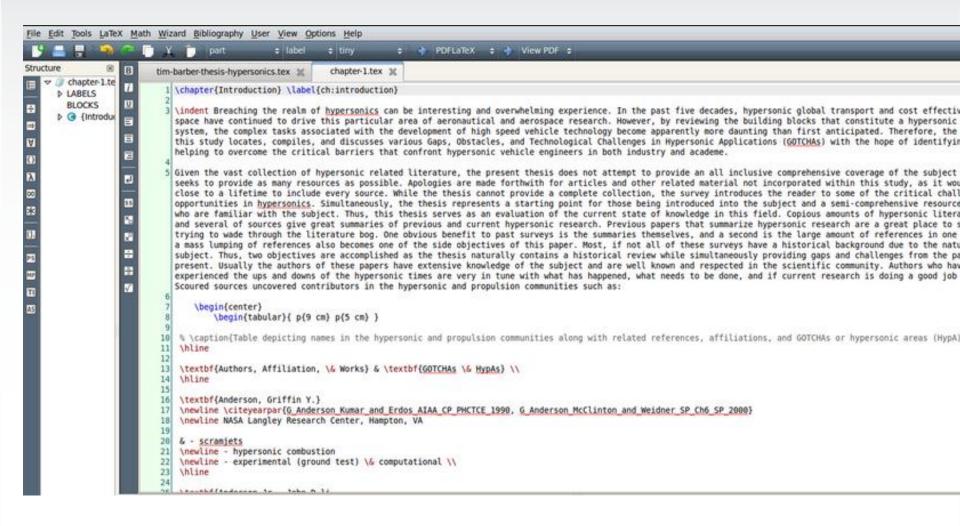
# 3. Zotero & Mendeley: Differences



Zotero: Good for importing data from the web browser







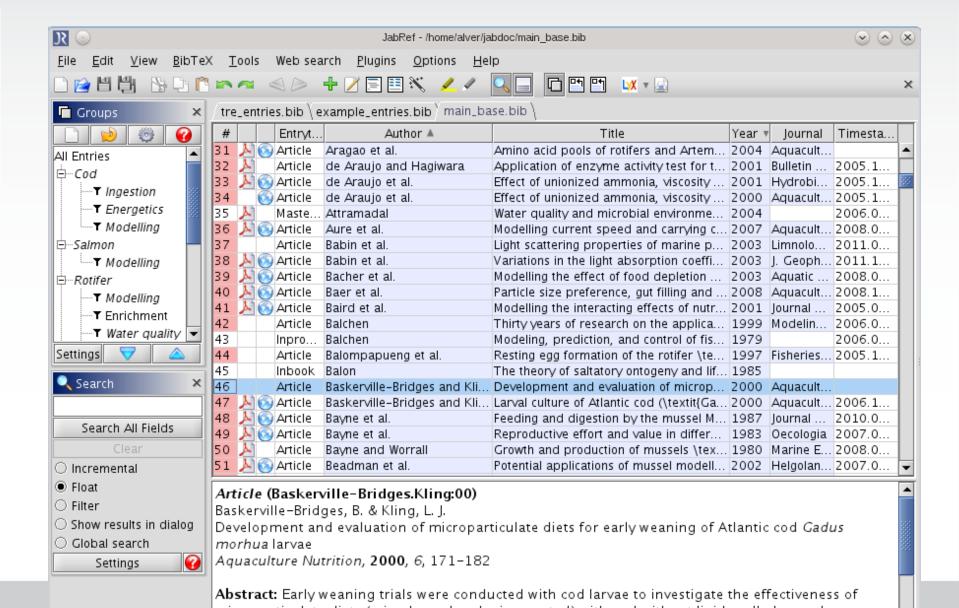


- Add-on for the LaTeX word processor
- Integral part of the usual LaTeX installations (free, for all operating systems)
- Inserts citations and bibliographies into LaTeX documents
- BibTeX-Database as data source
- BibTeX cannot be used to create and organise references
- How to proceed: Use a citation management program and export the data as a BibTeX database



- http://jabref.sourceforge.net/
- Open source programm, free
- For all operating systems
- Specialized for editing BibTeX databases
- Limited functionality compared to other software





## 3. Market overview: Papers

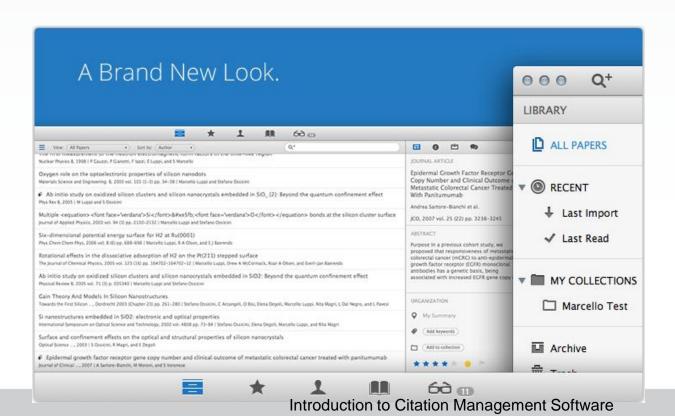


- http://www.papersapp.com/mac/
- For Mac (Mac OS X Lion and newer)
- Windows version with limited functionality
- Cost: License € 59 (student version for € 34)
- Englisch user interface

## 3. Market overview: Papers



- Intuitive user interface
- Well suited to work with PDF files
- For mobile phones and tablets



### **Tips**



### As soon as possible

- 1. Select a program
  - 1. Define criteria
  - 2. Ask other people which programs they use
  - 3. Try out different programs
- 2. Define groups/structure
- 3. Keep your database up-to-date
- 4. If possible work together with other people

#### **End**



http://literaturverwaltung.wordpress.com/

ThULB courses

http://www.thulb.uni-jena.de/schulungen.html

#### Contact:

Basil Marti, 9-40036, <u>basil.marti@thulb.uni-jena.de</u>