Reference Management Software

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Objectives

- Define reference management software
- Compare popular reference managers
- Demonstrate reference manager capabilities
Reference Management Software

Allows a researcher/clinician to:

- Import citations from journal databases directly into text
- Organize reference materials
- Annotate PDFs
- Build bibliographies
- Format citations
- Easily change format for publication
- Share references with colleagues
Endless Options:
Highlights the great need, but also shows that the perfect solution is lacking, evidenced by continuous rollout of new programs.

Reference Management Software

BibDesk
BibMe
Bibus
Bookends
Citeline
CiteULike
Connotea
EndNote
Heurist
JabRef
Mendeley

MyPeers
NoodleTools
OttoBib
OWL at Purdue
Paperpile
Papers
Qigga
Referencer
RefWorks
Sente
Zotero
Reference Management Software

We’ll focus on the highlighted ones. These seem to be the most popular.

<table>
<thead>
<tr>
<th>BibDesk</th>
<th>MyPeers</th>
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*Disclaimer: I have not used all of these extensively, and my personal favorite has become Paperpile, so naturally I've mastered that one the most….but a level of mastery could likely be attained with any of these. Pick what works best for you.*
<table>
<thead>
<tr>
<th>Software</th>
<th>Cost</th>
<th>Compatibility</th>
<th>Citation Styles</th>
</tr>
</thead>
<tbody>
<tr>
<td>EndNote Basic</td>
<td>Free for web-based (very limited)</td>
<td>Microsoft Word</td>
<td>7</td>
</tr>
<tr>
<td>EndNote X7</td>
<td>$249.95 individual download, student/group pricing options (Free on most government computers)</td>
<td>Microsoft Office, Open Office, iWork Pages</td>
<td>6,000</td>
</tr>
<tr>
<td>Mendeley</td>
<td>Free / Team Accounts ($4.99 to $14.99)</td>
<td>Microsoft Word, LibreOffice, BibTex</td>
<td>1,000+ from community-managed database</td>
</tr>
<tr>
<td>Paperpile</td>
<td>$2.99 / mo</td>
<td>Google Docs running in Google Chrome</td>
<td>1,000+/customizable (can add as many as you want)</td>
</tr>
<tr>
<td>Refworks</td>
<td>Free based on institution affiliation</td>
<td>Microsoft Word, Google Docs</td>
<td>500+</td>
</tr>
<tr>
<td>Zotero</td>
<td>Free; monthly fee for storage upgrade ($20 to $60 / year)</td>
<td>Microsoft Word, Open Office, Google Docs</td>
<td>1,000+</td>
</tr>
<tr>
<td>Software</td>
<td>Cost</td>
<td>Storage</td>
<td>Collaboration</td>
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</tr>
<tr>
<td>EndNote Basic</td>
<td>Free for web-based (very limited)</td>
<td>50,000 citations and 2 GB of attachment storage</td>
<td>None</td>
</tr>
<tr>
<td>EndNote X7</td>
<td>$249.95 individual download, student/group pricing options (Free on most government computers)</td>
<td>Unlimited file attachment storage with background synching and work saved online</td>
<td>Requires everyone to have X7, sharing enabled, and desktop version. Limited to 14 people. Can only share 1 library at a time.</td>
</tr>
<tr>
<td>Mendeley</td>
<td>Free / Team Accounts ($4.99 to $14.99)</td>
<td>2 GB for free account; 3 paid tiers (5GB to unlimited)</td>
<td>Free (share w/ 3 users); Premium (unlimited share)</td>
</tr>
<tr>
<td>Paperpile</td>
<td>$2.99 / mo</td>
<td>Based on your Google Drive storage limits (15GB is default)</td>
<td>Create folders to share, or just share citations (with pdf). Excellent for collaboration.</td>
</tr>
<tr>
<td>Refworks</td>
<td>Free based on institution affiliation</td>
<td>2 GB of cloud storage</td>
<td>Online sharing</td>
</tr>
<tr>
<td>Zotero</td>
<td>Free; monthly fee for storage upgrade</td>
<td>300 MB</td>
<td>Group sharing; Others can’t see without a Zotero account</td>
</tr>
</tbody>
</table>

In Google Docs, multiple authors can be writing at the same time, on the same document. Great for version control.
Summary

• There is a lot of give and take when deciding what to use (cost, institutional support/access, editing program you use to write in, work restrictions, etc).

• Working on a government system has some pros and many cons.
  • PROS: Endnote is free; Microsoft Word is free
  • CONS: No access to Google products (Google Docs) and variable access to Chrome browser. You need both for Paperpile

• I personally use my own computer for writing, and I therefore can access Chrome and Google Docs easily. With as much writing as I do, this is a life-saver for me.
I will admit that this presentation is a bit biased towards paperpile, and that is only because I now use it exclusively so I know it best. To save space, I’ll just link some reviews you might want to read to learn more:

- http://robjhyndman.com/hyndsite/paperpile/

Until then, I hadn’t found a solution that let me easily organize and find all my article pdfs (from computer, phone, ipad), share easily with others, and collaborate when writing (without emailing endnote libraries back and forth or have just 1 citation entry person)

YOU CAN do some of the same things with the other managers. Baylor programs use Zotero almost exclusively (free) and with good success.
Citation Manager Reviews

- http://www.literaturereviewhq.com/6-tips-on-how-to-choose-reference-management-software/
Resources

- **Step-by-Step Procedure to Cite References from Mendeley and Reference Management Software in LaTeX Journal Articles, Conference Papers, Thesis, Dissertations and Research Proposals**

The paper above, and then the VIDEO TUTORIAL LINKS found throughout this presentation are what you will most likely want to bookmark and keep easy access to. Most videos are 5-10 minutes long, and provide an excellent overview of how to use each solution. This will help you decide which product will work best for you.
Introduction to Paperpile
Collect and Organize Articles into Folder

Paperpile Intro Video (link here)
Enter criteria to search online

Select desired article(s)
Clinical Hip Tests and a Functional Squat Test in Patients With Knee Osteoarthritis: Reliability, Prevalence of Positive Test Findings, and Short-Term Response to Hip Mobilization

Ciborne AV, Wallin RG, Rnor DI, Judd CD, Fee TT, Matkel RL, Whitman JM
Already in my paperpile library

If not, I can add with 1 click.
Your proxy connections - Access restricted PDFs through these proxy server(s) Learn more

- Baylor University
- MyAthens
- UoN

Add a proxy connection - Choose a preconfigured proxy connection or configure your own

Institution: Choose an institution
Name: Set name for the proxy connection
URL: URL for the proxy connection

Add Proxy Connection
Steps to Add Citation Using Paperpile in Google Drive

1. Using one of two paperpile plug ins – click “insert citation” once cursor is placed where new citation is desired
Step 2. Search paperpile folders for desired citation
Step 3. add citation

4. MILITARY RELEVANCE

The U.S. Armed Forces are experiencing alarming rates of post-war chronic pain related to musculoskeletal disorders.\textsuperscript{1} Pain is reported by 40% of OIF/OEF/OND veterans.\textsuperscript{2} Chronic pain after musculoskeletal injury is the leading cause of medical discharge from service\textsuperscript{3} and a primary source of disability to the Department of Defense with an approximate 2.4 million medical visits to military patient care costs.\textsuperscript{4} The cumulative incidence of chronic pain is about 25% for men and 55% for women.\textsuperscript{5,6} Physical injuries\textsuperscript{7,8} and 80% of these injuries are considered temporary disability.\textsuperscript{9}

Military personnel are especially susceptible to the effects of chronic pain compared to the general population,\textsuperscript{10} N conditions, and over half of these injuries are expected to perform duties in extreme operational environments that require very intense physical demands. The body armor and full combat load can be in excess of 120 pounds, which increases the physical demands even further and leaves military personnel at greater risk for back injury and other musculoskeletal disorders.\textsuperscript{11} Considering the demands of combat load, the incidence of lower extremity musculoskeletal injury is also common among soldiers, which results in significant lost workdays.\textsuperscript{12}

The U.S. Military faces a post-war chronic pain epidemic. Chronic pain after musculoskeletal injury is the leading cause of medical discharge and related to a growing rate of opioid addiction.\textsuperscript{13,14} Traditional medical management has failed to correct this chronic pain epidemic.

5. BACKGROUND AND SIGNIFICANCE

Historical Perspective:

Initial evidence that there was little evidence that OIF/OEF/OND veterans had a significant increase in pain from the deployment.
4. MILITARY RELEVANCE

The U.S. Armed Forces are experiencing alarming rates of post-war chronic pain related to injuries. Pain is reported by 40% of OIF/OEF/OND veterans. Chronic pain after injury is a leading cause of medical discharge from service and a primary source of disability in the U.S. military. Chronic pain related disability to the Department of Defense exceed $1.5 billion annually. Injuries resulted in approximately 2.4 million medical visits to military treatment facilities and $4 billion in direct patient care costs. The cumulative incidence of injuries requiring an outpatient encounter-level training is about 25% for men and 55% for women. Physical training and sports-related injuries up to 90% of all injuries and 80% of these injuries are considered overuse in nature.
4. MILITARY RELEVANCE

The U.S. Armed Forces are experiencing alarming rates of post-war chronic pain related to musculoskeletal disorders. (French et al. 2000) Pain is reported by 40% of OIF/OEF/OND veterans. (Cifu et al. 2013) Chronic pain after musculoskeletal injury is the leading cause of medical discharge from service (Gatchel et al. 2009) and a primary source of disability in the U.S. Military. (Songer and LaPorte 2000; Lincoln et al. 2002) The costs of chronic pain related disability to the Department of Defense exceed $1.5 billion annually. In 2007, musculoskeletal injuries resulted in approximately 2.4 million medical discharges, accounting for a significant portion of the total medical discharge rate. (Dugas 2008) The high prevalence of musculoskeletal injuries among military personnel, particularly in combat zones, underscores the need for effective pain management strategies to mitigate disability and improve quality of life. (Kolody 2010)
Bibliography is formatted when Citations are formatted.


Adding a Paper From a Search Engine

1. A multicentre randomised, 1-year comparative effectiveness, parallel-group trial protocol of a physical therapy approach compared to corticosteroid injections.

Deyle GD, Gill NW, Rhon DI, Allen CS, Allison SC, Hando BR, Petersen EJ, Dusenberry DI, Bellamy N.

PMID: 27033961 Free Article Paperpile

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Enter a name for the new shared folder

Reference management presentation
Dan Rhon has shared a paper with you

The 'Best Practice Guide to Conservative Management of Patellofemoral Pain': incorporating level 1 evidence with expert clinical reasoning
Barton CJ, Lack S, Hemmings S, Tufall S, Morrissey D

View PDF  Website  Abstract
Paperpile at a Glance

**Pros**
- Seamless Google Drive integration with effortless citations
- Easy management system for articles and PDFs
- Lets you share articles and reference lists with others

**Cons**
- Requires a Google account
- Supports only Chrome browser

Paperpile is a reference manager that resides entirely on the Web. There’s nothing to download except a Chrome add-on, and no account is needed aside from your existing Google account. Unlike reference managers that charge you extra to cloud-host your PDF files, Paperpile makes use of cloud storage you already have—Google Drive—and with 15GB of free storage, you won’t run out of space quickly. This means that once you upload your PDFs to Google Drive via Paperpile, you can access them from anywhere. But let’s not get ahead of ourselves.

Writing academic papers using Paperpile, Google Docs, and LucidChart ([Video Tutorial](#))
Zotero at a Glance

What Zotero Does

Zotero (pronounced “zoh-TAIR-oh”) is a Firefox addon that collects, manages, and cites research sources. It's easy to use, lives in your web browser where you do your work, and best of all it's free.

Zotero allows you to attach PDFs, notes and images to your citations, organize them into collections for different projects, and create bibliographies.

It automatically updates itself periodically to work with new online sources and new bibliographic styles.

Getting Started with Zotero (tutorial video) and Using Zotero (good video – link here)

Zotero + EndNote

It's easy to use EndNote and Zotero together and take advantage of the best features of each, or to share Zotero libraries with colleagues using EndNote or vice versa. Both programs can read and write a standard citation file format called RIS, which means references can be converted back and forth with a few clicks.

PDFs and other attachments do not export between programs, however; only citation information.
Mendeley at a Glance

**PROS**

**CONS**
Sluggish synchronization. Microsoft Word plugin requires Visual Basic. To search online repositories users must leave the application and use a temperamental browser plugin.

**BOTTOM LINE**
It is less refined than document-manager Zotero, but for researchers looking for a more social experience, Mendeley accommodates your existing academic toolkit.

Getting started with Mendeley ([Tutorial video](#))

**BY WILLIAM FENTON** Whether you are looking to build a repository for a major research project or simply hoping to organize journal articles, Mendeley (Free) offers an elegant solution to document management. With 1GB of free cloud-based storage (upgradable to two for $5 per month, 5GB for $10, or unlimited for $15), cross-platform compatibility, and iOS apps, you will always have access to your Mendeley library, but, thanks to web browser and Microsoft Word plugins, you will not feel tethered to it. Mendeley pairs nicely with browser-based research manager Zotero 3. Now entering its seventh year of development, Zotero handles documents with greater élan; however, many scholars, educators, and students—especially those in the sciences—may find they prefer Mendeley for its collaboration options.

Generate citations in Word ([Tutorial Video](#))

Another nice [Mendeley Tutorial](#)
How do Mendeley and Zotero Compare

Mendeley
- Works well with PDFs
- Built in PDF viewer, annotator
- Share papers with collaborative groups
- Access via standalone app, Mendeley web, or third party clients
- Works on PC, Mac, Linux, iOS (Android coming) with Word, Open Office, and LaTeX.

Zotero
- Works well with PDFs too
- Works on PC, Mac, Linux with Word and Open Office
- Better support for some humanities databases
- Standalone version under development
EndNote at a Glance

From research to publication

EndNote basic gives you the tools for learning how to do research, cite sources, write term papers, and even match your manuscript to a scientific journal.

- Create an online account to search, save and use your research sources
- Use built-in connections to search the 5 most popular databases
- Save and organize the references you find (up to 50,000)
- Integrate with Microsoft® Word to properly cite and format your paper
- Choose from the 7 most popular bibliography formats, including MLA and APA style
- Use manuscript matcher to identify the best journal for your research to be published

Zotero

- Cost
- Collecting sources online
- Syncing
- Speed, editing citations
- Sharing with others
- Creating sources from PDFs

EndNote

- Speed, overall
- Speed, inserting citations
- Speed, editing citations
- Finding full text
- Customizability

How to use Endnote in 7 minutes (video tutorial here)
RefWorks at a Glance

RefWorks is a reference management system where you can:

1. **Collect** citations
2. **Manage** citations, by folder or a searchable database
3. **Cite** using proper formatting in a variety of citation styles (e.g. APA, AMA, Vancouver, etc)
4. **Share** research with colleagues

**Learn to use REFWORKS in 20 minutes** (series of 9 mini video tutorials)

**Cons:**
1. Must create separate account for groups
2. Does not allow annotation on PDFs
DON’T THINK OUTSIDE THE BOX.
THINK LIKE

there is no box