



MODULE: REFERENCE MANAGEMENT

OVERVIEW

Learning Objectives

At the conclusion of this module, you will be able to:

- Interpretation: Describe the purpose and importance of reference managers.
- Interpretation: Summarize some basic features of reference managers.
- Evaluation: List several good and bad practices when using reference managers.
- Application: Import publications into reference managers and manipulate data entries.
- Application: Create citations and bibliographies from a reference manager.

Checklist

Prior to meeting with mentor

- Review the information provided in this module and complete all deliverables.
- Download and use a reference manager to complete the activities outlined in this module.
- Compile a list of questions you may have after completing the module to discuss with your mentor.
- Complete the Five-Minute Reflection.

Materials for this Module

- Reference Manager Handout 1
- Reference Manager (installed on your computer and your account created)

Introduction

A reference manager is a software that will help you collect information about publications, organize the publications, and help format citations in your writing. There are many different reference managers available and there are a few considerations to make when choosing one. Some software is available to download for free, others require a subscription fee or an upfront cost. Some reference managers provide multi-platform desktop versions while others are completely web-based.



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A comprehensive comparison between reference managers can be found at:

https://en.wikipedia.org/wiki/Comparison_of_reference_management_software

One of the most important factors in determining what reference manager to use will be the one that your colleagues and workplace supports. If you work at a university, the library will often have a subscription service to a reference manager offered for free to faculty, staff, and students. If you work for a private company, there may be a particular software that is preferred for the company workflow. A few recommended choices for researchers are: Zotero and Mendeley (available for free), RefWorks, or Endnote. Regardless of which one you decide to use, you should choose a reference manager that performs three essential functions: *easily* collect article information, organize information, and create citations in your writing.

First, the reference manager should support features that allow you to import the publications directly from your browser or desktop. This feature allows you to instantaneously save all your articles in one defined space. This is all done automatically through a browser extension of the reference manager (if supported). However, it is important to know that while the article will be imported automatically, sometimes important information regarding the publication is omitted. This can be problematic when you try to search for a publication you read a year ago...only to remember the author but not the title. Therefore, it's important that you verify the listing is complete within the reference manager and manually fill in all information fields that may be missing.

Second, once your articles are stored in the reference manager, you can sort them in many ways such as by author, title, publisher, etc. You should also be able to add your own keywords or organize the articles by categories as you synthesize your understanding and organization of the literature. This will allow you to search your reference manager for all the articles you found on a topic, such as "tissue engineering".

Third, there are many citation styles available within your reference manager and the one you choose is dependent on the type of document you are writing. Remember that the purpose of a citation in your paper is so that the reader can retrieve the same information you used in supporting your writing. The information needed to retrieve a specific article may include

- Names of authors
- Dates
- Source such as publisher of a book, name of a journal, name of conference proceedings, ...
- Issue number, volume number, pages numbers
- The Digital Object Identifier (DOI), doi.org, is evolving as a system to provide any piece of work (article, books, ...) with a unique number that can be used to locate that work.

There are two parts to the citation: the in-text marker and the bibliography entry. Different disciplines place more importance or emphasis on certain reference data, such as date, journal, or author - the format of the in-text citation and the bibliography will reflect this. For example, the IEEE citation style in-text marker is simply a number inside square bracket, e.g. [1]. In contrast, science papers often use the American Psychological Association (APA) style, where the in-text citation includes the date of the work after the authors name because importance is placed on the timeliness of the work, e.g. (Smith, 2020). There are also



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differences in the bibliography entries. For example, Modern Language Association (MLA) styles used in humanities list the date much later in the citation than other formats because this is considered less important. Verify formatting guidelines with the individual to whom you're submitting your paper. Professors have different formatting preferences and journals within the same discipline oftentimes require different reference styles. It is ultimately the authors responsibility to verify the correct citation style prior to submitting the publication.

Changing the citation style will vary depending on the reference manager you are using. Here are some websites with guidelines for changing citation styles:

- Zotero: <https://zotero-manual.github.io/citations/>
- Mendeley: <https://www.mendeley.com/guides/using-citation-editor/06-changing-citation-styles>
- RefWorks:
https://knowledge.exlibrisgroup.com/RefWorks/Product_Documentation/RefWorks_User_Guide/0900_Managing_Citation_Styles
- Endnote: <https://kemh.libguides.com/c.php?g=200836&p=1321271>

A reference manager should allow users to automatically update each citation within the bibliography of the document. For example, if you imported three different citations within your document and decide later to change the order of citation; the reference manager is able to automatically update the entries in bibliography according to the listing order within the document. This feature is especially important for longer documents where you may have hundreds of citations and updating your bibliography every time a change is not feasible. Many reference managers have add-ons for Microsoft Word so that the software interfaces seamlessly, streamlining the process of creating citations.

Assignment(s) for this Module

If you are having trouble choosing a reference manager, consult the Wikipedia link in the introduction of this module or simply choose one of the free recommended managers (Zotero or Mendeley). Once you have installed the reference manager, install any available browser extensions. Additionally, (if using with Microsoft Word) make sure your reference manager is linked within Word (usually within the Tools).

Import at least five journal articles into the reference manager. Try adding articles directly from your browser as well as from your desktop. View and update all entries pertaining to the publication. For example, typically only one author (if any) is automatically imported within the reference manager; update the entry so all authors are listed. Sometimes the entries may have missing or extraneous information; take the time to ensure each entry is complete and correct. Now try adding a patent (see Handout 1). When completing these activities think long term. What information or keywords should be added to ensure you can easily search for this article a year or even five years from now? A small amount of work as you collect citations will save an enormous amount of work later!

Within an MS Word document, write a short one paragraph summary of an article within your database. Add a citation of the article you summarized to the document from the reference manager. Then, create a bibliography using the new citation you just added.



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Deliverable 1: Save a copy of your original paragraph and bibliography.

Add a second paragraph to the MS Word document (can be a summary of another article). Add another citation from your reference manager. Within the MS Word document, change the order of where the citations appear. If done correctly, your bibliography should be automatically updated.

Change the citation style of your references, consulting your reference manager user guide. Some reference managers will require changing styles directly from the reference manager while some will have an option to change the style using an MS Word plugin installed with the reference manager.

Deliverable 2: Save a copy of your two paragraphs and updated bibliography.

Five-Minute Reflection

1. Should you use reference managers even when completing a small project that only requires a few citations? Why or why not?
2. List any problems you may have encountered while completing the activities.
3. Formulate one question to discuss with your mentor (maybe a concept you are unclear on, something you found interesting, etc.)
4. What information did you feel was the most informative? Least?

Deliverable 3: Save a copy of your responses to the Five-Minute Reflection.

Discussion with mentor

- Why is citation management important?
- What are some citation management platform options?
- Takeaways from Five-Minute Reflection.

Mentee Deliverables

- Deliverable 1: Save a copy of your original paragraph and bibliography.**
- Deliverable 2: Save a copy of your two paragraphs and updated bibliography.**
- Deliverable 3: Save a copy of your responses to the Five-Minute Reflection.**
- Send an electronic file containing Deliverables 1, 2, and 3 to your Mentor prior to the meeting (preferably the day before) and bring your own printed or electronic copy to discuss at your next Mentor meeting.**