WHY USE REFERENCE MANAGEMENT SOFTWARE?

Reference management software (also called citation management software) helps you manage your bibliographic resources and integrates with your word processing software to generate in-text citations, footnotes, and bibliographies. You can store PDFs, PowerPoints, and other materials with your references and you can share your references or libraries with others. You can also keep notes on specific references, making it easier to remember what an article, book, or other reference material was about. With some basic planning in advance, you can keep a well-organized system of individual and shared libraries that will help you write literature reviews, conference papers and journal articles.

WHAT SOFTWARE IS AVAILABLE?

Many applications are available, but here are three popular options:
- **Zotero** is a free, open source tool that you can use in your web browser or you can download as a software application on your computer.
- **Endnote** is available for purchase from the UW bookstore.
- **Proquest** is often used in libraries.

WHAT SOFTWARE SHOULD I USE?

What you choose is up to you, but here are some things you might want to consider:
- What your research team is already using
- Differences in GUI (graphical user interface) organization
- Cost

USING SOFTWARE MEANS I NEVER HAVE TO EDIT MY REFERENCES AND CITATIONS AGAIN, RIGHT?

Wrong. Reference management software is great for quickly citing and generating reference lists and bibliographies while you write, but it isn't perfect. When you create a citation in your document, you won't be able to cite specific page numbers for a quote. Additionally, some of your references my automatically add in information you don't always need in your reference list or bibliography (such as a doi) or not know how to handle unique types of references. To clean up your automatically generated references in a document, you will have to remove the citation "field codes" (look up in the help menu of your specific software program to find out how) and manually revise your citations and references. When manually revising your references, you can refer to the style guides at the UW Libraries Citation Styles and Tools webpage.

FAST AND DIRTY ZOTERO BASICS

- Find an article, book, conference paper, etc
- If possible, download a digital copy of the item (such as a pdf of a chapter or the article through the UW library site)
- Save the item in a folder you can use just for the literature that you are collecting
- Open Zotero
- Add item manually using the new item button "plus sign" (see pro tip for how to automate this process through adding a publication identifier number)
- Select item type (e.g. report, journal article)
- Fill in details, such as title, authors, publisher, date
- Add the abstract
- Add an attached pdf to your reference by right-clicking on the reference and selecting "add attachment"->"stored copy of file"
- Once you read the item, keep a set of notes about the purpose of the article, your thoughts, and possible critiques by right-clicking on the reference and selecting "add note"

PRO TIP: Click on the "add item by identifier" button and copy and paste in the doi or ISBN number. Do not paste in the ISSN number. If you do you will end up with a lot of references about rodents and bacteria. Unless you are a biologist, these references are useless in your library.

PRO TIP: Keep things neat and tidy in Zotero through using folders to manage different types of topics. You can add a new folder through the File menu and selecting "New collection". You can also add sub collections within folders.

PRO TIP: Keep a memo in a word document of the main points of each article and your thoughts and ideas about the article as you read. You can later organize this memo into themes to help you write a literature review. You can find examples of memos on the Research Support page.

For more help and information, visit UW Libraries Citation Management Help and the UW's Citation Management Software Guide.