

Chapter 18

Reference Management Software for Assisting Researchers: A Comparative Analysis of Usage and Usability

Subhajit Panda

*Assistant Librarian,
Chandigarh University, Mohali, Punjab-140413 (India)
Email: suvapanda007@gmail.com*

ABSTRACT

An academic library is supposed to help its users, e.g. students, faculty, and staff members, to find the best resources with an efficient strategy. By assisting users in creating search strategies, sparingly utilising resources, conducting research, and clearly and concisely presenting ideas and conclusions, reference management software (RMS) also works toward the same objective. Since most RMS are geared toward the same goal, their attributes and work architecture are considered to be comparable. Aside from these shared characteristics, each RMS has its own identity and offers some unique features. The main goal of this paper is to examine, contrast, and present the current situation of five distinct RMS, including Citavi, EndNote, Mendeley, Qiqqa, and Zotero, in terms of the features they offer and their current demand in the user base. The data on the websites of the RMS and their manuals are taken into consideration to portray the state of the art of the five selected RMS and identify their advantages and disadvantages. While some prior research was also referenced for comparative analysis. Data from the last 52 weeks of Google Trend Analysis are used as the foundation to assess the current RMS demand. The feature-wise comparative analysis helps a user to choose the best suitable RMS for his study. And the Google Trend Analysis indicates that Mendeley is the most preferred (79.06 hits/week) RMS among the five while Qiqqa is the least one (~0 hits/week).

Keywords: *Reference management Software, Citavi, EndNote, Mendeley, Qiqqa, Zotero, Comparative analysis, Google trend analysis.*

INTRODUCTION

During various academic practices, like writing assignments, research papers, project writing, dissertations or thesis, an academicians need to consult ideas from different researchers of the same field, more concisely, previous researchers covered the same area of research. It helps a researcher to go through the already completed researches in that field and figure out the gap to make their ideas clear about preparing a blueprint of their research process. Researchers acknowledged such directly or indirectly consulted researches by giving proper reference and citation in his work. Unfortunately, there are several papers due to the practice of false citation and reference, when one for the citations or references in original paper, he cannot find such citation or reference neither as text nor as idea (Karim, 2018) (Mohta and Mohta, 2003). Therefore, it is jobs of the academicians to prevent this corruption and provide proper citation and reference for their readers for smooth understanding of the topic and go beyond it.

ICT and Emerging of Reference Management Tools

Researchers may encounter numerous referencing issues when drafting a research paper, including which citation style to use (based on the requirements of the journal or institution), where to store bibliographies, how to arrange them for use, how to alter their citation style if necessary and many more. When researchers have to do it manually, providing citations, organising references, and creating bibliographies appear like inconvenient, repetitive and laborious tasks. References were previously written on file cards and stored in inboxes. But now, with the rapid development of Information and Communication Technology (ICT), the infrastructure and components that enable modern computing, provide researchers with an automatic or semi-automatic way to manage reference, citation and bibliographies readily and efficiently. Researchers in general value creativity and originality, thus the ICT tools which provide the most open situations with great autonomy to the researcher can really help in identifying and solving research problems in the most creative ways (Scholarify.in, 2019). Utilizing ICT tools also enhanced research performance and accelerate the research process towards completion. Researchers can use a variety of tools to find and organise facts, information, and content in accordance with specific demands. Search engines are used to find information, content management systems are used to manage the content, grammatical tools are used to check for grammatical errors and typos, plagiarism detection tools are used to identify similarity and duplicity, and reference management tools can be used to provide references, citations, and bibliographies.

Background Study: Understanding Reference Management Software

Reference Management Software (also known as citation managers or bibliographic management software) is such a kind of ICT innovation that provide

a researcher with some useful features that helps him in his research, like (Wiese, 2022),

1. Storing and organising references systematically
2. Generating preferred citations and bibliographies in the style; and,
3. Easily converting referencing styles to suit publication requirements.

There are numerous definitions available for RMS. Each researcher defined its appearances and functionality in light of their personal experiences. According to Fenner *et al.* (2014), "a reference management software generally perform three basic research steps: Searching, Storing and Writing. It helps researchers find relevant literature, allows them to store papers and their bibliographic metadata in a personal database for later retrieval and allows researchers to insert citations and references in a chosen citation style when writing a text". Pointing to the usage, Aronsky *et al.* (2004) describe that the bibliographic management software is being utilized by researchers, analysts, teachers and numerous experts for inserting references in their academic papers in an appropriate format. This lessens the burden on writers by allowing them to focus on writing instead of editing and proofreading references to avoid errors.

In a previous study, Fitzgibbons and Meert (2010) indicated the popularity of the reference management software, specially EndNote, RefWorks, BibTeX and Zotero, among students, researchers and academicians as an efficient and time-saving tool for their writing of academic works. Jose and Jayakanth (2008) describe the features of the reference management software as a back-end database of the reference details and provides the user interface which can facilitate in searching and rendering of references according to the desired styles. Singh (2017) stated that TELESTAR (Technology Enhanced Learning supporting Students to Achieve Academic Rigor) had defined two essential functions of RMS. One is to build a citation database for researchers to organize their documents. And the second task is to format the bibliographies and citations for writing papers via plug-ins or add-ons for the Word processing software. The study by Mead and Berryman (2010) might be the most helpful source when it comes to the costing and access criteria of the reference management software. They investigated more than 25 reference management programmes available on the market at the time and encountered an enormous range in cost and installation requirements. Similar to how some are completely free to use while others charge expensive registration fees. Additionally, some are difficult to download and install, while others can be accessed directly from the web without a need for installation.

Following are some of the major RMS functions which is essential for a RMS to provide adequate services:



Figure 18.1: Major Functions of a Reference Management Software
(Source: Rodriguez, n.d.)

Scope of the Study

There are a variety of tools available for researchers to help in finding interesting facts and aid in their research. For locating facts and information Search Engines are helping, for managing the contents Content management software is available, for checking sentence structure and errors Grammatical tools are in reach, for detecting duplication and similarity Plagiarism tools are functional, and for giving references, citations and bibliographies RMS are available. This study limits its scope to five most commonly used RMS namely, Citavi, EndNote, Mendeley, Qiqqa and Zotero.

Objective of the Study

This study basically structured upon three primary objectives,

1. To thoroughly analysis the characteristics, functionality, pros and cons of five most commonly used RMS, *i.e.* Citavi, EndNote, Mendeley, Qiqqa and Zotero.
2. To compare their major functions to gain a overall understanding about their usability and action points.
3. To assess the current demand of the user base for these five RMS.

Research Methodology

For analysis or review the characteristics, functionality, pros and cons of the five targeted software, manuals, guides, software knowledge base, FAQs in the website of the software helps significantly. To compare these five software, ten common and major functions are selected and conduct a comparison within the limit of available information. Data from the previous 52 weeks of Google Trend Analysis are used as the basis for examining the current user base demand for these RMS.

Software Review

Technically, a software review is a systematic inspection of software by technical experts to find and resolve errors and defects in the software during the early stages of the Software Development Life Cycle (SDLC) (GeeksforGeeks, 2019). But taking into account the user's perspective, every user, whether or not they are technical experts, reviews any software before deciding whether or not to utilise it for their activity. This study examines or reviews the five most popular RMS to determine their true potential and appropriate usage standards.

Citavi

Citavi RMS helps its users in constructing search strategies, carefully using resources, carrying out research, and presenting ideas and results in a clear and structured way (Citavi, n.d.-a). The software was introduced in 2006 in Switzerland, to help academicians in organizing the research projects and to manage their time. More than 300 universities procured Citavi license, allowing their students, faculty and staff to use Citavi for Windows at no cost. Citavi blends knowledge organisation and reference management to offer the best support possible for a researcher. Citavi allows researchers to perform a search through global resources more quickly and effectively than they ever imagined, including creating tasks, analysing texts, saving quotations and ideas, creating draught outlines, and writing reports, articles, or books. Additionally, the software assists in finding full-text articles, annotating PDFs, saving documents, webpages, and photographs, as well as assisting in analysing them. It is possible to compile, organise, and add all the references, quotations, and thoughts the researcher has acquired into the working document (Citavi, n.d.-c). The software is available in 5 other modules based on the user groups. The modules are entitled as:

1. Citavi for Researchers

2. Citavi for Companies and Organizations
3. Citavi for Students
4. Citavi for Librarians
5. Citavi for Home users

Citavi is available both in no cost and commercial formats. The free version offers all of the features of other editions, but the only difference is that the number of references is limited to 100. The most recent version of Citavi is its version 6, first released on 20 February 2018, and it continuously updated with a minor time interval and its latest update released on 16 May 2022 with minor improvements (Citavi, 2018). Citavi 6 provides its license via the Citavi account and allows users to save their ongoing project on the clouds (Citavi Cloud or DBServer). It gives a storage capacity of 5 GB and limited the pdf size up to 100 MB and other files up to 50 MB. This cloud version also facilitates team access for the researchers and academicians who conduct research as a group (Citavi, n.d.-b).

Advantages and Disadvantages of Citavi

Citavi constantly offers updates, enhances its features, and resolves unwanted bugs. Even though it has all of the best features, there are still a few minor issues. Below are listed both the benefits and drawbacks of utilising this software:

Advantages

- ☐ References can be added manually
- ☐ Users can attach files to each entry
- ☐ It allows searching through ISBN, DOI, MPID
- ☐ It supports import-export options for references

Disadvantages

- ☐ It is only compatible with Windows
- ☐ It seems to be a little bit high
- ☐ It is very difficult for first-time users
- ☐ Bibliographies cannot be formatted.

EndNote

During long-term research or thesis writing, it is impossible for a researcher or academician to remember all the consulted sources for providing acknowledgement. EndNote is one of the several RMS that enables users to quickly arrange references in a searchable database and required bibliographic format. As a commercial reference management software, EndNote was first publicly released in 1989 by Niles and Associates (1991). Later, in 2000 it was acquired by the Institute for Scientific Information's Research Soft Division, part of Thomson Corporation, and in 2016 sold to Clarivate Analytics (Kwon *et al.*, 2015) (McKeown and Mir, 2021).

The new version of EndNote *i.e.* EndNote 20 was first published in April 2020, and its most recent update, EndNote 20.3 was made available for both macOS and Android on April 26, 2022 (EndNote, n.d.-a).

Initially, EndNote was started as a DOS program, but currently, it's available on Windows and Mac environments (Urdaneta, 2001). EndNote is accessible on two platforms, EndNote Desktop and EndNote Online. Although the desktop version is expensive, the online version offers the learners a free basic account. But users have to sign up at myendnoteweb.com (EndNote, n.d.-b). Both editions are available for Windows and Macintosh operating systems. The EndNote software consists of four main parts: Library, Connections, Filters and Styles (Priore and Giannini, 2007); and offers six ways to add references: by syncing with the desktop, direct export, capture, online search, import text file, and manual entry (Thomson Reuters, 2015). EndNote presents two ways for a researcher to share their reference library with other researchers (upto 100) for a group project: Read-only access or Read and Write access. With the latest version of the software (*i.e.* EndNote 20) users can provide a maximum of 58 types of references, 54 fields per reference and a comprehensive listing of more than 7000+ bibliographic styles used by diverse journals and fields across all academic disciplines.

Advantages and Disadvantages of EndNote

Here are some of the positives and negatives of EndNote reviewed as follows:

Advantages

- ☐ Collects references from a variety of online sources such as healthcare databases
- ☐ Manage and organize one's references and images/figures
- ☐ It is best with Web of Science and EBSCO databases for direct export.
- ☐ Export/Import options are available for other Databases.

Disadvantages

- ☐ Web-version: documents cannot be shared between members of a shared group
- ☐ Only full-text sharing via E-mail
- ☐ Confusing share options for groups and libraries with different sharing permissions.
- ☐ One can't create a citation style sheet

Mendeley

Mendeley is a free reference manager that can help researchers and academicians store, organize, note, share and cite references and research data. It automatically generates bibliographies, collaborates easily with other researchers online, easily imports articles from other research software, finds relevant research

articles based on the online reading habits of the researcher, and access saved articles from anywhere online (Elsevier, 2019). Three PhD students created Mendeley in 2007 as an application to manage PDF document collections and automatically suck metadata from it. Its original moniker, the B-movie monster, was eventually changed to Mendeley, a combination of the names of the biologist Gregor Mendel and the chemist Dmitri Mendeleev (Victorhenning, 2008). Later, Mendeley was purchased by the academic publisher Elsevier in early 2013 to expands its open, social education data efforts (Lunden, 2013). The software is compatible Windows, Mac and Linux operating systems and can generate bibliographies in Microsoft Word, OpenOffice and LaTeX by the support of Chrome, Firefox and Internet Explorer and Safari Web browsers. It also comes with a free application for iPhone and iPad. The software is available on both the desktop and web-based interfaces. With Mendeley, users can choose from one of 8000+ available citation styles or can create their own. On the web, Mendeley enables drag-and-drop or manual entry into a user's folder of PDFs or other documents and works with word processing tools (Askandar, 2021). With the installation of Mendeley Web Importer, it can import citations and PDFs of online journal articles directly from the web browser. Mendeley makes easy web pages, journal papers, and other web-importer tools as the user seeks them by Google, Google Scholar, proprietary databases or other online catalogues like WorldCat. Mendeley makes it relatively simple to import references from other citation managers such as RefWorks, EndNote, Zotero and Papers(Macmillan, 2013).

Advantages and Disadvantages of Mendeley

Some of the advantages and disadvantages identified by Chawla and Gupta (2017) in their study discussed below:

Advantages

- ☐ Mendeley a free software for scholars;
- ☐ It also works offline and shares its library with other RMS like Zotero;
- ☐ It permits to store 2 GB records;
- ☐ Mendeley can discover an excess of information and empower Boolean, field, progressed looking of entire databases.

Disadvantages

- ☐ When pulling in a PDF to Mendeley Desktop, information needs to edit most of the time, but it is easy to edit;
- ☐ It can pull completely wrong data;
- ☐ It is possible that information like Title, Authors, *etc.* Can't be edited and saved (mostly when in a group);
- ☐ Creation of bibliographies only with cut and paste.

Qiqqa

Qiqqa (pronounced “quicker”) is a software tool that is more familiar for storing, organizing and annotating PDFs using tags and metadata that make searching for documents a lot easier (Scolarly.com, 2019). Back in 2009, the beginning of Qiqqa was started in Cambridge, although in April 2010, a public alpha with PDF management and brainstorming features was made available. The Web Library, OCR, interaction with BibTeX and other reference managers, and the use of natural language processing (NLP) methods to direct researchers’ reading have all been added in later updates. The current pre-release beta version of Qiqqa is v83.0.7649-30836, and the most recent stable version is v82.0.7568-29227 (Jardine, 2022). Qiqqa is available in both free and premium version, and the premium version also offers a 50 per cent off for the educational institution (Qiqqa, n.d.).

The principal work architecture of Qiqqa is divided into five tabs: a PDF library, a concept map editor, an expedition feature to find new concepts, a web browser, and one tab that includes several tools such as a DOC to PDF converter that can create safety copies. As a reference management tool, Qiqqa includes all kinds of systems that help researchers organize their references, store consulted researches, help to acknowledge (cite) them, share references with co-researchers, and so on. Qiqqa can be helpful for researchers working with high volumes of data. Qiqqa can scan all the saved documents and read the text in order to look for concepts and information, like the author, title, and keywords. Inside this PDF library, a researcher can add notes and tags in order to search faster. It integrates citations and bibliographies into thousands of styles automatically with Microsoft Word XP, 2003, 2007, and 2010 and BibTeX/LaTeX; although there are currently no Mac or Linux versions. Qiqqa also has an android app dedicated to displaying documents on an android devices (Graham, 2013).

Advantages and Disadvantages of Qiqqa

Some of Qiqqa’s pros and cons are listed below:

Advantages

- ☐ Incredible organizational capability;
- ☐ Easy to use interface;
- ☐ It has built-in PDF view/editor;
- ☐ It can work in offline mode with multiple libraries and accounts

Disadvantages

- ☐ It is only meant to organize research notes, not the paper itself;
- ☐ Only available for windows platform;
- ☐ No browser integration tool;
- ☐ Lack of hands-on customizable formatting.

Zotero

Zotero is a free easy-to-use tool that helps researchers and academicians collect, organize, cite, and share research articles. It was originally developed by George Mason University's Center for History and New Media, now known as the Corporation for Digital Scholarship, and launched on October 5, 2006 (Zotero, n.d.-b) as an extension, or add-on, for the Firefox browser (Krause, 2012). The name "Zotero" originates from the Albanian language "to master or acquire" (Dingemanse, 2008). Three foundations, especially the Alfred P. Sloan Foundation, the Andrew W. Mellon Foundation, and the United States Institute of Museum and Library Services, generously provided funding for Zotero (Zotero, n.d.-a). It was written on JavaScript with SQLite backend and supported by Windows, Macintosh, Linux operating system, accessed through Chrome, Firefox, Opera, Safari web browser and can be integrated with Microsoft Word, LibreOffice for export, format and modify reference and bibliographies. With the help of this research management tool, all research resources from Web of Science, PubMed Central, Science Direct, Google Scholar, Google Books, Wikipedia, Amazon, and other sites may be collected, arranged, cited, and shared in a single searchable interface (Andersson, 2015). It also has the ability to find, extract and import bibliographies from various URIs, such as DOI, ISBN, or PMID (Fernandez, 2012). The most recent updation of current Zotero version (*i.e.* Zotero 6) is 6.0.11 released on July 19, 2022 (Zotero, 2022).

Advantages and Disadvantages of Zotero

Ray and Ramesh (2017) labeled the advantages as well as disadvantages of Zotero.

Advantages

- ☐ Provide bookmarklet for accessing by other browsers;
- ☐ Zotero can work offline as well as online;
- ☐ Researchers can create a personal online database;
- ☐ It provides 8100+ Bibliographic styles in the Zotero Style Repository.

Disadvantages

- ☐ When using the Zotero button with one's Internet Browser, Information needs to edit most of the time, but it is easy to edit.
- ☐ Might take extra time to figure out plug-in is needed, but the documentation is excellent.
- ☐ Database search from within the program.
- ☐ No editing of full texts.

Comparative Analysis of Reference Management Software

Feature-wise Comparison

Although all the reference management software is likely to have some basic features intended to help a researcher to generate, export, manage, store, and share references and bibliographies in the easiest way. Hence, it is so challenging to determine whether one is superior to the other, but this comparative analysis aids a researcher in selecting the best reference management software for his project. (Vuletich, 2016) (*Compare - Qiqqa*, n.d.)(Bodleian Libraries, 2022)

Table 18.1: Major Functions Comparative Table of Five Most Commonly Used RMS

Features	Reference Management Software (RMS)				
	Citavi	EndNote	Mendeley	Qiqqa	Zotero
Developers	Swiss Academic Software	Clarivate Analytics	Elsevier	Qiqqa	Center for History and New Media
First Release	2006	1988	2008	2010	2006
Latest Version	6.3	X9	1.19.2	V79	5.0.36
Cost	Commercial	Commercial	Free + Commercial	Free + Commercial	Free + Commercial
Operating System	Windows	Windows + Mac OS	Windows + Mac OS + Linux	Windows	Windows + Mac OS + Linux
Import/Export	Import + Export	Export	Import + Export	Import + Export	Import + Export
Database Connectivity	Copac, CSA, ISI, Medline, Ovid, PubMed, Scifinder	Arxive, PubMed	Arxive, CiteSeer, PubMed	Arxive, PubMed	Arxive, CiteSeer, PubMed
Literature Search	Yes	Yes	Yes	Yes	Yes
Reference Sharing	Yes	Yes	Yes	Yes	Yes
Access					
Web	Yes	Yes	Yes	Yes	Yes
Desktop	No	Yes	Yes	Yes	Yes

Comparison through Google-Trend Analysis

In addition to examining their basic features, the most recent Google Trend

Analysis is another way to compare these RMS. It shows how frequently the users or researchers still looking for them.

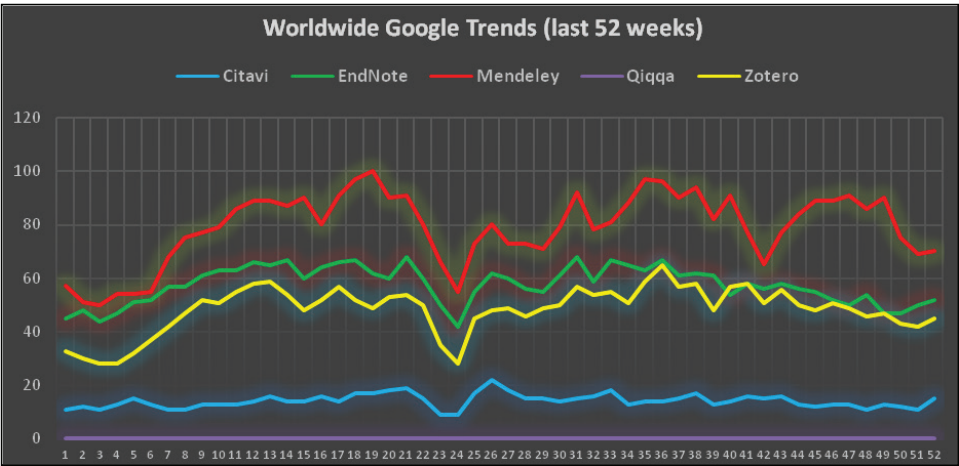


Figure 18.2: Worldwide Google Trends of Five Selected RMS (last 52 weeks) (Google Trends, 2022).

Figure 2 shows the Google Trends over the previous 52 weeks for the five reference management programmes under study. The result indicates that Mendeley has the highest average frequency among the five, with 79.06 hits per week. Zotero and EndNote come at second and third, respectively, with 57.62 and 48.44 hits per week. Finally, Citavi has a paltry 14.19 hits per week, and Qiqa has seen virtually no searches during the past 52 weeks. In comparison to other recent reference management tools created from 2006 to the present, the results demonstrate that Mendeley, EndNote, and Zotero have high demands in the research community, while Qiqa does not appear to have garnered a big user base.

Conclusion

Although any kind of research and academic writing contains the novel work of the researcher or academician, they still consider consulting previous studies to understand the area, find the research gap, compare similarity and fractionation in research results *etc.* The reference management tool has advanced significantly since then to assist the researcher in maintaining the consulted papers and providing them with proper acknowledgement in a certain style. RMS has evolved to include more functions that support exporting, importing, storing references, uploading files, searching databases, and producing reference outputs that can be associated with standard citing formats in order to keep up with increasing demand. Therefore, a researcher or academician must first grasp the needs of the study and then attempt to evaluate those needs with the features offered by the RMS before utilising or choosing any of them for research or academic writing.

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