

Reference management software comparison

There are a number of different types of software packages that you can use to manage the bibliographic details of information and the documents you find during your degree or research. The two main packages that the College provides free access to are EndNote and RefWorks, but there are now several software packages or bookmarking tools online at no cost to you or the College. You may find these online tools do not have all the functions you need, so make sure you choose carefully.

TO DECIDE WHICH PACKAGE TO USE, FIRST ASK YOURSELF THE FOLLOWING QUESTIONS:

1. Do you have access to a single College owned computer?

EndNote must be installed on each individual computer before use. RefWorks and EndNote Web can be used from any computer with internet access. Zotero and Mendeley can be used on and offline, with desktop installation required on an individual computer for offline access.

2. Do you use a PC or a Mac?

EndNote is compatible with both Windows and Mac operating systems, as are Zotero and Mendeley.

3. Which package is used by your colleagues?

Although the packages are compatible with each other, it is wise to choose the package which most colleagues in your department use. Then you can share databases or libraries, and give each other support. If you are still undecided as to which package to use, refer to the table overleaf for a detailed comparison.

4. Can I upload full-text articles?

You may upload full-text copies of individual articles relevant to your research but may not systematically store the contents of a relevant journal in your field. When selecting a sharing option either choose to keep full-text articles private or share them only with members of your project group at Imperial.

The table below provides a comparison between the packages Imperial Library supports. If you have any questions about using these, or how to get access, please contact your Liaison Librarian.

	RefWorks	EndNote (desktop)	Endnote basic (EndNote Online)	Zotero	Mendeley (basic)
Cost	Free to College members and Alumni	Can be freely installed by College members on College or personal devices	Free	Free	Free
What is this package best at?	Easy to learn. Cloud based so can use on any computer with internet. Once Word tool bar is synced you can work offline. Recommended for Imperial undergraduates and master's students.	Good at handling large amounts of references. Has 'find full text' feature. The editing tools make this a versatile reference management tool. Records are on your computer rather than in a cloud so good if dealing with anything confidential. Recommended for Imperial PhD students, research students and researchers.	If you want to use a version of EndNote on non-College machines or can't access the Software Hub to download.	Open source software. Can gather citation records for non-pdfs easily. Can sync with website to use on any computer with internet.	Also easy to learn and cloud based.
Is it compatible if you're going to be working off campus?	Yes	Yes	Yes	Yes	Yes
Is it easy to collaborate with other researchers?	Yes. Can share with an unlimited number of people with or without RefWorks accounts by using the Share options. Can create a shared account for a research group/ project.	Yes (you need to be using Endnote 7.2 or higher.) Can share files or access a shared library with up to 100 others (Version 8). But there can be only one simultaneous user.	Yes, you can share references that you have in groups with anyone that has an EndNote Online account.	Yes (you need to have a Zotero account) Can create public or private groups.	Yes (you need to have a Mendeley account.) Can create up to 5 private groups.
Is there a custom College style?	Yes	No	No	Harvard and Vancouver but Imperial specific	No
Number of referencing styles available	6000+	6000+	3500+	9400+	8000+

Operating System	Web-based, OS-independent. Add-in available for Word, Google Docs, Hangul	Windows, Mac, iOS app.	Windows, Mac, iOS app.	Windows, Mac, Linux, BSD, Unix, iOS app (install Bookmarklet)	Windows, Mac, Linux, iOS app, Android app
Browser	Microsoft Edge Latest versions of Firefox (Windows, Mac, and Linux) Latest versions of Safari (Mac) Latest versions of Google Chrome	N/A	Internet Explorer 8x or later. (Windows Only) Firefox 27 or later. Safari 5.0 or later. Chrome 31 or later.	You can download connectors for Chrome, Firefox and Safari, as well as one that works with any browser.	<ul style="list-style-type: none"> • Chrome • Edge • Firefox • Safari • Microsoft Internet Explorer 11 Exception: Mendeley Web Importer does not work with any versions of Safari.
Are there apps available?	N/A	iPad app- Available free from the App store for iPad only.	iPad app- Available free from the App store for iPad only.	Official Zotero app is in Beta testing but their website lists ones for pdf readers, android and ios.	No – mobile apps have been retired as of March 2021.
Can I annotate stored pdfs?	Yes	Yes	No	Zotero PDF reader is in Beta testing. It is expected to launch with Zotero 6 later in 2021.	Yes
Maximum number of records per library or folder	unlimited	unlimited	50000 records. 2GB for web space.	Unlimited number of references (Size only restricted by local storage constraints.) 300MB free web space for attachments (PDFs, images etc)	2GB of free personal storage space 100MB shared web storage across all groups.
College authenticated	Yes	Yes	No	No	No
Export to BibTeX?	Yes	Yes	Yes	Yes	Yes
Library training available?	Yes	Yes	No	Yes	Yes

What happens when you leave the University?	If you're a student, register for an alumni account. Save or export your references to use with other software.	Save or export your references to use with other software.	Free so can use wherever you work.	Free so can use wherever you work.	Free so can use wherever you work.
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