

## 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 three main packages that the College provides free access to are EndNote, RefWorks and Reference Manager, 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 and Reference Manager must be installed on each individual computer before use. RefWorks and EndNote Web can be used from any computer with internet access. Zotero can be used on any computer with internet access, but is currently only available for use in the Firefox Browser. 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. Reference Manager is only compatible with Windows. RefWorks can be used with both systems, as can Zotero and Mendeley.

### **3. Which package do your colleagues use?**

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.

**The table below provides a comparison between the established and newer packages now available.  
If you have any questions about using these, or how to get access, please contact your librarian.**

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Cost</b>	Free to College members	Free to College staff and postgraduate research students	Free to College staff and postgraduate research students	Free to College members	Free	Free to College staff and postgraduate research students	Free
<b>Operating System</b>	Windows, Mac (Write N Cite plugin not compatible)	Windows, Mac	Windows, Mac	Windows, Mac	Windows, Mac, Linux	Windows	Windows, Mac, Linux
<b>Browser</b>	Internet Explorer Version 7.0 or later (Windows only) Firefox 3.X or later (Windows, Mac and Linux) Safari 3 and later (Mac) Google Chrome (Windows only) Note: RefGrab-It does not work with Google Chrome	n/a	IE7.x (32 bit) or later, Firefox, Safari 4.x or later	IE7.x (32 bit) or later, Firefox, Safari 4.x or later	Firefox only, connectors available for Chrome, Opera and Safari; bookmarklet available for other browsers	n/a	IE, Firefox, Chrome, Safari
<b>Work offline?</b>	Yes (Write N Cite)	Yes	No	No	Yes	Yes	Yes
<b>Share data with other reference management software</b>	Yes	Yes	Yes	Yes	Yes, and can sync account with Mendeley library	Yes	Yes, and can sync library with Zotero accounts
<b>Maximum number of records per library or folder</b>	unlimited	unlimited	unlimited	50 000	?	unlimited	Unlimited on desktop (Size only restricted by local storage constraints.); 1GB of free web space permitted

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Maximum number of fields per record</b>	51	52	46	46	26 plus additional author/contributor fields	37	62
<b>Number of source types</b>	31	45	48	48	33	35	20
<b>Support of special characters</b>	Yes	No	No	No	Yes	Yes	Yes (add manually)
<b>Linking to PDFs or other materials</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Direct search of online catalogues/databases</b>	Yes	Yes	Yes	Yes	No	Yes	No
<b>Use of direct export feature</b>	<a href="http://www.refworks.com/content/products/direct_export.asp">http://www.refworks.com/content/products/direct_export.asp</a>	<a href="http://endnote.com/en/online-databases">http://endnote.com/en/online-databases</a>	<a href="http://endnote.com/en/online-databases">http://endnote.com/en/online-databases</a>	<a href="http://endnote.com/en/online-databases">http://endnote.com/en/online-databases</a>	<a href="http://www.zotero.org/translators/">http://www.zotero.org/translators/</a>	<a href="http://www.refman.com/support/webcap.asp">http://www.refman.com/support/webcap.asp</a>	<a href="http://www.mendeley.com/import/">http://www.mendeley.com/import/</a>
<b>Work within a wordprocessor to create formatted bibliographies, in-text citations, and footnotes</b>	Word for Windows 2000 or later Word for Mac 2004 or later You can also use any word processor including Ami-Pro, FrameMaker, OpenOffice, StarOffice, Word Perfect or any other program which allows you to save your files as RTF.	CWYW for Word, Open Office and Pages '09. EndNote Add-in for WordPerfect, RTF document scan, LaTeX through BibTex	Windows plugin: Word 2003 / 2007 / 2010 (32 or 64 bit) / 2013 (32 or 64 bit); Mac plugin: Word 2008 SP1 / 2011	Windows plugin: Word 2003 / 2007 / 2010 (32 or 64 bit) / 2013 (32 or 64 bit); Mac plugin: Word 2008 SP1 / 2011	Word, Open Office/Libre Office, Google Docs, LaTeX through BibTex	Word 2003/2007 for bibliographies and in-text citations but not footnotes	Word (PC & Mac), Open Office, Google Docs, LaTeX through BibTex

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Number of referencing styles available</b>	3076 (August 2011) <a href="http://www.refworks.com/content/products/output_style.asp">http://www.refworks.com/content/products/output_style.asp</a>	over 6000	over 3300	<a href="#">over 3300</a>	over 1 250 <a href="http://www.zotero.org/styles">http://www.zotero.org/styles</a>	over 1 300 <a href="http://www.refman.com/support/rm-styles-terms.asp">http://www.refman.com/support/rm-styles-terms.asp</a>	<a href="http://www.mendeley.com/citationstyles/">over 1 180</a> <a href="http://www.mendeley.com/citationstyles/">http://www.mendeley.com/citationstyles/</a>
<b>Create a formatted list of figures, charts, etc.</b>	No	Yes	No	No	No	No	No
<b>Collaboration features</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Mobile device applications</b>	Yes (when Shibboleth authentication is available in the UK)	Yes	Yes	Yes	No	No	Yes (iPhone, iPad)
<b>College authenticated</b>	Yes	Yes	Yes	Yes	No	Yes	No
<b>Bookmarklet</b>	Yes	No	Yes	Yes	Yes	No	Yes
<b>Export to BibTeX?</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Library training available?</b>	Yes	Yes	No	No	No	Yes	No
<b>Language interfaces</b>	English, Spanish, French, German, Japanese, Korean, Chinese	EndNote uses the language setting from your operating system	English, Chinese, Japanese, Korean, German, Spanish, Portuguese	English, Chinese, Japanese, Korean, German, Spanish, Portuguese	Uses the native language according to browser setting	English only	
<b>Attachment storage</b>		Unlimited	5 GB	2 GB			
<b>Maximum record size</b>	1 GB	64 KB; Figure field can hold one graphic	64 KB	64 KB	?	Size only restricted by local storage constraints.	Size only restricted by local storage constraints.

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Read Only capability</b>	Yes (need Imperial affiliation)	No	No	No	Yes	Yes	Yes
<b>Search and replace</b>	Yes	Yes	No	No	No	Yes	No
<b>Global editing</b>	Yes	Yes	No	No	No	Yes	No
<b>Auto completion of data</b>	Yes, author/s, keyword/s, journal title	Yes, author/s, keyword/s, journal title	No	No	Yes, author/s, journal title, tags	Yes, author/s, keyword/s, journal title	Yes, author/s, keyword/s, tags, journal title
<b>Spell check</b>	No	Yes	No	No	Yes	Yes	No
<b>Duplicate detection</b>	Yes	Yes	Yes	Yes	Yes, only when syncing libraries	Yes	Yes
<b>Authority lists</b>	Yes, authors, keywords, and journal titles automatically generated	Yes, authors, keywords and journal titles automatically generated	No	No	Yes, authors, journal titles, and tags automatically generated	Yes, authors, keywords and journal titles automatically generated	Yes, author, keywords, publications and tags automatically generated
<b>Automatic journal abbreviation lists</b>	No	No	No	No	No	No	No
<b>Sort capabilities</b>	Selected fields	any field	By author, title or year	By author, title or year	any field	Yes	Selected fields
<b>Boolean AND, OR and NOT</b>	Yes	Yes	OR is default, plus sign for AND, minus sign for NOT	OR is default, plus sign for AND, minus sign for NOT	Is, Is Not, Contains, Does Not Contain	Yes	AND, OR, - (NOT)
<b>Field searching</b>	Yes, selected fields	Yes	Yes, by author	Yes, by author	Yes	Yes	Yes
<b>Advanced search</b>	Yes	Yes	No	No	Yes	No	Yes (of whole Mendeley database)
<b>Search across multiple folders/groups</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Authority list browsing</b>	Author, keyword, journal title	Author, keyword, journal title	No	No	Author, publications, tags	Author, keyword, journal title	Author's Keywords, Author, Tags, Publication
<b>Save search strategies</b>	Yes	Yes	No	No	Yes	Yes	No
<b>Filters for importing from online databases</b>	<a href="http://www.refworks.com/content/products/import_filter.asp">http://www.refworks.com/content/products/import_filter.asp</a>	<a href="http://endnote.com/downloads/filters">http://endnote.com/downloads/filters</a>	<a href="http://www.myendnoteweb.com/help/en_us/ENW/hsr_importformat.htm">http://www.myendnoteweb.com/help/en_us/ENW/hsr_importformat.htm</a>	<a href="http://www.myendnoteweb.com/help/en_us/ENW/hsr_importformat.htm">http://www.myendnoteweb.com/help/en_us/ENW/hsr_importformat.htm</a>	No	<a href="http://www.refman.com/support/rm_filters-terms.asp">http://www.refman.com/support/rm_filters-terms.asp</a>	<a href="http://www.mendeley.com/import/">http://www.mendeley.com/import/</a>
<b>Editing or creating filters</b>	No	Yes	No	No	No	Yes	No
<b>Can you insert references manually and then automatically generate formatted bibliographies, in-text citations, and footnotes?</b>	Yes	Yes	Yes	Yes	Yes	Yes for bibliographies and in-text citations but not footnotes	Yes
<b>Automatically create a formatted bibliography, footnotes, and in-text citation</b>	Yes	Yes	Yes	Yes	Yes	Yes for bibliographies and in-text citations but not footnotes	Yes
<b>Can you edit/create styles?</b>	Yes	Yes	No	No	Yes, if you know Citation Style Language	Yes	Yes

	RefWorks	EndNote (Desktop)	EndNote (Online - linked to Desktop)	EndNote Basic (online with WOK)	Zotero	Reference Manager	Mendeley
<b>Create a bibliography as a file within reference manager?</b>	Word 2000 or later, Word for Mac 98 or later, HTML, RTF, Plain Text, SML, Open Office	HTML, RTF, XML, Plain Text	HTML, RTF, Plain Text	HTML, RTF, Plain Text	HTML, RTF, Open Office, Plain Text	HTML, RTF, Plain Text	Word, Open Office, Google Docs, LaTeX
<b>Create a subject bibliography (create a list of references grouped by subject)</b>	No	Yes	No	No	Yes	Yes	Yes, Groups
<b>Export</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>RSS feeds</b>	Yes	No	No	No	Yes	No	No
<b>Data visualization</b>	No	No	No	No	Yes, using Zotero Maps plugin	No	No
<b>Company</b>	RefWorks-COS	Thomson Reuters	Thomson Reuters	Thomson Reuters	Centre for History and New Media, George Mason University	Thomson Reuters	Mendeley
<b>Software updates</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes