An efficient way to manage references

If you are still editing in-text citations and reference lists by hand, you may be interested in the various types of reference management programs. These programs are useful to editors, as they make it easy to:

- add citations to text

- generate a bibliography, with items in the correct numerical or alphabetical order

- switch from numbered citations to author-date (or vice versa)

- apply a specific style (e.g. from a particular style manual or journal) to the citations and bibliography.

If used properly, a reference management program also does away with the need to check citations against the reference list and vice versa.

Such programs work by storing the various elements of a publication (e.g. author, title, date, publisher and edition) in a database. The referencing program links to a word processing program such as MS Word by means of an additional toolbar. An icon in this referencing toolbar can be used to insert a citation into a document; this creates a 'live' link between the citation in the document and the relevant reference in the database. Once citations have been inserted, another icon in the referencing toolbar can be used to generate a bibliography. The settings within the program can be adjusted to change the format of the references, including whether they are by author–date or by number, how they are ordered within the text (e.g. alphabetical or date order), and how they are displayed in the bibliography in terms of punctuation, order of the various elements of the reference, and so on.

Of course, the references still need to be edited within the program. This might involve, for example, ensuring that all the elements within a reference are in the right place, fixing spelling mistakes and changing hyphens to en dashes in number spans.
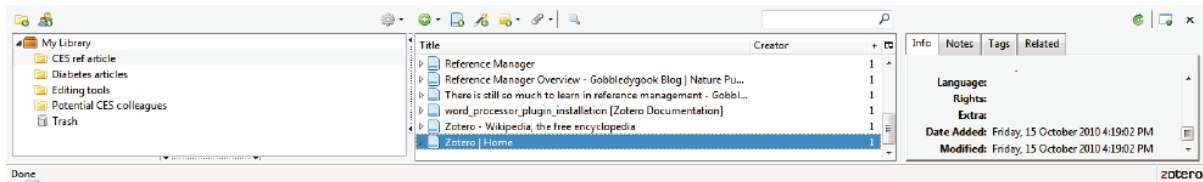
I first came across reference management software a few years ago when clients started sending documents containing live *Endnote* [1] links. As I had no experience with the program, this was daunting. However, now that I've worked through the training materials available on the *Endnote* website, I realise how much easier the editor's job is when the references are supplied as a reference management database file.
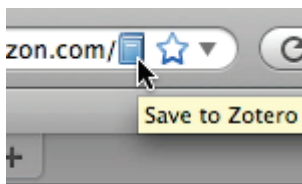
Software options

There are several commercial reference management programs that are widely used, including *Endnote* and *Reference Manager* [2], which cost several hundred dollars each. However, there are cheaper alternatives; for example, *Zotero* [3], a free referencing program that apparently functions much like the commercial versions. I've chosen *Zotero* as the focus of this article because it is compatible with Windows, Mac and OpenOffice applications, and it scored well in some recent reviews of reference management programs [4,5].
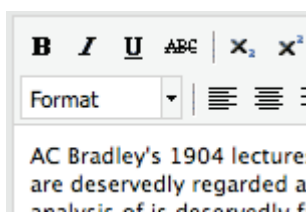
Using *Zotero*

Zotero is an extension for the web browser *Mozilla Firefox* [6]. Once installed, the link to the program appears in the toolbar at the bottom right-hand corner of the browser. Clicking on the link brings up a toolbar across the bottom of the screen that contains a 'My Library' folder, a list of the references in the folder, and details of whichever reference is selected, as shown below. The user can create subfolders within the library; for example, I created a 'CES ref article' subfolder for this article, containing all the websites and articles that I planned to cite.

It is simple to add items such as websites, articles and other publications to the database directly from the internet, rather than typing them in manually. This helps to avoid errors such as spelling mistakes; it also ensures that the specific elements of the information are entered into the correct fields within the program, and thus appear correctly in a reference list. For example, imagine that I want to add the article *Blood and organ donation patterns of trauma surgeons* to my *Zotero* library. This article is available from PubMed, an online database that contains millions of citations for biomedical literature [7]. When I go to the page for this particular article within the PubMed website, using *Mozilla Firefox*, an extra icon appears in the address bar, as shown below.

Clicking on this icon immediately adds the details of the article to my *Zotero* library. The information added includes the author, abstract, journal title (in full and abbreviated), volume, issue, page span, publication date, ISSN and URL. Also, there are tabs for adding notes on the citation (as shown below), tags and links to related items in the *Zotero* library.

By creating a group, I can also share a library with other *Zotero* users. Groups can be public with open membership (anyone can view the group online and join it instantly), public with closed membership (members must apply or be invited) or private (only those invited to the group can join).

I highly recommend *Zotero*. I did have some trouble adding the *Zotero* toolbar to Word 2007, but sorted this out by watching the instruction video (which showed me what the toolbar should look like), and then removing and reinstalling the program. Once I'd got it up and running, I found it was easy to use (easier than some of the commercial programs I've tried), and it certainly made referencing this article much less onerous than the manual system I have used for previous articles.

References

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2. Reference Manager. At <http://www.refman.com/>
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