

# Citation Management Tools

## Comparison of Features and Functions



UNIVERSITY LIBRARIES

Use the chart below to narrow down your choices, the rest is personal preference.

Talk to people in your department – some disciplines tend to use one tool more than others.



Learning curve			
Quick to learn, especially with training	Quick to learn, especially with training	Quick to learn, especially with training	Takes longer to learn, training recommended.
Strengths			
<ul style="list-style-type: none"> <li>• Quick for collecting citations</li> <li>• User friendly features such as tagging, attachments, and notes</li> <li>• Unlimited # of private or public groups</li> </ul>	<ul style="list-style-type: none"> <li>• Automatic citation extraction from PDFs</li> <li>• Sync with Zotero library automatically</li> <li>• Build a community of scholars</li> <li>• Free searchable online library of papers &amp; citations</li> <li>• Good tools for adding annotations to PDFs</li> </ul>	<ul style="list-style-type: none"> <li>• Easy to work in multiple locations</li> <li>• Easy to share access with colleagues</li> </ul>	<ul style="list-style-type: none"> <li>• Best for organizing large collections of citations and managing PDFs</li> <li>• Wide variety of citation styles</li> <li>• Easily customized</li> <li>• Many research databases (ex. Web of Science) offer Export options specifically for EndNote</li> </ul>
Limitations			
<ul style="list-style-type: none"> <li>• Very limited storage space with free account</li> </ul>	<ul style="list-style-type: none"> <li>• Only 1 private group (3 members) with free account</li> <li>• Still mainly popular in scientific communities</li> </ul>	<ul style="list-style-type: none"> <li>• Not as user-friendly, but improving</li> <li>• Not able to save webpage snapshots</li> </ul>	<ul style="list-style-type: none"> <li>• Not as user-friendly, but improving</li> <li>• Not able to save webpage snapshots</li> </ul>
Good choice if you want to...			
<ul style="list-style-type: none"> <li>• Work in multiple groups and freely share resources</li> <li>• Easily save webpages and snapshots</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate online with colleagues</li> <li>• Work in a small group with good collaboration tools</li> </ul>	<ul style="list-style-type: none"> <li>• Manage a massive number of references.</li> </ul>	<ul style="list-style-type: none"> <li>• Manage a massive number of references.</li> <li>• Collaborative work and communication.</li> </ul>

Questions? Contact [systrev@umd.edu](mailto:systrev@umd.edu).

# Getting Started with Citation Tools

## **Zotero**

- Create a free account at <https://www.zotero.org/>
- **Zotero video tutorials:** [https://www.zotero.org/support/screencast\\_tutorials](https://www.zotero.org/support/screencast_tutorials)
- **Zotero Quick Start Guide:** [http://www.zotero.org/support/quick\\_start\\_guide](http://www.zotero.org/support/quick_start_guide)

## **Mendeley**

- Create a free account at <https://www.mendeley.com>
- **Mendeley video tutorials:** <http://www.mendeley.com/videos-tutorials/>
- **Mendeley Help Guide:** <https://www.mendeley.com/guides>

## **EndNote**

- **EndNote Online** is accessible via any Internet-connected computer/device, go to [www.myendnoteweb.com](http://www.myendnoteweb.com)
- **EndNote Desktop video tutorials:** <http://www.youtube.com/user/EndNoteTraining>
- **EndNote Desktop user guides:** [http://clarivate.libguides.com/endnote\\_training/users](http://clarivate.libguides.com/endnote_training/users)

### *Zotero vs. Mendeley*

- <https://youtu.be/2HnOKMmv5x4>
- <https://guides.library.pdx.edu/managecitations>

## Detailed Comparison of Selected Features

Check citation tools' web sites for new features (last updated 1/21/2019)



Web based	Can sync with online account; connectors for Firefox, Chrome and Safari and Opera available	Not primarily, but can sync with an online account which is editable	Yes, can synch with Endnote Desktop	Yes, with EndNote Online account
Must be online	No	No	Yes	No
Cost	Free for basic account; option to pay for additional cloud storage (\$20/year for 2 GB, \$60/year for 6 GB, \$120/year for unlimited)	Free for basic account; option to pay for additional cloud storage or additional private groups (\$55/year for 5 GB, \$110/year for 10 GB, \$165/year for unlimited)	Free	\$\$, Requires individual purchase by user, research group or department. Student discount through <a href="https://endnote.com/buy/">https://endnote.com/buy/</a>
Operating System Requirements (for most recent version)	Windows, Mac, Linux	Windows, Mac, Linux	Web-based	Windows, Mac
Mobile apps for iPad, iPhone, Android, smart phones	Yes, created by 3 <sup>rd</sup> parties. For info, go to <a href="http://www.zotero.org/support/mobile">http://www.zotero.org/support/mobile</a>	Yes, Mendeley created its own iPad/iPhone app, and Android apps	Can access EndNote Online on devices via browser.	Yes, iPad App that allows PDF annotation.
Word-processor compatibility	MS Word, Open Office, Google Docs	MS Word, Open Office, LaTeX	MS Word	MS Office, Open Office, iWork Pages
Export data between citation managers	Yes	Yes	Yes	Yes
Import from databases	Yes	Yes, Mendeley has some difficulty downloading citations and PDF files from library databases. Older PDF files that do not have proper metadata will not give proper citation information to Mendeley.	Yes	Direct export from specific databases
Import citation info from web pages	Yes, also archives the page and you can add annotations	Yes, with a bookmark for a limited number of sites (mostly publishers or databases)	Yes, with Web Capture tool	Yes, with Web Capture tool and EndNote Online account



Storage capacity	<p><b>Zotero desktop:</b> your computer's storage capacity.</p> <p><b>Zotero Online:</b> 300 MB free, additional space for a fee.</p>	<p><b>Mendeley Desktop:</b> your computer's storage capacity.</p> <p><b>Mendeley Online:</b> 2 GB free, additional space for a fee.</p>	Limited to 50,000 citations and 2 GB of attachment storage; unlimited with purchase of EndNote Desktop.	Your computer's storage capacity.
Attachment limits	No limit on attachments per citation; no limit on file size; total (free) attachment cloud storage limited to 300MB	No limit on attachments per citation; Attachment file size limited to 250MB; total (free) attachment cloud storage limited to 2GB	No limit on attachments per citation; no limit on file size; total attachment storage limited to 2GB	Max of 45 attachments per citation; no limit on file size or total cloud storage
Attach associated files (PDFs, etc.)	Yes, with option to attach automatically	Yes, and can highlight and annotate PDFs	Yes	Yes, and can highlight and annotate PDFs
Search full text of PDFs	Yes	Yes	No	Yes
Create group or shared libraries	Yes	Yes, free for up to 3 group members (larger group plans available for purchase)	Yes	Yes, with EndNote Online account
Create bibliography with different styles	Yes	Yes	Yes	Yes
Automatic citation extraction from PDFs	Yes	Yes	No	Yes
Sync features	Sync library with multiple computers	- Sync library with multiple computers - Sync with Zotero library	Sync with only one library from EndNote desktop	Sync only one library with EndNote Online
Organizing references	Use tags to organize/search			Insert figures and charts using word processor integration
Work from multiple computers or locations	Yes, Zotero saves your citation library to your local computer, but syncs with multiple computers so you can work from home, work, or school.	Yes, Mendeley is a program that lives on your local computer, but syncs with a web account.	Yes	No. The desktop should be synchronized with the Endnote Online. Since EndNote is desktop-based, syncing between devices can be challenging, but continues to improve.
Work without an Internet connection	Yes, Zotero stores your citation libraries locally on your computer.	Yes, Mendeley stores your citation libraries locally on your computer.	No, because it's a web based program and needs to be connected to Internet.	Yes, Endnote stores your citation libraries locally on your computer.



Archive web pages and import citations from sites such as Amazon, Flickr, and ArtSTOR	Yes, Zotero allows you to easily save snapshots of web pages and annotate them within your citation library. It is a great tool for scraping citation information from web-based publications and some commercial and social networking sites.	No	No	No
Work on a group project or share citations with others	Yes, Zotero allows you to share your citations through shared folders -- you can give individuals or groups permissions to add and edit the citations in the shared folder.	Yes, Mendeley allows you to share citations and documents with a group of up to 2 other users, or create a public reading list that is open to all.	Yes, EndNote Online allows sharing of one group from your library.	Yes, EndNote allows sharing of your entire library with up to 100 people.
Work with unusual or complex citation styles, cite unusual document types or create my own document type	No	No	No	Yes, EndNote has more citation styles than any other program, more flexibility, ability to customize styles.
Retrieve citation information from PDFs	No	Yes, Mendeley has better ability to extract citation information automatically from PDFs, PDF full-text search-ability, and a social networking component to see what others in your field are reading and commenting on (particularly in the sciences).	No	Yes- uses DOI or PubMed ID fields
Add notes to references	Yes, notes can stand alone or be attached to references	Yes, via "notes" tab in desktop version	Yes, in "notes" field	Yes, in "notes" field
Annotate PDFs	No, but will sync PDFs annotated with 3rd party software	Yes	No	Yes
Types of items that can be saved	Book/article citations, PDFs, webpages (URLs + snapshots), video, images	Book/article citations, PDFs, webpages (URLs + snapshots), video, images	Book/article citations, PDFs, webpages (URLs only)	Book/article citations, PDFs, webpages (URLs only)